Company & Other Entity User Guide

Version 2.9.4

Last Updated 23rd April 2012

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1. Welcome to Portal by BGL

1.1 Overview of Portal by BGL

Portal is a web based document delivery, data access and client collaboration tool that is fully integrated with your CAS and Simple Fund software.

Portal streamlines the flow of information to your client and removes the need for you to post or email documents. Through its unique end to end paperless document delivery, retrieval and reminder system, Portal automatically delivers documents direct to your client via the web, reminds your client to process the document, informs you when your client has processed the document and automatically updates your BGL software document tracking and management systems for all stages of document processing. It also provides the ability for you to digital sign using BGL smart sign technology.

For more information about Portal by BGL, visit **Portal by BGL** on our website or contact BGL Sales on 1300 654 401.

Getting started with Portal by BGL is very simple and easy. There is no need to have a degree in Network engineering or even have experience with running Internet Servers. You simply need to install the **Data Connector** from BGL and input a username and password into Simple Fund or CAS software. Please read the **Getting started with Portal** section for further information.

Instructional videos of Portal can also be viewed and shared with your clients:
How to log into Portal
http://vimeo.com/41529893

How to view documents in Portal
http://vimeo.com/41545672

How to upload document to Portal
http://vimeo.com/41545806

How to Digitally Sign documents in Portal
http://vimeo.com/41742711

1.2 Portal by BGL - Data Connector MINIMUM Requirements

- Simple Fund Version 2011.2 or later
- CAS Version 2012.0 or later
- 1 GHz 32-bit (x86) Processor
- Windows XP, Windows Vista, Windows 7, Windows Server 2003 or 2008
- 2 GB of system memory
- 20 GB hard drive with at least 15 GB of available space
- Internet access (fees may apply)

1.3 Portal by BGL - Supported Browsers

Portal by BGL has been tested to work on the following web browsers:

Internet Explorer 7.0 or later
Firefox 3.5 or later
Google Chrome 8.0 or later
Apple Safari for Mac

Internet Explorer 6.0, Apple Safari for Windows and any browsers are not currently supported so pages may display incorrectly if you are using these browsers.

2. Getting started with Portal

To set up Portal for your clients, complete the following four simple steps.

Step 1: You would have received a welcome email from Portal by BGL containing a username and password. Login to Portal HTTP://BGLPORTAL.COM.AU/ and enter the credentials from the email.

The next step is to add companies and other client entities .

You can add companies and other entities directly on Portal – using **Step 2** or jump to **Step 3** if you want to connect your CAS software to Portal and add companies using the data connector

Step 2 Add Companies - Quick Setup
You can begin to add companies and other entities like partnerships and trusts directly on Portal using the Add Entity Function See 8.2 Grid View – Adding an Entity .

Step 3 – Add Companies from CAS using Data Connector

If you are a CAS or Simple Fund client, you can use the Data Connector to push data securely from your CAS Installation. To do this Install the Data Connector application. Click here for instructions on how to set up the Data Connector.

Once Data Connector is installed open CAS software and select the companies you want to submit to the Portal. Click here for instructions on how to select companies you want to submit to the Portal.

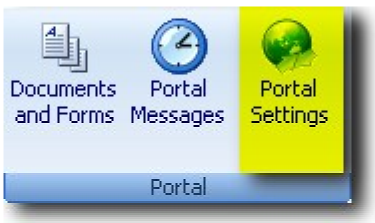
Step 4: Once your companies and entities (step 2 or 3)have been added to the Portal. Log into the portal using the Portal administration account provided to you by BGL and begin inviting users. Click here for instructions on how to invite users to the Portal.

3. CAS Setup for Portal

The majority of Portal settings used to interact and communicate with the Portal, can be configured directly from the **CAS | Portal Settings** screen.

Note: For these settings to work, you will need a Portal Licence. If you are not a Portal client and would like more information on the Portal, please follow this link: http://bglcorp.com.au/products/portal/introduction

To access the **Portal settings** screen, from the **Ribbon Toolbar**, go to **Portal** and click on the **Portal Settings** button.



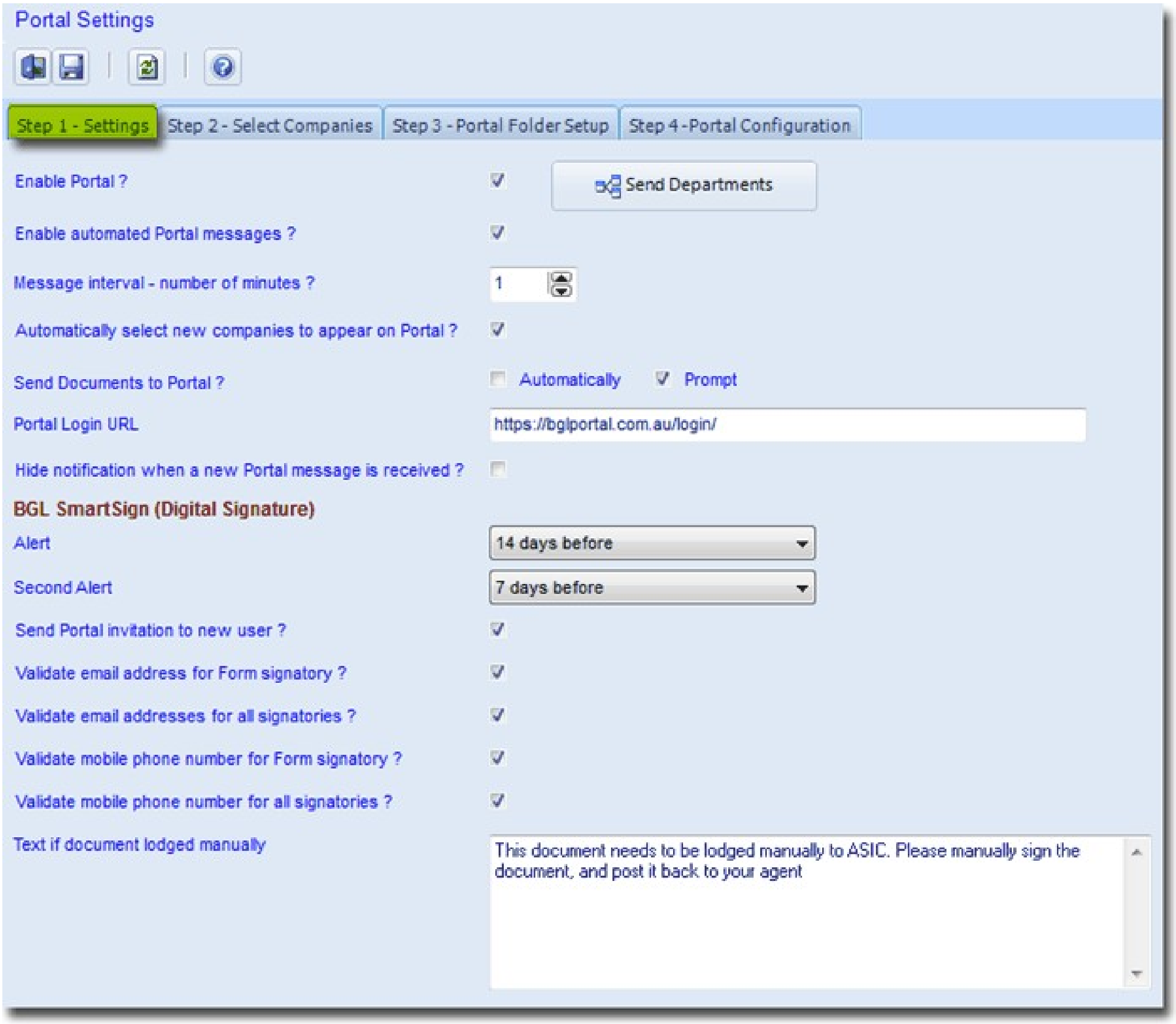
Screen Prompts

The Portal Settings screen is broken down into four steps:

Step 1 - Settings
Step 2 - Select Companies
Step 3 - Portal Folder Setup
Step 4 - Portal Configuration

Each step must be completed in order for CAS to communicate with the Portal successfully.

Step 1 – Settings



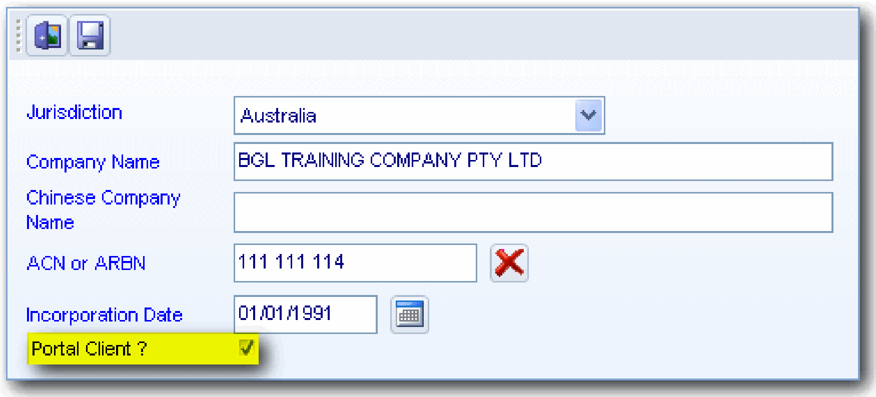
Enable Portal?
Please tick this check box so that CAS will be able to communicate with the Portal. If you want to disable all communication between CAS and the Portal, simply **untick** this box.

Send Departments
By clicking on this icon CAS will send the department information to the Portal.

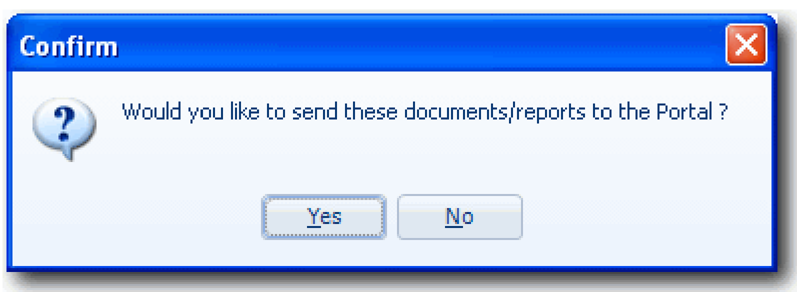
Enable automated Portal messages?
Ticking this box will display a message to CAS users that there are unread Portal Messages based on the Message Interval input below.

Message Interval - number of minutes?
This is the frequency (in minutes) the Data Connector will check for new messages to be sent or received. It is recommended setting this to 1.

Automatically select new Companies to appear on Portal?
If this box is **ticked**, any new company that you create in CAS after this setting is saved, will automatically have the **Portal Client?** box ticked in the **Company Selection** screen when clicking ***New***.



Send Documents to Portal?
By default, *Prompt* will be selected. When this is selected, each time you ***Print*** or ***Export*** a document, the following message will display:



You can then click **Yes** to send the document to Portal. Click **No** to cancel.

If you do not want this confirmation message to appear every time you push a document to Portal, you can select **Automatic**. CAS will then directly send the document to Portal without any confirmation pop up.

Portal Login URL
Please enter your Portal URL Login provided in your welcome email.

Hide notification when a new Portal message is received?
If this box is **ticked**, no notification will pop up when a new Portal message is received in CAS.

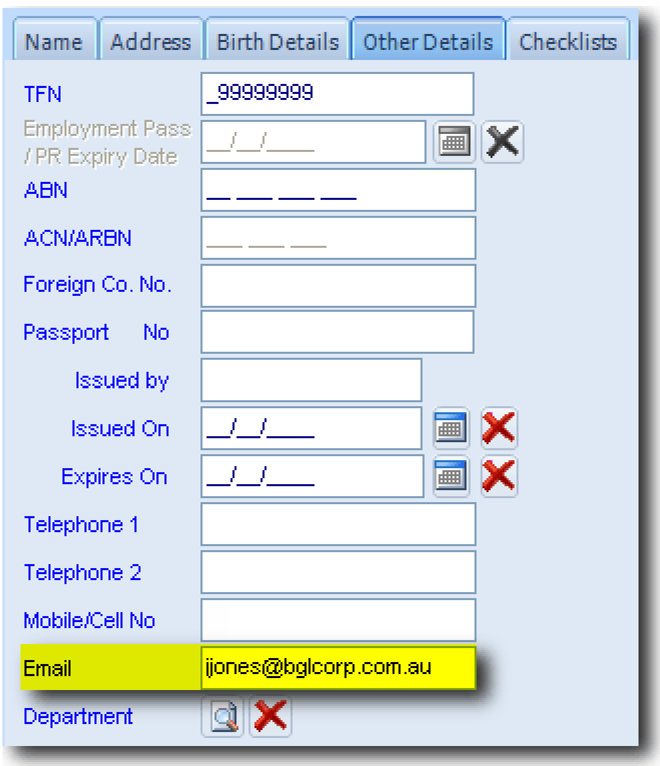
BGL SmartSign (Digital Signature)

When documents are sent to Portal for your clients to sign, you can set up alerts in **CAS** so that a reminder will be sent to these clients based on the number of days selected below.

Alert
Select a number of days from the drop-down list when the alert will be sent.
Second Alert
You have also the option to send a second alert by selecting a number of days from the drop-down list. This option will only be enabled if a number of days has been selected next to **Alert** above.

Send Portal Invitation to New User
Ticking this box will send a Portal Invitation to the signatory(s) if they are not Portal Users.

Note: An email address needs to be attached to the signatory under **Other Details** for the invitation to be sent.



Validate email address for Form signatory ?
Ticking this box will check if there is an email address attached to the Form signatory **only** when exporting documents from **CAS**.

An email address is required for the signatory to be able to sign documents electronically through BGL SmartSign on Portal.

Validate email address for all signatories ?
Ticking this box will check if there is an email address attached to **all** the signatories when exporting documents from **CAS**.

Validate mobile phone number for Form signatory ?
Ticking this box will check if there is a mobile phone number attached to the Form signatory **only** when exporting documents from **CAS**.

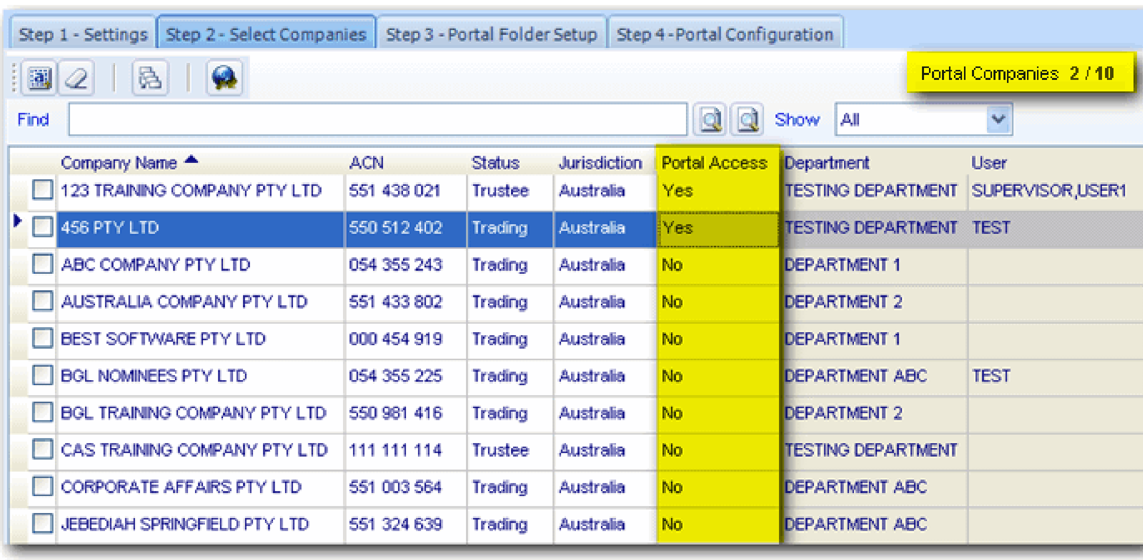
Validate mobile phone number for all signatories ?
Ticking this box will check if there is a mobile phone number attached to **all** the signatories when exporting documents from **CAS**.

Text if document lodged manually
If a document cannot be lodged electronically and needs to be manually lodged with ASIC, you can enter the text you wish to use in the email sent to your Portal clients when such a document is uploaded to Portal.

Step 2 - Select Companies

This screen allows you to select which companies you wish to display on Portal and communicate with CAS.

Companies that are currently interacting with Portal will have Portal Access set to **Yes**. The total number of companies that are enabled for Portal will be displayed on the top right hand corner.



Company Name	ACN	Status	Jurisdiction	Portal Access	Department	User
123 TRAINING COMPANY PTY LTD	551 438 021	Trustee	Australia	Yes	TESTING DEPARTMENT	SUPERVISOR,USER1
456 PTY LTD	550 512 402	Trading	Australia	Yes	TESTING DEPARTMENT	TEST
ABC COMPANY PTY LTD	054 355 243	Trading	Australia	No	DEPARTMENT 1	
AUSTRALIA COMPANY PTY LTD	551 433 802	Trading	Australia	No	DEPARTMENT 2	
BEST SOFTWARE PTY LTD	000 454 919	Trading	Australia	No	DEPARTMENT 1	
BGL NOMINEES PTY LTD	054 355 225	Trading	Australia	No	DEPARTMENT ABC	TEST
BGL TRAINING COMPANY PTY LTD	550 981 416	Trading	Australia	No	DEPARTMENT 2	
CAS TRAINING COMPANY PTY LTD	111 111 114	Trustee	Australia	No	TESTING DEPARTMENT	
CORPORATE AFFAIRS PTY LTD	551 003 564	Trading	Australia	No	DEPARTMENT ABC	
JEBEDIAH SPRINGFIELD PTY LTD	551 324 639	Trading	Australia	No	DEPARTMENT ABC	

Portal Access

The **Portal Access** field is editable. You can click twice into the field and click to select:

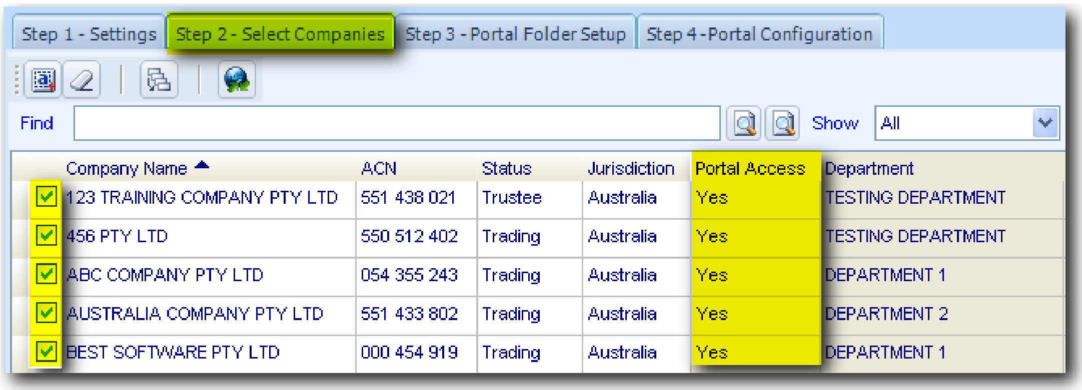
Yes - This option will display the company on Portal and you will now be able to communicate with CAS.

No - This Company will not show on Portal. Changing the status from **Yes** to **No** will stop any future communication with CAS and Portal.

Update - If you make any changes under the **Portal Settings** screen, you need to change the **Portal Access** setting to **Update** and click ***Save*** to send the changes to Portal.

You can change the **Portal Access** setting to **Yes** for multiple companies. You will need to tick the box on the left hand side of the companies you want to enable for Portal and click the icon. This will change the **Portal Access** from **No** to **Yes**.

If you want to change the **Portal Access** setting to **No** for multiple companies, you will need to select the companies using the check the box and then click.



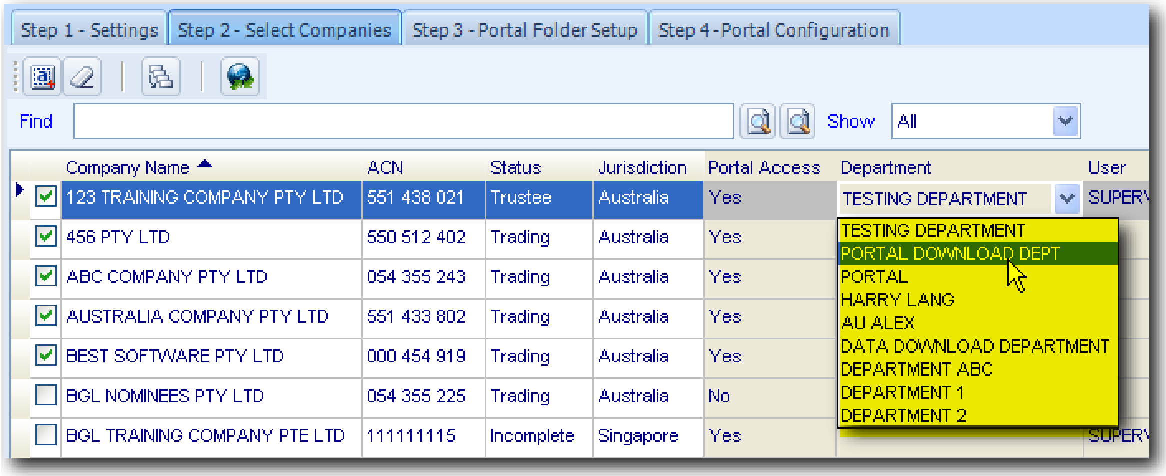
You can order the company display list by clicking on one of the following headers:

- Company Name
- ACN
- Portal Access
- Status
- Jurisdiction
- Department
- User

Department

You can also attach a department and user(s) to any company from this screen.

The **Department** field is editable. You can click twice into the field and click to choose a department from the list. Portal Users can be attached to a Department. They will then be able to view all the companies linked to that department.

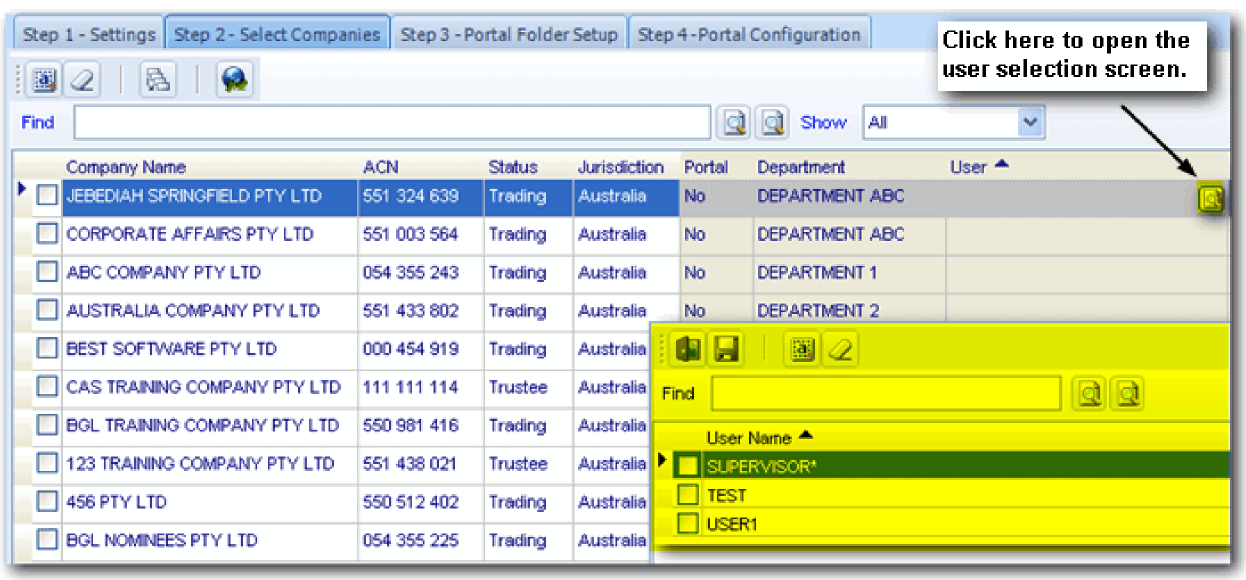


User

You can also select to which user(s) you want to send a message whenever there is a change in Portal, for example, if a document is uploaded in Portal, the selected user(s) will receive a message in CAS to notify them of this.

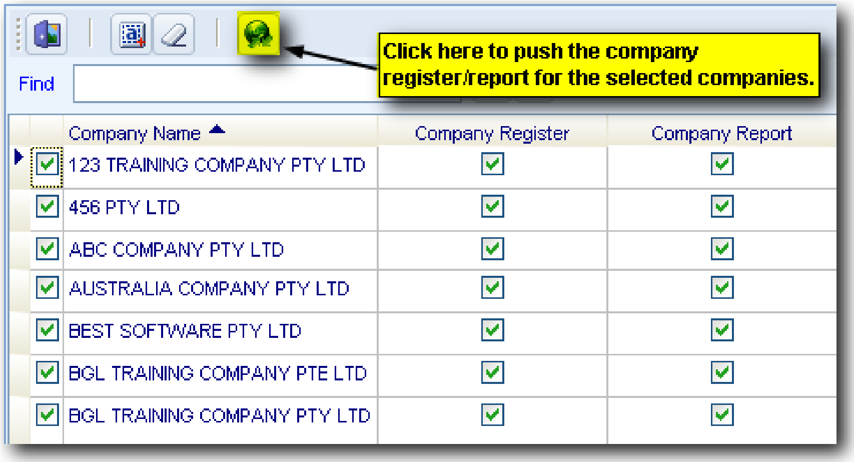
To select user(s), click into the ***User*** field and click .

A screen with all users will display and you can select the user(s) from there by ticking the box next to the user(s).



