Preparation of form ADT-1 along with documents for auditor's appointment

Dear users, we have linked the process of auditor's appointment with form preparation. Now you can prepare the documents for appointment or cessation and also generate relevant forms i.e. ADT-1 & ADT-3 along with.

You can make the entry for appointment or cessation of auditors; necessary documents will be created using the inputs provided by you.
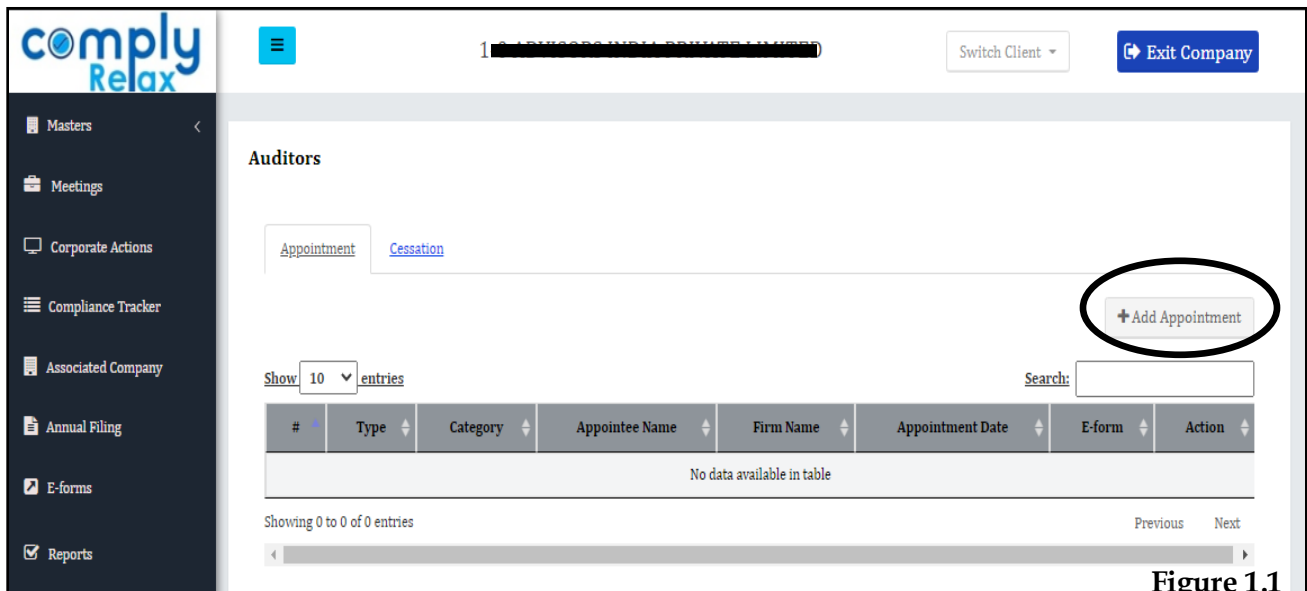
Thereafter you can import that data for preparing form ADT-1.

You only enter inputs once and system will create necessary documents as well as form.

You can also generate form directly if you want. Instructions are give below for both the cases:

APPOINTMENT:

Dashboard ⇨ Clients ⇨ Compliance Manager ⇨ Corporate Action ⇨ Auditors ⇨ Add Appointment

Figure 1.1

When you click on Add Appointment button, you will be redirected to the following window:

Figure 1.2

You have to add the information here and submit.

You can now view or download the relevant documents as shown in the below figure.

Figure 1.3

For generating the form go to the *Create Form* button as show in the figure 1.3.

Or you can follow these steps to go to ADT-1 preparation window:

Dashboard ⇨ Clients ⇨ Compliance Manager ⇨ E-Forms

⇨ ADT-1 ⇨ Fill ADT-1

Figure 1.4

For importing the existing information go to *Import From Database* button as shown in the *figure 1.4*

For importing this dialogue box will open on your screen.

Select the entry for which you want to prepare the form.

Figure 1.5

The information already filled by you will be fetched for form preparation, rest you can fill and submit.

