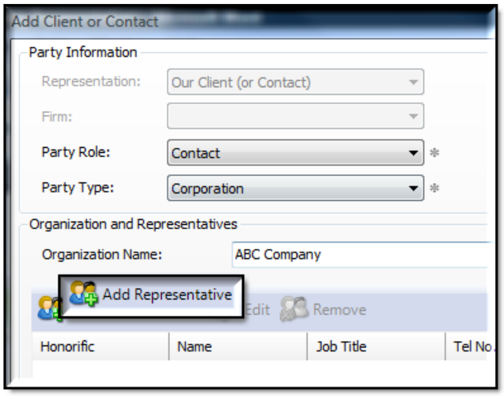
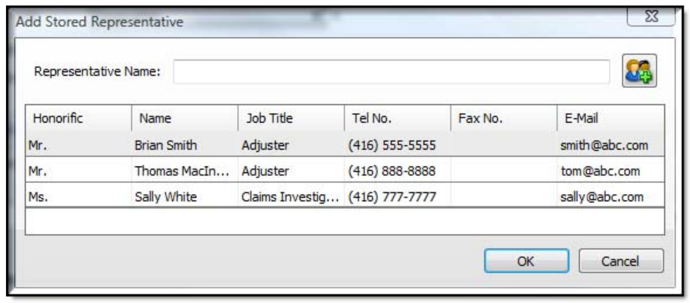
Adding a Stored Representative



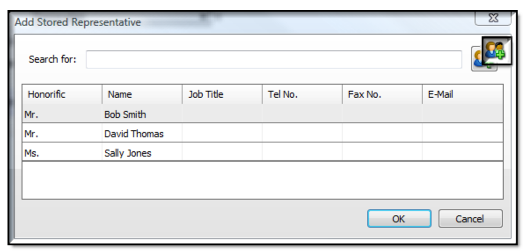
To add a stored representative to the file, click Add Representative in the **Add Client or Contact** window.



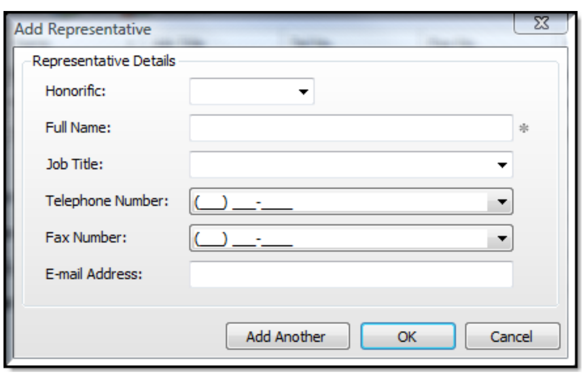
Select the name from the list and click **OK**. If additional representatives are required, they can be selected one at a time.

If the representative does not appear in the list he or she will need to be added.

Adding a New Representative



Click the icon above the list of stored representative to open the Add Representative dialog.



Complete the details as required and click OK. The new representative will now be added to the stored representatives list for that company and will be available for future use.