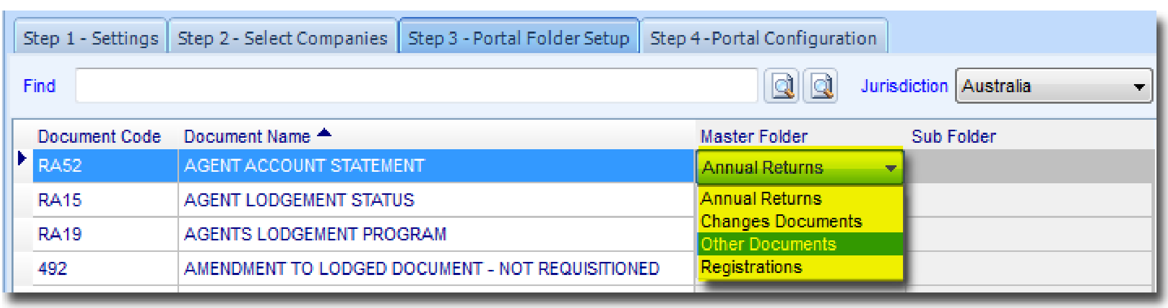
Pushing Company Registers and Reports to Portal

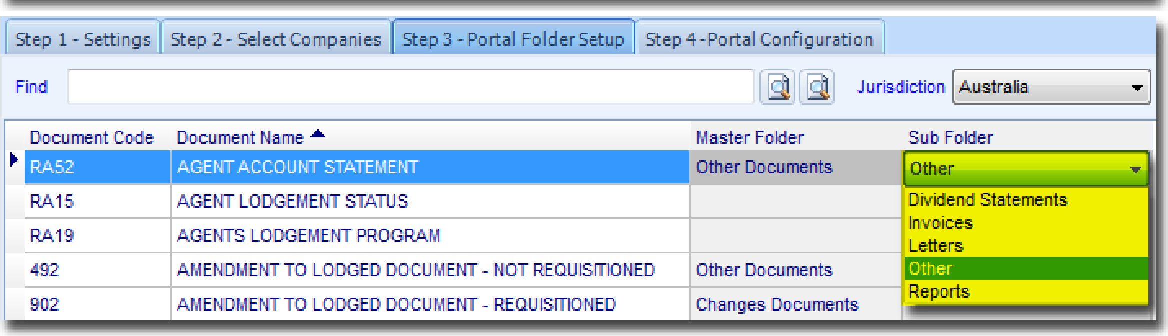
To send company reports and registers to Portal, click , this will open a new screen to allow you to select the companies for which you want to push the Company Report and/or Register to Portal. If you do not want to send these documents for a particular company, you can **untick** the box to the left of that company.



Step 3 - Portal Folder Setup

When a document is exported to Portal, it will go to a specific folder in Portal. The default Master Folder and Sub Folder will be specified here for each document. You can change the folder or sub folder you want it to be exported to by clicking twice into the Master Folder and/or Sub Folder. You have to select the Master Folder first and if you want the document to go to a Sub Folder within the Master Folder, you can then specify a Sub Folder from the list.





Master Folders contain Sub Folders which can be used to organise your documents

Annual Returns:
- Annual Return
- Other

Changes Documents:
- Address Changes
- Company Name Changes
- Officer Changes
- Other
- Shareholder Changes

Other Documents:
- Dividend Statements
- Invoices
- Letters
- Other
- Reports

Step 4 - Portal Configuration

You will need to enter the configuration settings for Portal in Step 4. These details will be provided to you by BGL when you purchase a Portal Licence.

Saving the changes

Make sure you click ***Save*** to apply any of the changes that you have made. If you click, ***Exit*** without saving, all the changes will be lost.

4. Administration - General Setup

The **General Setup** page allows the agent to customise the appearance of Portal as well as changing the global email templates and settings for all portal users.

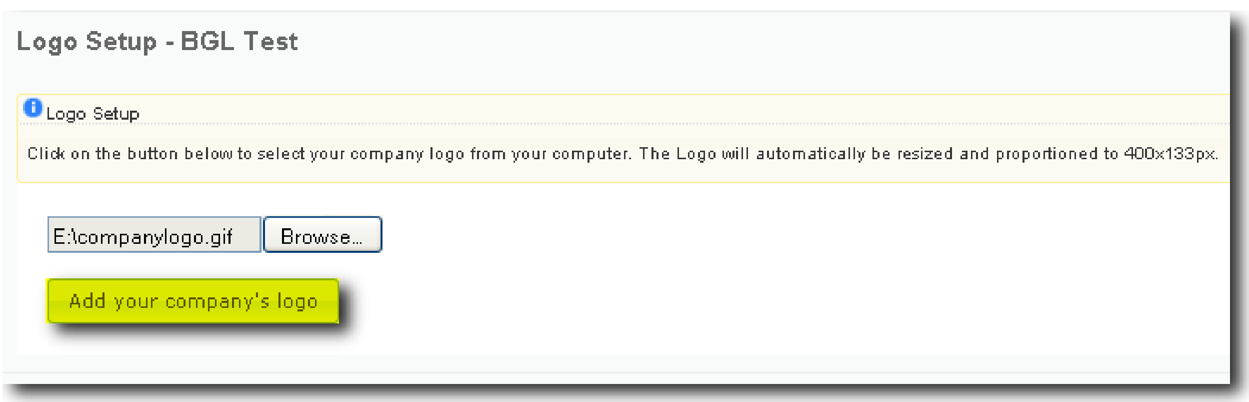
4.1 Add your firm logo

You can add your firm logo in Portal and it will appear on the top left corner of your Portal screen.

Click on the **Administration | General Setup | Logo** button. You can then choose your image file by clicking on the **Browse** button. After you have selected the correct file, you can then click on **Add your company's logo** to upload the selected logo to Portal.

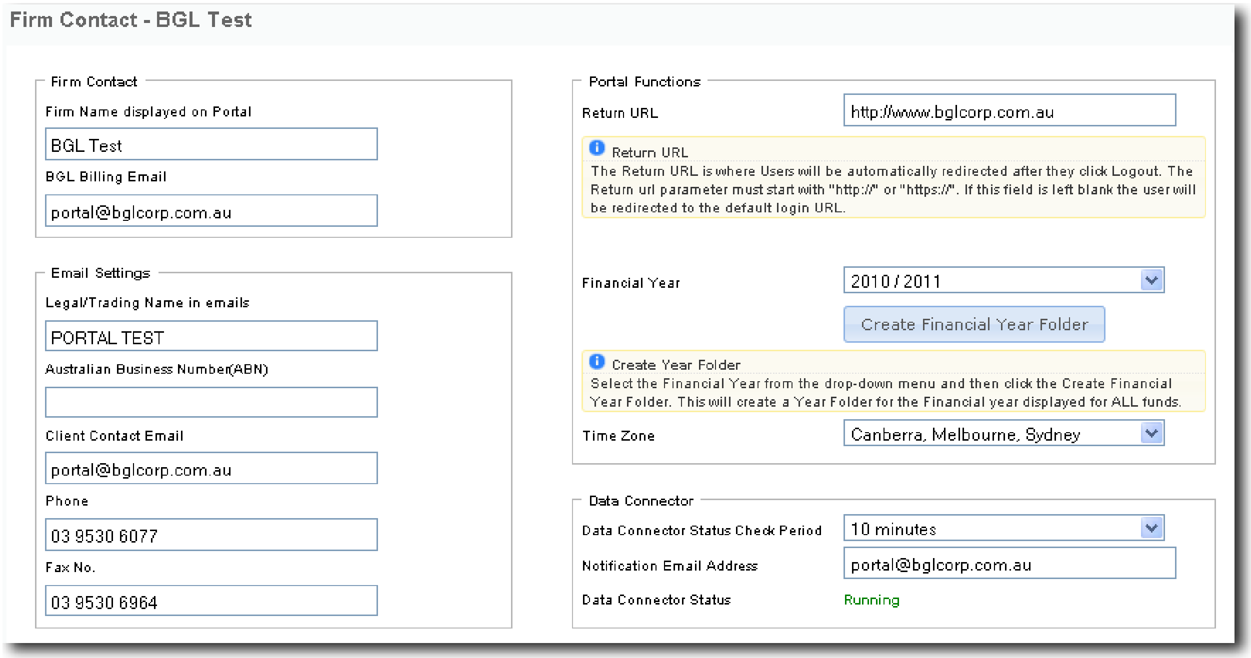
The Logo should be no larger than: Width 1300 x Height 800 in pixels.

The Logo will automatically be resized and proportioned to 400 x 133 pixels.



4.2 Firm Contact

You need to enter the contact details of the firm on this screen which will be used in emails sent to your clients. To access the **Firm Contact** screen, click on **Administration | General Setup | Firm Contact**.



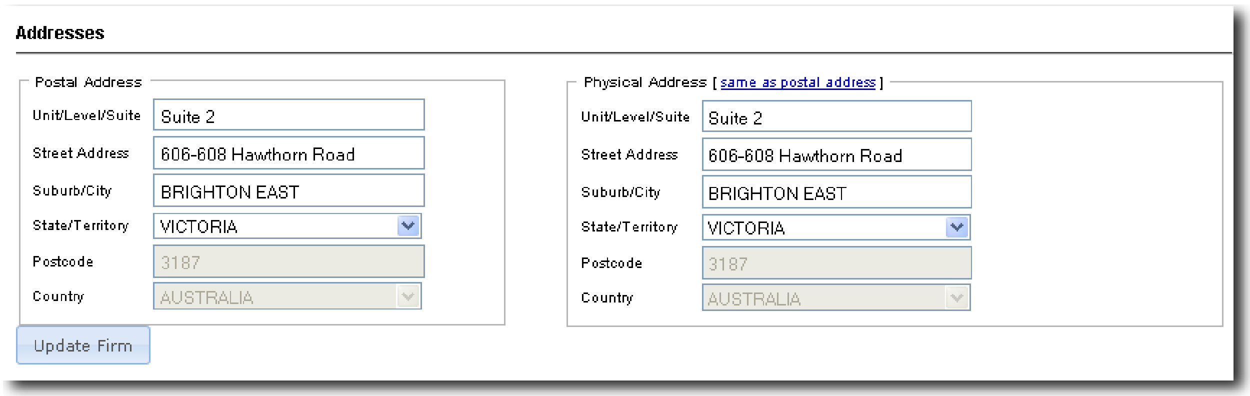
Firm Contact Details

The following details are mostly used in emails sent.

Firm Name	This is the firm name your users with Agent access will see when they log into Portal.
BGL Billing Email	This email will be used in the event an invoice needs to be sent for excess usage.
Legal/Trading Name	This is the firm name that will be displayed in emails.
Australian Business Number (ABN)	Enter the ABN of the firm.
Client Contact Email	Enter the email address to appear in emails.
Phone	Company phone number
Fax No.	Company Fax Number
Return URL	You can enter a URL where the user will be automatically redirected to after clicking on Logout. If this field is left blank, the user will be redirected to the default Portal login URL. This must start with either **http://** or **https://**.
Financial Year	Select the Financial Year folder you wish to create for ALL companies.
Create Financial Year Folder	This icon will create a new folder for all companies for the year specified in the drop-down.

Time Zone	Select the time zone in which you operate.
Data Connector Status Check Period	An Interval of 10, 30, 60, and 120 minutes can be set. When the Data Connector has not connected to Portal within the set time, an email will be automatically sent to the Portal Administrator. It also shows the status of the Data Connector whether it is running or stopped.

Addresses



Postal Address

Unit/Level/Suite	Enter the unit/level/suite details (if applicable).
Street address	Enter the number and street name or PO Box Number.
Suburb/City	Enter the suburb or town. As you type in a few letters of the suburb, a list of matching Australian suburbs will appear. You can then select the suburb from the list and Portal will automatically fill in the State/Territory, Postcode and Country fields.
State/Territory	If the postal address is not in Australia, select **Foreign**.
Postcode	If you have selected the suburb from the list, this will get automatically filled in, unless it is a not Australian address. You will then need to manually enter the postcode.
Country	Select the country from the list if address is not an Australian address.

Physical Address

The “same as postal address” function can be used if the physical address is the same as the postal address.

If these two addresses are not the same, you will need to enter in the address details for the physical address.

Update Firm

Click on this button to save the changes made to the firm details.

4.3 Theme

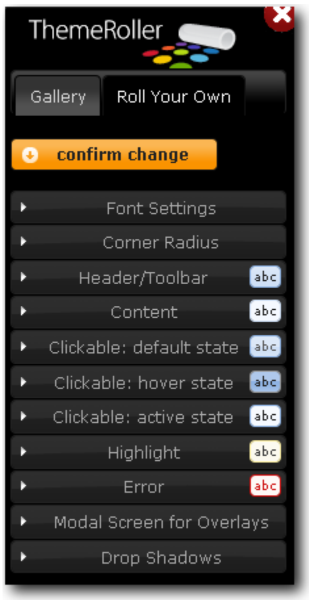
There is a set of available themes that you can choose from to change the look of Portal. You can access the **Theme** screen by clicking **Administration | General Setup | Theme**.

ThemeRoller provides you with pre-rolled themes and also gives you the ability to Roll Your Own, i.e. to create and personalise your own theme.

To select a pre-rolled theme, click on **Gallery** and choose the theme you wish to use by clicking on **Apply**.

Users can modify any pre-rolled theme by clicking **Edit**.

This will then take them to the **Roll Your Own** tab which allows you to customise an existing theme. The **Roll Your Own** interface is categorised into multiple panels which allow configuration of various CSS properties such as font size, colour, and weight, background colour and text, border colour, text colour, icon colour, corner radius, widget container styles, interaction states for clickable elements, various styles for overlays and shadows and more.



When choosing a colour, you have the flexibility to either insert the hexadecimal colour code or select the colour from a picker.

4.4 People

The **People** screen provides details about all the digital signatories on Portal. This can be accessed from **Administration | General Setup | People**.

You can search for a specific signatory using the **Name** search box and then clicking **Search**.

For more advanced search options, you can use the **Filter By** function.

You can filter the list of signatories using the following details:

Entity Name	Enter the name of the company/entity here.
Mobile	Input the mobile number of the trustee/officer. Only mobile numbers from Australia, China, Hong Kong and Singapore are currently accepted. You need to include the country for mobile numbers from China, Hong Kong and Singapore. If a mobile number has not been provided, tick the ***Not Provided*** check box to list all users who have not provided a mobile number.

BGL SmartSign Registration Status	You can select to filter the signatories by one of the following statuses:

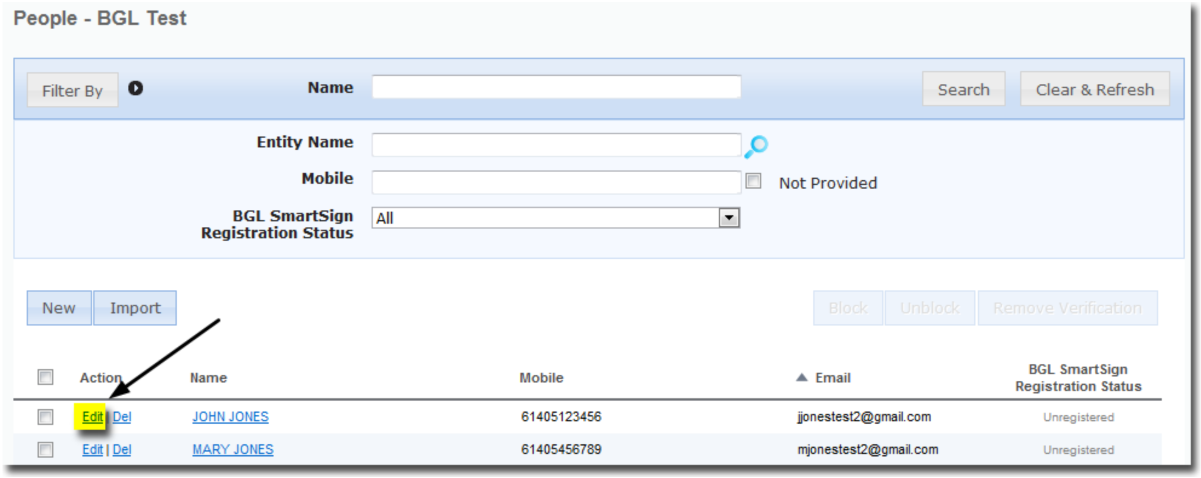
All	This will display all signatories
Registered	This will display signatories who have registered for smart signing by verifying their TFN and/or Mobile as specified under **Administration | User Roles**.
Unregistered	This will display signatories who have **not** registered for smart signing.
Blocked	This will show all signatories who have been blocked and cannot digitally sign documents on Portal.

Search	Click to filter the list based on the selected options.
Clear & Refresh	Click to clear out the filter details and refresh the list of signatories.
Block	Click to disable the selected signatory(s) from using BGL SmartSign to electronically sign documents on Portal. You need to tick the box on the left first. The Status will change to ***Blocked***.
Unblock	Click to enable the selected signatory(s) to digitally sign documents. You need to tick the box on the left first. The Status will change to ***Registered***.
Remove verification	Click to remove the BGL SmartSign Verification for the selected signatory(s). This will deregister them. These signatory(s) will need to verify their identification again in order to digitally sign documents.

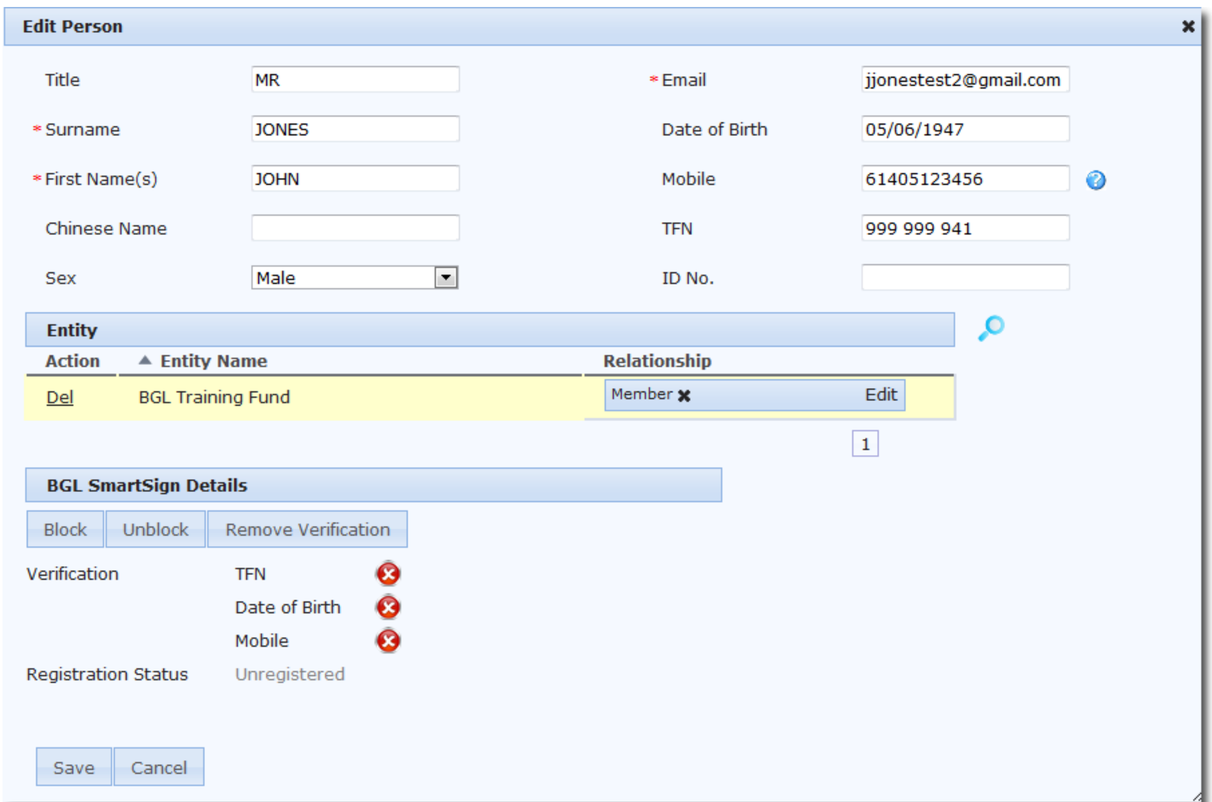
Changing a signatory's details

The details of the signatory(s) will flow through to Portal from **CAS** if these details have been entered in **CAS**.

Users can also manually change these details by clicking **Edit** next to that person.

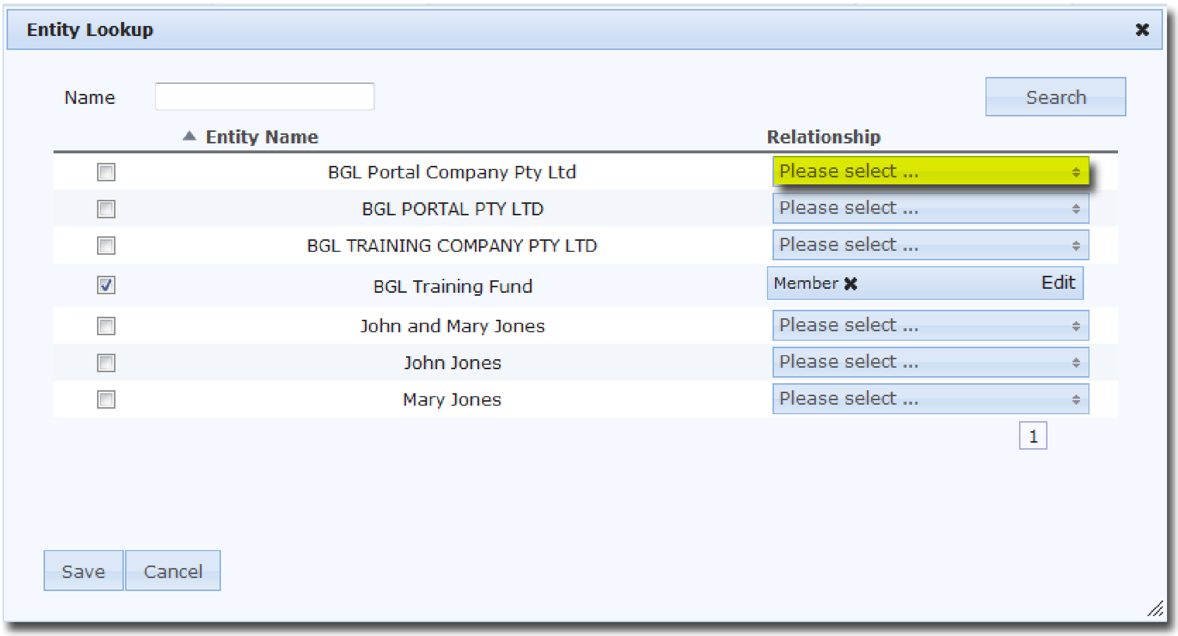


The details of that person will then display and you can make any changes as required.

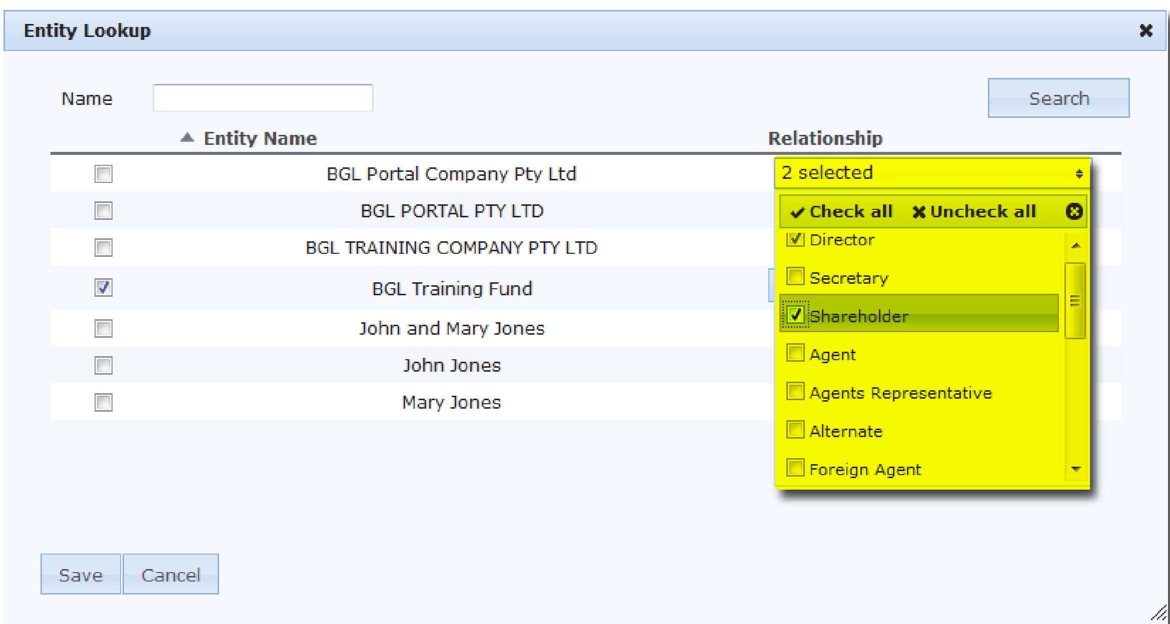


You can assign the person to other entities by clicking . The **Entity Lookup** window will open with a list of all the entities you have on Portal. You can assign the person to an entity by clicking on the drop-list next to the entity.

Note: You can use the **Search** function to locate the entity by typing in the **Name** of the entity in the search box and clicking **Search**.



A list of positions will show. Select the position(s) the person will have in that entity. Multiple position(s) can be selected. The number of positions selected will display at the top.

