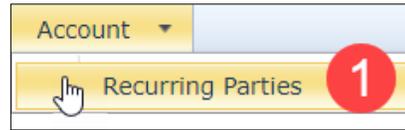# Steps to Set Up Recurring Parties

Steps to Set Up Recurring Parties:

Menu Selection:

1. Select **Account → Recurring Parties**

Add/Edit Recurring Party:

2. Click **Add** button
3. Select **Party Type**, "Individual" defaults
4. Type **First Name**
5. Type **Middle Name**
6. Type **Last Name**
7. Type **Suffix**
8. Type **Notes**
9. Select **Address Info** Available or Not Available
10. Type **Address** (Line 1)
11. Type **Address 2** (Line 2)
12. Type **City**
13. Select **State** from list
14. Type **Zip** code
15. Type **SSN** (Social Security Number)
16. Type **Phone**
17. Select **Gender** from list
18. Check **Special Accomodations** checkbox, if applicable.
19. Click **OK** button
   - ➤ Repeat Steps 2-19 to add additional parties.
20. Select **Recurring Party** from list to add parties in e-filings