Home page
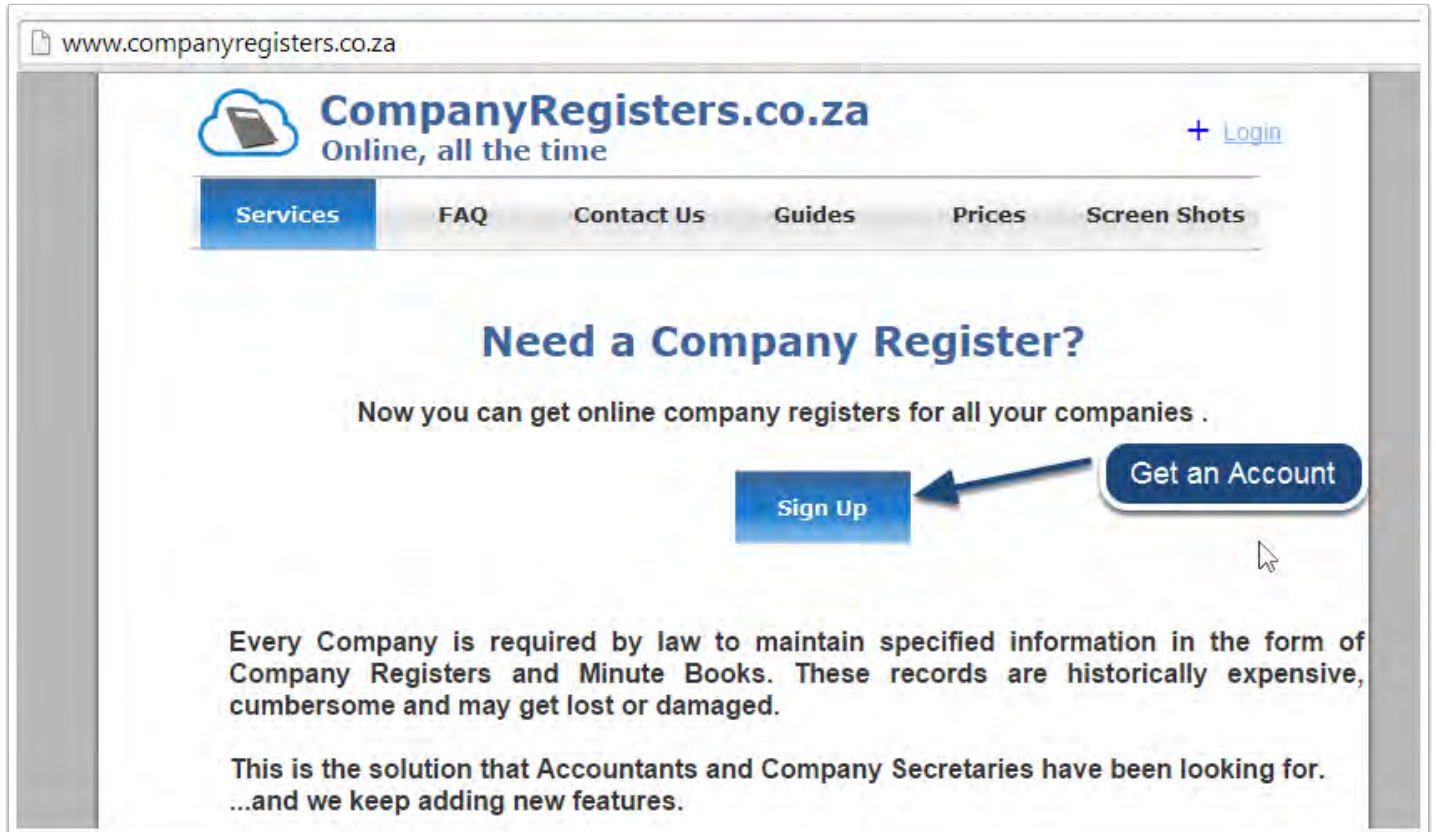
Visit our Home page and Sign Up for a new account. Then you can test the system and all its features.
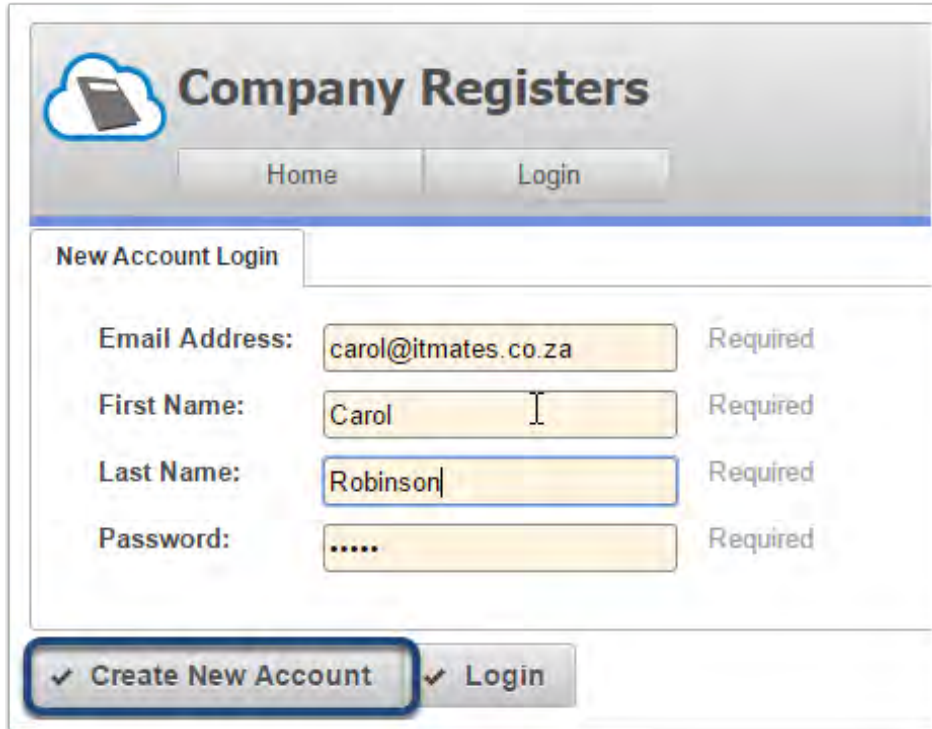
Sign Up for a New Account