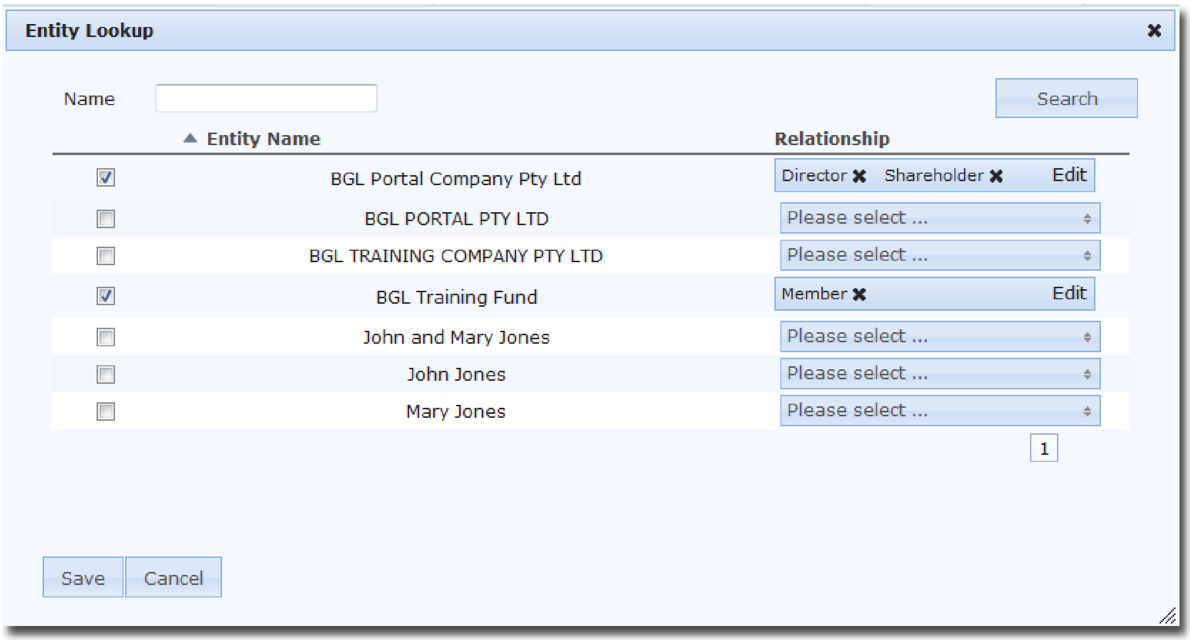


Check all	Click to select **All** positions in the list.
Uncheck all	Input the mobile number of the trustee/officer. Only mobile numbers from Australia, China, Hong Kong and

Singapore are currently accepted. You need to include the country for mobile numbers from China, Hong Kong and Singapore.

If a mobile number has not been provided, tick the ***Not Provided*** check box to list all users who have not provided a mobile number.

Click the **x** icon to save the changes and close the list. You can also click anywhere outside of the list to close the list.

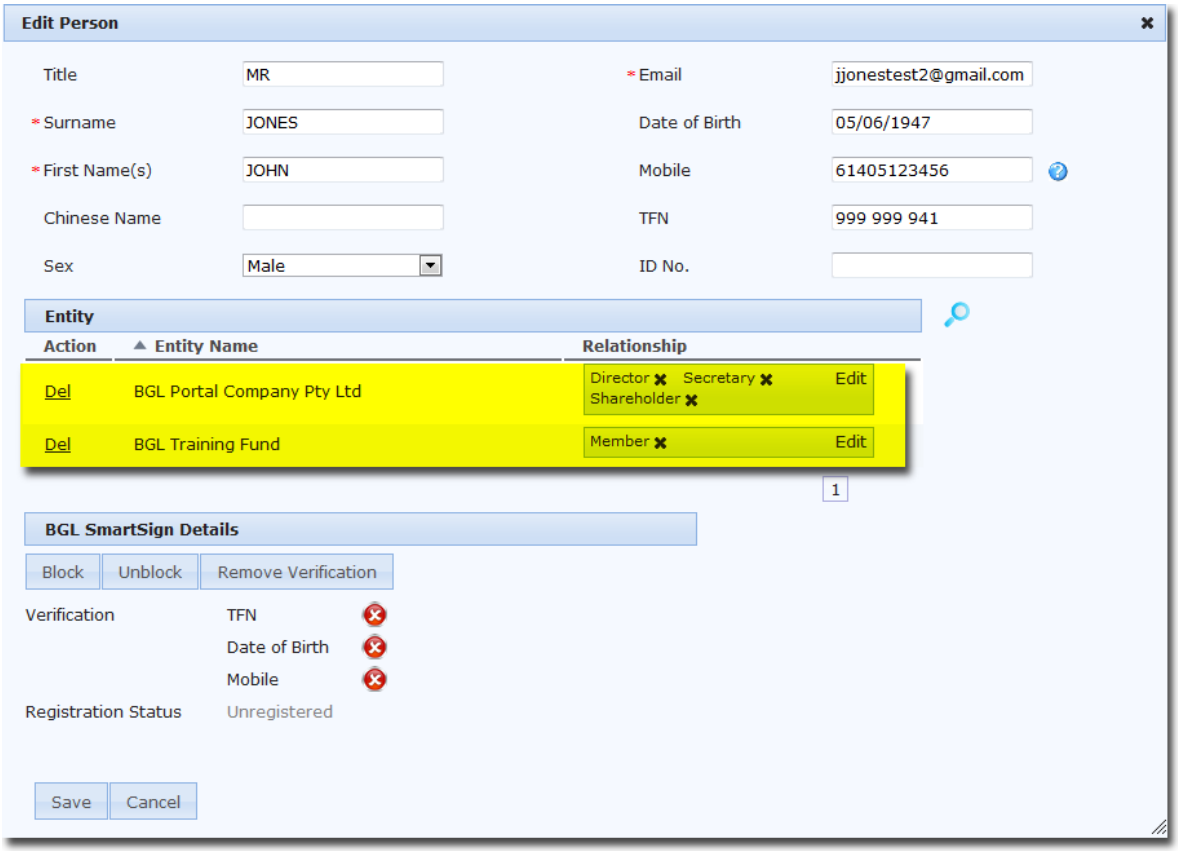


You can click **Edit** to make further changes.

Click **Save** to assign the person to the selected entity(s).

BGL SmartSign Details

Block	Click to disable the selected signatory(s) from using BGL SmartSign to electronically sign documents on Portal. The Registration Status will change to ***Blocked***.
Unblock	Click to enable the selected signatory(s) to digitally sign documents. The Status will change to ***Registered***.
Remove verification	Click to remove the BGL SmartSign Verification for the selected signatory(s). This will deregister them. These signatory(s) will need to verify their identification again in order to digitally sign documents.

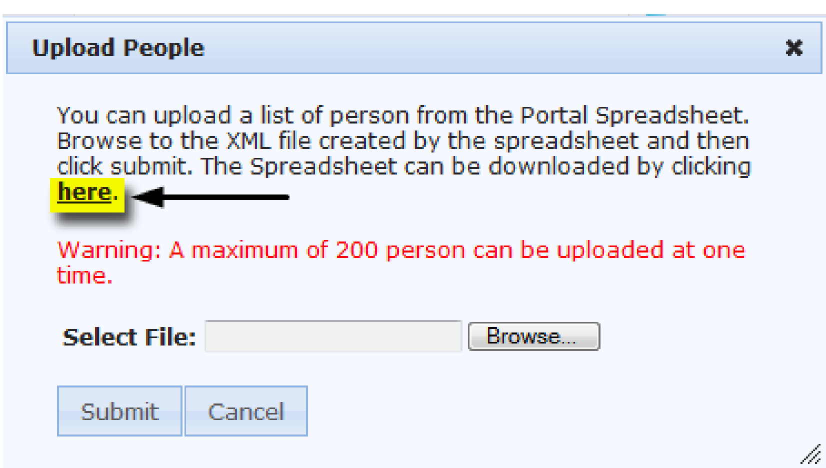


Click **Save** again to apply the changes or click **Cancel** to abort any changes made.

Import

Alternatively, these details can be imported to Portal through a spreadsheet, for example, if you have these details already entered into another system.

The spreadsheet can be downloaded by clicking **Import** and then clicking on the provided link.



Follow the instructions contained in the spreadsheet.

You then need to locate the XML file created with the spreadsheet by clicking **Browse** and then click **Submit** to upload the data.

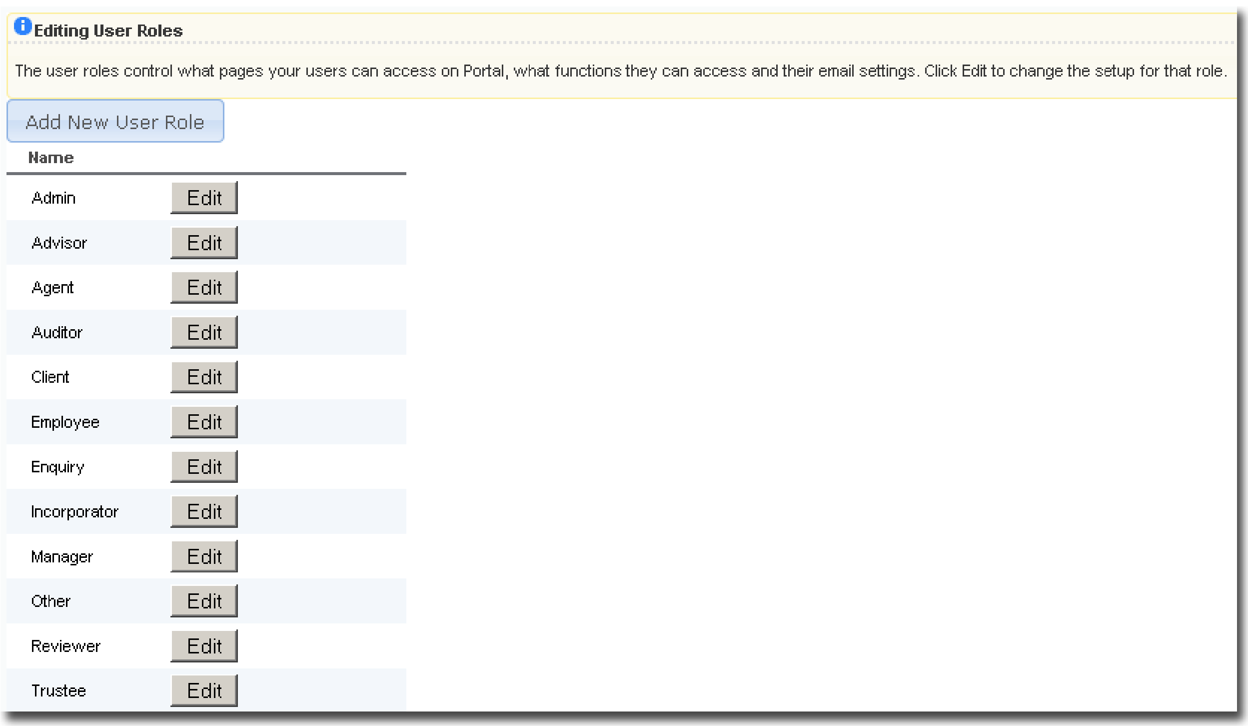
4.5 User Roles

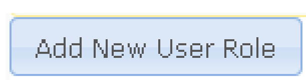
User Roles determine what the user can see and access.

To access the **User Roles** screen click on **Administration | General Setup | User Roles**.

Editing a user role here will affect all users who have been assigned that user role.

The **Admin** user has access to everything on Portal and only the email settings are customisable for that user role



You can also add **New User Role**. To add a **New User Role** click on 

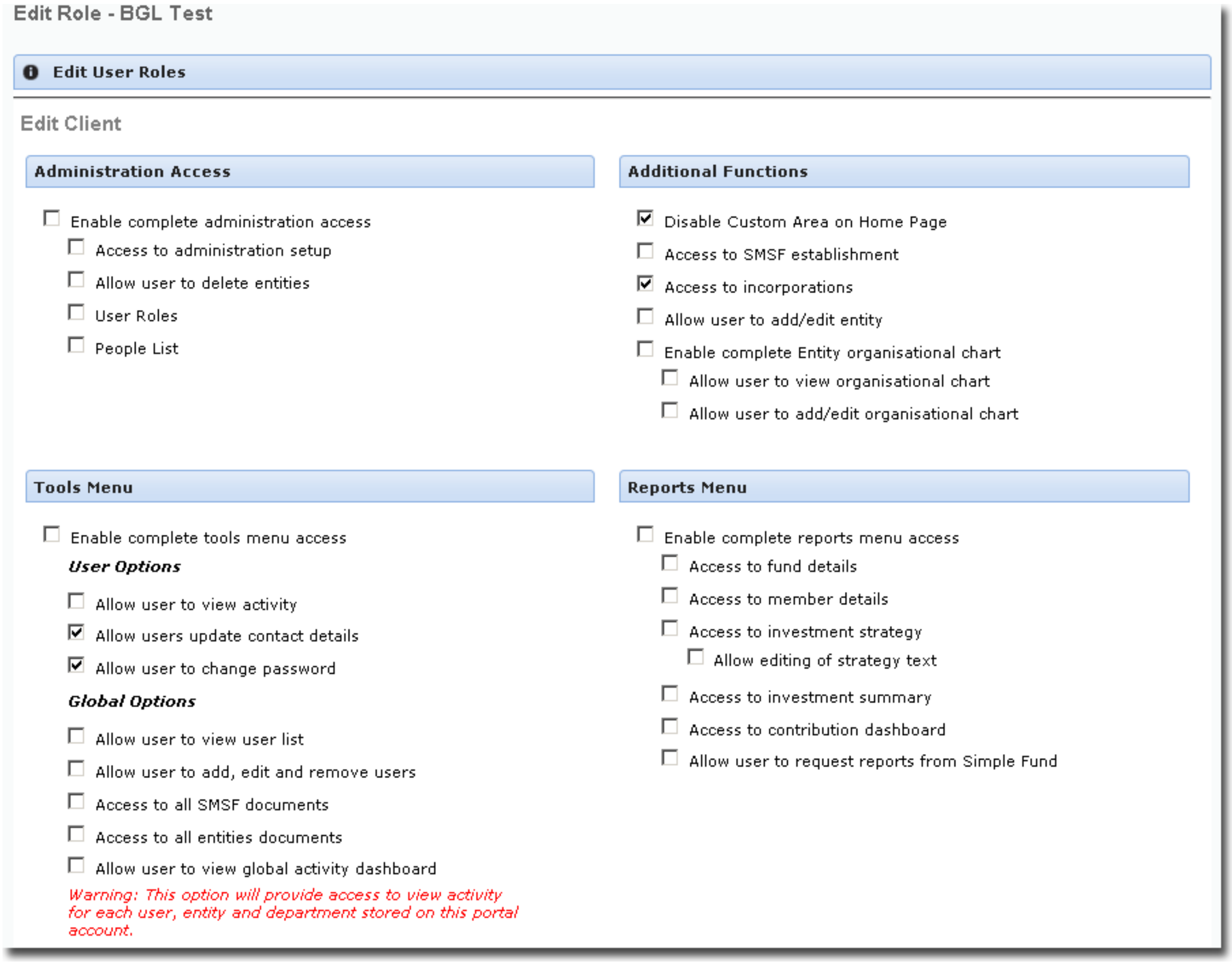
and enter name of the new user role.

Once you have created a new user role you can edit the role and select the access options of that role. To delete the new user role click 

.

Depending on the User Role you edit, different options will display for you to select.

For example, the Client User Role has the following options available:



Note: Different options will be available based on the User Role you are editing.

Select Access Options

Administration Access	Administration access user role gives access to administrative tasks. You can give a Role access to administration setup and delete companies.
Additional Functions	Additional function role allows users to access the Incorporations page and disable the Home Page.

Note: If *Disable Home Page* is ticked and the user has access to only **one** company, the user will be taken directly to t **Company Reports** screen after logging in to Portal. Users with access to multiple companies will always be taken to t **Entity Selection** screen after logging in.

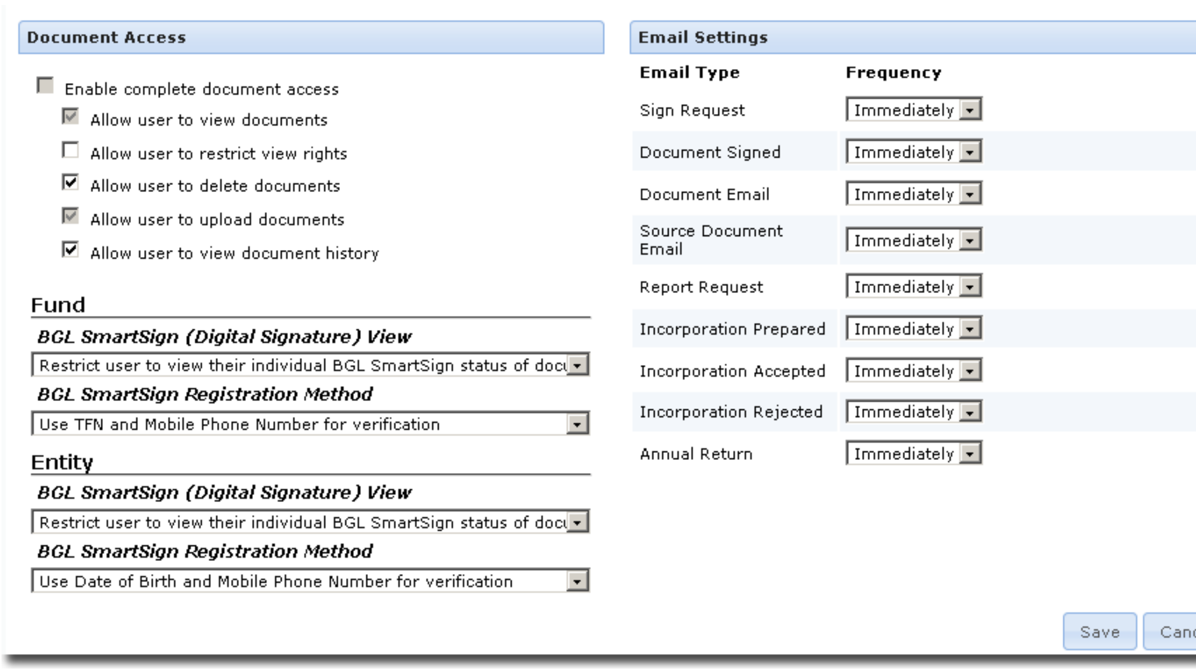
Tools Menu

Tools Menu provides access to the Tools on the top bar. It gives user access to view activity, change contact details and password and all Company documents.

Note: This option will provide access to view activity for each user, entity and department stored on th portal account.

Reports Menu

Report Menu role gives access to CAS Reports such as the company report.

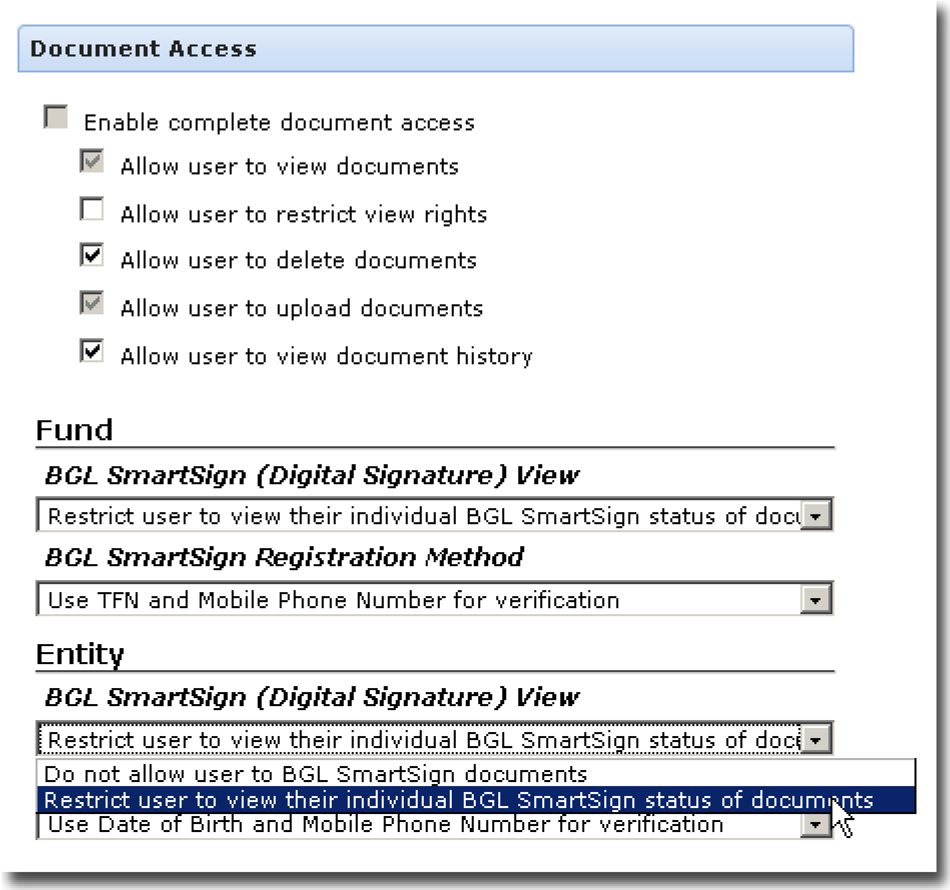


Document Access

Document access gives access to all document functions. These options allow users to request repor from **CAS**, delete and upload documents and view document history.

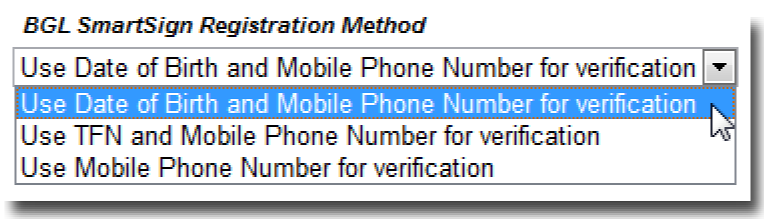
You can choose the following options for **BGL SmartSign (Digital Signature)**:

1. Do not allow user to BGL SmartSign documents – This user will not be able to use BGL SmartSig digitally sign documents through Portal.
2. Restrict user to view their individual BGL SmartSign status of documents



BGL SmartSign technology allows your clients to sign documents electronically eliminating the need t
print, manually sign, scan and re-upload documents.

Selecting Option 2 above will bring up the following field:



Choosing **Use Date of Birth and Mobile Phone Number for verification** will require users to enter b
their Date of Birth and mobile number when registering for BGL SmartSign. You can alternatively cho
the **Use TFN and Mobile Phone Number for verification** option so that the TFN and mobile numbe
be verified during the BGL SmartSign registration process. You can also select **Use Mobile Phone Number for verification** to require only the mobile number from the user when registering for BGL SmartSign.

Note: If the user has access to funds and need to sign documents through BGL SmartSign for these entities, you need to select the options for **Entity** as well.

Email Settings

For each User Role, you can also customise the frequency the user will receive email alerts, for example, when documents are available on Portal or when a signature is required.

4.6 Email Templates

Email notifications that are generated by Portal and sent to your clients can be personalised here. You can access **Email Templates** by clicking on **Administration | General Setup | Email Templates**.

The Email Templates are split up into three categories:

1. Generic – applies to all entities (e.g. funds, companies, trusts, partnerships)
2. SMSF – applies only to funds
3. Company/Entity – applies to entities other than funds (e.g. companies, trusts, partnerships)

4.6.1 Editing Email Templates

Click **Edit** next to the template to edit it.

Email Template List - BGL Test

Generic

Type	Subject	Email setting	Last Update	Edit	Delete
Changed Password	Password has been successfully changed	Default	09/01/2012	Edit	
Document Email	New document ${DocName} loaded on the portal	Default	09/01/2012	Edit	
Document Email Summary	New documents have been loaded on the portal	Default	09/01/2012	Edit	
Document Signed	Document ${DocName} has been signed	Default	09/01/2012	Edit	
Document Signed Summary	Document(s) have been signed	Default	09/01/2012	Edit	
Invitation	Portal temporary password notification	Default	09/01/2012	Edit	
Password Reset	Your password has been reset	Default	09/01/2012	Edit	
Sign Request	Important: ${DocName} requires signature	Default	09/01/2012	Edit	
Sign Request Summary	Important: Document(s) require signature	Default	09/01/2012	Edit	

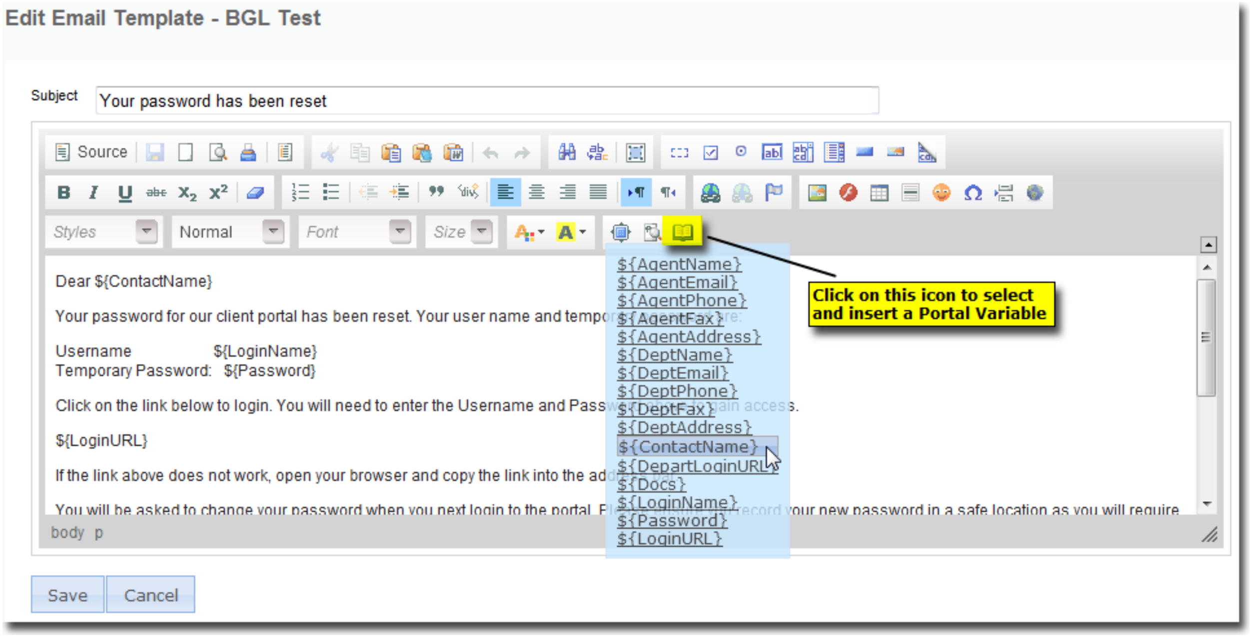
SMSF

Type	Subject	Email setting	Last Update	Edit	Delete
Establishment Processed	New SMSF - ${FundName} has been created	Default	09/01/2012	Edit	
Report Request	The ${ReportName} you requested is now available on the portal	Default	09/01/2012	Edit	
Report Request Summary	The following report(s) you requested are now available on the portal	Default	09/01/2012	Edit	
Source Document Email	Source Document Requested	Default	09/01/2012	Edit	
Source Document Email Summary	Source Document Requested	Default	09/01/2012	Edit	

Company/Entity

Type	Subject	Email setting	Last Update	Edit	Delete
Annual Return	Annual return has been received from ASIC and is available on the portal	Default	09/01/2012	Edit	
Annual Return Summary	Annual returns have been received from ASIC and are available on the portal	Default	09/01/2012	Edit	
Incorporation Accepted	Incorporation documents have been lodged successfully - certificate of incorporation is available for download	Default	09/01/2012	Edit	
Incorporation Accepted Summary	Incorporation documents have been lodged successfully - certificate of incorporation is available for download	Default	09/01/2012	Edit	
Incorporation Prepared	Incorporation documents have been prepared and are awaiting client signature	Default	09/01/2012	Edit	
Incorporation Prepared Summary	Incorporation documents have been prepared and are awaiting client signature	Default	09/01/2012	Edit	
Incorporation Processed	New Company ${CompanyName} ready for Incorporation in CAS	Default	09/01/2012	Edit	
Incorporation Rejected	Incorporation documents have been lodged but were rejected.	Default	09/01/2012	Edit	
Incorporation Rejected Summary	Incorporation documents have been lodged but were rejected.	Default	09/01/2012	Edit	

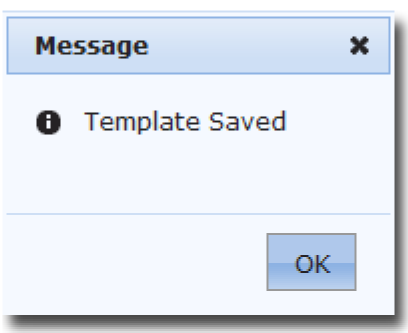
A list of editing and formatting options is available on the toolbar. A list of Portal Variables is also available from that screen.



