Relate Company Secretary – Training Course Brochure

Our training course for all users is designed as a 'hands on' tutorial led experience, which once completed will allow you to carry out all of your work with added confidence.

To get the best return from Company Secretary software investment and to improve staff efficiency we would recommend that you attend our training course.

Benefits

• Extensive tutorial based manual

• Trainers selected from our support team, experts in Relate Company Secretary

• Modern classroom facilities

• Small groups (Maximum of 9 people)

This course is run every second Thursday from 9:30 to 12:30 in our offices in Dublin 24.

The training course fee is €195 (VAT Exempt). To book visit www.relate-software.com or email training@relate-software.com

Terms & Conditions

Rescheduling:

There is a minimum of 5 confirmed attendees on the course in order for it to go ahead. If cancelled, you will receive an email at least 72 hours prior to the date of the course notifying you of the cancellation. You will then receive a phone call from one of our team re-scheduling the training course with you.

If you need to cancel we will endeavour to reschedule your training initially, however if it is not possible to reschedule and you need to cancel, these are the related charges:

Less than 7 days notice there will be no refund of fees

Greater than 7 days notice but less than 14 days notice then you will receive a 50% refund (€147.50)

Greater than 14 days notice you will receive a full refund (less an administration fee of €25)

Course Content

TUTORIAL 1 – Login, Access Groups & Users

Logging in and out, setting up access groups and users.

TUTORIAL 2 – Options

Setting up practice, system, printing and E-filing details and setting up presenters.

TUTORIAL 3 – Individuals

Setting up Individuals, printing individual reports and officer change of address (B10)

TUTORIAL 4 – Companies

Setting up Companies, printing company reports and checking a companies Annual Return Date.

TUTORIAL 5 – Events

Create Company, Share Capital, Officer and Shareholder events.

TUTORIAL 6 – E-Filing

Setup an account with the CRO, register as a statutory electronic filing agent, setup E-Filing and E-File.

TUTORIAL 7 – Tools

Setup Lookups, Document Templates, Event Templates, Generate Merge File, Toolbars and Registration.

TUTORIAL 8 – Reports

Learn how to generate reports.

TUTORIAL 9 – Utilities

Convert Shares, Remove Locks, Compact and Repair, View Addresses, Query Data, SAP Link, Update E-Filing Flag, Remove Unused Individuals, Remove Unused Addresses, Remove Duplicate Addresses, Clear Submission No, Get Latest Version of Program, Communications Test, Execute SQL List, Validate Officers and Export Annual Return List IE.

Course Schedule

From	To	Duration	Module
		Mins	
09:30	09:40	10	Welcome & Introduction to Trainer, Relate Software + Support
09:40	10:00	20	Login, Access Groups & Users
10:00	10:30	30	Presenters and Individuals
10:30	11:00	30	Companies
11:00	11:15	15	COFFEE BREAK
11:15	11:45	30	Events
11:45	12:15	30	E-Filing
12:15	12:30	30	Tools, Reports, Utilities

Frequently Asked Questions

1. How long is the course?

The Course is a half day Course and it starts at 9:30am and finishes at approximately 12:30pm.

2. What is the course fee?

The full training course fee is €195 per person. This Training is VAT Exempt. Fees may be paid by Visa Debit, Credit Card, Cheque or Bank Transfer.

3. When does the course run?

The course is run every second Thursday of the month (minimum quota of 5 people).

4. Do I need to purchase any materials or books for this course?

No, all required course materials are included in the course fee.

5. How many people are there in each class?

The course is run in small groups, with a maximum of 9 people.

6. What do I need to do if I cannot make it to the course?

It is best to reschedule your training as soon as possible, you can do this by contacting us by phone on +353 1 459 7800 or by sending us an email to training@relate-software.com

However if it is not possible to reschedule and you need to cancel, these are the related charges:

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- Greater than 7 days notice but less than 14 days notice then you will receive a 50% refund (€147.50)
- Greater than 14 days notice you will receive a full refund (less an administration fee of €25)

7. Where is the course held?

The course is held at the Relate Software office at Unit D6 South City Business Park, Whitestown Way, Tallaght, Dublin 24, D24 P940.

Parking: There is ample free parking.

Public Transport: If you are coming by public transport the location is serviced by bus routes 77a & 65b and Luas – Red Line, Tallaght stop, 20 min walk.

*Attendees requiring accommodation can avail of our corporate rate with the Maldron Hotel, 10 minutes walk from Relate training centre.