

RELEASE NOTES

for DRIVE



Version 3.2 Build 1

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software

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INTRODUCTION

These release notes outline the enhancements introduced in **DRIVE Version 3.2**

We have made significant improvements in the performance/speed in the areas of Communications, Lodgements and Email. We have made additional changes to Reports, including UK MTD-VAT Returns and introduced a new Bank Import feature.

Please take the time to read the notes and then apply the update.

If you have any queries, please contact support at support@relate-software.com or call +353 1 4597800 ROI or +44 871 284 3446 (UK).

The following program changes have been requested from both user feedback and internal quality control reviews. If you have any changes you would like to see in DRIVE CRM & Practice Management, please send an email to enhancements@relate-software.com with a detailed description of the change required.

IMPORTANT

Backup your database before running the update.

Relate Software recommends that you take regular backups of your database to minimise any loss of data.



BANK IMPORTS IN BANK AND CASH

In this update we have introduced a new feature to import Bank csv files, with records of bank payments and receipts, from AIB and Bank of Ireland into DRIVE. Future updates will include other bank csv files.

BANK IMPORTS

From the [**Bank and Cash**] module, you should see a new option called [**Bank Imports**]. Click on the [**Bank Imports**] icon and you should then see the **Bank Import** browse screen, see below

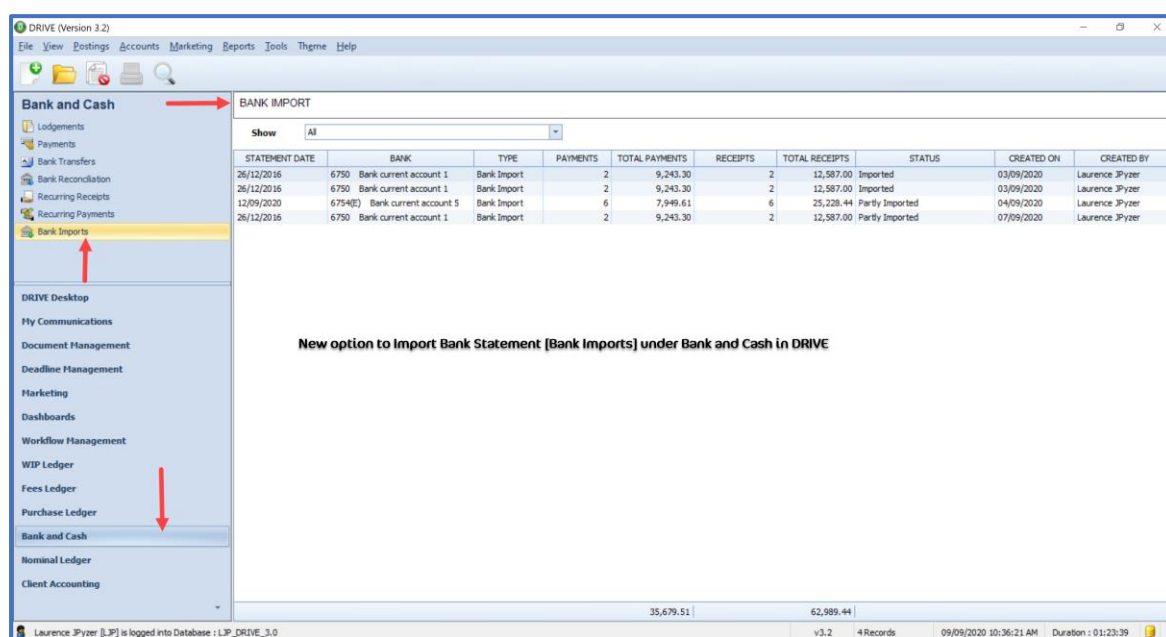


Figure: Bank Imports

To import a bank csv file click on the [**New**] icon. The [**Bank Import**] window will appear on your screen.

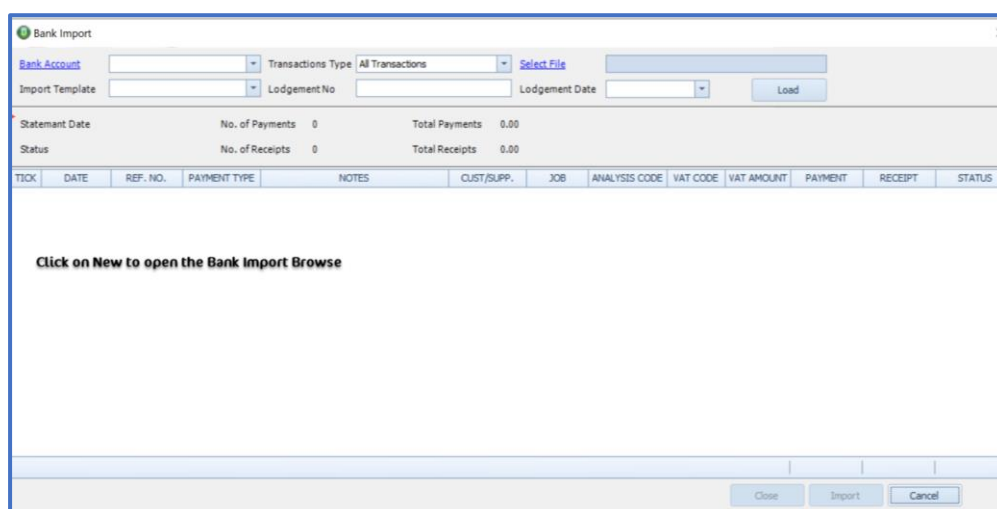


Figure: New Bank Import

1. Select the [**Bank Account**] which these bank payments and receipts are to be imported into, click the drop-down arrow to see the list of available banks.

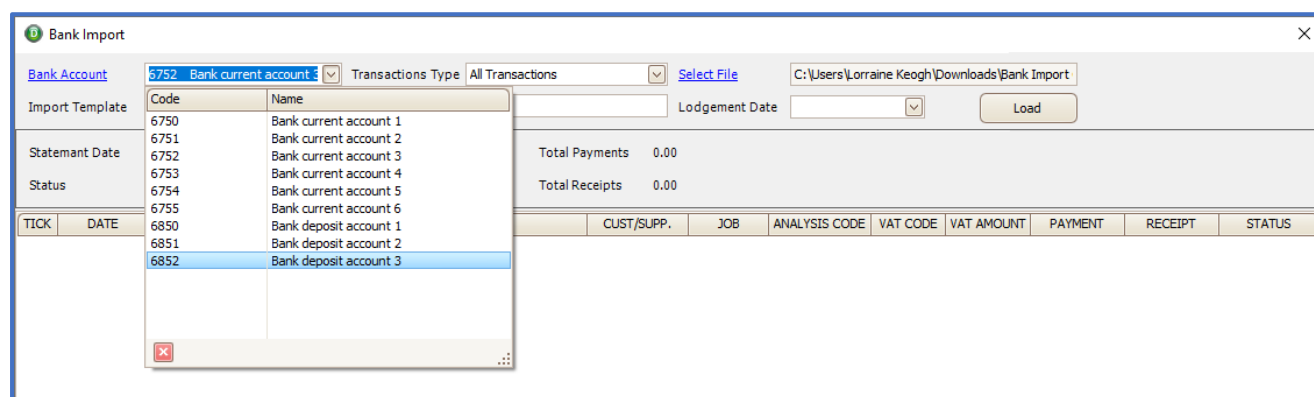
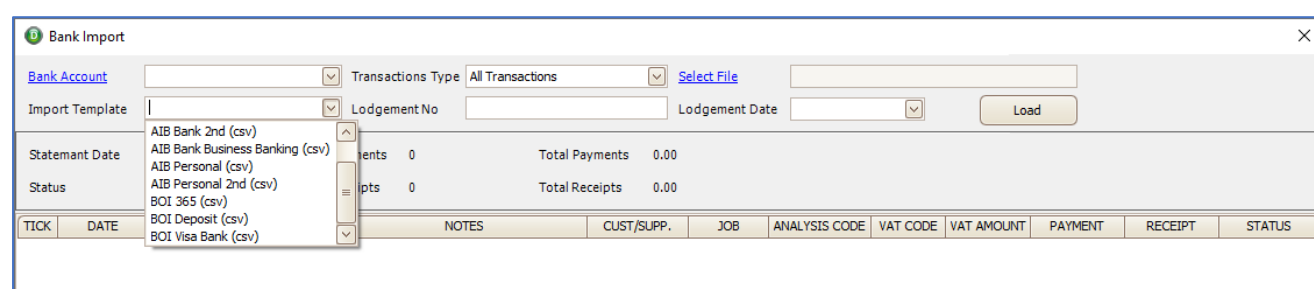


Figure: Bank Account selection

2. Select the [**Import Template**] to be used, click the drop-down arrow to see the list of available import template files.