Note: Where Department variables have been inserted into an email template instead of Agent variables and the company/entity is attached to a department, the Department details will be sent instead. If the company/entity is not attached to a department, the Agent details will be sent.

Click **Save** to apply the changes or click **Cancel** to abort the change process.

The following message will display to confirm that the template has been saved.



Click **OK** to go back to the **Email Template List** screen.

Any email template that has been edited will have the **Email Setting** as **Custom**.

Email Template List - BGL Test

Generic

Type	Subject	Email setting	Last Update	Edit	Delete
Changed Password	Password has been successfully changed	Default	09/01/2012	Edit	
Document Email	New document ${DocName} loaded on the portal	Default	09/01/2012	Edit	
Document Email Summary	New documents have been loaded on the portal	Default	09/01/2012	Edit	
Document Signed	Document ${DocName} has been signed	Default	09/01/2012	Edit	
Document Signed Summary	Document(s) have been signed	Default	09/01/2012	Edit	
Invitation	Portal temporary password notification	Default	09/01/2012	Edit	
Password Reset	Your password has been reset	Custom	10/01/2012	Edit	Delete
Sign Request	Important: ${DocName} requires signature	Default	09/01/2012	Edit	
Sign Request Summary	Important: Document(s) require signature	Default	09/01/2012	Edit	

4.6.2 Restoring Email Templates

To restore the original email template, click **Delete**.

Email Template List - BGL Test

Generic

Type	Subject	Email setting	Last Update	Edit	Delete
Changed Password	Password has been successfully changed	Default	09/01/2012	Edit	
Document Email	New document ${DocName} loaded on the portal	Default	09/01/2012	Edit	
Document Email Summary	New documents have been loaded on the portal	Default	09/01/2012	Edit	
Document Signed	Document ${DocName} has been signed	Default	09/01/2012	Edit	
Document Signed Summary	Document(s) have been signed	Default	09/01/2012	Edit	
Invitation	Portal temporary password notification	Default	09/01/2012	Edit	
Password Reset	Your password has been reset	Custom	10/01/2012	Edit	Delete
Sign Request	Important: ${DocName} requires signature	Default	09/01/2012	Edit	
Sign Request Summary	Important: Document(s) require signature	Default	09/01/2012	Edit	

The following message will display:

Confirm

Delete selected Email Template?

YES NO

Click **Yes** to undo any changes made to the original template and restore the original template.

To keep the customised template, click **No**.

4.7 View Scheduled Maintenance

Information about schedule maintenance can be viewed **under Administration | General Setup | View Schedule Maintenance.**

This page provides information on the date and time Portal is scheduled for maintenance.

View Scheduled Maintenance - BGL Test

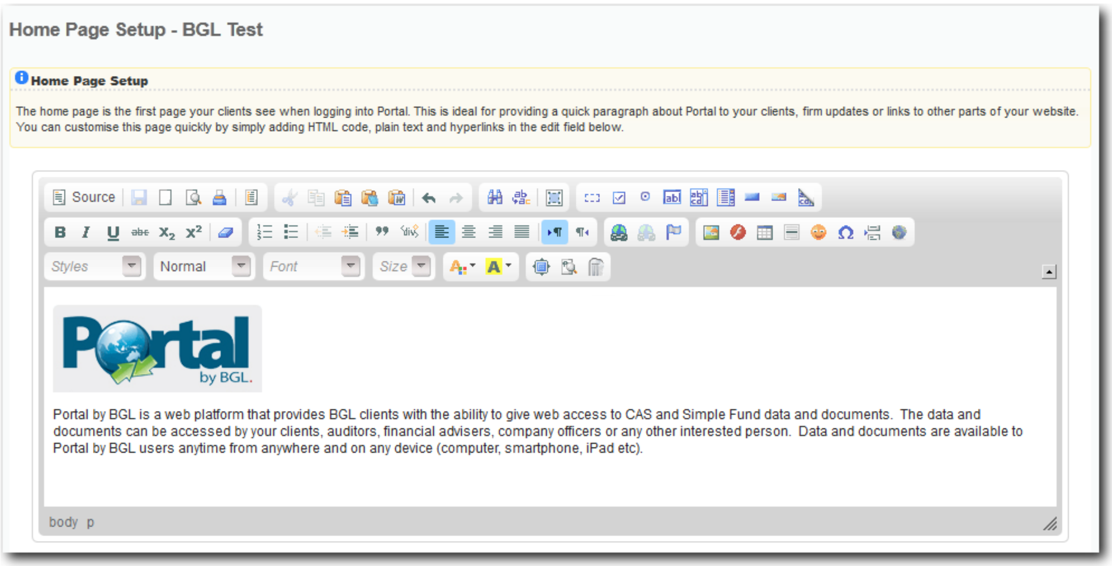
Scheduled Date	Time	Reason
26/08/2011	01AM-12PM	The Test server will be down for scheduled maintenance
10/08/2011	09PM-04AM	The Live Server will be ugraded for additional storage for a period of 10 hours.

5. Administration - Company Setup

5.1 Company Home

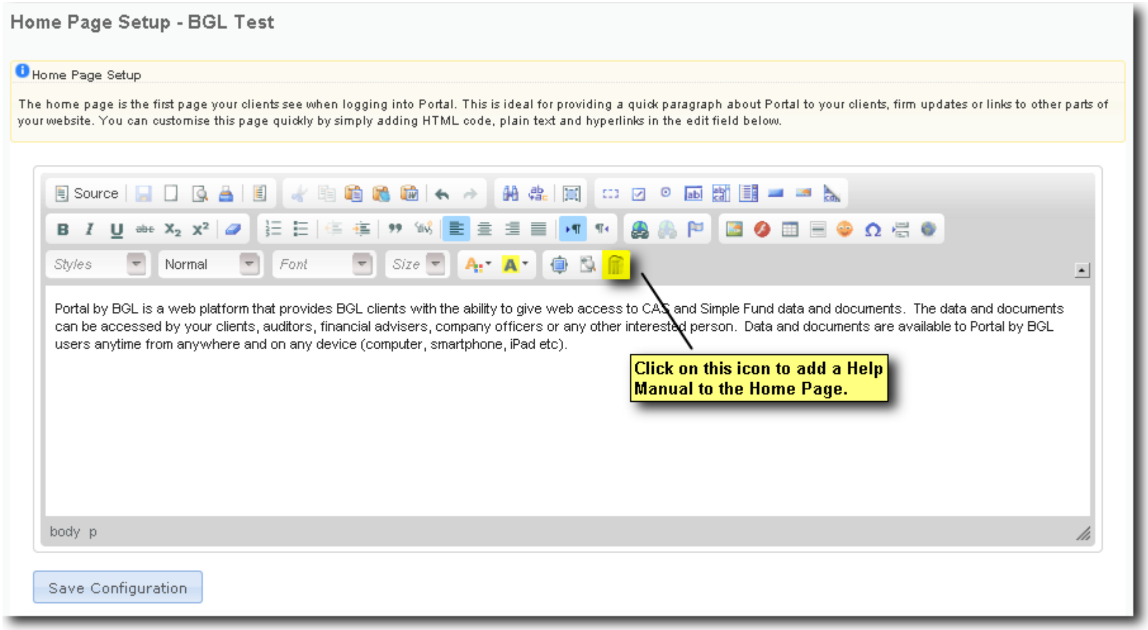
This is where you can enter any text, upload user manuals or create hyperlinks, which will appear on your client's Company home page. This is also a useful way to alert clients of current compliance issues and new services you have.

You can access the **Home** screen by clicking on **Administration | Company Setup | Company Home**.

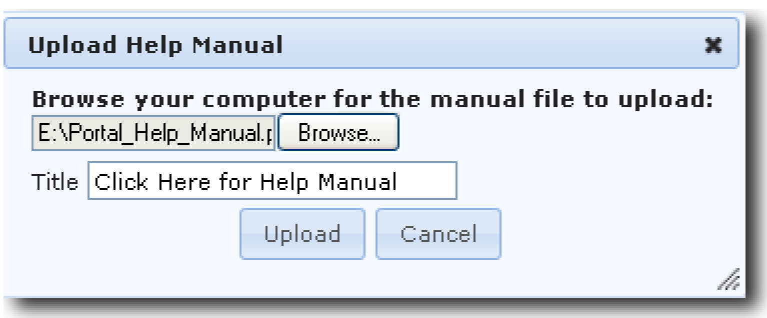


Adding a manual to the Home Page

You can provide your clients with a link to a Help Manual on how to use Portal by clicking **Upload Manual** on the Toolbar.

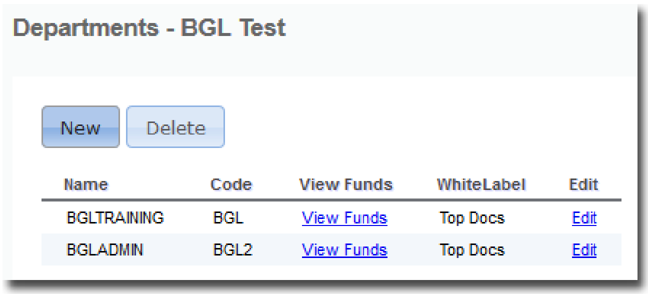


You then need to browse for the document and enter the text you wish to use for the link. The link will then appear on the Home Page.



5.2 Departments

This screen allows you to view the departments that you have set up and the companies attached to these departments. You can access the **Departments** screen by clicking on **Administration | Company setup | Departments**



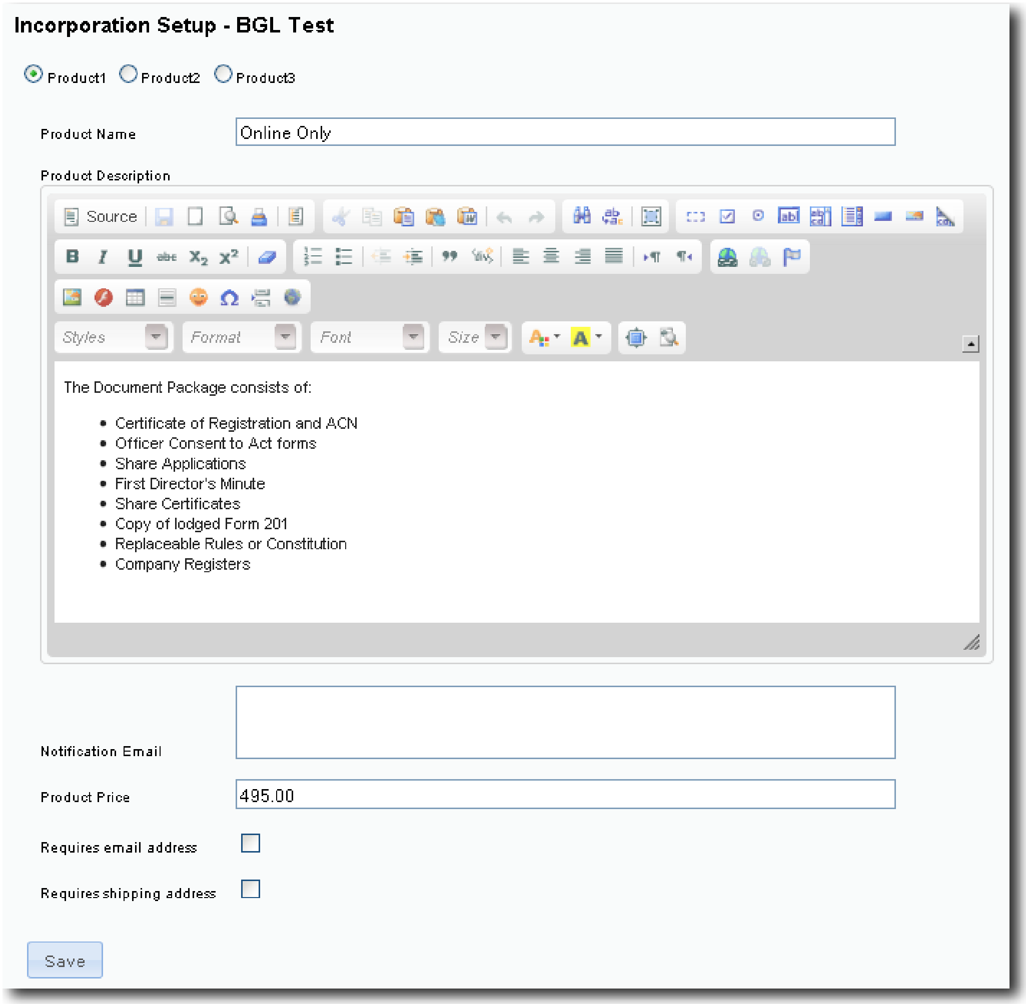
New	Click to add a new department in Portal. You will then need to enter a Department Name and Code.
Delete	Click to remove an inactive department from Portal
View Companies	Click to view the company(s) attached to the department.
Edit	Click to edit department code or department name

5.3 Incorporations

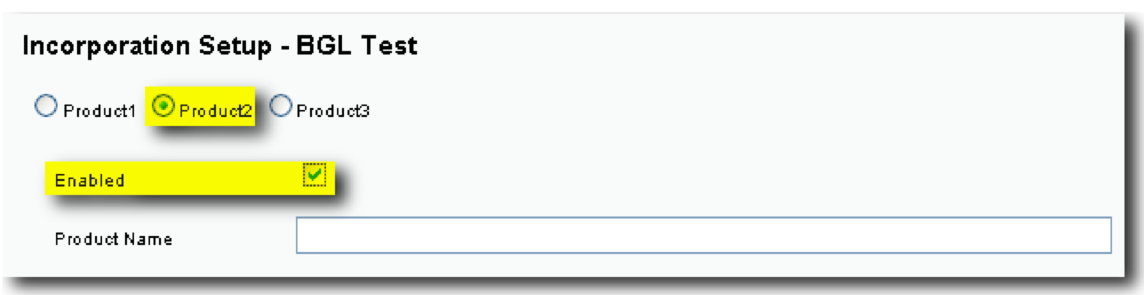
This tab allows you to customise the different types of products that you wish to offer to your clients when they are incorporating a company through Portal.

You can access this tab by clicking on **Administration | Company Setup | Incorporations**.

The Product Name, Description and Price fields are fully customisable. This will give you and your client the flexibility to offer different delivery options.



Product 1 will be selected by default. You can choose whether you wish to enable Product 2 and Product 3 by ticking the Enabled box.

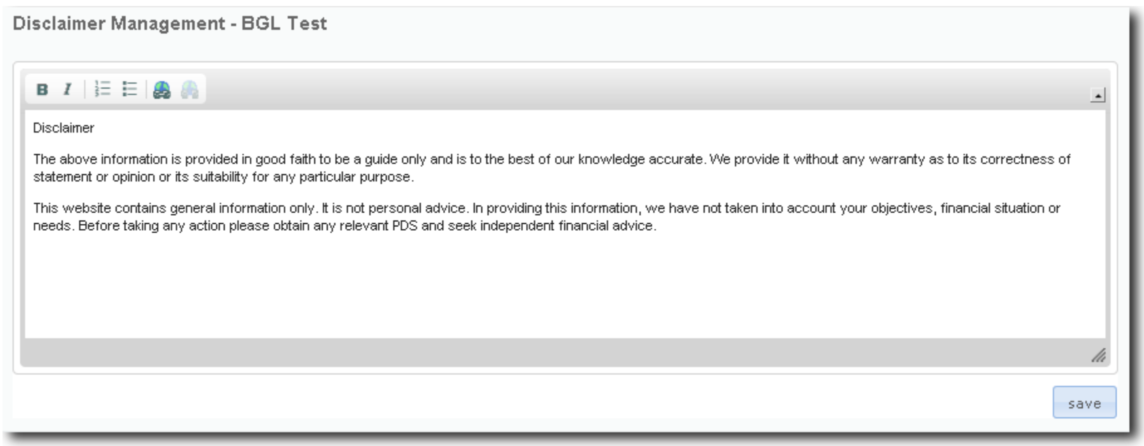


Notification email	Users are able to enter up to 20 email addresses to notify that a new Incorporation has been created in XML format. To enter more than one email address, separate emails with a semicolon, comma or spaces.

Requires email address	Tick this box if you wish for clients to provide an email address when registering a company (e.g. if you will need to email documents to clients)
Requires shipping address	Tick this box if you wish for clients to provide a shipping address when registering a company (e.g. if you will need to send documents by post)

5.4 Disclaimer Management

The Disclaimer Management tab allows you to enter text for a Disclaimer which will appear at the bottom of all report pages. You can access this page **under Administration | SMSF Setup | Disclaimer Management**.



6. Tools – User Tools

The User Tools section can be accessed by clicking on **Tools | User Tools** section of Portal.

6.1 Entity Activity

All communication between CAS and Portal will appear in the Activity List. For example, whenever a document is exported to Portal, a new message will be added to the list. A change in document status will also generate a message. The activity list can be accessed by clicking on **Tools | User Tools | Entity Activity**. This option appears after you have selected a company under **Company Selection**.

The first half of the screen lists out the recent activities that have occurred.

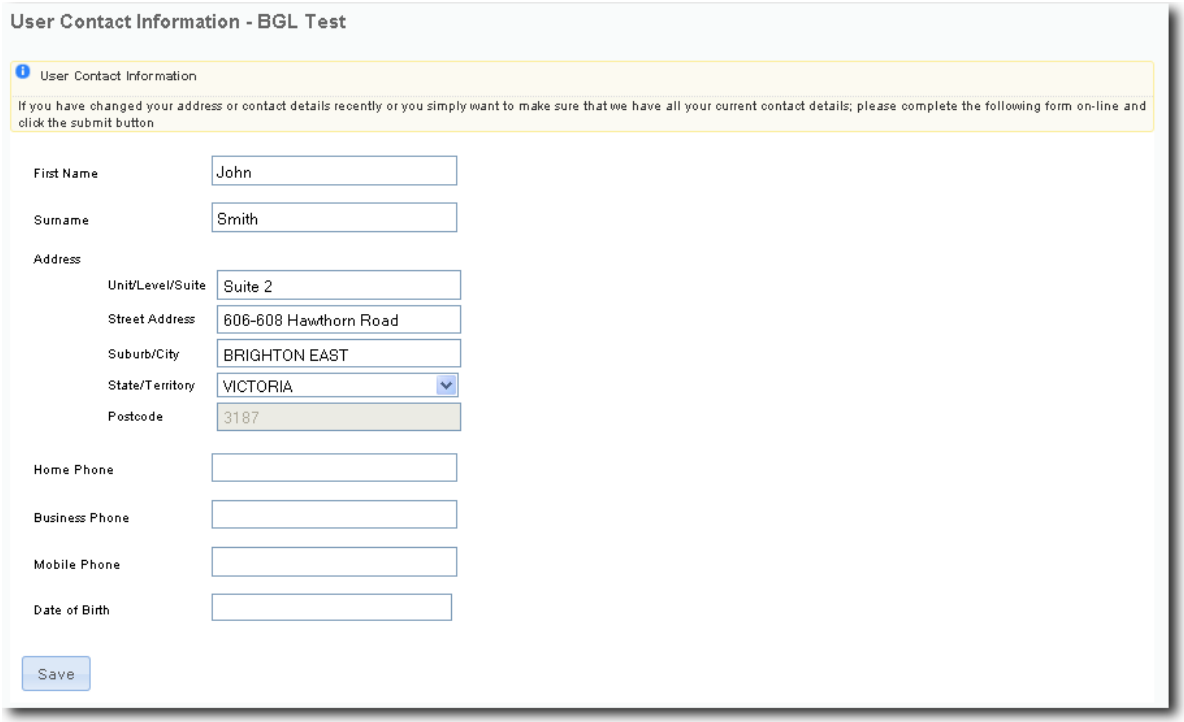
Users can search for specific activities under **Search Info**.

Details

Quick Search	Allow users to look for a specific message by typing in a search query.
Download	Allow users to export the activity log. The file name will be **messages** and format will be pdf.
Date/Time	This shows the date and time the activity happened.
User Name	The name of the person who generated this message will show here.
Fund/Company/Entity	The name of the company for which the message has been generated will show here.
Activity	The type of activity carried out by the user will display here e.g. PageViewed, DocumentUploaded
Product	Allow users to view for which product the activity occurred.
Content	Allow users to see which document has been uploaded or viewed

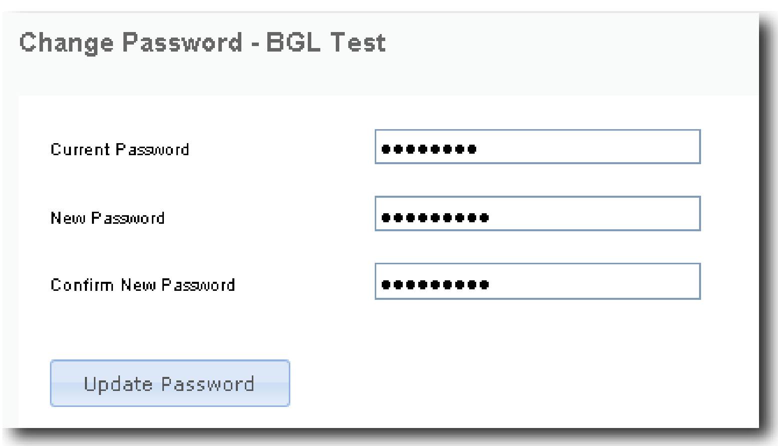
6.2 Change Contact Details

This screen can be accessed by clicking on **Tools | User Tools | Change Contact Details**. You can enter address and contact information on this screen.



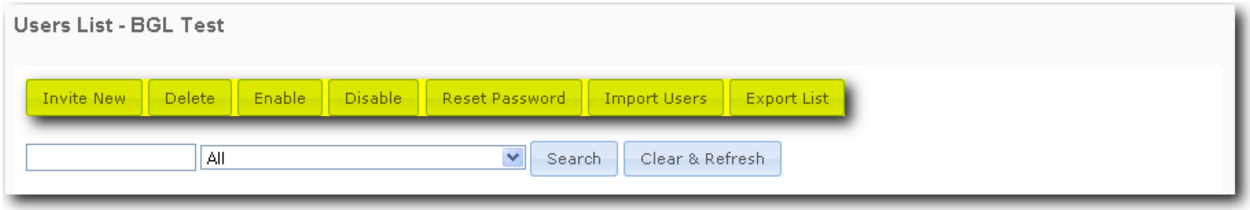
6.3 Change Password

You can access this screen by clicking on **Tools | User Tools | Change Password**.



Input your **current password** and **new password** and confirm the new password. Click on **Update Password** to change the password.

6.4 User List



This screen allows you to add new users and manage existing user accounts.

Invite New

If the user is not listed, you can send the user an invitation. Clicking on this button will open up the **Invite User** screen.

Delete

Clicking this will delete the user from the list. Only the Account Admin can see this button.

Enable/Disable User

Clicking on this button will enable or disable the selected user from Portal. Once a user is disabled, they will no longer have access to Portal.

Reset Password

If you wish to reset the password for a user, click on this button.

Import Users

Users can be uploaded from an xml file if you have a large number of users to create in one instance. To do this you will need the following:

1. Click Here to download the User spreadsheet. Instructions on how to use the spreadsheet are within the worksheets and the spreadsheet which will create an xml file.
2. Log in as the Account Administrator user, click **Import Users**.
3. Select the xml file from your computer or server and then click **Submit**.
4. The user names will then be uploaded. No users will be uploaded if the upload process detects an error in the file, e.g. if the ACN or the Company Name does not exist.

Export List

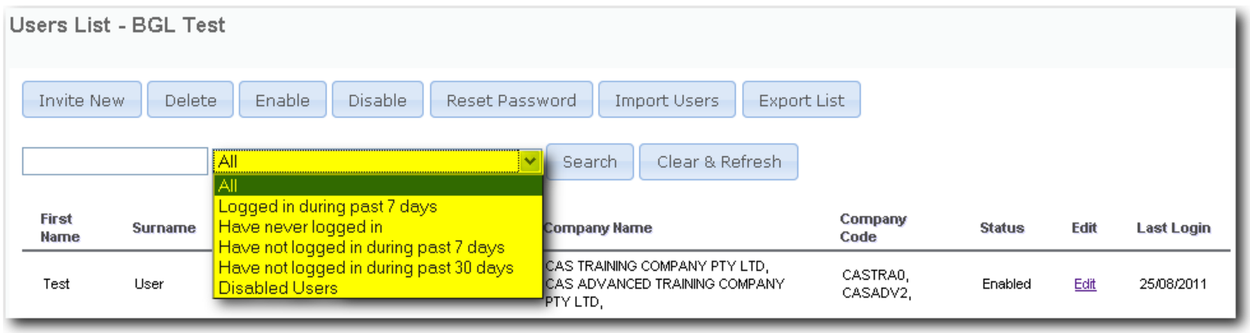
Clicking this will export a list of all the users containing the following user details:

- First Name

- Surname
- Email
- User Role
- Company Name(s)
- Company Codes(s)
- Status
- Last Login

The filename of the exported file will be ***users*** and will be in CSV format.