Creating a new account is easy - Fill in the prompts and press the "Create New Account" button

Update Firm

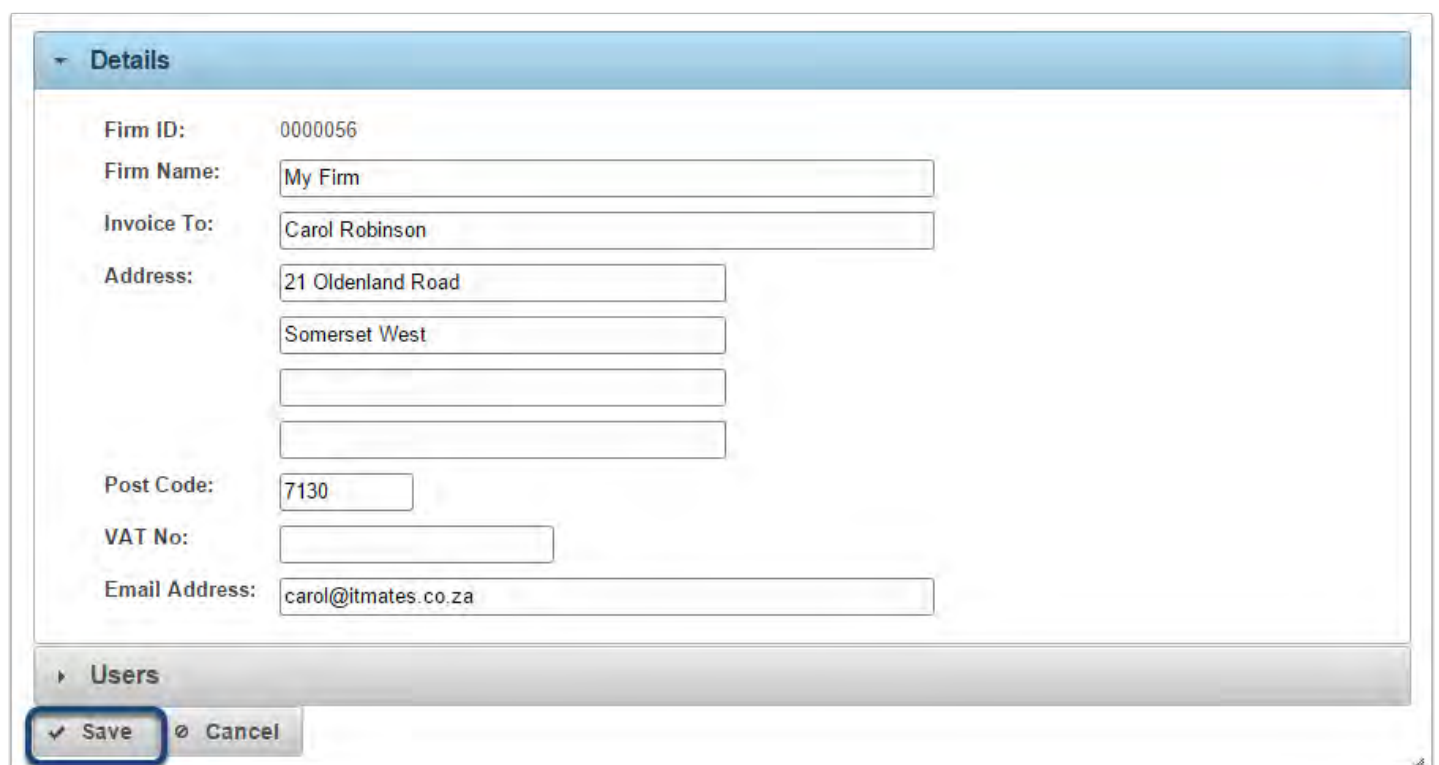Fill in your firm details