



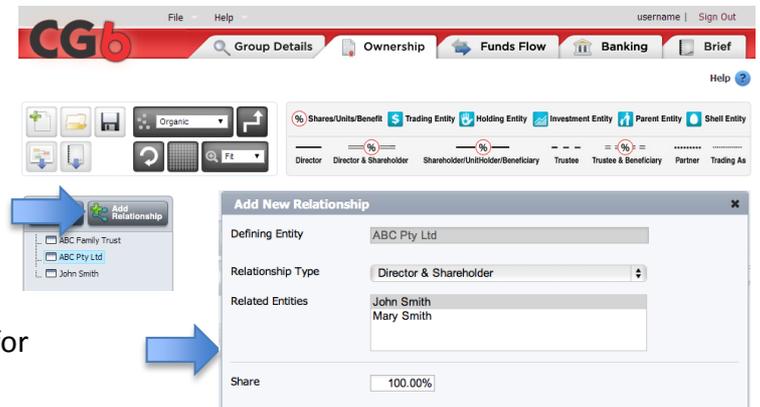
## 1. Create Entities

Start by adding entities to the group. To do this, simply select the “Add Entity” button and complete the fields in the “New Entity” pop-up. **NB**, if you complete the “Comments (visible)” field of the “New Entity” pop-up, this entity will automatically be displayed in the tree. The only other way to display the entity in the tree, is to add a relationship (refer below).



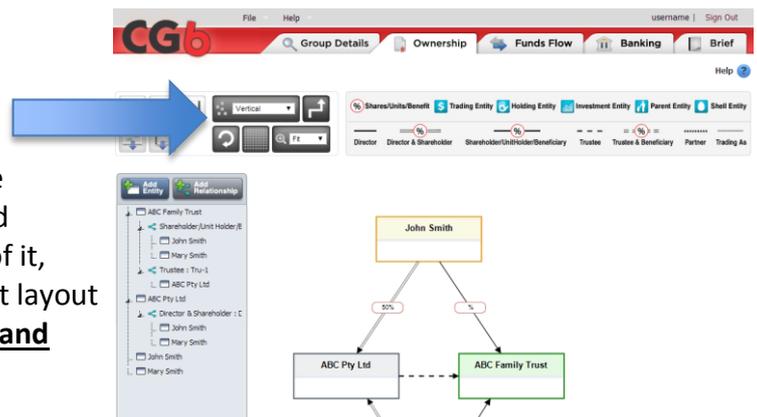
## 2. Define Relationships

To create the visual tree, you need to define the relationships between various entities. To do this, select an entity, click on the “Add Relationship” button and complete the “Add New Relationship” pop-up. **NB**, you only need to define relationships for corporate entities (ie, companies, trusts, partnerships, etc.). You do not define relationships for individuals.



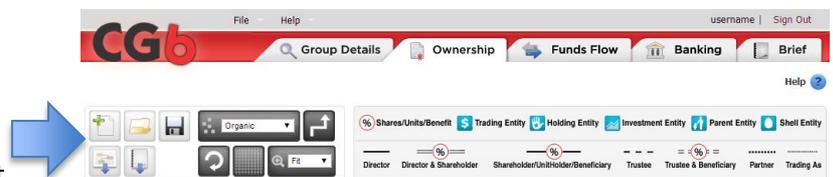
## 3. Changing Tree Layouts

You can change the appearance of the tree by either selecting one of the preset layouts (vertical, horizontal or organic), or by selecting an entity on the tree and moving it around. You can also invoke a grid to ensure perfect alignment and if you make a mess of it, simply select the reset button to go back to the preset layout selected. **NB, make sure you create all your entities and relationships prior to changing the layouts.**



## 4. Export & Save

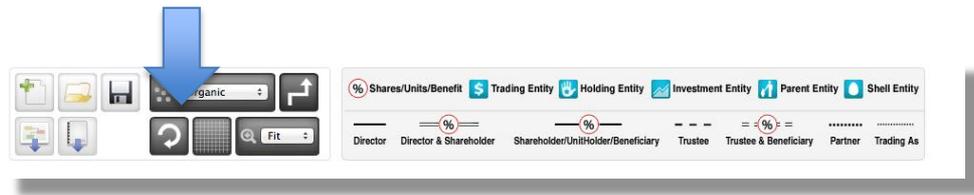
You can export your tree as a picture or PDF document. Always remember to save your file by pressing the save button. This will ensure that you are able to retrieve the tree at a later date and make changes.



don't forget to...

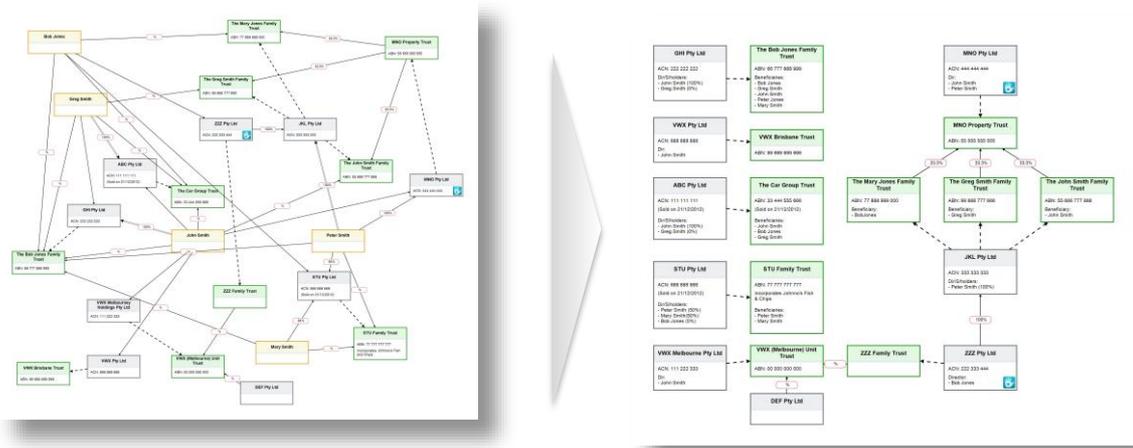
### 1. Create all your entities and relationships before changing the tree layout

You can make your manual layout changes at any time and if you add an entity or relationship, the application will add the new detail, without affecting your manual changes. This is useful when you're opening an existing group and adding a new entity or relationship. However, if you use this functionality too early in the tree creation process, it will restrict the layout possibilities of the application. Make sure you only change the layout of the tree once you have created all your entities and relationships. If you do make a change and want the application to do the layouts, simply hit the reset layout button.



### 2. Simplify complex structures

Rather than recording each relationship, you can simply use the "Comments (visible)" section of the New Entity pop-up, to detail certain relationships within the entity boxes.



### 3. Save your work!!!

The CGt+ is a web-based application and we don't store any of your customer's data, it is important that you save your work for later use. Pressing the save button will create a .fst file that you will be able to access later using the open button.