Filter



This feature allows you to filter users so that you can easily identify among the following users:

- Logged in during past 7 days
- Have never logged in
- Have not logged in during past 7 days
- Have not logged in during past 30 days
- Disabled Users

This will make it easier for the agent to track their Portal users.

Search

You can also type in the name of the user or the company name/code in the search box and click **Search** to locate a specific user.

Clear & Refresh

Click this to clear the search box and refresh the list of users.

Edit

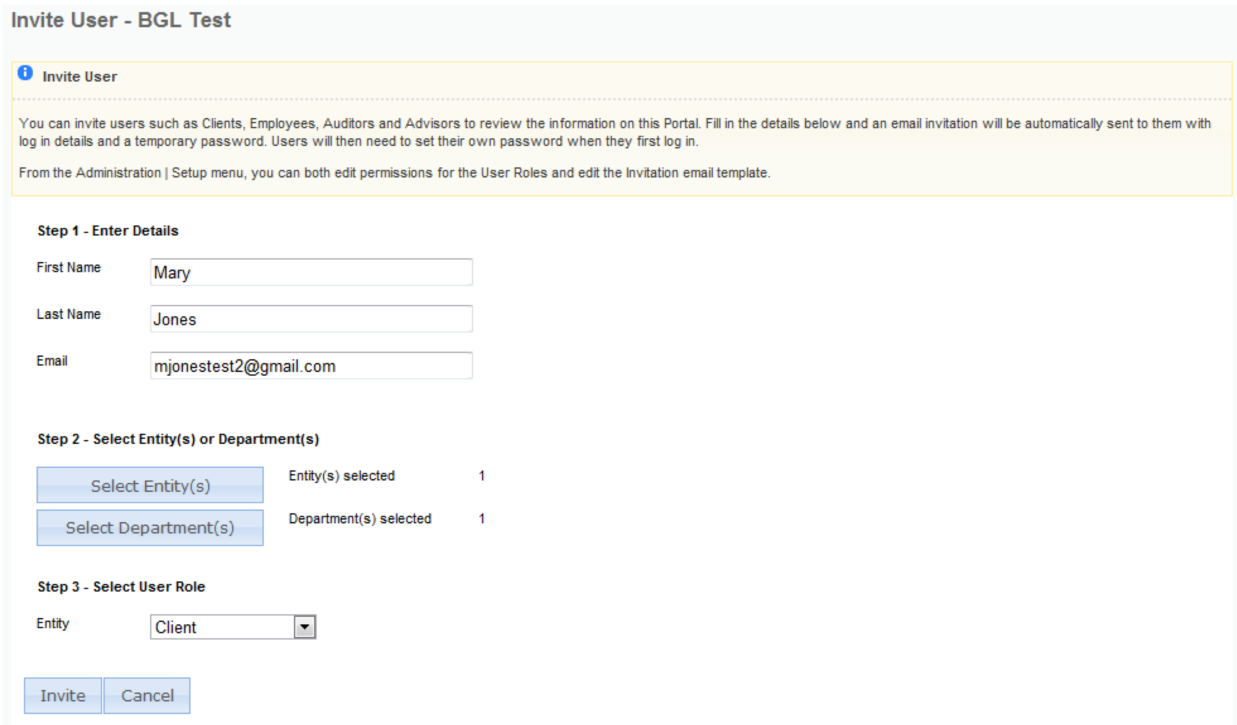
Clicking on this button will open up the **Edit User** screen (which is similar to the **Invite User** screen) where you can then change the details and security settings for that user.

6.5 Inviting Users to Portal

In order for staff, clients, advisors, users and others to access Portal, an invitation will need to be sent. You can access this tool by clicking on **Tools | User Tools | Invite User**.

Completing the details below will deploy a message to the individual containing a user name and password to be used to access Portal based on the settings completed below.

A valid email address and security level will be required to complete the invitation.



Step 1 - Enter details

First Name	Enter user's first name.
Last Name	Enter user's last name.
Email	Enter user's email address that will be used for login and to which the invitation email will be sent.

Step 2 - Select Entity(s) or Department(s)

Select Entity(s)	This button is used to select single or multiple companies to allow access to for this user. A counter will show the number of companies selected.
Select Department(s)	This button is used to select single or multiple departments to attach to this user. A user can be granted access to the entire department(s)

giving that user access to all companies attached to the department(s). A counter will display the number of departments selected.

Step 3 - Select User Role

You will have the option of selecting Agent, Client, Enquiry, Incorporator or Manager. These user roles determine what the user can see and access on Portal. User Role settings can be edited in the **Company Agent | Setup | User Role** screen.

SMSF	If the user also has to access to fund(s) on Portal, select the role from the drop-down menu that the user will have for the fund(s).
Entity	Select the role from the drop-down menu that the user will have for the entity(s).

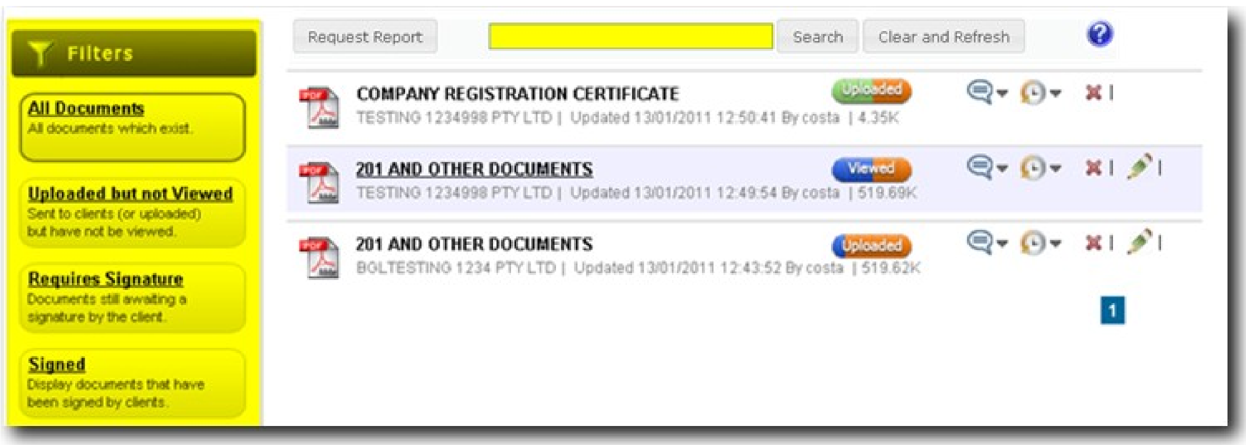
Step 4 - Click Invite

Users will be sent an email inviting them to access Portal. The email will contain a temporary username and password. The user will be asked to click on the link in the email and log in to Portal and change their password.

7. Tools - Global Entity Tools

7.1 All Entity Documents

This page gives you a list of all the documents for the selected company. You can access this page by clicking on **Tools | Global Entity Tools | All Entity Documents**.



Filters

Users are able to filter by:

- All Documents
- Documents which have been uploaded but not yet viewed by the client
- Documents which need signing
- Documents which have been signed

Agents can view and search through a list of all the documents available on Portal from this screen.

Search

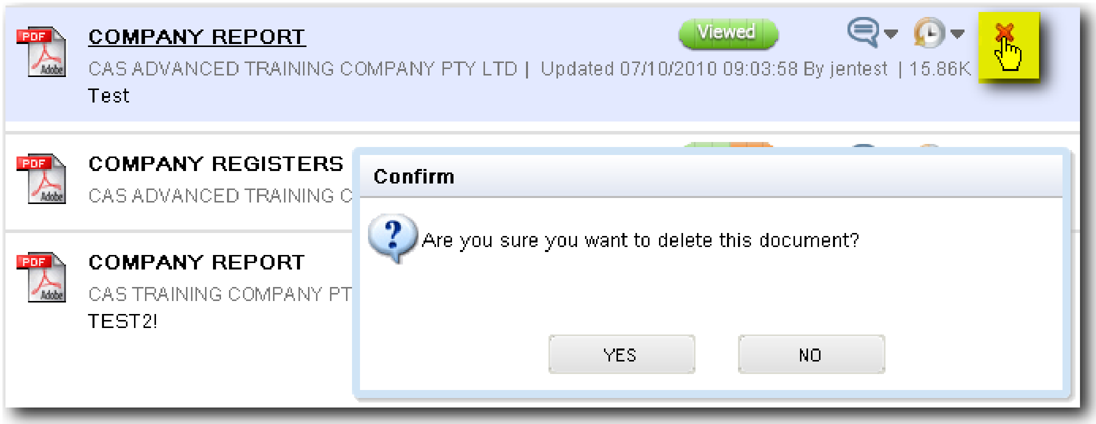
Agents can make use of the search box to look for a specific document, report, company and email address.

Clear and Refresh

Users can use this button to clear the search box and refresh the list of documents and reports.

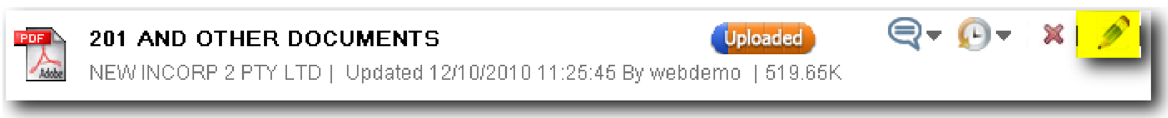
Delete

To delete a document, the agent can click on the **Delete** icon. A message will pop up for the agent to confirm the deletion of the file.



Note: Once a file has been deleted, it cannot be recovered or restored. The only exception is for a CAS document which can be resubmitted to Portal from CAS.

Sign



This should be used when a signed document is to be uploaded to Portal. This will then change the status of the document to Signed.

Clicking on the **Sign** icon will bring up the **Upload Document** screen.

There is a maximum file size limit of 10 MB.

Select File	You can look for the document you want to attach here by clicking on this button.
Progress	The progress bar will indicate when the upload process is complete.
Comment	A note can be added here on the uploaded signed document.
Submit	Once the above details have been entered, the agent can click on this button to upload the selected file. A message to confirm that the file has been successfully uploaded will pop up.
Cancel	Click on this button to cancel the upload.

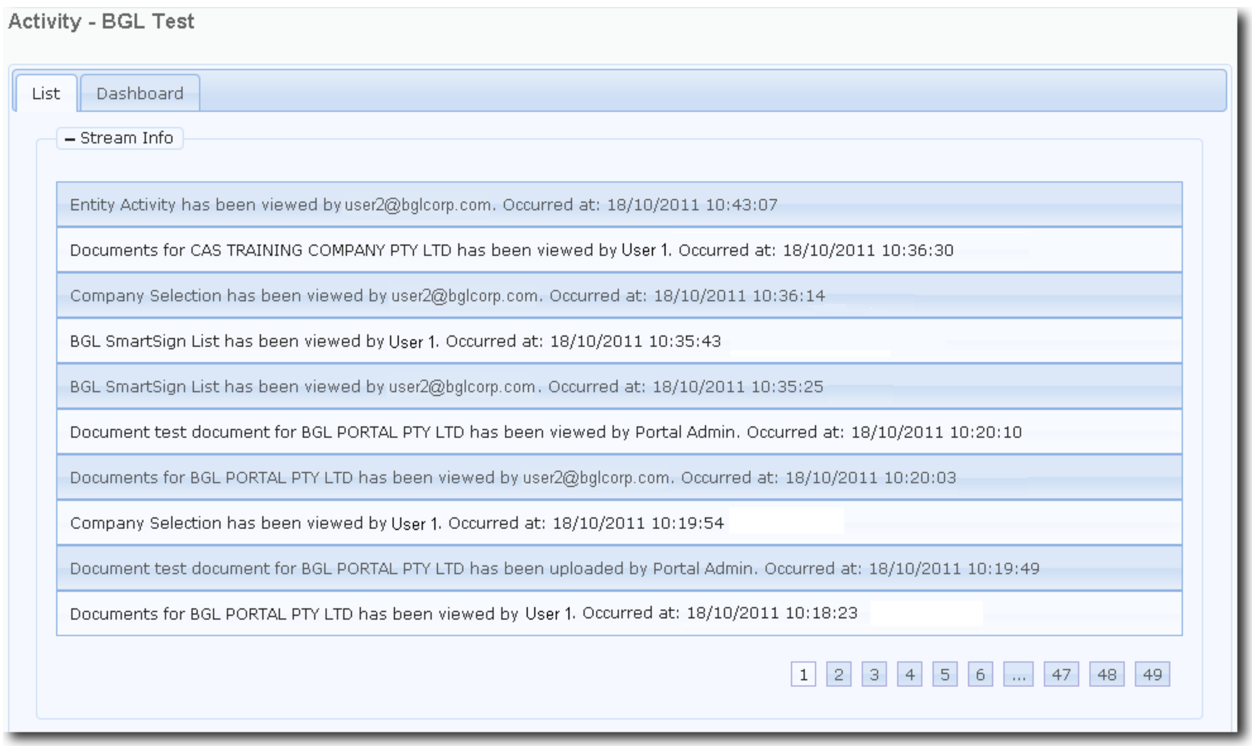
7.2 Global Activity Dashboard

This page is split into two sub-tabs List and Dashboard. You can access this screen by clicking on **Tools | Global Company Tools | Global Activity Dashboard**.

List

<u>Stream Info</u>

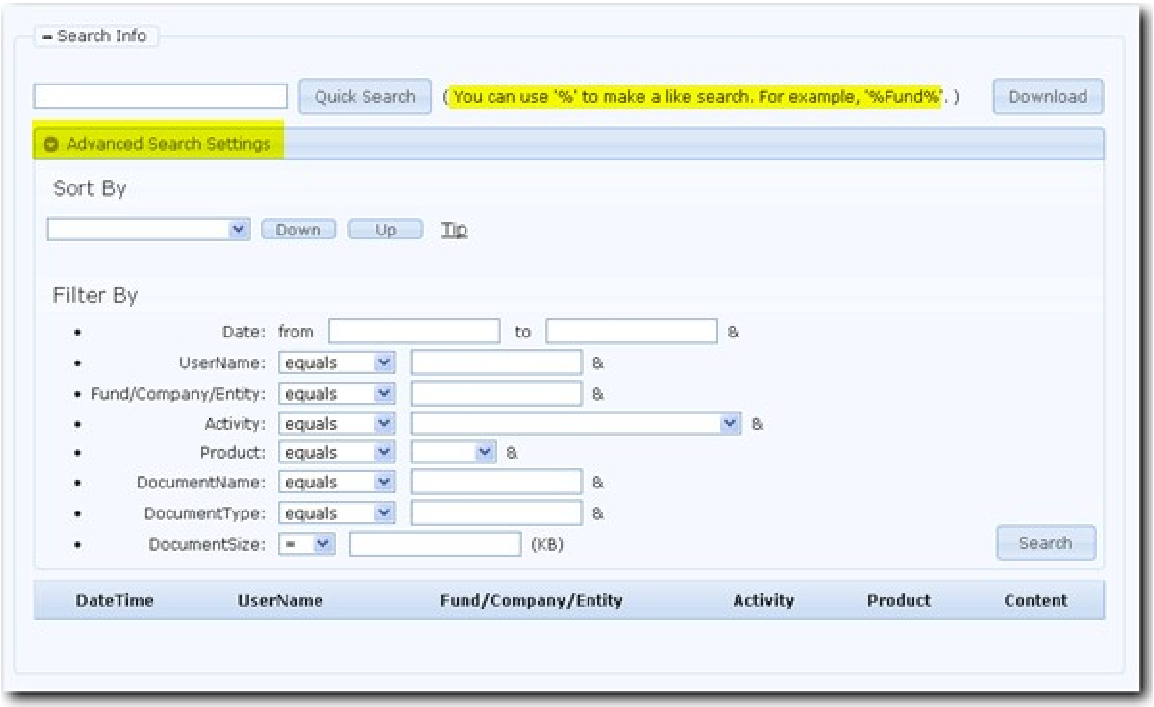
This will display the list of activities that occurred whenever clients perform a set of functions in Portal. For instance, if a document that requires a signature is uploaded to Portal from CAS, a new message will appear on this screen.



<u>Search Info</u>

Quick Search	Allow users to look for a specific message by typing in a search name.
DateTime	This shows the date and time the process happened.
UserName	The name of the user doing the activity
Fund/Company/Entity	The Fund/Company the activity was performed in
Activity	The activity that was performed
Product	The product against which the activity was done

Content	The content of the activity



For **Quick Search** you can either input the username or use the % to make a **like search** e.g. %john% for all activities that have the word “john” in them. You can also use the **Advanced Search Settings** feature for filtering your search.

Dashboard

The **Dashboard** contains information and graphs on the following:

- Top 10 users logged in ranking (last 30 days)

  This will show the 10 users who have logged in the most to Portal the last 30 days.

- Top 10 users reset password ranking (last 30 days)

- Top 10 reports requested ranking (last 30 days)

  This will show the reports that have been requested the most by Portal users over the last 30 days.

- Top 10 data storage(KB) ranking

  You can use this graph to monitor your internet traffic on the site. There is currently a quota limit of 60mb per company per annum. Email warnings will be sent to the billing email address entered under the **Administration | General Setup | Firm Contact** tab when your account is approaching its quota. Excess data fees may apply if you exceed your quota.

The current licence agreement states the following:

Portal by BGL Subscription Fees are based on the number of funds or companies and are paid in advance either quarterly or annually. Excess usage charges apply to clients exceeding the traffic quota and will be charged in arrears. An invoice for the Subscription Fee plus the Excess usage charges will be issued to the Billing Contact each quarter or 12 months from the date you day you first signed up for the service. Portal by BGL will continue invoicing you quarterly or annually until this Agreement is terminated in accordance with the termination clause. Your Subscription Period is shown on your subscription invoice and commences upon the day you first signed up for the service or if paying late upon full payment of your Annual or Quarterly Subscription fee. BGL does not provide services or software (including software updates) until payment has been received. Payment methods include cheque, Credit Card (Visa, MasterCard and American Express) or Electronic Funds Transfer. You are responsible for payment of all taxes and duties in addition to the Subscription Fee.

8. Portal – Company/Entity Selection

8.1 Chart View

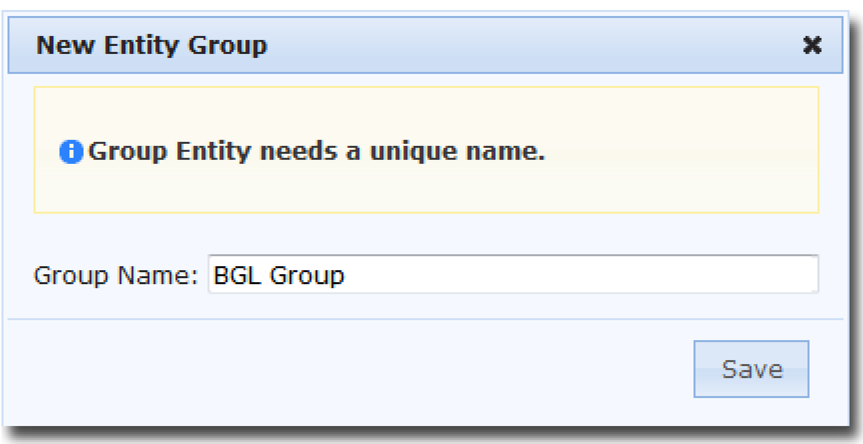
The Chart View allows you to create an organisational chart to show how entities are linked to each other.

Note: If a user has access to the Chart View and a chart has been set up, the Chart View will be the default view after they log in to Portal or click on the Entity Selection tab.

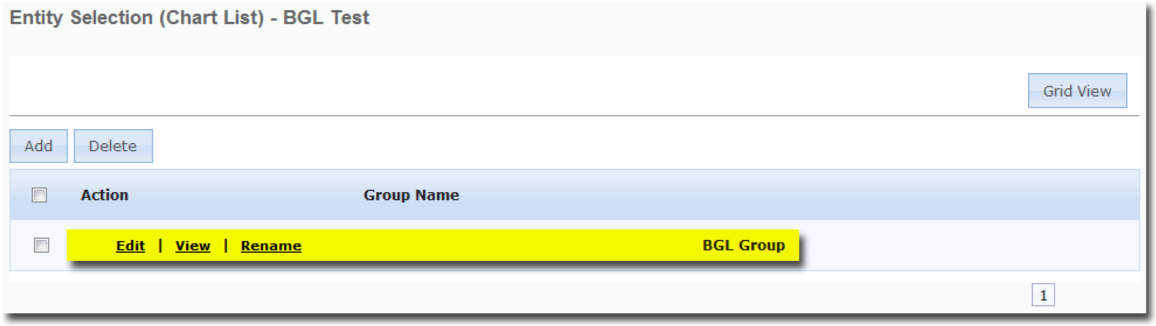
8.1.1 Adding a Group Entity

Click **Add** and enter a name for the Group Entity.

The name of a Group Entity needs to be unique and should be a name that is already being used as an entity name on Portal.



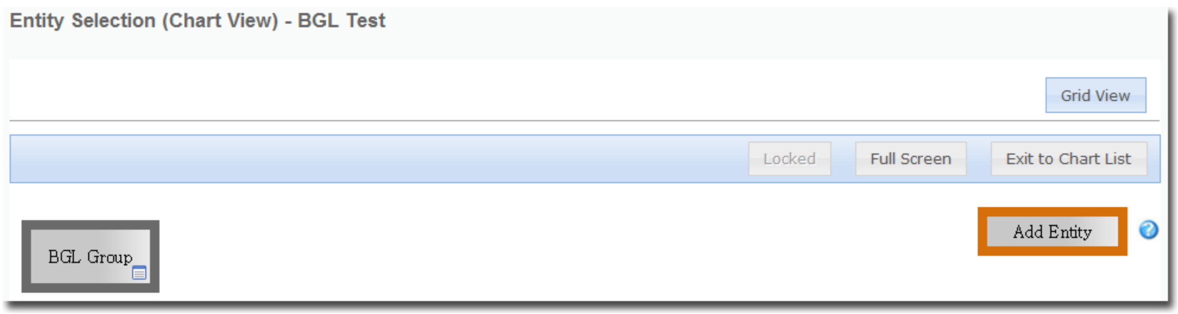
The Group Entity will be added to the Chart List.



8.1.2 Creating a Chart

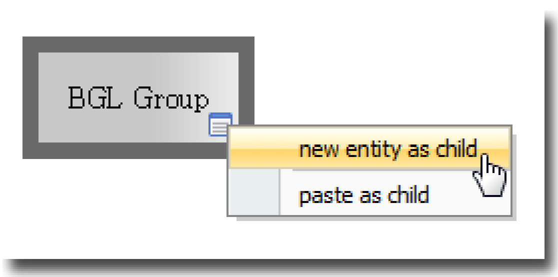
To add an entity as a child to the Group Entity, click **Edit**.

The following screen will display to allow you to add child entities to the Group.

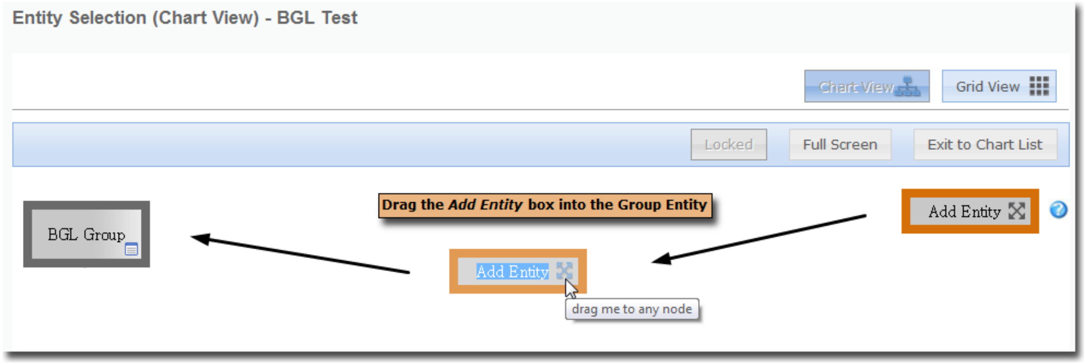


There are two ways to add a child entity:

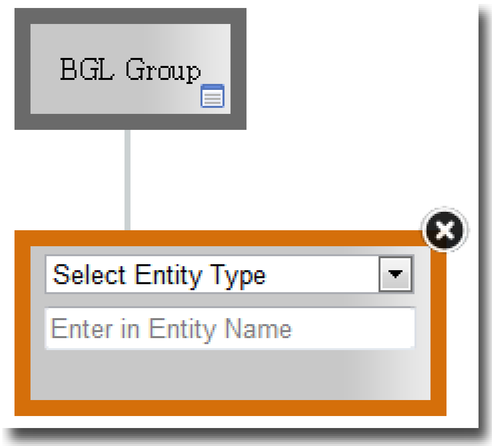
Click next to the Group entity and select new entity as child.



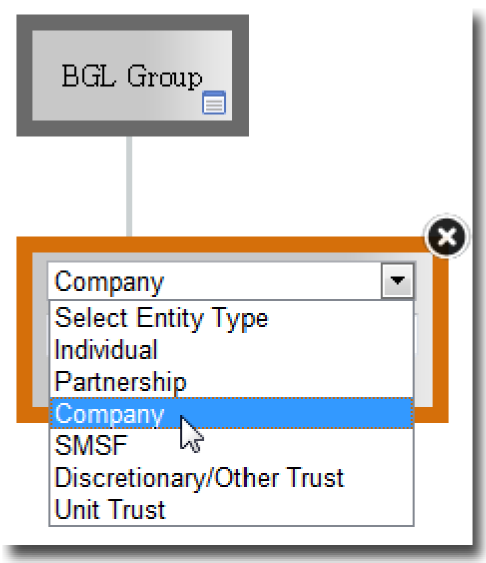
Drag the Add Entity box on the right-hand side into the Group Entity.