and click the Save button

Login for Registered Users

If you've already signed up, you can login by clicking Login.
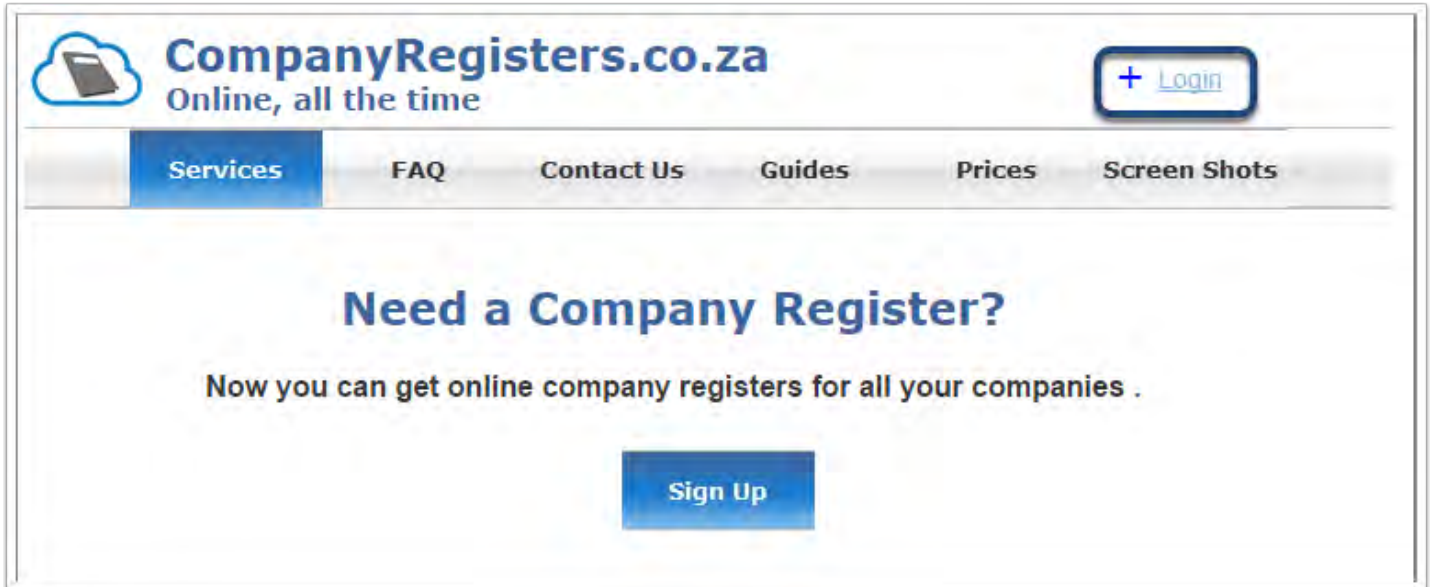
Login Screen