Available Import Templates

1. AIB Bank (csv)
2. AIB Bank (out)
3. AIB Bank 2nd (csv)
4. AIB Bank Business Banking (csv)
5. AIB Personal (csv)
6. AIB Personal 2nd (csv)
7. BOI 365 (csv)
8. BOI Deposit (csv)
9. BOI Visa Bank (csv)

You must select the correct template based on your actual bank account type e.g. If you are an AIB Business Banking customer then you must select the template for AIB Banking Business Banking (csv).

3. Select the [**Transaction Type**] you want to import from the bank csv file. By default [**All Transactions**] will be selected, alternatively you can choose to import only payments or only receipts.

Bank Import

Bank Account: 6750 Bank current account 1 Transactions Type: All Transactions Select File

Import Template: Lodgement No: Lodgement Date: Load

Statement Date: No. of Payments: 0 Total Payments: 0.00

Status: No. of Receipts: 0 Total Receipts: 0.00

T... DATE REF. NO. PAYMENT TYPE NOTES CUST/SUPP. JOB NOM CODE VAT C... VAT AMOUNT PAYMENT RECEIPT STATUS

Select the [Transaction type] you want to import from Bank Statement into DRIVE

Figure: Transaction Types selection

4. Select the actual file which you want to import, click on the **[Select File]** hyperlink, this will open windows explorer, you should go to the location of the csv file that you have downloaded from the bank and click OK.

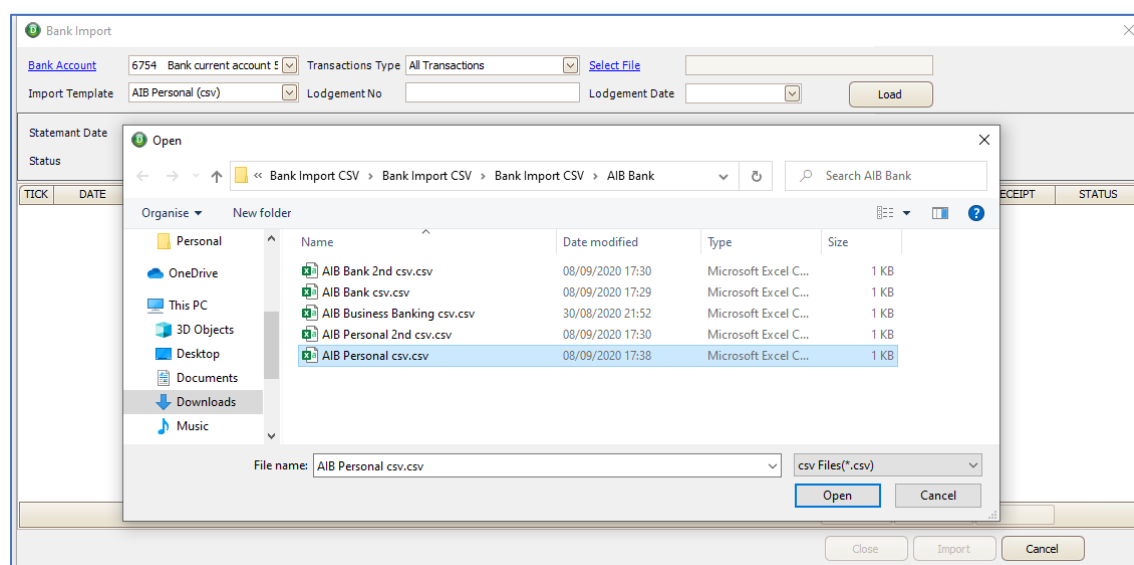


Figure: Select the CSV file to import

5. To display the payments and receipts contained in the bank import file and the summary or header details, click the **[Load]** icon.

Bank Import

Bank Account: 6751 Bank current accou... Transactions Type: All Transactions Select File C:\Users\Lorraine Keogh\Downloads\Bank Import

Import Template: AIB Bank (csv) Lodgement No: Lodgement Date: Load

Statement Date: 30/08/2020 No. of Payments: 2 Total Payments: 9243.30

Status: Loaded No. of Receipts: 2 Total Receipts: 12587.00

TICK	DATE	REF. NO.	PAYMENT TYPE	NOTES	CUST/SUPP.	JOB	ANALYSIS CODE	VAT CODE	VAT AMOUNT	PAYMENT	RECEIPT	STATUS
<input type="checkbox"/>	28/08/2020			REVENUE					0.00	8,920.46	0.00	Loaded
<input type="checkbox"/>	29/08/2020			CLEANING CONTRACTOR					0.00	322.84	0.00	Loaded
<input type="checkbox"/>	30/08/2020			CUSTOMER A					0.00	0.00	4,656.00	Loaded
<input type="checkbox"/>	26/08/2020			CUSTOMER B					0.00	0.00	7,931.00	Loaded

Once the details of the file are loaded the **[Header Details]** section of the above screen will be updated with the following information.

Statement Date	The date of the latest transaction
No. of Payments	The number of payment transactions in the loaded csv file
Status	The status of the loaded csv file: Loaded, Imported or Partly Imported
No of Receipts	The number of receipt transactions in the loaded csv file
Total Payments	The total amount of all payment transactions in the loaded csv file
Total Receipts	The total amount of all receipt transactions in the loaded csv file

Figure: Header details of the Loaded Bank Import file

The screenshot shows the 'Bank Import' window. At the top, there are fields for 'Bank Account' (6751 Bank current accou...), 'Transactions Type' (All Transactions), 'Select File' (C:\Users\Lorraine Keogh\Downloads\Bank Import), 'Import Template' (AIB Bank (csv)), 'Lodgement No' (empty), and 'Lodgement Date' (empty). Below these is a 'Load' button. The header section displays: Statement Date 30/08/2020, No. of Payments 2, Total Payments 9243.30, Status Loaded, No. of Receipts 2, and Total Receipts 12587.00. A table of transactions is shown below, with columns: TICK, DATE, REF. NO., PAYMENT TYPE, NOTES, CUST/SUPP., JOB, ANALYSIS CODE, VAT CODE, VAT AMOUNT, PAYMENT, RECEIPT, and STATUS. The table contains four rows of data, all with a status of 'Loaded'.

TICK	DATE	REF. NO.	PAYMENT TYPE	NOTES	CUST/SUPP.	JOB	ANALYSIS CODE	VAT CODE	VAT AMOUNT	PAYMENT	RECEIPT	STATUS
<input type="checkbox"/>	28/08/2020			REVENUE					0.00	8,920.46	0.00	Loaded
<input type="checkbox"/>	29/08/2020			CLEANING CONTRACTOR					0.00	322.84	0.00	Loaded
<input type="checkbox"/>	30/08/2020			CUSTOMER A					0.00	0.00	4,656.00	Loaded
<input type="checkbox"/>	26/08/2020			CUSTOMER B					0.00	0.00	7,931.00	Loaded

The details contained in the csv file of the individual payments and receipts will be displayed along with additional columns of information that is needed before the entries can be imported into the system.