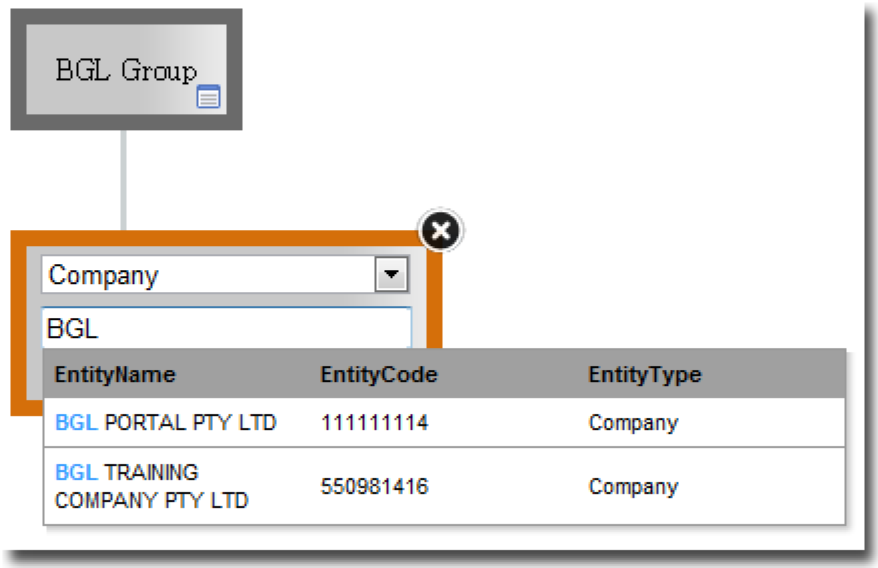
You will then need to select the child entity type and enter the child entity name.



The following entity types are available from the drop-down list.

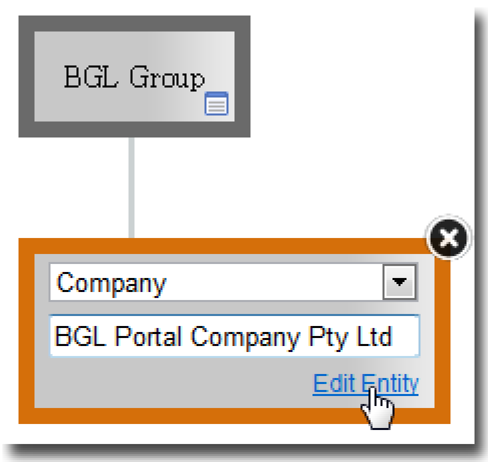


As you start typing in the name of the entity, based on the entity type selected, Portal will display a list of entities containing these letters.

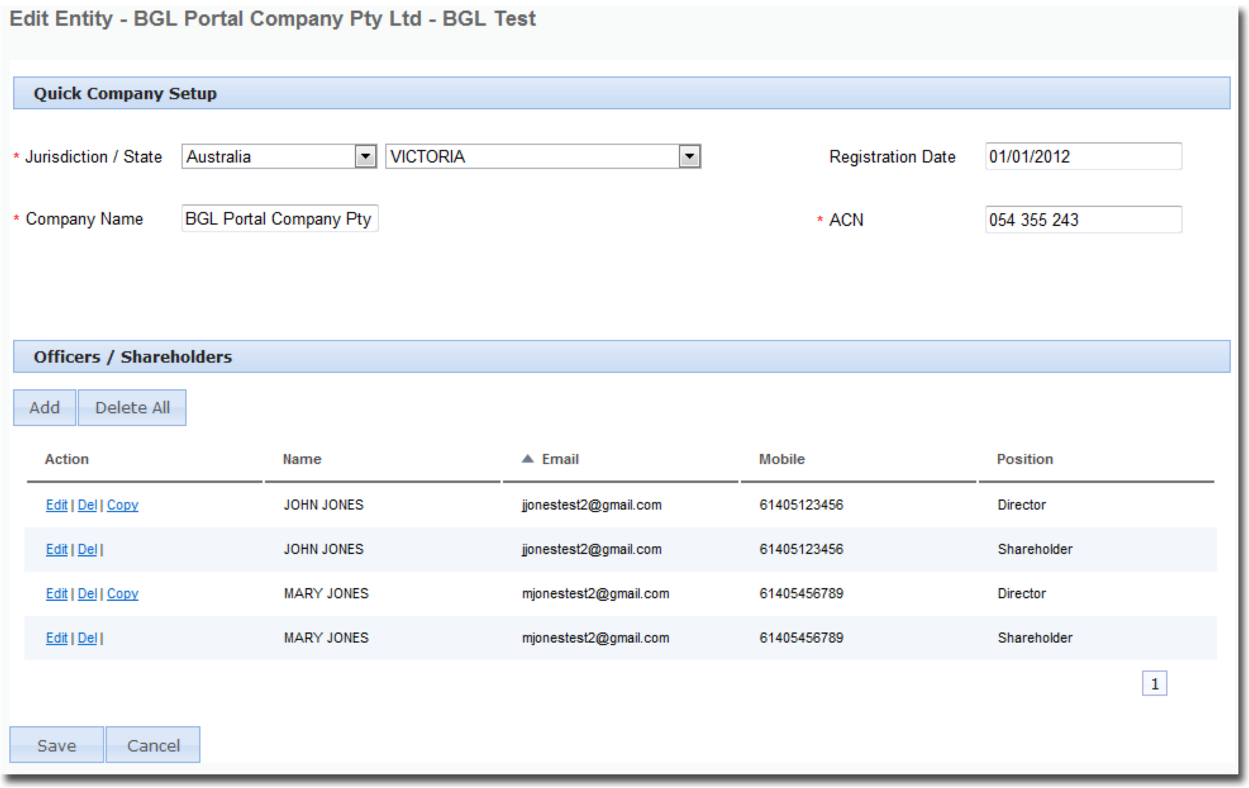


You can then select the entity from the list.

If the entity is not on Portal yet, click Edit Entity.

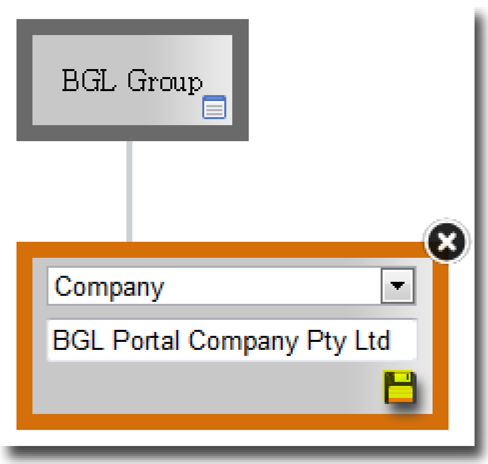


You will then be able to enter in the entity details on Portal.

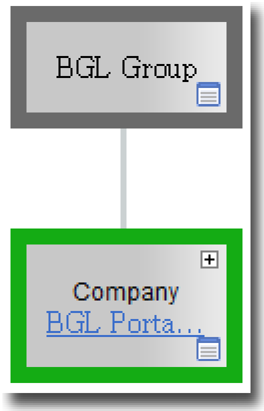


Once all the details have been input, click **Save**.

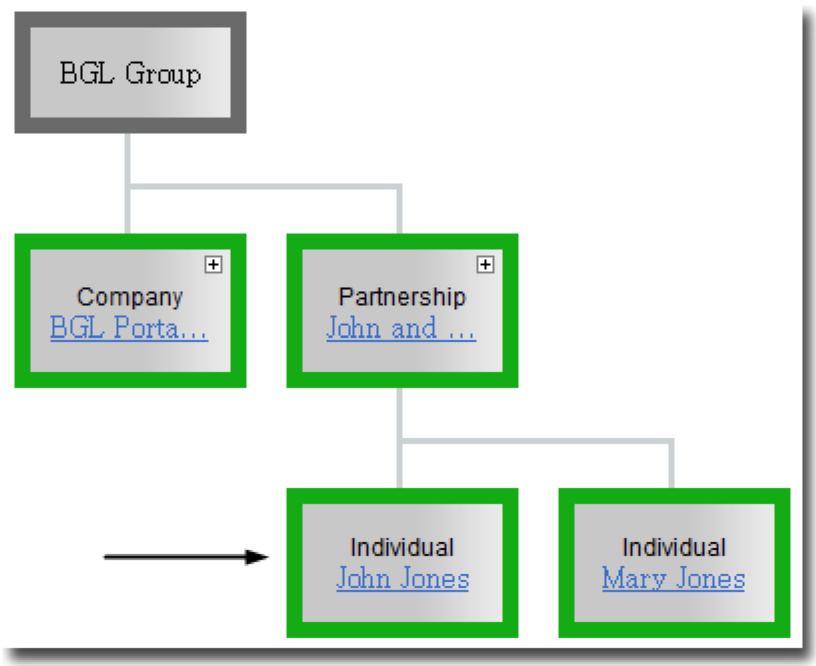
Once the details of the entity has been entered and saved on Portal, click .



The colour of the child entity will change to **green** when the details are saved.

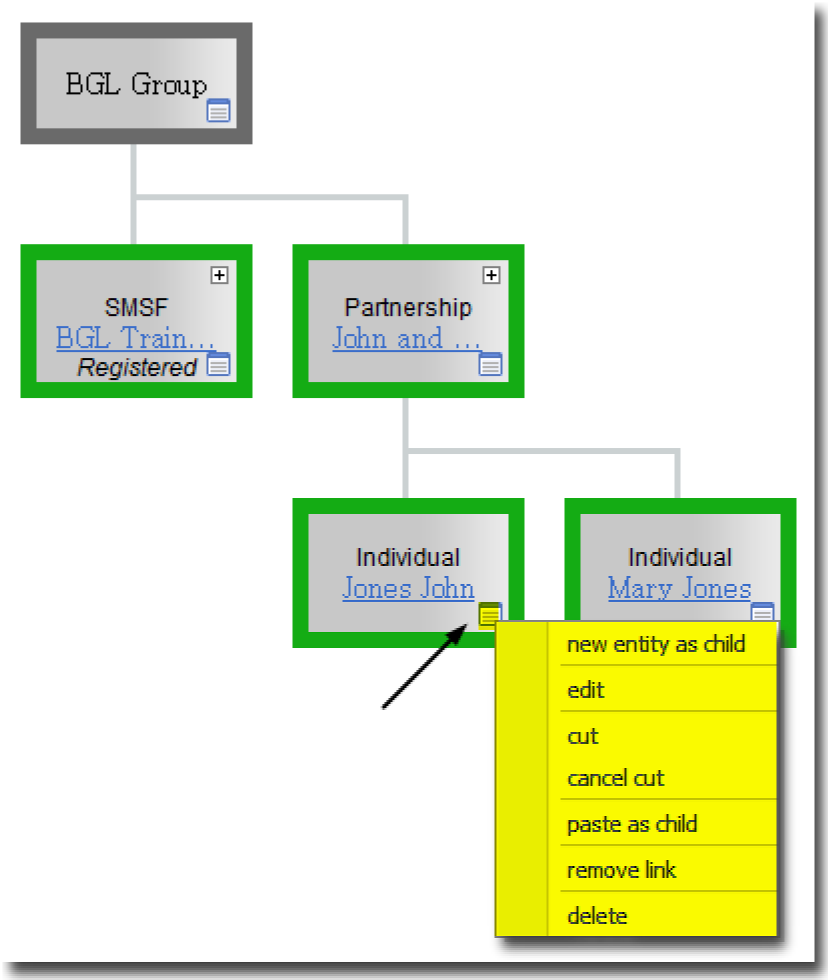


Additional child nodes can be added to the Group Entity. Child nodes can also be added to existing child nodes using one of the methods mentioned above.



8.1.3 Editing a Child Node

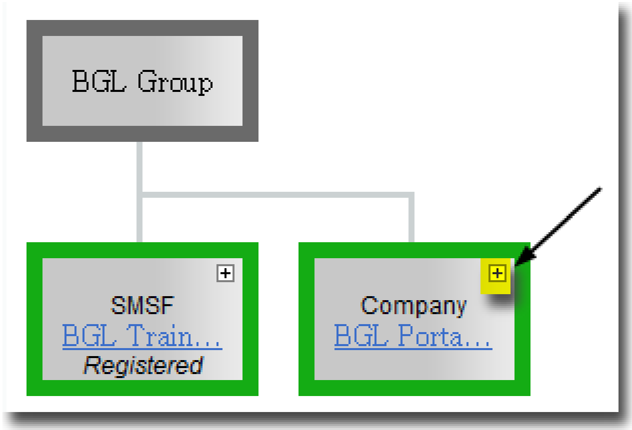
Child Nodes can be edited by clicking .



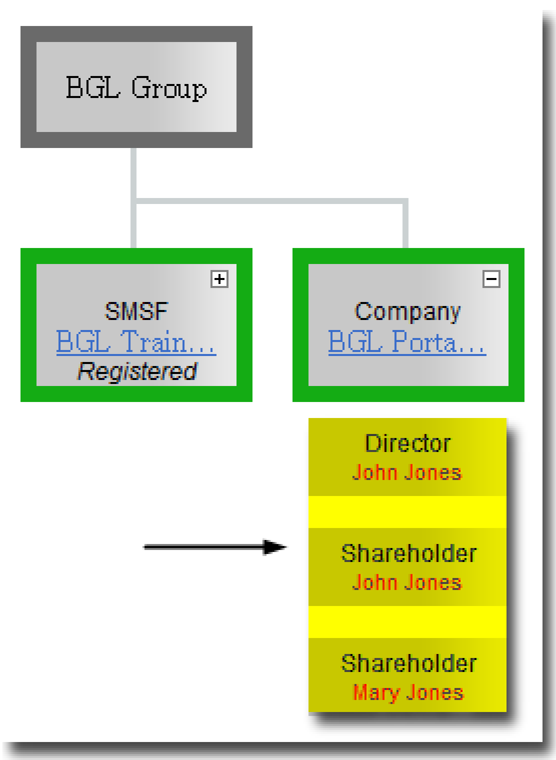
new entity as child	This will add a new entity under the existing node.
edit	This allows you to change the details of the entity.
cut	You can cut a node and paste it under a different node. The colour of the node will change to **orange** when it is cut.
cancel cut	This will cancel the cut process made previously.
paste as child	After you have cut the entity, you can use this option to paste that entity as a child under a different entity.
remove link	This will delete the node from the chart but the entity will still be available on Portal.
delete	This will remove the entity from Portal **permanently**.

8.1.4 Viewing the entities attached to a child node

To view the individuals/entities to an entity, click on the plus icon located inside the child node.



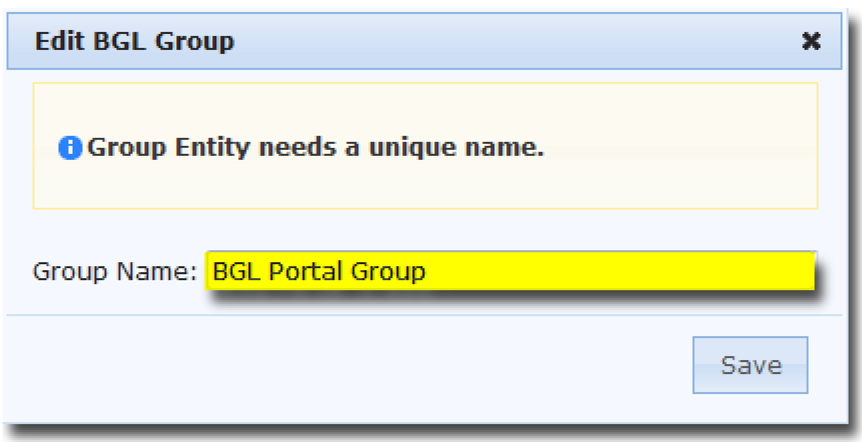
The individuals/entities attached to the child node will display at the bottom.



8.1.5 Renaming a Group Entity

From the **Entity Selection (Chart List)** screen, click **Rename** next to the Group Entity.

You can then change the name of the group.

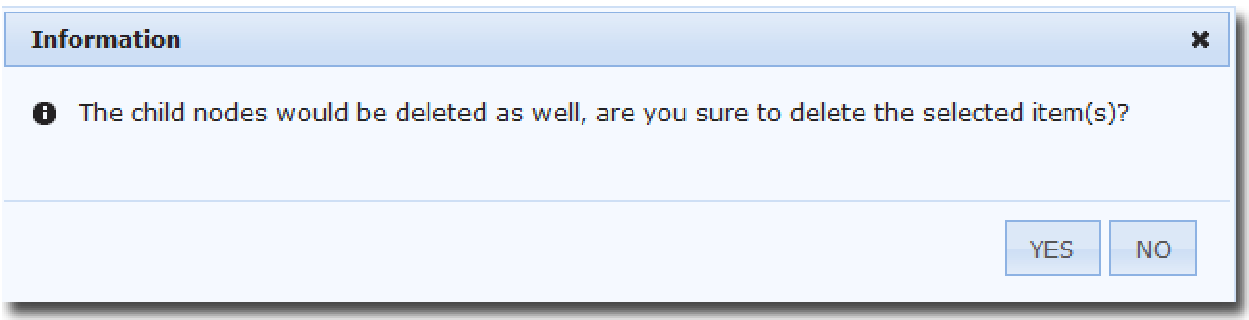


Click **Save** to update the name.

8.1.6 Deleting a Group Entity

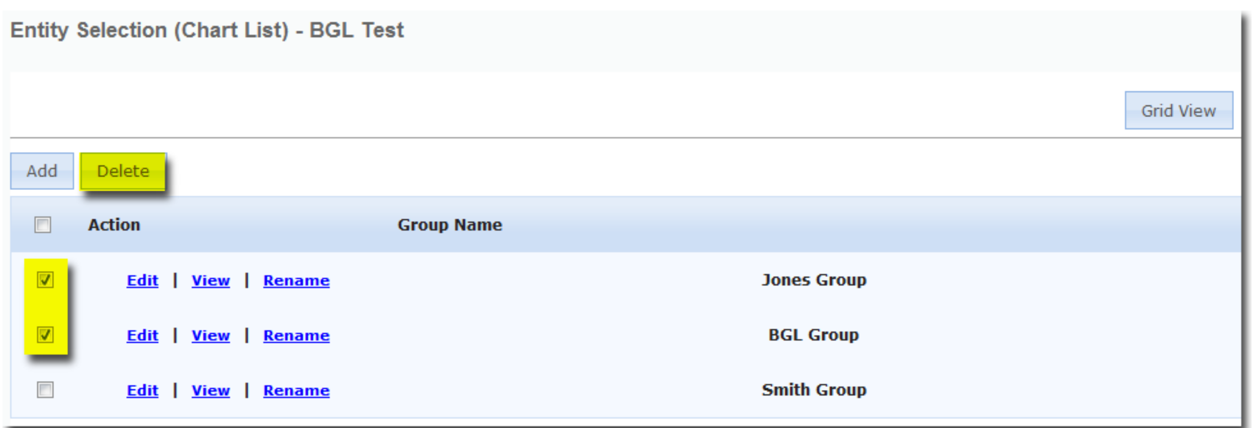
From the **Entity Selection (Chart List)** screen, tick the box next to the Group Entity you wish to delete and then click **Delete**.

The following message will display to warn you that all child nodes will get deleted:

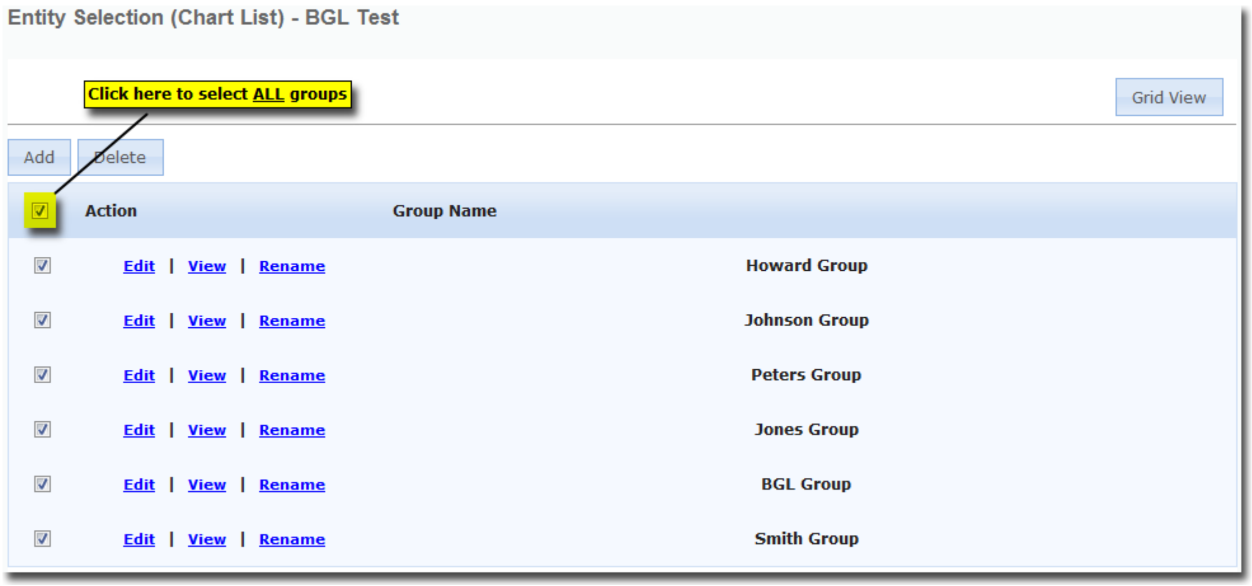


Click **Yes** to proceed with deleting the Group Entity or click **No** to abort the deletion process.

Multiple group entities can be deleted at the same by ticking the boxes next to the other groups and then click Delete.

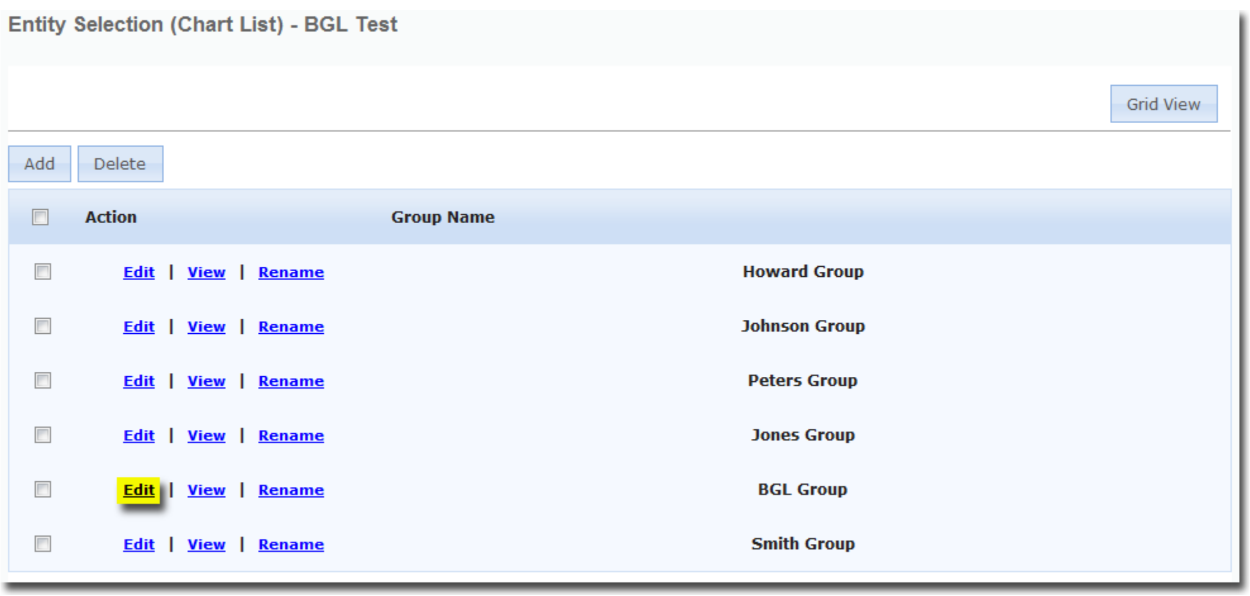


You can select all groups by ticking the first box next to Action.



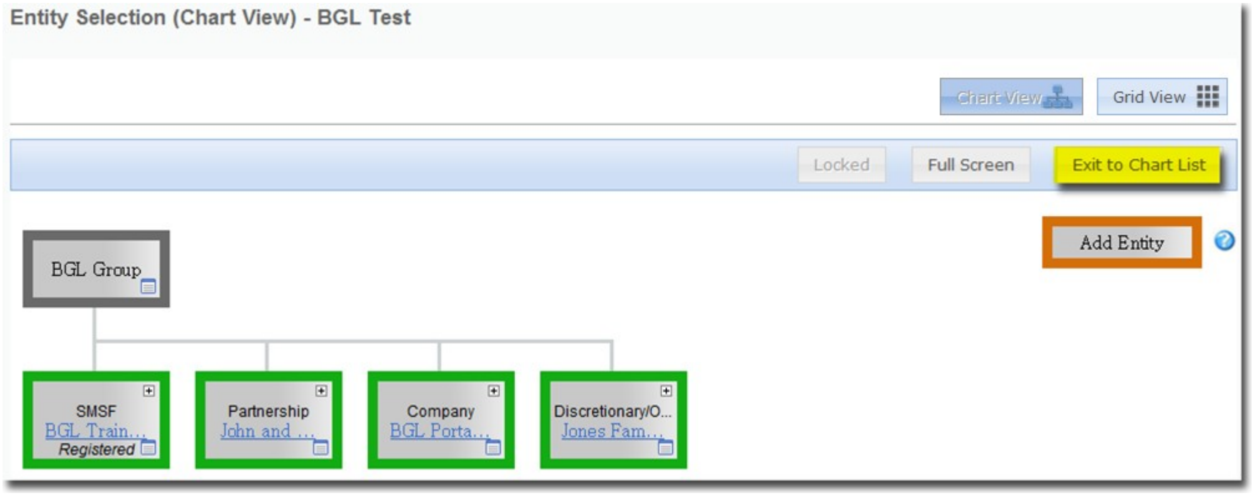
8.1.7 Editing a Group Entity

From the **Entity Selection (Chart List)** screen, click **Edit** next to the Group Entity.