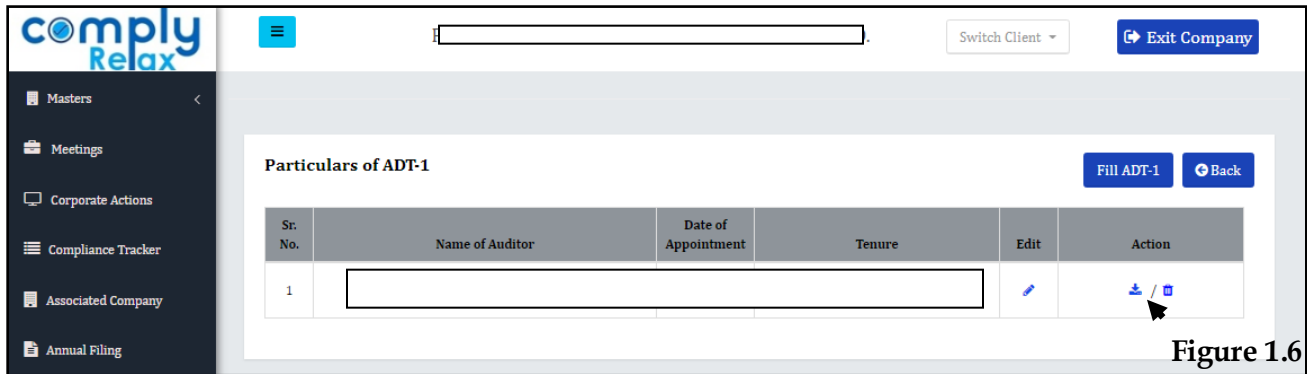To download the form you can go to the e-form window.

Figure 1.6

CESSATION:

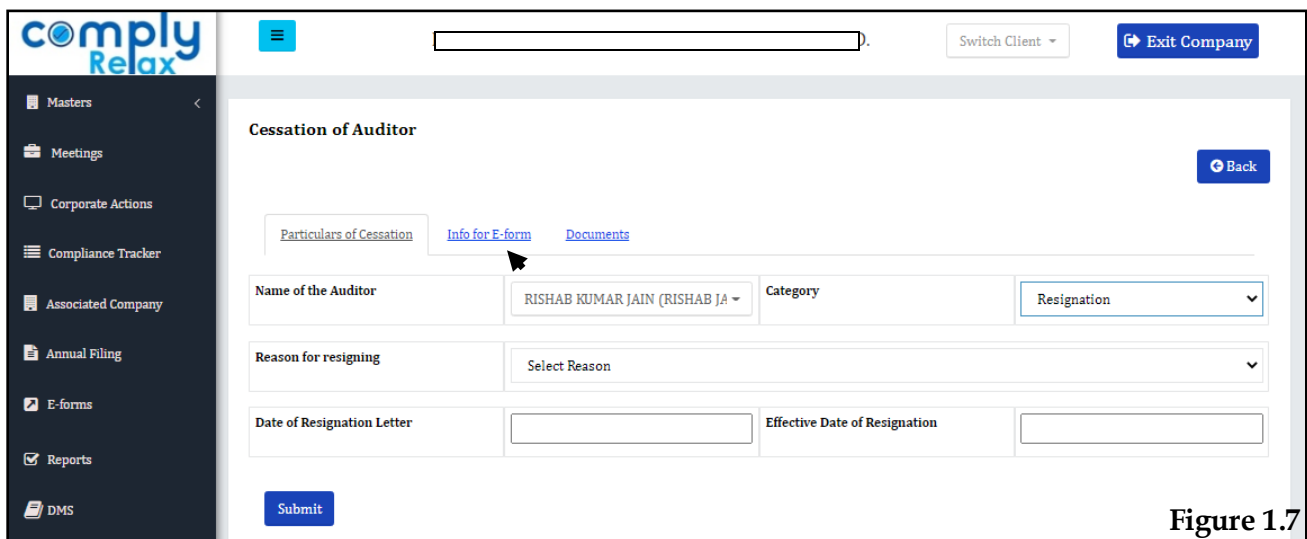Dashboard ⇨ Clients ⇨ Compliance Manager ⇨ Corporate Action ⇨ Auditors ⇨ Cessation

Figure 1.7

E-form ADT-3 is linked with this process directly. You can fill the information here and generate the form very easily from the documents section .