Type in your email and password, if you'd like the system to remember your login for next time, make sure the Remember Me button says Yes, and click Login
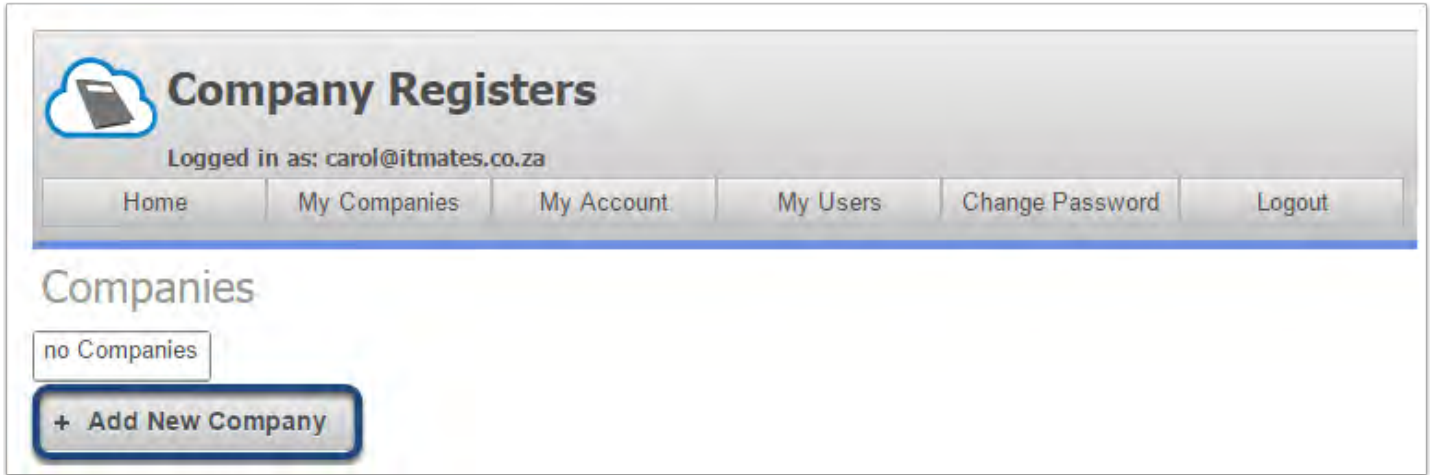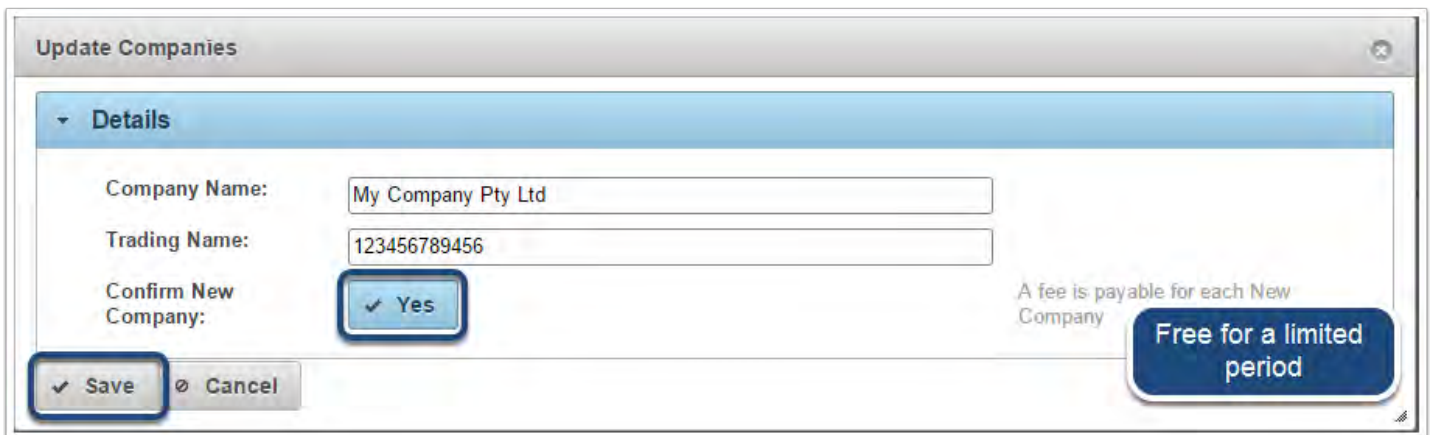
My Companies