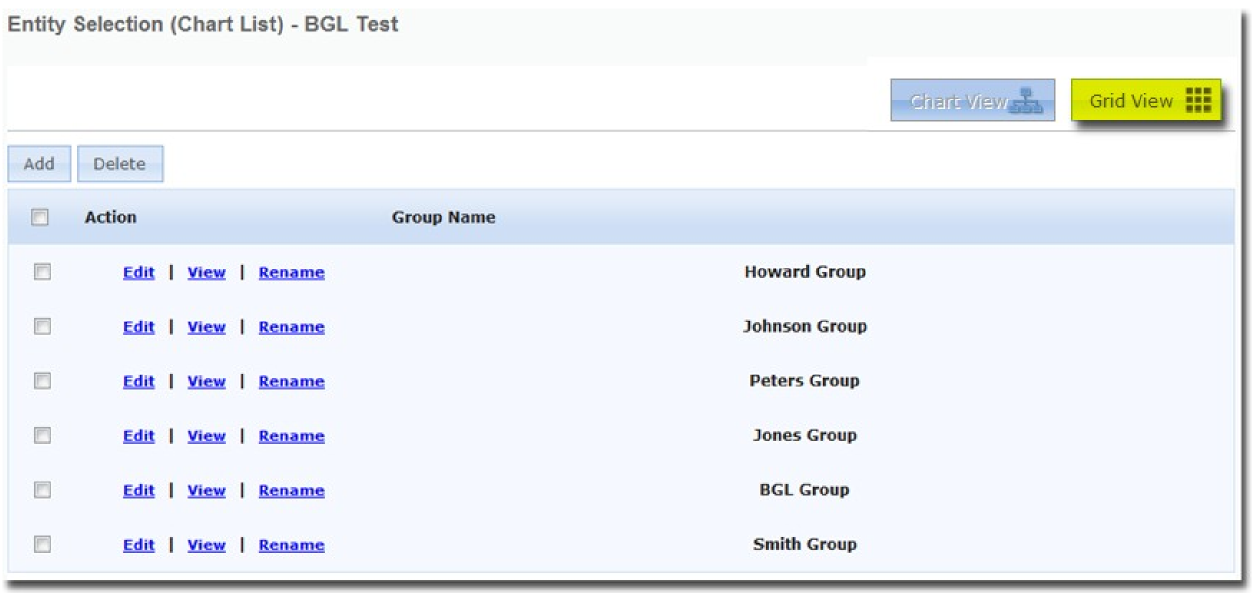
You will be taken to the **Entity Selection (Chart View)** screen where you can make changes to the existing chart.

After you have made the necessary changes, click **Exit to Chart List** to go back to the **Entity Selection (Chart List)** screen.

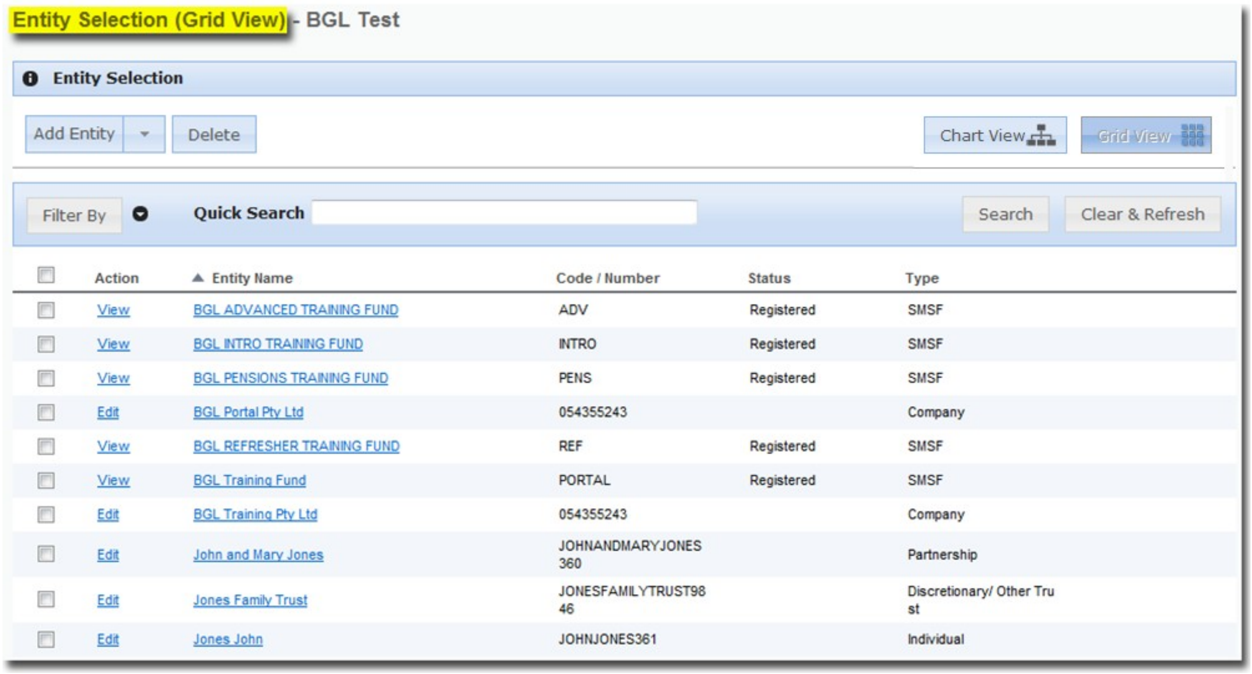


8.1.8 Switching to Grid View

If you wish to switch to the Grid View where you can see a list of the entities on Portal, click **Grid View**.



You will be taken to the **Entity Selection (Grid View)** screen.



8.2 Grid View

A list of the companies that have been enabled for the Portal user will display on the screen with the Company Code from **CAS**.

- If users only have access to one company/entity they will automatically be directed to the **Home** page.
- If users have access to multiple companies/entities but **not** other entities, they will be taken to the **Company Selection** page.
- If users have access to both funds and other entities, they will be taken to the **Entity Selection** page where they can select a fund or an entity.

Simply select one of the companies in the list before you can view the other tabs.

Search	You can type in the name of the company you are looking for and then click this button to locate that company in the list.
Delete	Only the Administrator has been given access to this function. You will be able to click this to open a wizard, which goes through the deletion process. If you wish to delete a company from Portal, you will also need to ensure that the ***Portal Client?*** check box in **CAS** under **Company Details** is **unticked** for that company.

Clear & Refresh	This will clear the search box and refresh the company list.

8.2.1 Adding a company/entity

Companies/Entities can be quickly set up in Portal by clicking **Add Entity**.

The following entities can be added:

- Individual
- Partnership
- Company
- SMSF
- Discretionary/Other Trust
- Unit Trust

For example, selecting **Company** will bring up the following fields for you to fill in:

Quick Company Setup

Jurisdiction/State	Select one of the following jurisdictions from the drop-down list: • Australia • Hong Kong • Singapore • United Kingdom If you select Australia, you will also need to choose a state from the next drop-down list.
Company Name	Enter a name for the new company.
Registration Date	Select or enter the date the company was registered.
ACN	Enter the Australian Company Number.

Officers/Shareholders

Adding an officer/ a shareholder

Click **Add**.

Title	Enter the title of the person (e.g. Mr, Mrs, Ms)
Surname	Input the surname.
	Input the first name(s).
Sex	Select **Male** or **Female** from the drop-down list.
Date of Birth	Select or enter the date of the birth.

TFN Input the Tax File Number

Email Input the email address

Tick the **Send user invitation and automatically allow access to Entity(s) that the user is attached to?** box for Portal to send an invitation email to that user and also give the user access to that entity.

Mobile Number

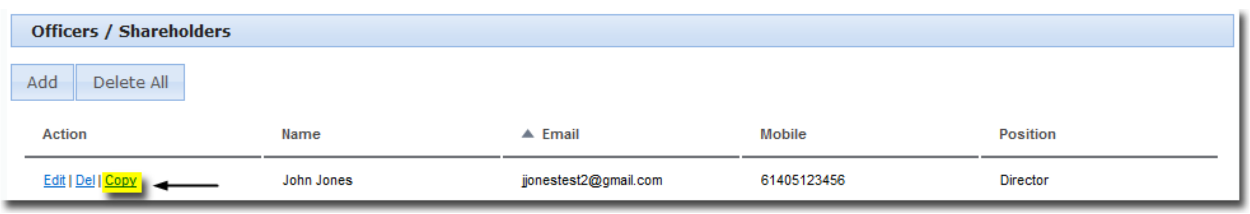
A mobile number is required for individuals that will be digitally signing documents. Only mobile numbers from Australia, China, Hong Kong and Singapore are currently accepted. For international numbers, please ensure you include the country code.

<u>Deleting an officer/ a member</u>

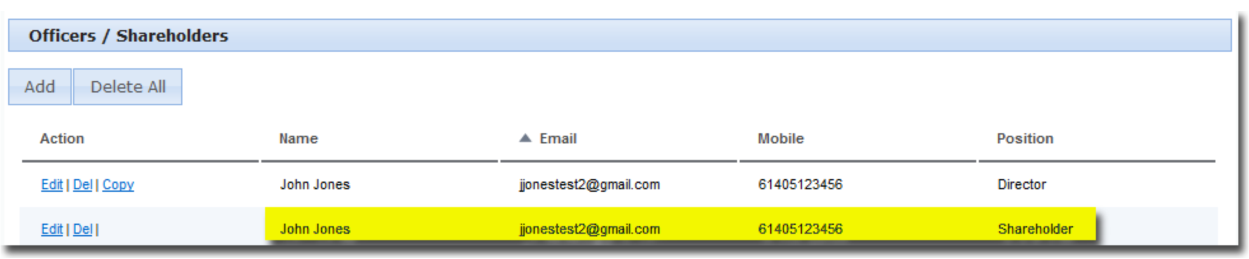
Click **<u>Del</u>** next to the officer/member you wish to delete.

<u>Copying the details of an officer/a member</u>

Click **<u>Copy</u>** next to the member you wish to duplicate.



For example, if John Jones has been added a director already, clicking **Copy** will add John Jones as a shareholder as well.



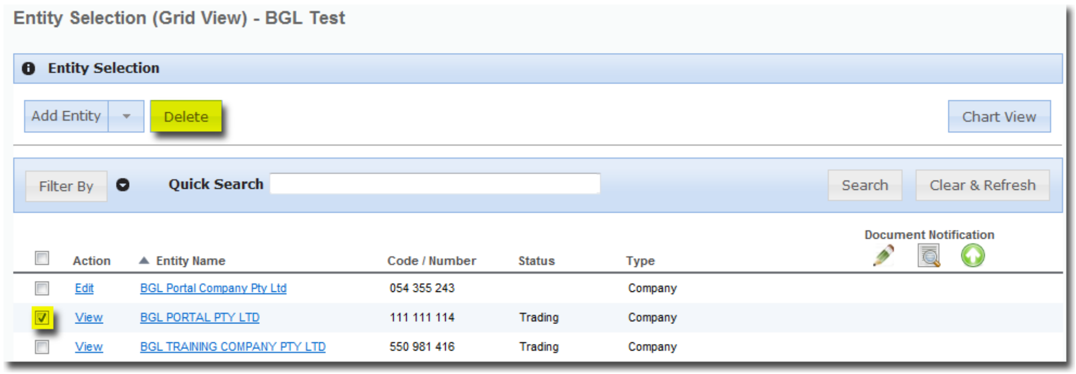
Click **Save** to create the officer/shareholder or click **Cancel** to abort the process.

8.2.2 Deleting Companies from Portal

Note: Users can be restricted from deleting entities by unticking the **Allow user to delete entities** box under the **Administration Access** when editing the User Role.

1. On the **Company/Entity Selection** tab, highlight the entity(s) you wish to delete by ticking the box on the left.

2. Click **Delete** to remove the selected entity(s) from Portal.



3. Click **Next** to continue.

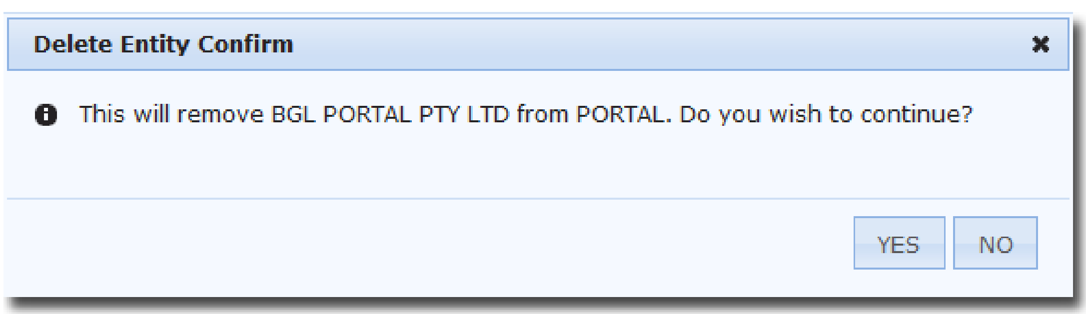
4. A list of entities attached to the company/entity will be displayed. Click **Next** to continue.

5. A list of users attached to the company/entity will be displayed. Click **Next** to continue.

6. A list of documents attached to the company will be displayed. Click **Next** to continue.

7. Click **Delete** to complete the process.

8. The following confirmation message will then display.

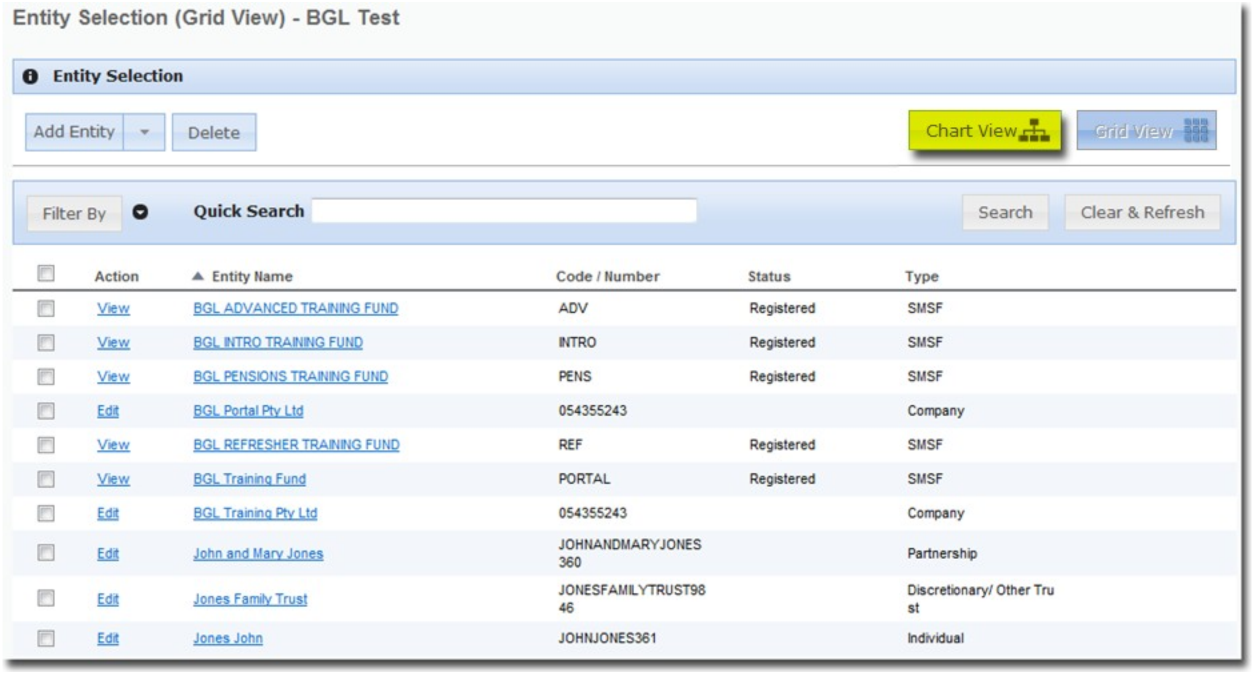


9. Click **YES** to delete the company/entity from Portal

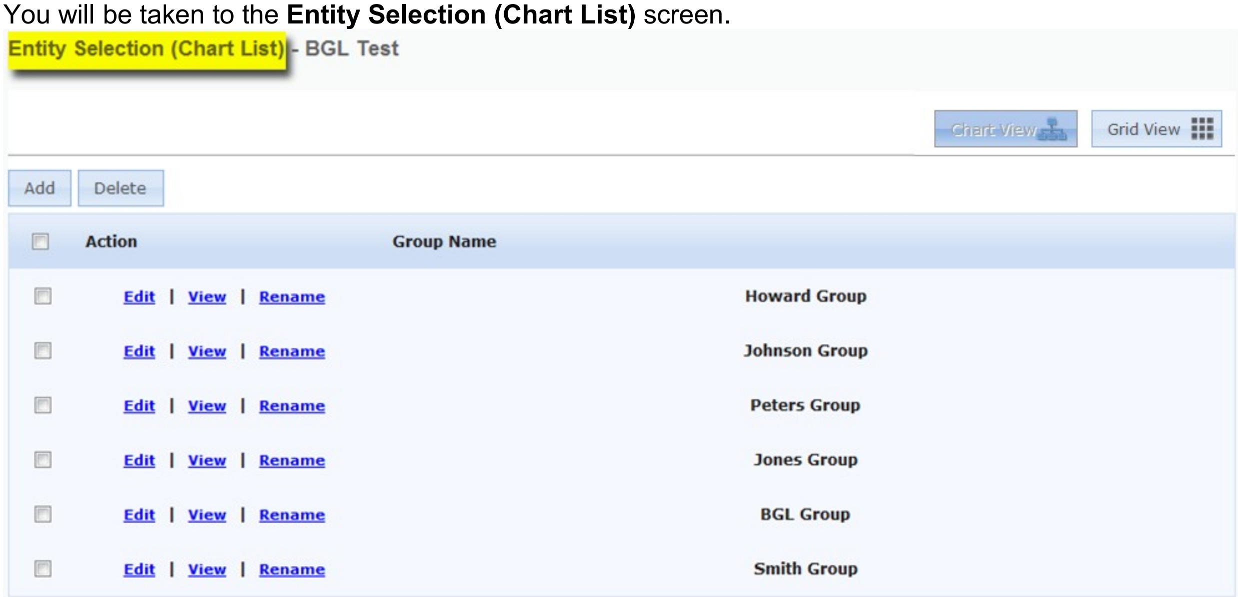
You will also need to change the Portal status in **CAS** from **Yes** to **No**.

8.2.3 Switching to Chart View

If you wish to switch to the **Chart View** where you can see a list of the Group Entities and organisational charts, click **Chart View**.



You will be taken to the **Entity Selection (Chart List)** screen.



9. Portal – Reports

9.1 Company Report

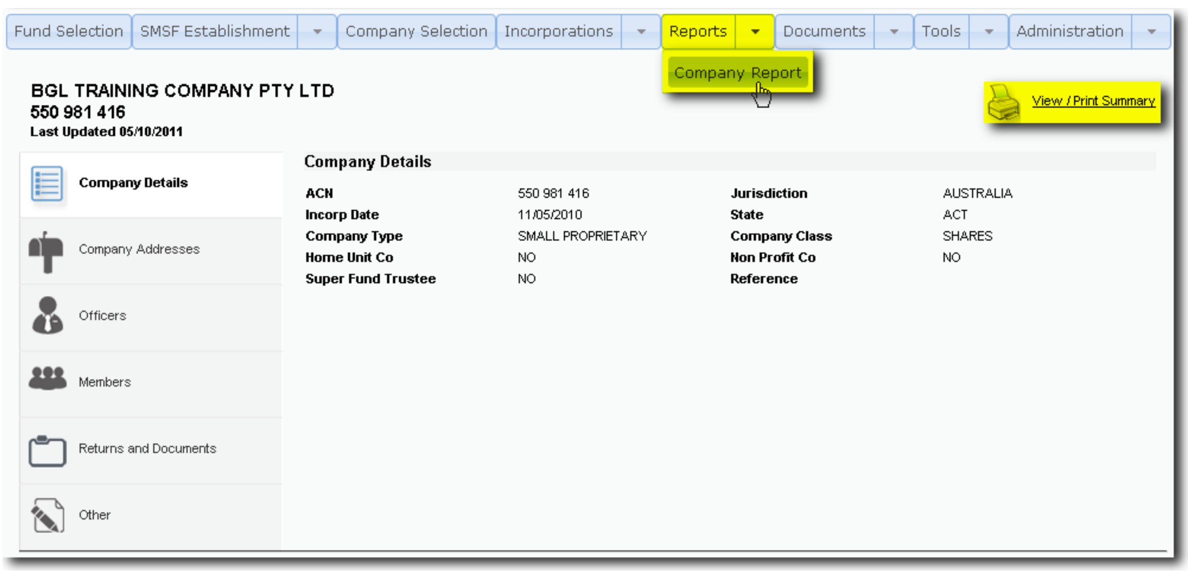
The first window that will display after selecting a company will be the **Company Report** tab.

This can also be accessed through **Reports | Company Report**.

The Company Report tab will display current company details, which gets automatically updated on Portal. The update to Portal will occur when you initially send a company to portal and when a change has occurred in CAS. You can identify when the data was updated by checking the Last Updated date located under the companies A.C.N.

To navigate through the Company Report tab, use the left hand side menu.

Clicking View/print Summary located on the top right hand corner will combine all company information and open a new window or tab, which can then be printed.



10. Portal – Documents

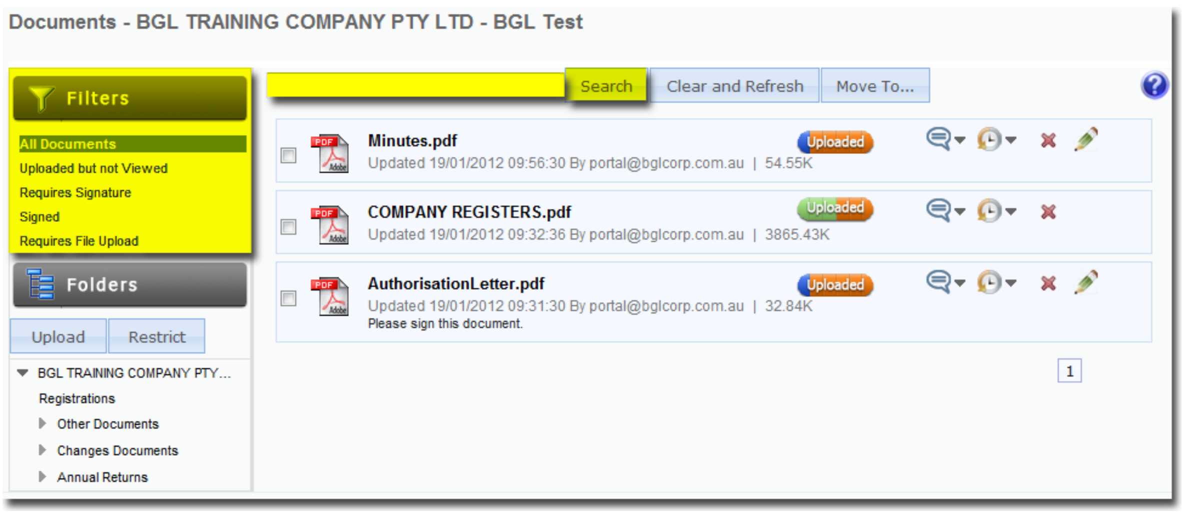
This screen allows users to view all the documents and reports that have been uploaded to Portal. Additional documents can also be uploaded to Portal from this screen. For example, if you request for your client to sign a document, you can choose the appropriate folder from the filters on the left hand side and click on the upload button.

Search

Users can make use of the search box to locate a specific document or report for a company.

You are also able to filter by:

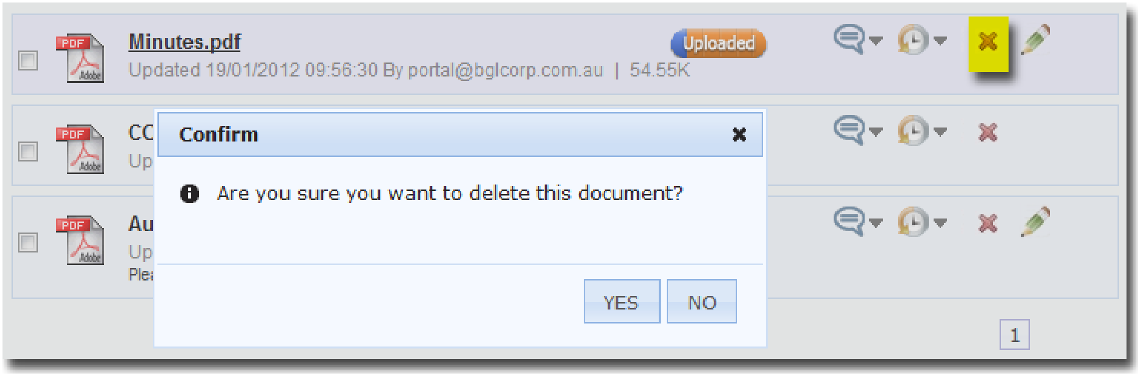
- All Documents
- Documents which have been uploaded but not yet viewed by the client
- Documents which need signing
- Documents which have been signed
- Documents which need to be uploaded



Viewing or Deleting Documents

To a view a document the user will simply need to click on the name of the document. Once viewed, the status of the document will change from **Uploaded** to **Viewed**.

To a delete a document off Portal, click on the red cross on the right hand side of the document which will prompt a warning message for you to confirm the deletion of the document selected.



Note: Once a file has been deleted, it cannot be recovered or restored. The only exception is for a CAS document, in which case, it can be resubmitted to Portal from CAS.

Document Comments and History

Comments can be added to documents by clicking on the speech icon**.**

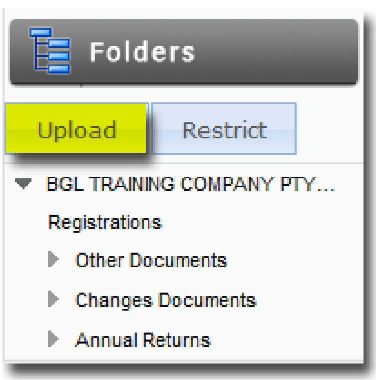
The version history of signed and uploaded documents can now be displayed by clicking on the History icon.