Tick	Tick to select the entries that you want to import
Date	The date of the payment or receipt, read-only
Ref. No.	Enter a Reference Number for the transaction (before importing), if required
Payment Type	Enter or select a Payment or Receipt Type (before importing), if required
Notes	The details that appear on your Bank account will appear here, you can change these if you wish (before importing), if required
Customer/ Supplier	Select the Customer or Supplier from the drop-down list, if appropriate
Job	If you have selected a customer then you must select a job from the available list
Analysis Code	For non-customer receipts or non-supplier payments you must select a Nominal Analysis Code from the dropdown list or enter the code
VAT Code	For non-customer receipts or non-supplier payments you can enter a VAT code, if appropriate
VAT Amount	If a VAT Code is selected, then this column will show the calculated amount
Payment	Payment amounts will be shown in this column, read-only
Receipt	Receipt amounts will be shown in this column, read-only
Status	This column will show the status of the transaction [Loaded or Imported]



NOTE: Imported transactions cannot be modified in the bank import file, they can be edited in the relevant payments or receipts browse.

6. Enter the [Lodgement No], you must enter a lodgement number if you have selected to import any receipts.
7. Enter the [Lodgement Date], you must enter a lodgement date if you have selected to import any receipts.

NOTE: If you have your Tools, Settings, Fees Ledger, Lodgement/Receipt Setup set to [**Use Receipt only**] then the lodgement number will be shown as the prefix to the Receipt Number.

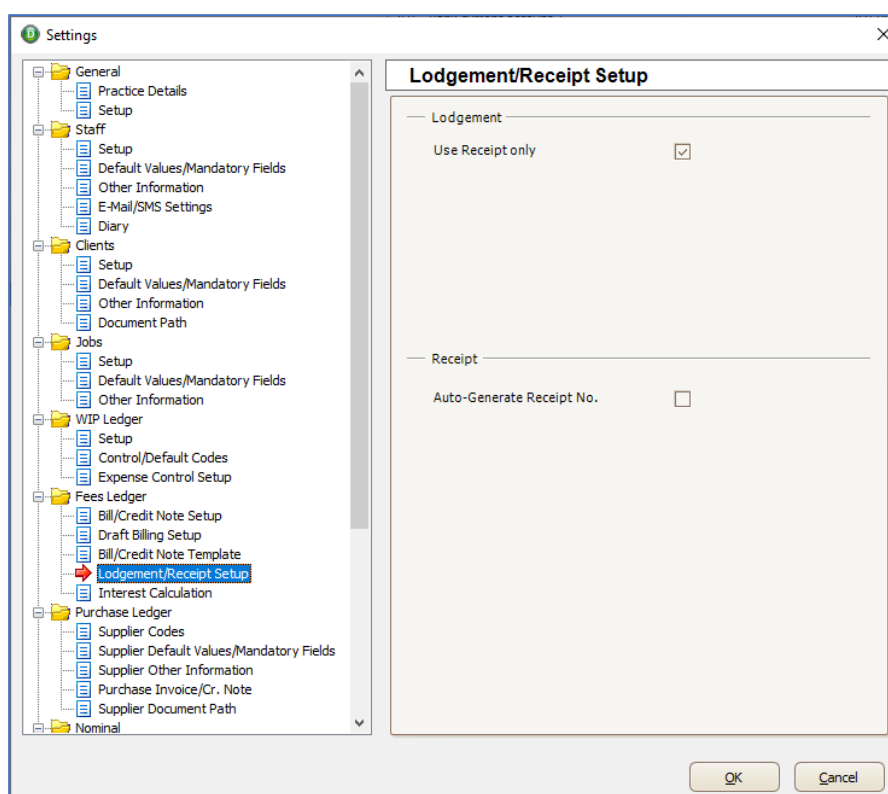


Figure: 'Use Receipt only' selected

REPORTS

JOB LISTING REPORT – 'JOB WIP DISCOUNT %' COLUMN ADDED

We have added WIP Discount % as a column option in the Job Listing Report.

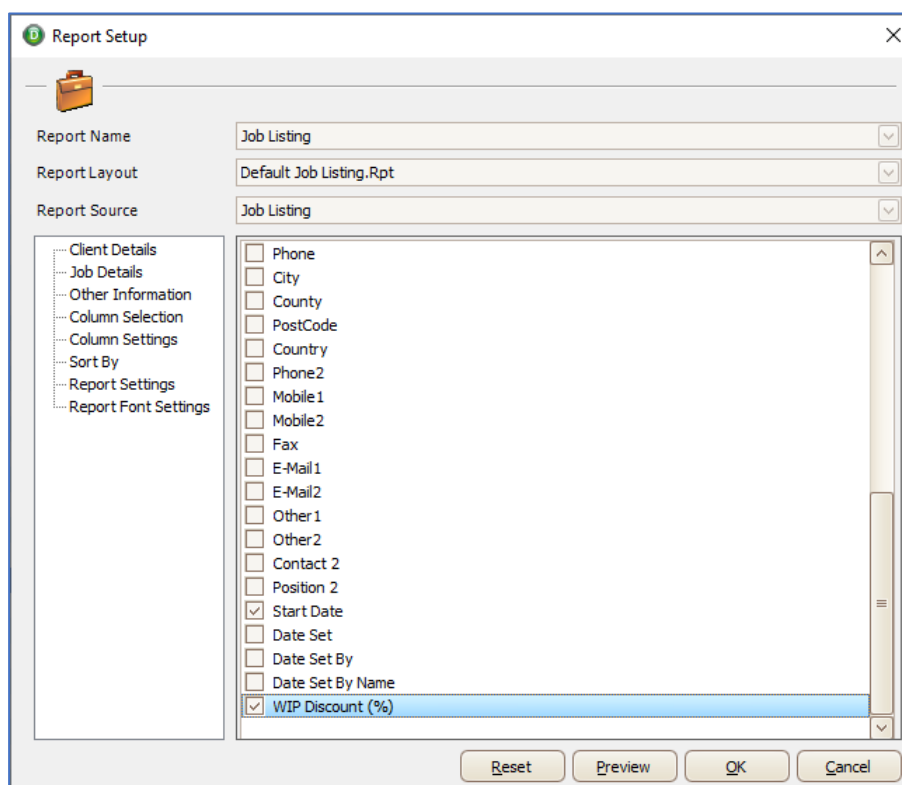


Figure: WIP Discount % column in the Report Setup


Client Code	Client Name	Job Code	Job Name	Job Partner	Job Manager	Job Lead Staff	Job Type	Start Date	WIP Discount (%)
ABE077	Aberdale Venezuelan PLC	258	Accounts	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Accounts		30.00
ABE077	Aberdale Venezuelan PLC	ACC	Audit and Accountancy	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		20.00
ABE077	Aberdale Venezuelan PLC	BKP	Bookkeeping	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Bookkeeping		
ABE077	Aberdale Venezuelan PLC	CFN	Corporate Finance	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		
ABE077	Aberdale Venezuelan PLC	CON	Consultancy	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		30.00
ABE077	Aberdale Venezuelan PLC	CSC	Company Secretary	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		20.00
ABE077	Aberdale Venezuelan PLC	CTX	Corporation Tax	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		
ABE077	Aberdale Venezuelan PLC	DEF	Default	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		
ABE077	Aberdale Venezuelan PLC	OTH	Other	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		30.00
ABE077	Aberdale Venezuelan PLC	PAY	Payroll	Arnoldo Doyle	Gerald Klein	Precious Buchanan	Default		20.00





Figure: WIP Discount % in the Job Listing Report



DATAMINING – JOB ONLY – ‘JOB WIP DISCOUNT %’ COLUMN ADDED

We have added JOB WIP Discount % as an available field in ‘Job only’ Datamines.