Click Add New Company.
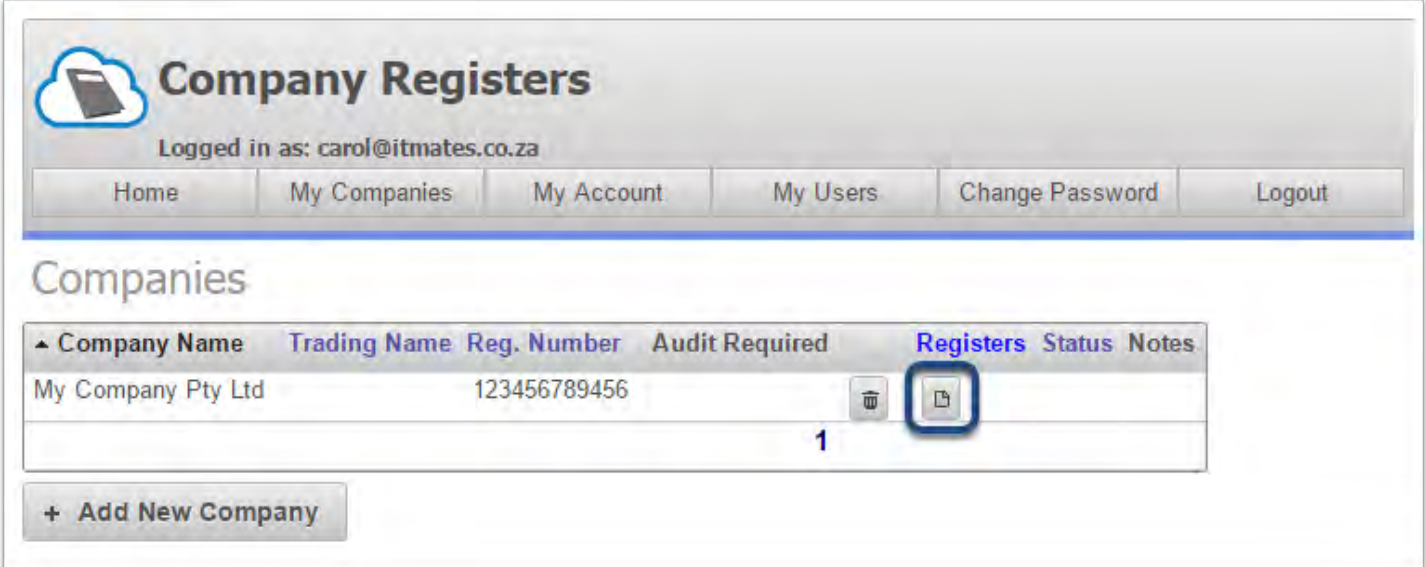
Fill in the companys details, **make sure the Confirm New Company button says Yes** and click Save.

