Dividends - AU

The **Dividends** page lists the current dividend statements for a company. You'll see the following details:

Field	Description
Status	Pending signature, in progress or done.
Declaration Date	The date the declaration was made.
Payment Date	The date the payment was made.
Share Class	The type of share.
Total Dividend Amount	This value of the total dividend amount.
Number of Shares	The number of shares.
Dividend Type	Final, interim, other or special.
Franking Type	Fully franked, partially franked or unfranked.

If you haven't added any dividends yet or need to add more, you can add them from the dividends page.

To add a dividend

1. Select a client from **All Clients** and click **Corporate Admin**.
2. Click the **Dividends** tab.
3. Click **Add dividend**.
4. Under **Dividend details**, enter the relevant details.
5. Under **Dividends**, click **Add dividend**.
6. Enter the payment details.

> You can only enter a specific franking percentage when you have selected **Partially franked** as the franking type.
>
> Some of these fields are calculated automatically based on values you've entered in other fields. You can't directly change a grey field.

7. Click **Add**.
8. Under **Signatory details**, enter the relevant details in the three sections:

- Dividend Payment Acceptance - Resolution of the Sole Director
- Dividend Payment Acceptance - Minutes of Meeting of the Members
- Dividend Payment Recommendation - Resolution of the Sole Director.

9. Click **Add dividends and create forms**. The **Client lodgements** page opens.

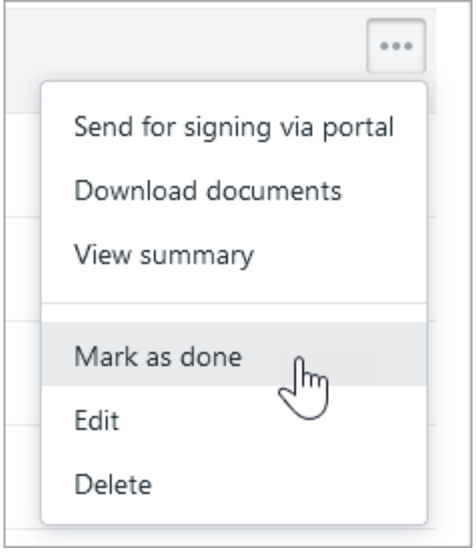
10. If you want to make any changes to the dividend, you can click the ellipsis () on your chosen client:

> The options you see when you click the ellipsis will depend on the status of the dividend statement.

Option	Description
Send for signing via portal	If the dividend is pending signatures, you can send the documents to clients for signing.
Resume	If the dividend is in progress, you can continue working on it.
Download documents	If the dividend is pending a signature or complete, you can download the dividend's documents.
View summary	If the dividend is pending signatures or complete, you can view its summary.
Mark as done	If the dividend is in progress, you can mark it as completed.
Edit	If the dividend is pending signatures, you can edit it.
Delete	If the dividend is in progress or pending signatures, you can delete the dividend.

To complete a dividend

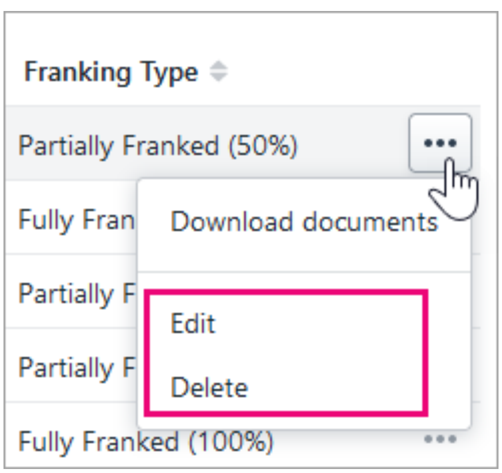
1. Click **Corporate Admin** on the top menu bar.
2. Click the ellipsis on the client you want to mark as complete.
3. Click **Mark as done**.



To edit or delete a dividend

> When you edit or delete a dividend, you will also be deleting the existing documents for the dividend.

1. Select a client from **All Clients** and click **Corporate Admin**.
2. Click the **Dividends** tab.
3. Find the dividend and click the ellipsis.
4. Select **Edit** or **Delete**.



5. On the confirmation window, click **Edit** or **Delete**.

To download documents

1. Select a client from **All Clients** and click **Corporate Admin**.
2. Click the **Dividends** tab.
3. Find the dividend and click the ellipsis.
4. Click **Download documents**.