 Query

FIELD	SECTION	
Job_AgedBalance	General	<input type="checkbox"/>
Job_Unallocated	General	<input type="checkbox"/>
[Job_Current]	General	<input type="checkbox"/>
Job_Ageing1	General	<input type="checkbox"/>
Job_Ageing2	General	<input type="checkbox"/>
Job_Ageing3	General	<input type="checkbox"/>
Job_Ageing4	General	<input type="checkbox"/>
Job_Turnover	General	<input type="checkbox"/>
Job_AgedWIPBalance	General	<input type="checkbox"/>
Job_AccruedWIP	General	<input type="checkbox"/>
Job_CurrentWIPBal	General	<input type="checkbox"/>
Job_AgeingWIP1	General	<input type="checkbox"/>
Job_AgeingWIP2	General	<input type="checkbox"/>
Job_AgeingWIP3	General	<input type="checkbox"/>
Job_AgeingWIP4	General	<input type="checkbox"/>
JobWIPDiscount	General	<input checked="" type="checkbox"/>
Newsletter_EmailTicked	GDPR	<input type="checkbox"/>
Newsletter_EmailOptInDate	GDPR	<input type="checkbox"/>
Newsletter_EmailOptOutDate	GDPR	<input type="checkbox"/>
Newsletter_EmailExpiryDate	GDPR	<input type="checkbox"/>

Figure: JOBWIPDiscount Field



QUOTES REPORT – 'AML DATE' RANGE ADDED

On the Quotes Report, the option to run the report for a specific AML Date has been changed to allow for a range of dates (From/To).

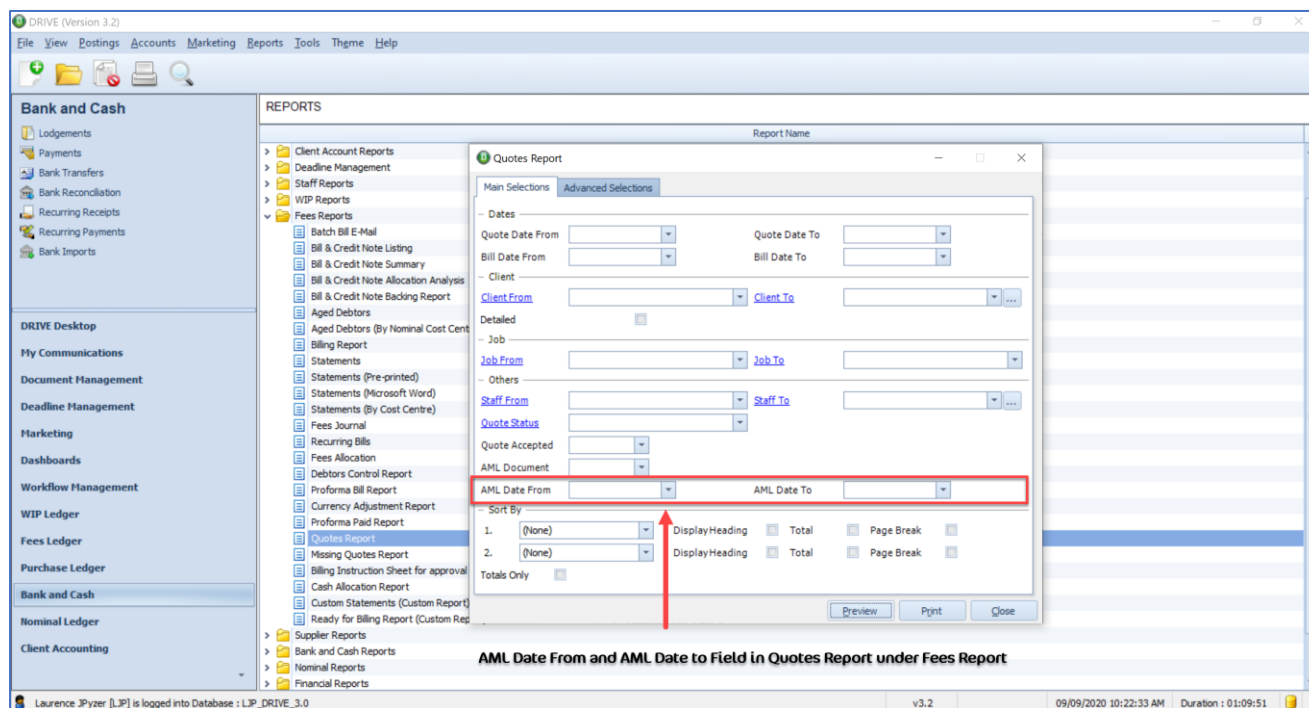


Figure: 'AML Date From' and 'AML Date To' in Quotes Report

WORKFLOW MANAGER REPORT – 'NOTES' COLUMN ADDED

We have added the 'Notes' as an available column on the Workflow Manager Report.

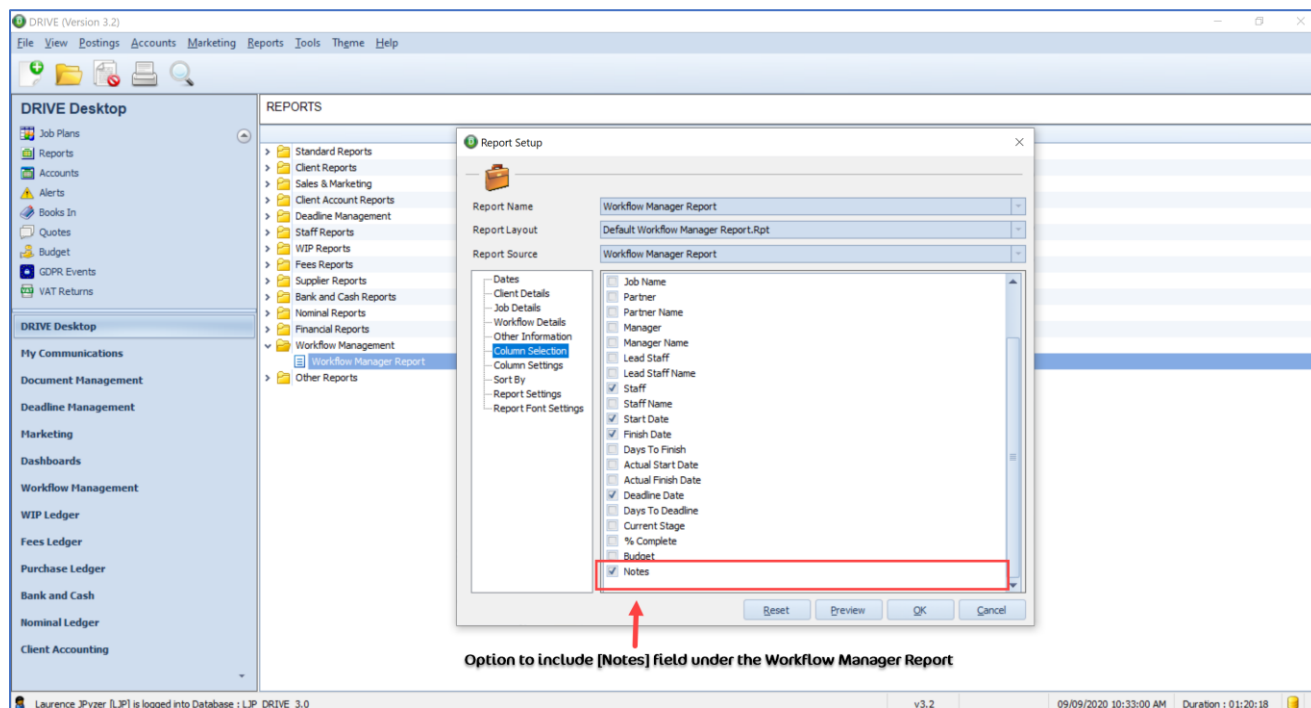


Figure: Option to include 'Notes' from the column chooser

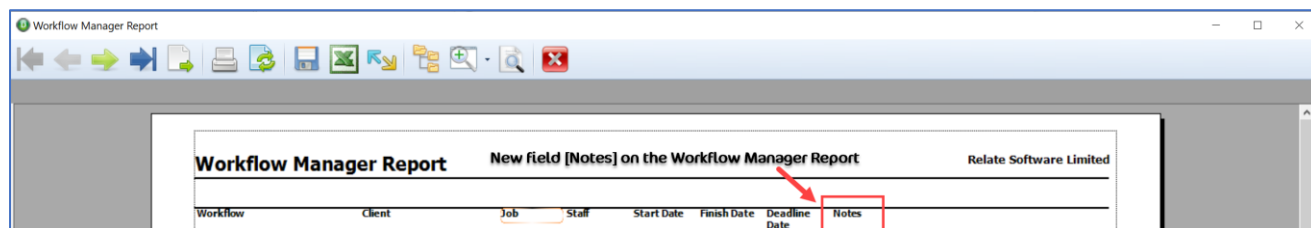


Figure: 'Notes' column on the Workflow Manager Report



MTD VAT RETURN – SAME VRN FOR MULTIPLE COST CENTRES

Where you are using DRIVE with multiple cost centres but these cost centres have the same VAT Registered Number (VRN) then you can now set the appropriate VRN on the Cost Centre's and also apply the same VRN for multiple cost centres.