Accessing the Register

You can now click the Registers button to access the Company Registers.

Status Tab

The default page is the Status tab, where you can set the work status of your Registers.

Company Tab

You can set your company information here, **Make sure you click Save Changes when done.**

Officers Tab

The Officers tab allows you to record appointments, resignations and other changes of the company's auditors, company secretaries and public officers.

Adding a New Auditor

Let's add the appointment of an auditor to our Register. Start by clicking Add New Appoint/Resign/Change in the Auditors section.

Fill in the details of the auditor appointment and click Save.

The record has been added to the Auditor's Register. Adding a record for company secretaries and public officers follows a similar process.

Directors Tab

The Directors tab allows you to mangage the Register of Directors, as well as a Register of Director's Appointments. To add a director, click Add New Director.

Fill in the relevant details and click Contact Details.

Fill in the new director's contact details and click Addresses.

Fill in the new director's addresses and click Directorships.

Click Add to add a new Directorship.

Click the ? button to select a company from the existing company list, or just type in the company name.

Click the tick to select the company.

Your company's name, registration number and nationality will pull through. You can then add an apointment date and click Save.

The new directorship has been added and you can continue to Appointments.

Click Add New Appointment/Resign/Change.

Fill in the relevant details and click Save.

The appointment has been added and you can click Save.

The new director has been added to the Register of Directors and Register of Appointments.

Minutes/Docs Tab

To add a document to the Documents Register, go to the Minutes/Docs tab and click Add New Minutes/Documents

Set the document date, **set the document type to the type of document you're adding**, add a reference and click Add File.

Navigate to the file you're adding, select it and click Open.
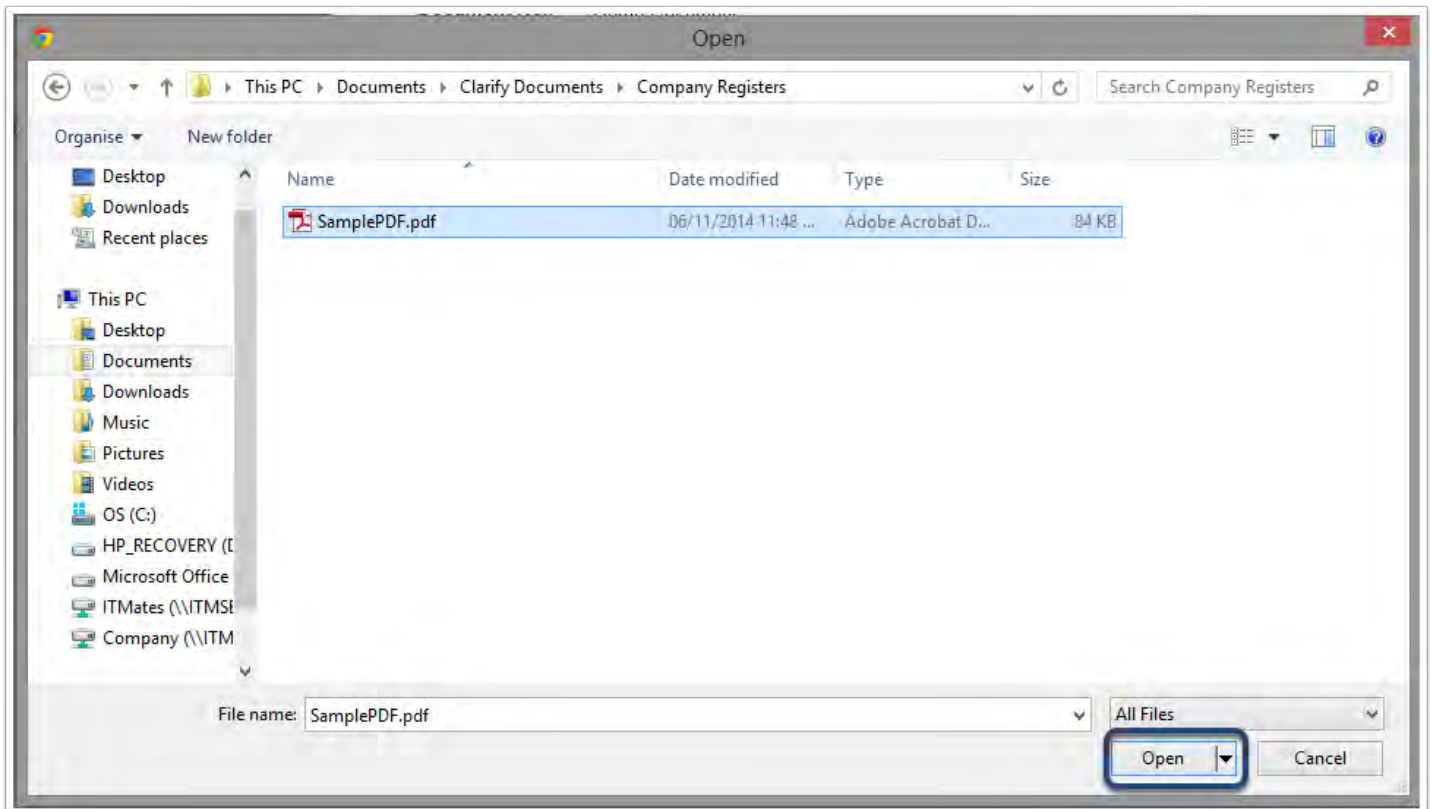
Once the file has been uploaded, you can click View Doc to make sure it's uploaded correctly and the click Save.

