

## Share Allotments

- Go to **Share Allotments** (located on the top bar) > **Add a Share Allotment**

Use the drop down list by 'Allottee' to pick either people already in the company, people you've recently viewed, and below that; all people saved on your system. ( you must have already saved the person you wish to allot shares to within the system - see 'Adding a Person' to learn how to do this)

- Add the number of shares you wish to allot
- Add the date you wish to allot the shares
- Below this, you have a tick box which gives you the option to leave this entry pending (meaning it will appear in your Action Station under pending until complete or with an Opening Balance)
- Next, choose the share class
- Below this is the Certificate Number and Index Number in Register

(If this is the first time you've allotted shares for this company on the system, you will need to add in the certificate number. After this has been done, the system will automatically keep a tally of what share certificate and issuing number needs to be here, and you will no longer need to fill this in manually)

- Below this you can enter payment details and any other information, alongside any notes you may want to add.
- Then click **Save**
- The SH01 form will be automatically populated and it will appear in the Filing Centre ready for you to submit to Companies House.
- To do this go to **Filing > Filing Centre** select the SH01 by clicking the checkbox on the left hand side of the form and then click **E-file items ticked above**
- You can also at any time look at the form by going to : **Filing > Share Forms > SH01 Form**
- You can check the progress of your SH01 by going to **Filing > Check E-Filing** select either **All Companies** or the company you have loaded.
- Here you can see if Companies House has accepted, rejected or has not yet looked at your form.