LOOKUPS, COST CENTRES

From Tools, Lookups, Cost Centre, click on the hyperlink to open the Cost Centre Lookup. Highlight the appropriate cost centre and click edit. You will be able to add the same VRN Number now to multiple cost centres.

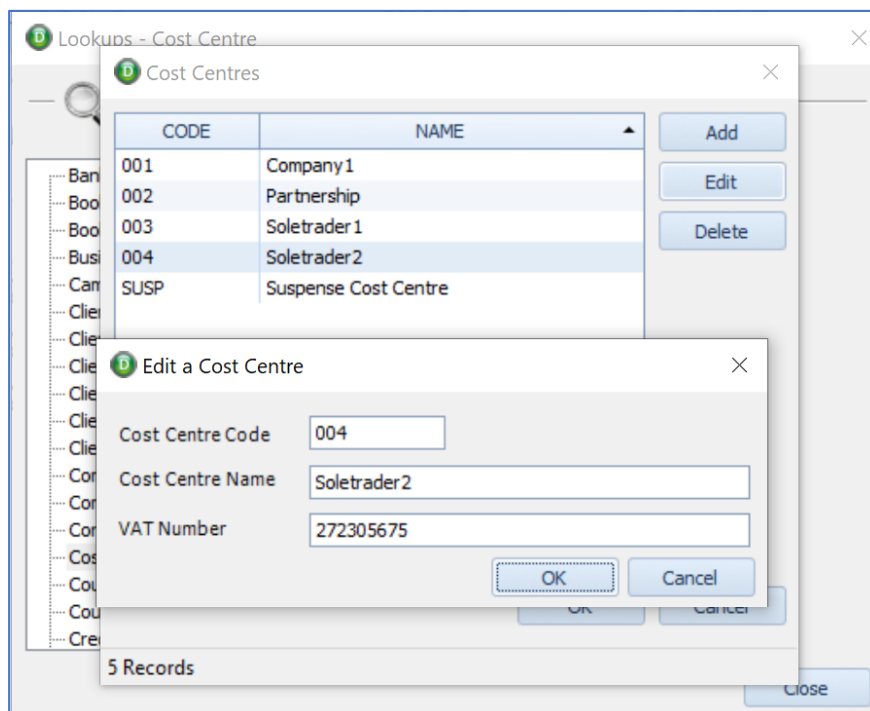


Figure: Cost Centre edit

MTD VAT RETURN BROWSE - OPTION TO RUN BY VRN NUMBER

Now instead of an option to run the VAT Return for a specific Cost Centre, you will now have an option to generate the return for a specific **VRN Number**.

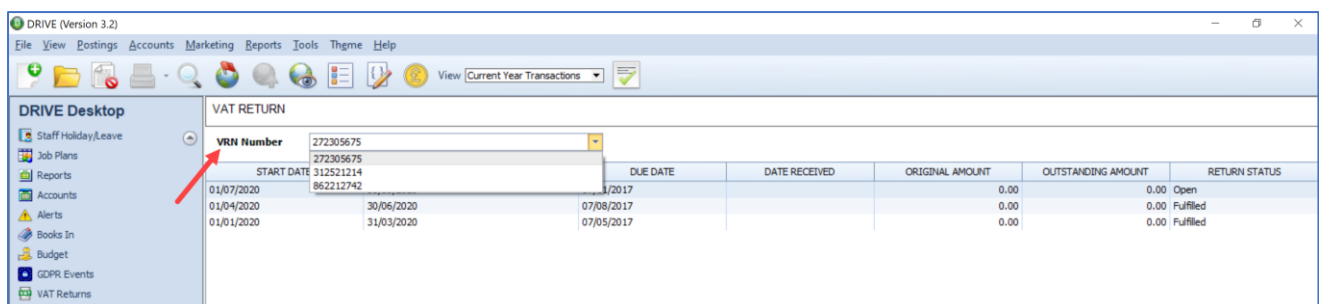


Figure: VRN Number in VAT Return browse

A list of available VRN Numbers will appear when you click on the VRN Number drop-down, when you select the appropriate VRN then the obligation for the combined cost centres will be generated. And if you select to generate the return, then the combined output will be generated and submitted.

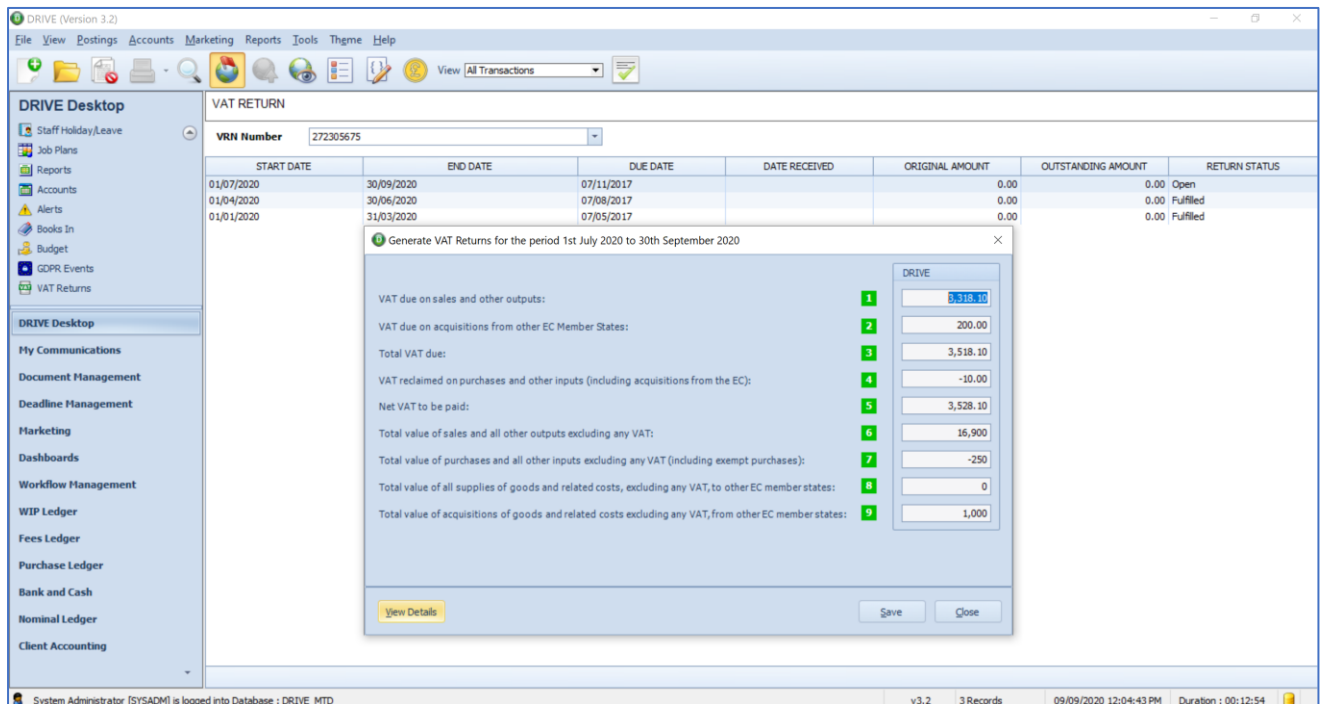


Figure: VAT Return generation screen

MTD VAT RETURN REPORT - COST CENTRES

If you click to 'View' the details of a multiple Cost Centre VAT Return, then the consolidated VAT Report will be generated for the selected VRN and the list of Cost Centres that this applies to will be listed.