The document has been added to the Register. The numbered buttons do the following:

1. Edit the document.
2. Duplicate the document.
3. Delete the document.
4. View the document.

The filter bar(circled), allows you to filter your documents, so if you click Resolution, only your resolutions will show in the list.

You can print the Register by clicking Print Register.

Securities Tab

To add a securities class, click Add New Securities Class.

Give the class a name and click OK.

The class has been added to the Register.

1. Edit button.
2. Delete button.

Click Add New Authorisation.

Add a date and the number of shares, then click Save.

The authorised shares have been added. These are the maximum number of shares that may be issued by the company.

Securities Holders Tab

To add a securities holder click Add New Securities Holder.

Type in all the details and click Save.

The holder has been added.

1. Edit the record.
2. Duplicate the record.
3. Delete the record.
4. View account and certificates.

Allotments

To add an allotment, click Add New Allotment.

Set the date, and the transaction type. Select the securities holder by clicking the ? and then select the securities holder from the list. Add the number of shares and the amount paid, then click Save.

The new allotment has been added to the Register **and the Securities certificate has automatically been issued.**

Certificates are automatically added for new Allotments.

Transfers Tab

To add a new tranfer, click Add New Transfer.

Select a securities class by clicking the ? and select the class. Set the date. Click the second ? then select the share holder the shares being tranfered from from the list. Set the number of shares being transfered. Click the thrid ? then select the share holder the shares are being tranfered to from the list, and click Save.

The transfer has been added to the Register.

Issuing Share Certificates

Now that we've transferred shares between holders, the securities certificates need to be updated.

The red crosses indicate that the number of securities held and the number certificated do not agree.

Start off by clicking the View Accounts and Certificates button.

Since this account doesn't have any certificates, we can just click "Create Certificate" to automatically create one with the correct number of shares.

Update Securities Account

▾ Securities Account

Carl Robinson

Securities Class: Common Shares ▾

Account

▲ Date	Type	No. Registered Securities	Transfer from / to Name	New Cert No		Consideration
11/11/2014	Transfer	100	Michael Robinson		▨	R 100
		100				

Print

Certificates

✔ ○ Active   ✖ ○ Inactive   ◉ All

No Securities Certificates

+ Add New Certificate

Uncertificated Securities

No. Reg Securities: 100

No. Cert Securities: 0

Securities to Certificate: 100   **▨ Create Certificate**

✔ OK

The certificate has been added, so you can click OK.

