



## Electronic Filing of B77 forms

### INTRODUCTION

In version 4.1 of Relate Company Secretary, electronic filing of B77 forms is enabled. Filing these forms electronically has the following advantages:

- The filing fee for paper B77 form is €15.00. There is no filing fee for electronically filed B77 forms.
- Unlike electronic filing of B1 forms (but like electronic filing of B2 and B10 forms), digital certificates, IDs and PINs are not required for electronic filing of B77 forms.

E-Filing this form through Relate Company Secretary is quite similar to E-Filing B2 and B10 forms. After the electronic submission, you will receive by email two PDF documents; these contain the details of the Electronic Filing Agent being authorised, and a signature sheet. This signature sheet must be signed by a company officer, and submitted by post to the CRO.

### REQUIREMENTS

In order to take advantage of this new feature, you will need to ensure that you have the following:

#### **Relate Company Secretary version 4.1 or later.**

If you have an earlier version of the package, you will need to update to the latest (Tools > Utilities > Get Latest Version of Product)

#### **CRO Customer Account Number.**

This number must be entered into Relate Company Secretary in Tools / Options /E-Filing. If you do not yet have a CRO Customer Account Number, you will need to send them an A/C1 form – this form may be printed from the same options screen.

#### **Internet connection on the PC that is sending the forms.**

This is required to send the form, and to receive submission details and signatory page back from the CRO.

#### **An email address.**

The CRO will send the submission details and signatory page back to the email address specified in Tools / Options / Practice details.

#### **Adobe Acrobat Reader.**

Make sure that you have Adobe Acrobat Reader version 5 or later on your PC. If you don't have this, you will need to download it before proceeding. Adobe Acrobat Reader can be downloaded free of charge from <http://www.adobe.com/>

## PROCEDURE

1. On the Companies Browse screen, highlight the company you wish to act as Electronic Filing Agent for, click the down-arrow beside 'Print', and select B77.

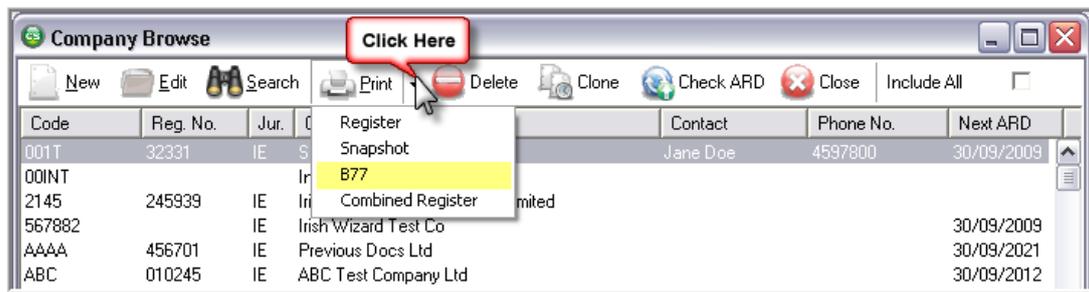


Figure 1

2. Select the officer who is certifying the B77 form, select the presenter, and set Status to 'Ready to E-File'. Then click Close.



Figure 2

3. Now go to E-Filing, and select B77; all outstanding B77s will be listed. Select the Send button. This will send all 77 forms that have the status 'Ready to E-File'



Figure 3

4. You will receive an email from the CRO that shows the detail of the B77, along with a Signatory sheet. The signatory sheet will show you which officers are required for signing.
5. When the signatory sheet has been signed, send it to the CRO.

6. At any stage after the initial electronic submission, you may check the status of the submission by clicking Status in the E-Filing section of the package. The Status may be:
  - **Sent to CRO.** This means that the submission has been sent.
  - **Received by CRO.** This means that the return has passed validation checks on the CRO server.
  - **Lodged with CRO.** This means that the submission has been successfully filed and closed by the CRO.
  - **Error with submission.** This means that there was a problem with the submission. You should receive more details on the nature of the error when you check the status.
7. When the status goes to 'Lodged with CRO', you may act as an Electronic Filing Agent for the company. Until this status is reached, you do not yet have authorisation.
8. For further details on acting as an Electronic filing agent, see our application note 'E-Filing B1 forms with Electronic Filing Agents' on our Support > Company Sec web page