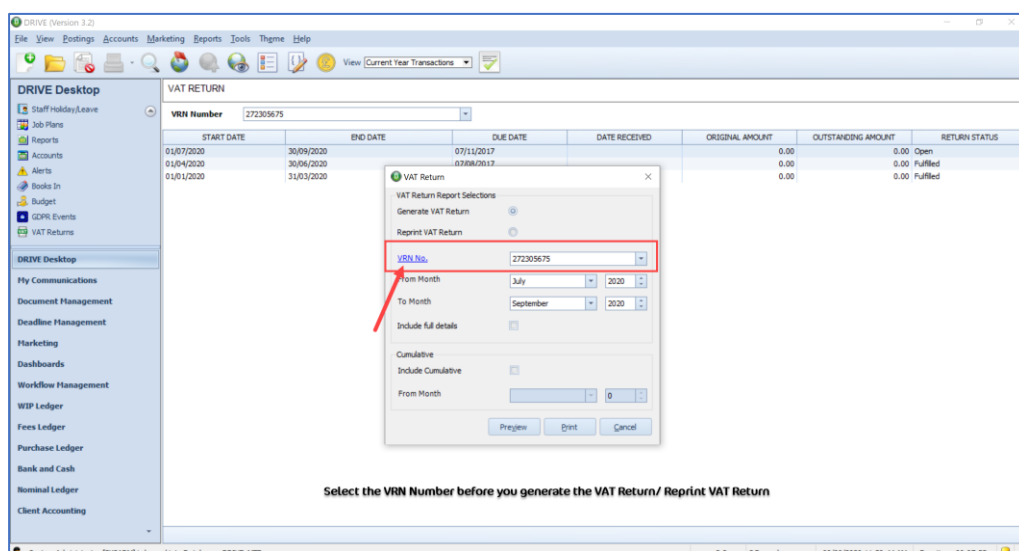


Figure: VRN No. in the VAT Return Generate window



VAT Return Report

Page No. 1

From Month : July/2020

To Month : September/2020

Cost Centre : 004 Soletrader2, CC1 Cost Centre 1, CC2 Cost Centre 2, CC3 Cost Centre 3, CC4 Cost Centre 4, CC5 Cost Centre 5, CC6 Cost Centre 6

Summary

VAT Payable/ (Repayable)

3528.10

VAT on Sales/Outputs

3318.10

VAT due on acquisitions from other EC Member States

200.00

Total VAT due

3,518.10

VAT on Purchases/Inputs

-10.00

3528.10

VAT Rate Breakdown : Sales/Outputs

Current Period

VAT Code	VAT Description	VAT Rate	Net	VAT	Gross
A	21%	21.00	4700.00	987.00	5687.00
B	Vat @ 23%	23.00	7200.43	1656.10	8856.53
E	VAT @ 13.5% (Not For Resale)	13.50	5000.00	675.00	5675.00
Totals			16900.43	3318.10	20218.53

VAT Rate Breakdown : Purchases/Inputs

Current Period

VAT Code	VAT Description	VAT Rate	Net	VAT	Gross
A	21%	21.00	-1000.00	-210.00	-1210.00
B	Vat @ 23%	23.00	300.00	69.00	369.00
G	VAT @ 23% sample	0.00	350.00	200.00	550.00
Totals			-350.00	59.00	-291.00

VAT Rate Breakdown : VAT due on acquisitions from other EC Member States

Current Period

Figure: Cost Centre Names on VRN Return Report

SETTINGS

CLIENT SELECT 'BY NAME' OR 'BY CODE'

When posting transactions and selecting which client you want, we have introduced an option whereby you can choose to select your clients by entering their client code or by entering their client name.

To set the system to the appropriate option, go to Tools, Settings, Clients, Setup and under [**Select Clients By**], click the drop-down and choose either 'Code' or 'Name'.

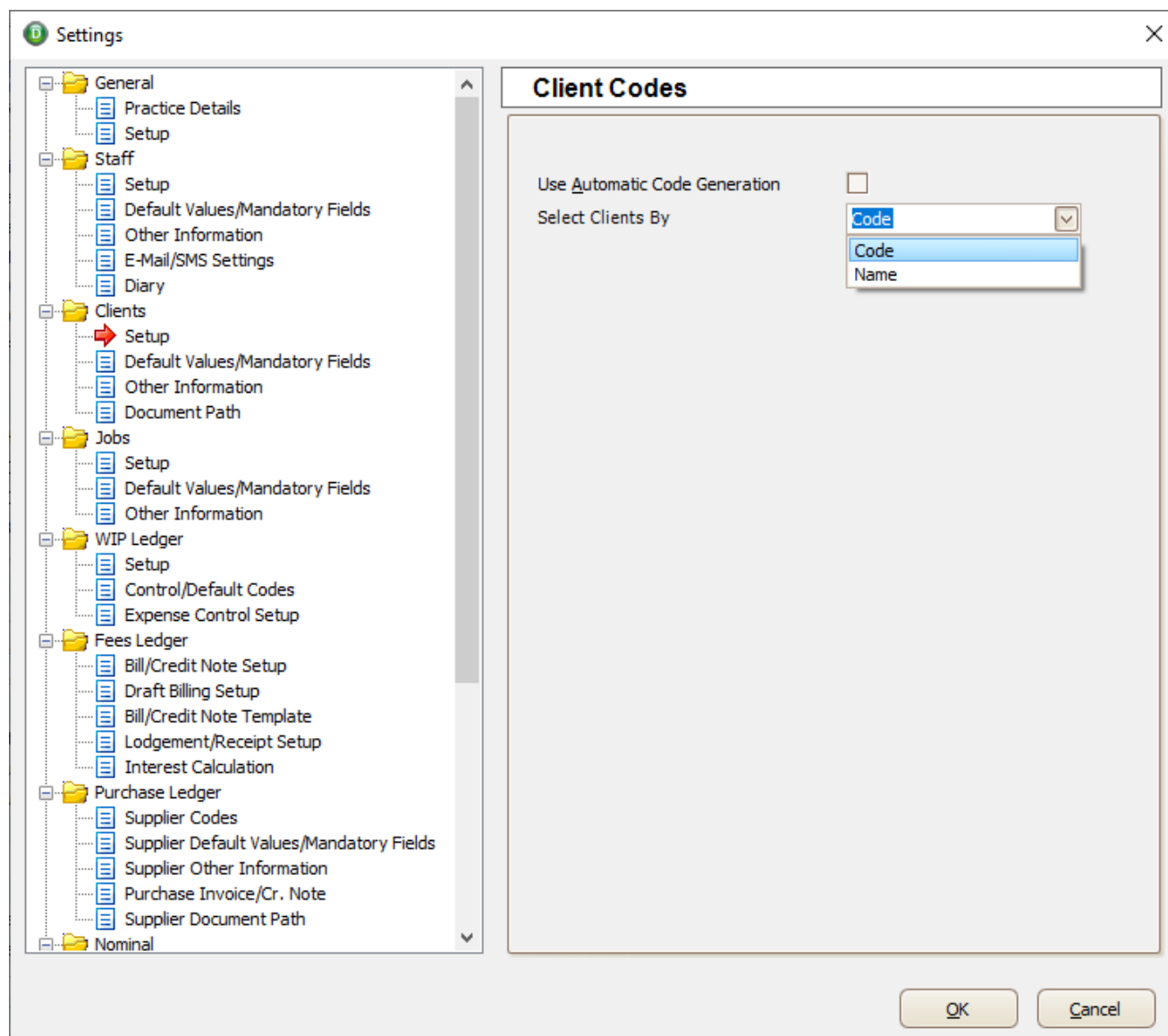


Figure: Clients – Setup; Select Clients By 'Code' or 'Name'



IMPORT ROUTINE

FILE - IMPORT – IMPORT CLIENT FROM EXCEL – 'SOURCE' FIELD ADDED

We have added the 'Source' field to the 'Import Clients From Excel'. Source fields that do not already exist in the system will be automatically created.