Update Securities Account

Securities Account

Carl Robinson

Securities Class:　　　　　Common Shares ▼

Account

▲ Date	Type	No. Registered Securities	Transfer from / to Name	New Cert No		Consideration
11/11/2014	Transfer	100	Michael Robinson		▣	R 100
		100				

Print

Certificates

✔ ○ Active　　✘ ○ Inactive　　● All

▲ Date Issued	Date Cancelled	No. Certificated Securities	Owner	Active	Certificate No			
17/11/2014	/ /	100	Carl Robinson	✔	2	✎	🗑	🖨
		100						

+ Add New Certificate

Uncertificated Securities

No. Reg Securities:　　　　　100

No. Cert Securities:　　　　　100

Securities to Certificate:　　　　　0　　　　⟳ Create Certificate

✔ OK

As you can see, the Carl Robinson account now has a green tick to show that it has a valid certificate.

Now we update the certificates for Michael Robinson, so click the View Accounts and Certificates button.

My Company Pty Ltd

Status	Company	Officers	Directors	Minutes/Docs	Securities	Securities Holders	Allotments	Transfers	Certificates

Securities Holders

Securities Class: Common Shares ▼

Surname / Entity	First Names	Email Address	No. Registered Securities	No. Certificated Securities					
Carl	Robinson		100	100	✔				
Michael	Robinson		100	200	✘				
			200	300					

+ Add New Securities Holder

🖨 Print List

✔ OK

At the bottom of this screen, the number of registered securities doesn't equal the number of certified securities, so we need to cancel the previously issued certificate and create a new one.

You are required to obtain the original issued certificate and "Cancel" it before the transfer is valid. To record the cancellation, start by clicking the Edit Certificate button.

Set a cancellation date and click Save.

Update Securities Certs

Details

Sec Class ID:	0000001	?	Common Shares
Certificate No:	1		A Number
Securitiesholder ID:	0000001	?	Michael Robinson
Number of Securities:	200		Required A Number
Notes / Restrictions:			Will be printed on the Certificate
Date Issued:	11/11/2014		dd/mm/yyyy Required
Date Cancelled:	17/11/2014		dd/mm/yyyy

✓ Save   ⊘ Cancel

The original certificate has now been recorded as cancelled.

You can now issue a new certificate for the remaining shares - click Create Certificate.

The new certificate has been added and you can click OK.

Update Securities Account

Securities Account

Michael Robinson

Securities Class: Common Shares ▼

Account

▲ Date	Type	No. Registered Securities	Transfer from / to Name	New Cert No		Consideration
11/11/2014	Allotment	200		1	☑	R 200
11/11/2014	Transfer	(100)	Carl Robinson	N/A	☑	R 100
		100				

Print

Certificates

✔ ⦿ Active ✖ ⦿ Inactive ⦿ All

▲ Date Issued	Date Cancelled	No. Certificated Securities	Owner	Active	Certificate No			
11/11/2014	17/11/2014	200	Michael Robinson	✖	1	✎	🗑	🖨
17/11/2014	/ /	100	Michael Robinson	✔	3	✎	🗑	🖨
		100						

+ Add New Certificate

Uncertificated Securities

No. Reg Securities: 100

No. Cert Securities: 100

Securities to Certificate: 0   ☑ Create Certificate

✔ OK

All the Accounts have green ticks, so they all have correct certificates.

Certificates Tab

You can find all your certificates under the Certificates tab. If you'd like to print a certificate, you can click the Print button next to that certificate.

The certificate will print in your browser. You can right click and select Save As to save it to your computer.

SHARE CERTIFICATE

My Company Pty Ltd

123456789456

Certificate No:		No. of Securities:
3	Common Shares	100

This certificate is issued to certify that the owner of the above securities as recorded in the securities register of the company is:

Name: Michael Robinson

21 Oldenland Road
Somerset West
7130

Date Issued: 17/11/2014

Issued in accordance with the company's board authorisation:

_____
Authorised Signatory

_____
Authorised Signatory

No transfer of these securities may be effected unless this certificate has been delivered to the company together with a proper instrument of transfer.