



Checklist - New Plan Not Managed

Things to check if a plan is not showing as managed and it should be:

1. Check that a bank account has been assigned.

In the "Corp" screen, Bank Acct tab, under the field "Main Bank Account".

2. Ensure that a manager has been assigned

In the "Corp" screen, General tab, in the "Manager" field, make sure there is a manager in here i.e. it is not blank

3. Ensure a Management commenced date has been entered

In the "Corp" screen, Structure tab, a date has is required in the "Management Commenced" field. Note: The date must be in the past in order for plan to appear as managed.

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