File, Import and select 'Import Clients from excel'

Figure: File, Import, Import Clients from Excel.

Edit Client Details - ABB Research Centre

General Practice Other Information Jobs Recurring Jobs Communications Contacts WIP Ledger Fees Ledger Job Plans Links

* Client/Prospect Client

Send E-Mails ☒ Synchronise with iPhone ☐

* Entity Type Company Limited By Shares

* Client Code ABB-CLS

Other Ref.

Company No. VAT No. 676767

CT Ref. PAYE Ref.

* Business Name ABB Research Centre

File As Centre, ABB Research

Name

Group ABB-CLS ABB Research Centre

Addresses

Business Green House Castle View

Town/City Dublin 1

County Co. Dublin

Post Code 8906555

Country Ireland

Phone 1234567890

Mobile

Fax

E-Mail

Web

More....

Contact 1 Automatic Electric Ltd.

* Position Account

Contact 2

* Position

Source

Campaign Antiques Dealers

Referred By Arunabha Dutta

Original Partner LJP Laurence JPyzer

Take On Date 31/12/2018

Business Type Hospital Trust

Year-End (in dd/mm format)

Annual Return Date (in dd/mm format)

The name on the Source field on the spreadsheet will appear on DRIVE while importing Clients from Excel

Figure: [Source] field in Client browse for successful Client Import from Excel.



COMPANY SECRETARY INTEGRATION

ENTITY TYPE MAPPING - IMPROVED

We have updated the entity type mapping between Relate Company Secretary and DRIVE. This will apply if you have the integration in DRIVE turned ON in Tools, Settings, Integration, Company Secretary.

DRIVE: Entity Type	Relate Company Secretary: Entity Type
Company Limited By Shares	Private company limited by shares
Company Limited By Guarantee	Private company limited by guarantee exempt under section 30
Partnership	Partnership
Sole Trader	Sole Trader

Figure: Updated mapping

The screenshot shows the 'Add Client Details - Integration with COSEC' window. The 'Entity Type' dropdown menu is highlighted with a red box and set to 'Company Limited By Guarantee'. Other fields visible include 'Client/Prospect' (Client), 'Send E-Mails' (checked), 'Synchronise with iPhone' (unchecked), 'Client Code' (CS01), 'Other Ref.', 'Company No.', 'VAT No.', 'CT Ref.', 'PAYE Ref.', 'Phone', 'Mobile', 'Fax', 'E-Mail', 'Web', and 'More...'. The window has tabs for General, Practice, Other Information, Jobs, Recurring Jobs, Communications, Contacts, WIP Ledger, Fees Ledger, Job Plans, and Links.

Figure: 'Entity type' in DRIVE is set as 'Company Limited by Guarantee'

When integrated with Relate Company Secretary, the following screen will appear

The screenshot shows the 'DRIVE Integration' dialog box. It contains four checkboxes: 'Create this Client in Relate Company Secretary.', 'Create this Client in Keytime Personal Tax.', 'Create this Client in Keytime Corporation Tax.', and 'Create this Client in IRIS Accounts Production.' The first checkbox is checked. An 'OK' button is at the bottom right.

Figure: DRIVE Integration with Relate Company Secretary.

OTHER

FOR UK & NI PRACTICES – SOLE TRADER & INDIVIDUAL CLIENTS – REF 'NI NO'

For United Kingdom or Northern Ireland Practices (Tools, Settings, Practice Details, Country), we have updated the Reference number fields on the Client Details, General Tab.

Where the Entity Type = Sole Trader or Individual then the field previously referred to as 'PPS number' will be labelled 'NI No'.

Practice Details/Country	Entity Type	Field Name
United Kingdom/Northern Ireland	Sole Trader/Individual	NI No
Republic of Ireland/Ireland	Sole Trader/Individual	PPS No

The screenshot shows the 'Settings' window with the 'Practice Details' tab selected. The 'Country' dropdown menu is set to 'United Kingdom'. A red arrow points to the 'Country' field, and a text box below it states 'The Practice Country is set to United Kingdom'. Other fields visible include 'Practice Name' (Relate Software Limited), 'Addresses' (Business: Albany House, 14 Shute End), 'Phone' (0870-1234-12345678), 'Mobile' (0044-7815 067882), 'Fax' (0870-1234-12345678), 'E-Mail' (info@relate-software.c), 'Web' (www.relate-software.c), 'Default Currency' (GBP - GBP Pound), and 'VAT Number' (123 4567 89).

Figure: Tools, Settings, Practice Details, Country

Add Client Details

Save & Close

General | Practice | Personal | Other Information | Jobs | Recurring Jobs | Communications | Contacts | WIP Ledger | Fees Ledger | Job Plans | Links

* Client/Prospect: Client

Send E-Mails: ☒ Synchronise with iPhone: ☐

* Entity Type: Sole Trader

* Client Code: AUTO

Other Ref.:

NI No. VAT No.

UTR PAYE Ref.

* Business Name

Phone

Mobile

Fax

E-Mail

Web

More...

Contact 1

Position

Figure: Client Details, General – Sole Trader - NI No.

QUOTES – NEW 'CLOSED' STATUS

We have added a new system-defined Status of 'Closed' to the list of available Quote Statuses.

QUOTES

Date: 05/10/2016

Ref No.: Q-003

Client: 070001MD Alpha Solutions Ltd.

Job: MFLRMS001L Financial Planning

Status: **Closed**

Quote Accepted: ☐ Bills Raised: ☐ Closed: ☐ Open: ☐ Ready for Billing: ☐

AML Date:

AML Checked: RM4 Richie M McMahon

Amount: 350.00

Bill No.:

Last Year Fee: 0.00

Created By: LJP Laurence JPyzer

Start Date: 12/10/2016

End Date: 14/10/2016

Attachments: jcc.docx, Quote Mail Merge 17-05-2017 14-58-27.docx

Notes: Check with client before billing

FEE AMOUNT	TO FEE	VARIANCE
0.00	350.00	-8,703.00
0.00	450.00	-5,750.00
0.00	550.00	47.00
0.00	650.00	-179.00
0.00	750.00	90.00
0.00	850.00	207.00
0.00	950.00	-750.00
0.00	1,050.00	480.00
110.00	0.00	110.00
0.00	120.00	240.00
0.00	1,000.00	1,000.00

System defined [Closed] option introduced in the Quotes Browse.

Figure: 'Closed' status



This will mean that the 'Quote Amount' column in the Client & Contact Database browse will now ONLY show 'Open' or 'Ready for Billing' Quotes. 'Closed' and 'Bill Raised' Quotes will not be included in the calculation of this amount.

CODE	NAME	ADDRESS	ENTITY TYPE	QUOTE AMOUNT
ABD077	Aberdare Veterinary PLC	151 Alder Green	Company Limited By Shares	5,000.00
ABD191	Aero Veterinary Limited	173 Midland Place	Company Limited By Shares	0.00
AMA152	Amazon Pet Insurance	156 Dog Quay	Sole Trader	0.00
AMB036	Amber Carpet Installation Limited	160 Box Quay	Company Limited By Shares	0.00
AMB071	Amber Transportation	94 Wood Woods	Sole Trader	0.00
ANG017	Angel Grove Resorts	24 Crick Manor	Sole Trader	0.00
APR121	Apricot Taxis Cabs	181 Hawthorne Glade	Sole Trader	0.00
APR133	Aqua Profiles Limited	27 Bower Lodge	Company Limited By Shares	0.00

DATAMINING – 'EMPTY' DATE FIELD FILTER

We have added an option to allow you to filter a date field in a datamine which is empty or blank.

To use this, go to the relevant date column, click on the Filter icon (top right corner of the Column) and select 'Show Empty'. Now ONLY records with a blank or empty date will appear.

