

How to Setup Licences in Chief

Account Professional Licence Settings (Settings > My Account)

Account professional licenses	
Institution #1 Use this for your licensee name	ID #1 Use this for your ACL number
Institution #2 Use this for your Corporate CR name (if there is onw	ID #2 Use this for your own CR number
Institution #3 CIO or FOS	ID #3 Use this for CIO or FOS number
Institution #4 MFAA or FBAA	ID #4 Use this for your MFAA/FBAA number
Institution #5 Use this for broker own Business name	ID #5 Use this for broker own ABN
Institution #6 Spare	ID #6 Spare

Organisation Professional Licence Setting (Settings > Details)

Organization professional licenses	
Institution #1 Use this for credit licensee name	ID #1 Use this for ACL number
Institution #2 Spare	ID #2 Use this for credit licensee ABN
Institution #3 Spare	ID #3 Use this for credit licensee Phone number
Institution #4 Spare	ID #4 Spare
Institution #5 Spare	ID #5 Spare
Institution #6 Spare	ID #6 Spare

These fields will merge in the 'About Us' section of each document as follows:

ABOUT US

ADVISER

Adviser Name	{deal.owner.nameFull}
Email	{deal.owner.email}
Phone	{deal.owner.phone}
Address	{organization.address}

CREDIT LICENCE DETAILS

Credit Representative	Number {deal.owner.license.id2} of {organization.license.institution1}
Credit Licence	Number {organization.license.id1}
ABN	{organization.license.id2}
Phone Number	{organization.license.id3}