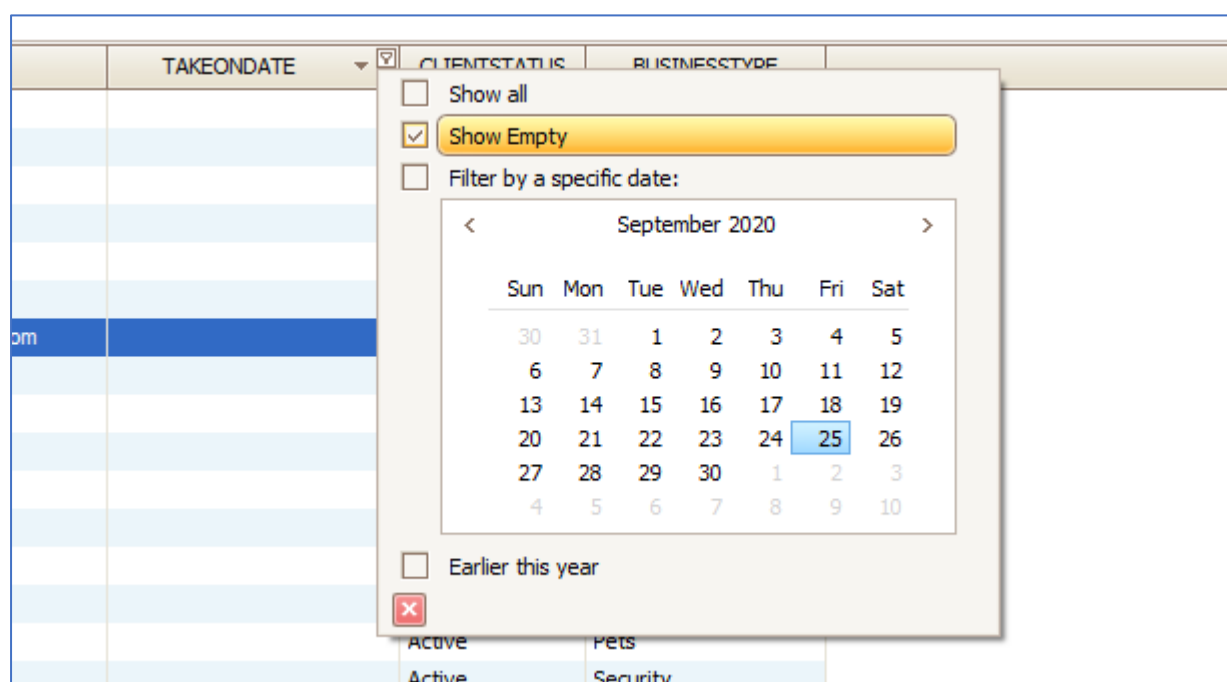
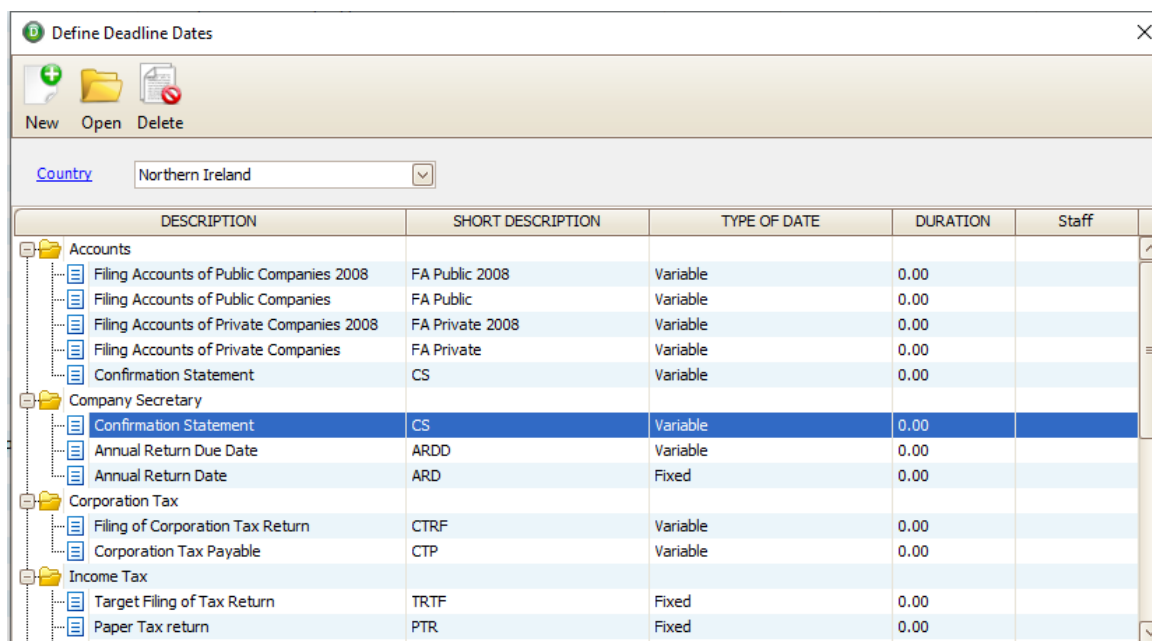


Figure: 'Show Empty' to filter blank dated records in a Datamine

NORTHERN IRELAND – NEW 'CONFIRMATION STATEMENT' SYSTEM DEADLINE

We have added a 'Confirmation Statement' deadline to the Northern Ireland system defined deadlines.

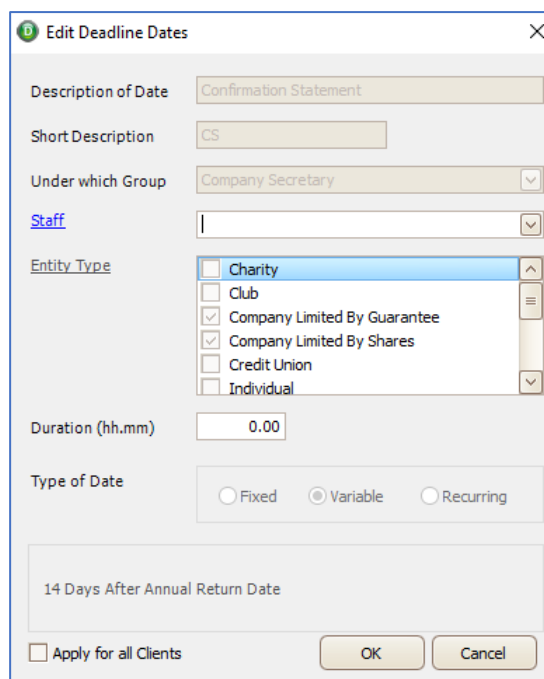


DESCRIPTION	SHORT DESCRIPTION	TYPE OF DATE	DURATION	Staff
Accounts				
Filing Accounts of Public Companies 2008	FA Public 2008	Variable	0.00	
Filing Accounts of Public Companies	FA Public	Variable	0.00	
Filing Accounts of Private Companies 2008	FA Private 2008	Variable	0.00	
Filing Accounts of Private Companies	FA Private	Variable	0.00	
Confirmation Statement	CS	Variable	0.00	
Company Secretary				
Confirmation Statement	CS	Variable	0.00	
Annual Return Due Date	ARDD	Variable	0.00	
Annual Return Date	ARD	Fixed	0.00	
Corporation Tax				
Filing of Corporation Tax Return	CTRF	Variable	0.00	
Corporation Tax Payable	CTP	Variable	0.00	
Income Tax				
Target Filing of Tax Return	TRTF	Fixed	0.00	
Paper Tax return	PTR	Fixed	0.00	

Figure: Confirmation Statement in Define Deadline Dates

It is a 'Variable deadline, set to be generated 14 Days After the Annual Return Date of the client.

It is set to only apply to 'Companies Limited By Shares' or 'Companies Limited By Guarantee'.



Edit Deadline Dates

Description of Date: Confirmation Statement

Short Description: CS

Under which Group: Company Secretary

Staff: |

Entity Type:

- ☐ Charity
- ☐ Club
- ☒ Company Limited By Guarantee
- ☒ Company Limited By Shares
- ☐ Credit Union
- ☐ Individual

Duration (hh.mm): 0.00

Type of Date: ☐ Fixed ☒ Variable ☐ Recurring

14 Days After Annual Return Date

☐ Apply for all Clients

OK Cancel

Figure: Confirmation Statement System Default Deadline