Document Statuses are colour-coded and act as a progress bar in the Document Process.

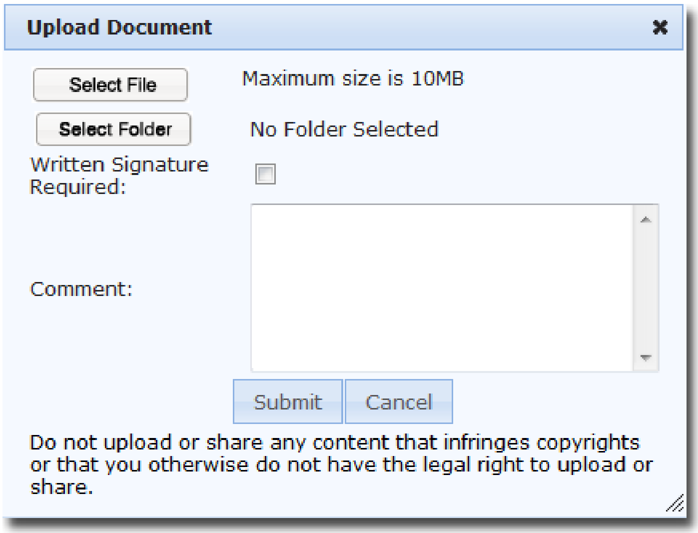
Documents (No Signature Required)	
Uploaded	Document has been Uploaded
Viewed	Document has been Viewed
Documents Requiring Signature	
Uploaded	Document requiring a signature has been Uploaded
Viewed	Document requiring a signature has been Viewed
Signed	Signed Document has been Uploaded

10.1 Uploading Any Document to Portal

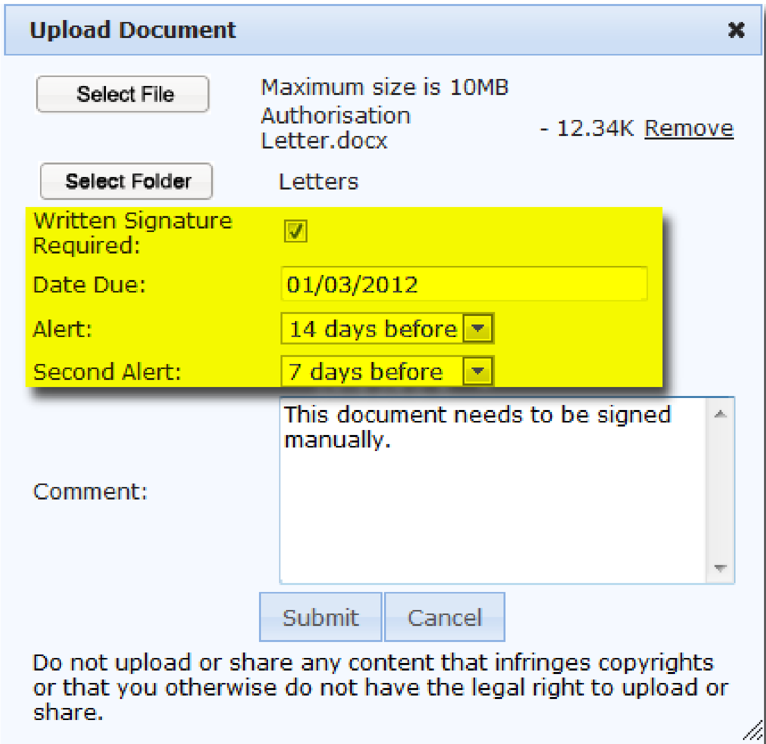
Users can upload any document or form, by selecting a folder or subfolder and then clicking on the **Upload** icon.



This will bring up the **Upload Document** screen:



Select File	You can browse for the document to be attached by clicking this button. The maximum file size is 10MB.
Select Folder	You can choose to which folder the document will be uploaded. The progress bar will indicate when the upload process is complete.
Written Signature Required	Tick this check box if the uploaded document needs to be signed. The Date Due and Alert fields will then be displayed.



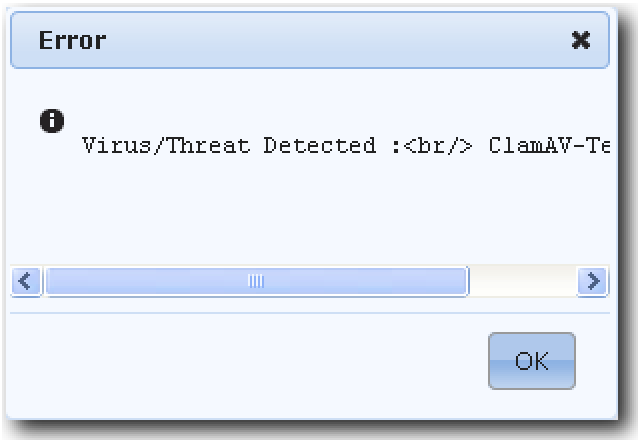
Date Due	Enter the date by which the document needs to be signed and uploaded back to Portal.
Alert	You can set up a reminder and Portal will send an email to the signatory on the number of days specified prior to the date due. You have the option to set up two reminders and another email will be sent.
Comment	A small description of the uploaded document can be entered in this box.
Submit	Once the above details have been entered, users can click this button to upload the selected document. A message to confirm that the file has been successfully uploaded will pop up.
Cancel	This will abort the upload process and take you back to the **Documents** screen.

Any of the following file types can be uploaded:

File Type	File Extension
Images:	.jpg, .jpeg, .gif, .bmp, .png, .tif
Documents:	.pdf, .txt, .xls / .xlsx, .csv, .doc / .docx, .htm / .html, .xml, .ods (OpenDocument Spreadsheet), .odt (OpenDocument Text document), .ods (OpenDocument

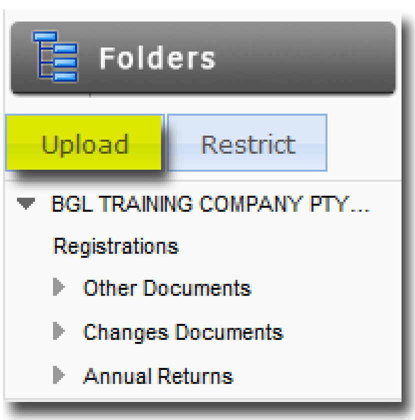
	Spreadsheet), .odp (OpenDocument Presentations)
Archives:	.zip

If harmful files are loaded being uploaded to Portal, the following warning message will display:

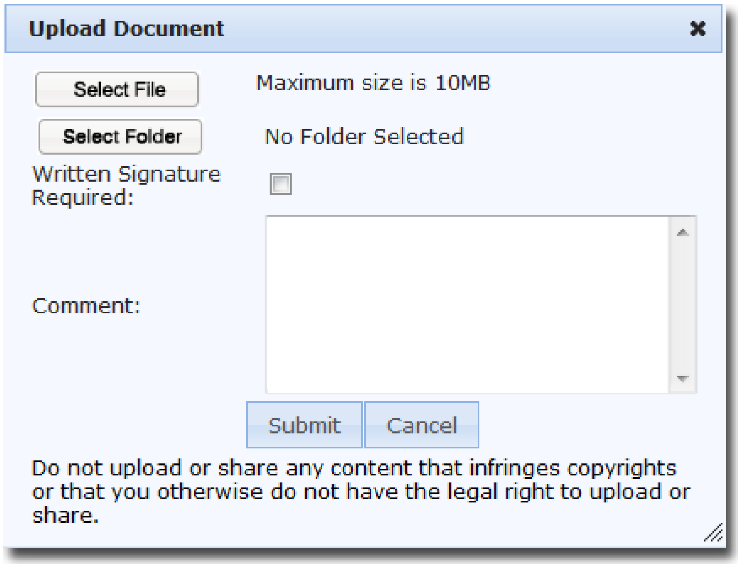


10.2 Uploading a PDF that requires digital signature

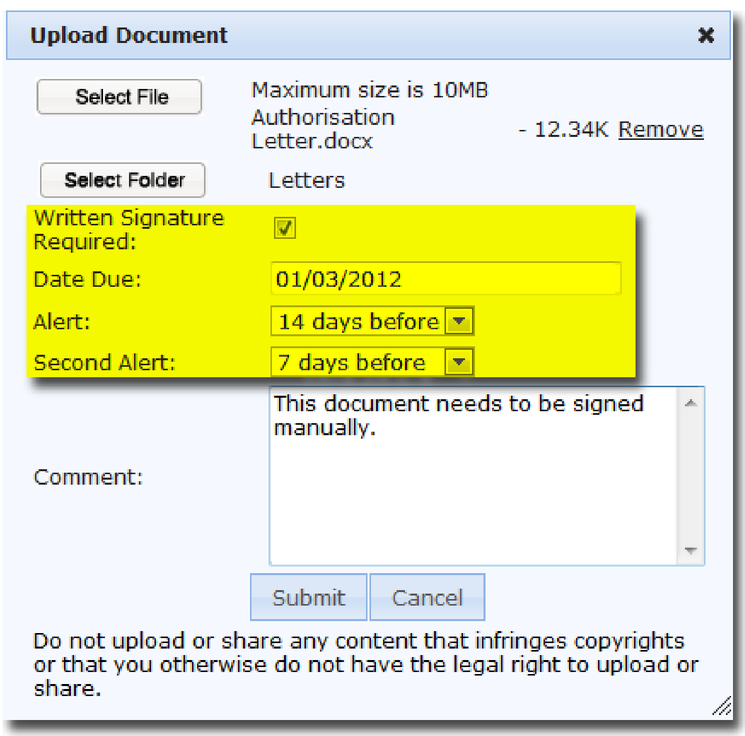
Note: Only PDF documents can be uploaded and digitally signed through BGL SmartSign.



This will bring up the **Upload Document** screen:



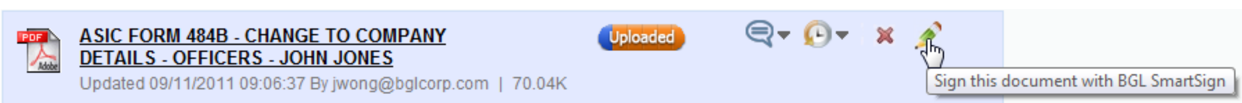
Select File	You can browse for the PDF to be attached by clicking this button. The maximum file size is 10MB.
Select Folder	You can choose to which folder the document will be uploaded.
Written Signature Required	Tick this check box if the uploaded document needs to be signed. The Date Due and Alert fields will then be displayed.



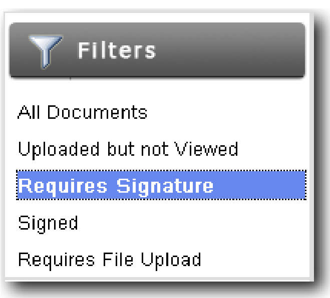
Date Due	Enter the date by which the document needs to be signed
Alert	You can set up a reminder and Portal will send an email to the signatory on the number of days specified prior to the date due. You have the option to set up two reminders and another email will be sent.
Comment	A small description of the uploaded document can be entered in this box.
Submit	Once the above details have been entered, users can click this button to upload the selected document. A message to confirm that the file has been successfully uploaded will pop up.
Cancel	This will abort the upload process and take you back to the **Documents** screen.

10.3 Signing Documents on Portal

Documents requiring a signature will appear with a **Sign** icon next to them.



Alternatively they can easily be found using the "Requires Signature" search filter.



This **Sign** icon allows you to digitally sign documents pushed from CAS or upload a scanned signed document originally uploaded through Portal.

Note: You need to register for BGL SmartSign in Portal. See BGL SmartSign for more information.

To know whether a document can be digitally signed, hover your mouse on the **Sign** icon and a bubble hint saying ***Sign this document with BGL SmartSign*** should appear.

Sign a Document electronically through BGL SmartSign

Documents that can be digitally signed with BGL SmartSign

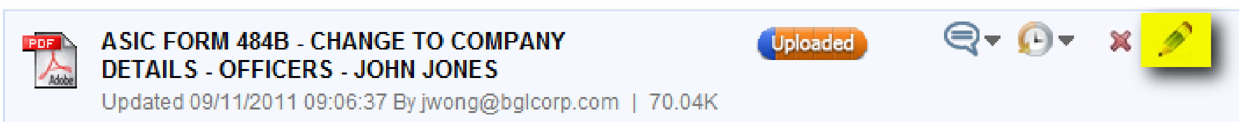
- The following ASIC Forms produced by CAS **can** be digitally signed through Portal

Form	Description
201 (include S)	Incorporation
205 (includes A)	Notification of Resolution
410 (includes B, F)	Reservation of Name and Extension
484A till C	Change to Company Details
485	Solvency Statement
490	Change of Officeholders – Foreign Companies
492	Amendment to Lodged Document – Not Requisitioned
6010	Voluntary Deregistration
902	Amendment to Lodged Document – Requisitioned

- Form 362 Appointment or Cessation of ASIC Agent – cannot be digitally signed because ASIC requires a ‘wet ink’ signature and states that an agent needs to keep a signed copy of a Form 362 for a period of 7 years.

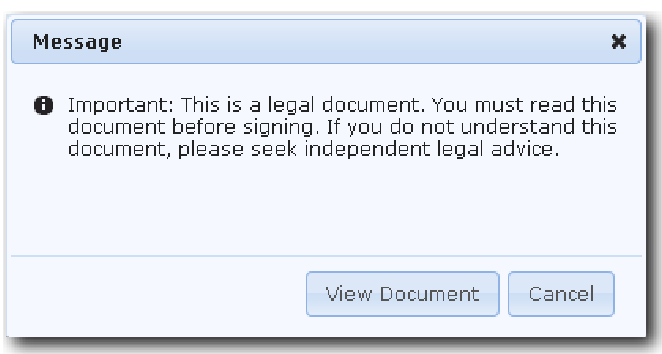
- ASIC Forms that **cannot** be lodged electronically – cannot be digitally signed because ASIC requires hard copy of the signed forms.

Click on the **Sign** icon.



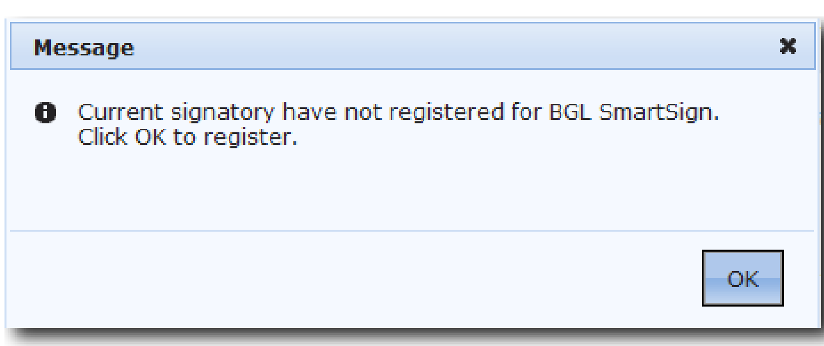
Signatory not yet registered on Portal

After clicking on the **Sign** icon, the following screen will display:

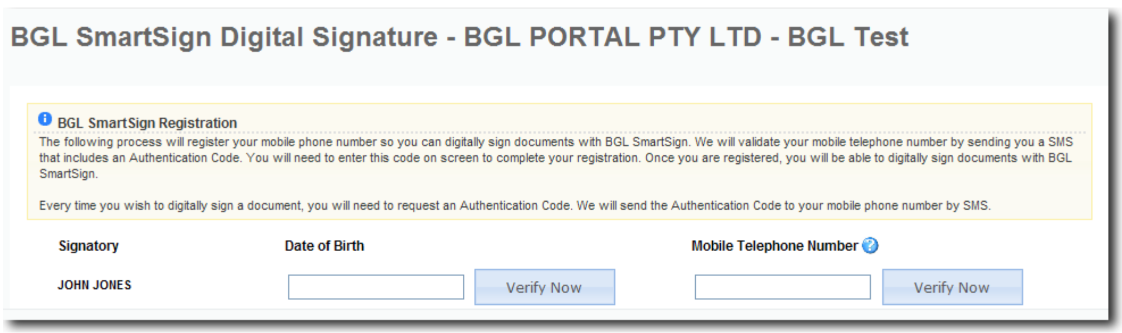


The document needs to be viewed before signing by clicking **View Document**.

If the signatory has not been registered for BGL SmartSign, the following message will come up:

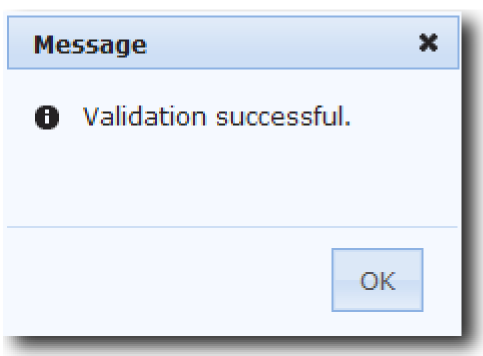


Click **OK** and you will be directed to the Registration page where required signatory(s) will be listed.

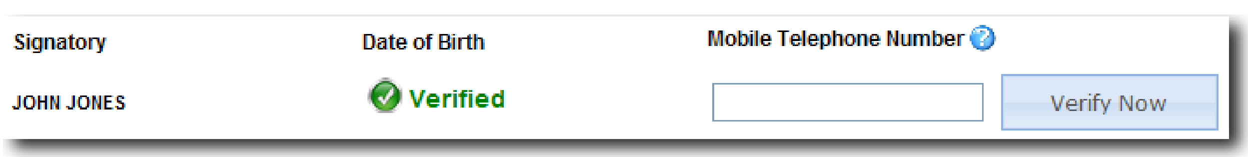


Input your **Date of Birth** (provided earlier) to be validated. **Date of Birth** is required only if user role has been set up to register with Date of Birth and Mobile Number. Click **Verify Now**.

The following message will show if the correct Date of Birth is entered:

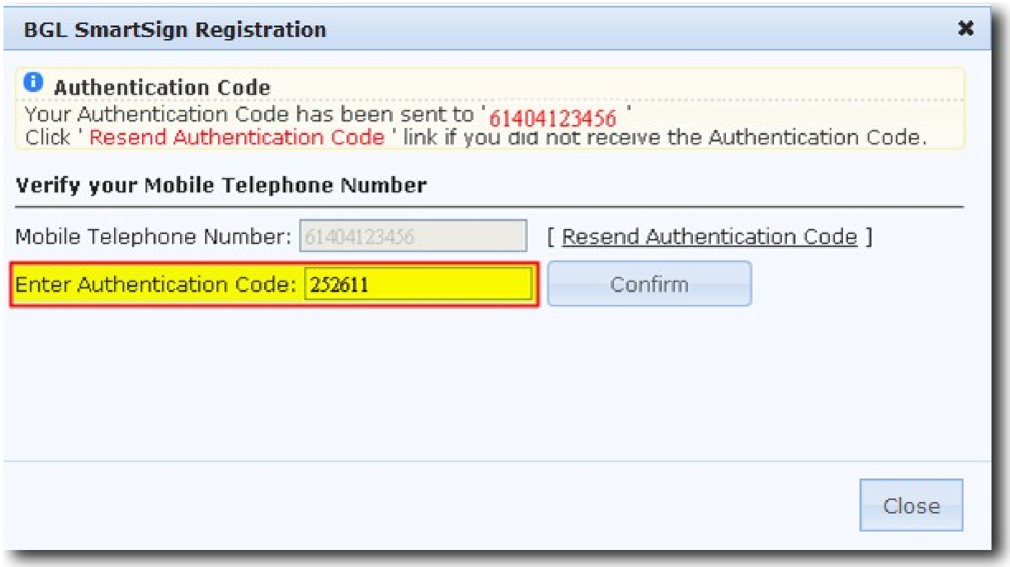


The **Date of Birth** will then be marked as ***Verified.***

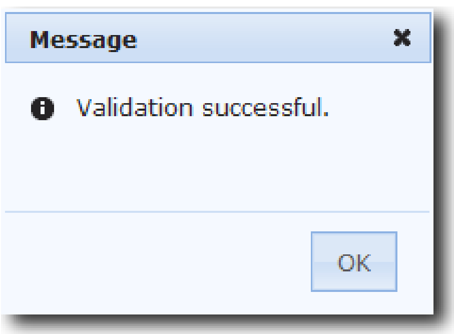


Then input your **Mobile Number** (provided earlier). To verify that the Mobile Number is correct, an Authentication code will be sent to that mobile number.

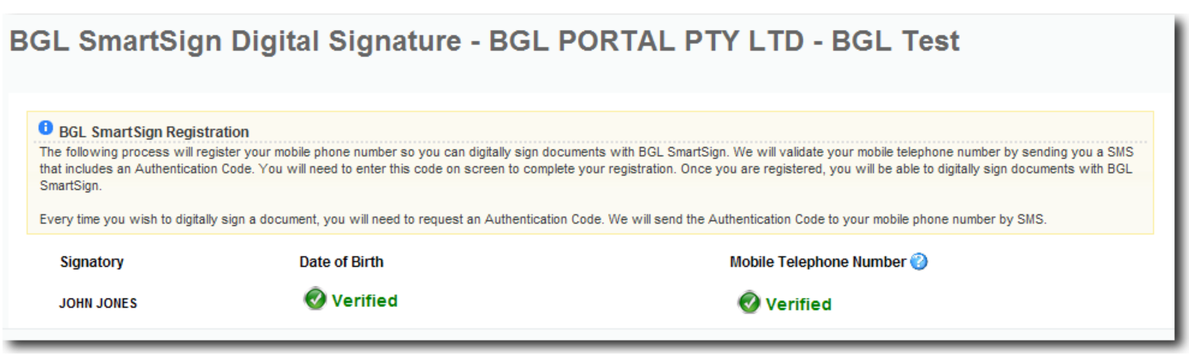
You then need to enter the Authentication code in the following screen.



Click **Confirm**. If the validation is successful, the following message will come up:



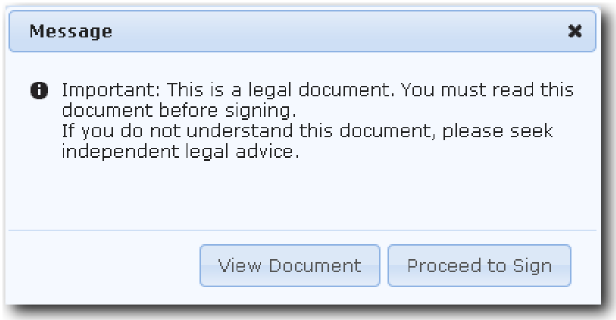
When both the Date of Birth and the Mobile Number have been successfully validated, they will be marked as **Verified**.



You can then follow the instructions below to proceed with the BGL SmartSign Digital Signature confirmation.

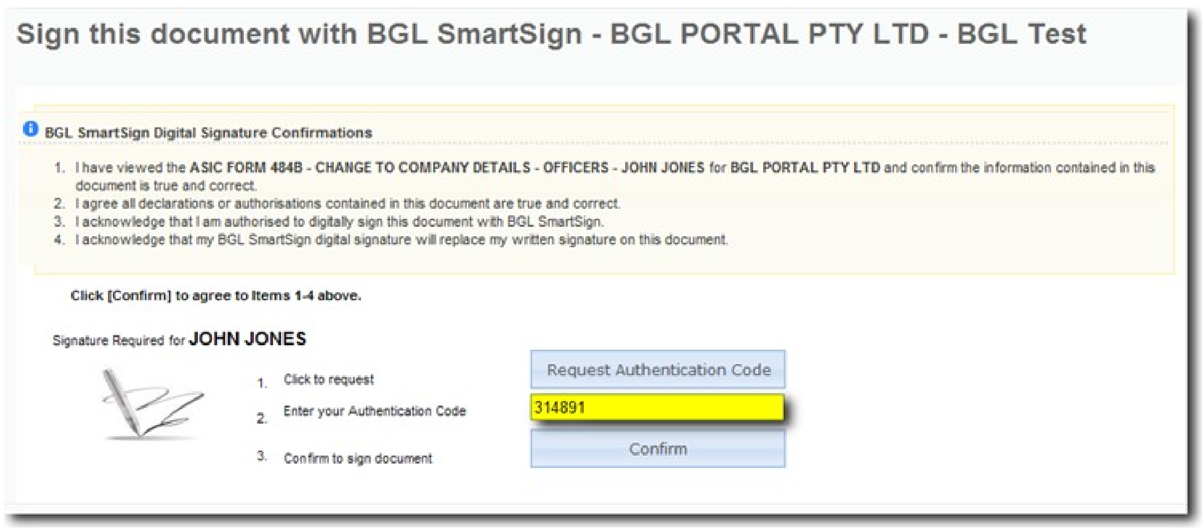
Signatory already registered on Portal

If the signatory's Date of Birth and/or Mobile Number have already been verified, the following screen will display:



You need to view and understand the document before proceeding to sign it. Click **View Document**.

Once the document is viewed, you can then click **Proceed to Sign**.



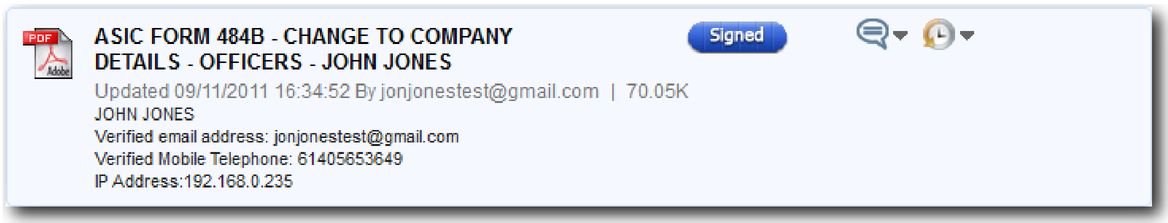
You will need to request for an Authentication Code. This will be sent to the registered mobile number.

Enter the code in the box and then click **Confirm**.

Note: Ensure you have read the terms and conditions before clicking **Confirm.**

The following message will show once the Authentication Code is verified and is correct.

You will then be taken to the **Documents** screen and the status will change to **Signed**.



A signature page will be appended to the end of the document. The signed document will flow back to CAS where the status of the document will change to ***RCVD SIGNED DOC***.

Note: To view the digitally signed PDF documents, Adobe 9 or later is required.

Documents that have been successfully signed with BGL SmartSign will have the watermark ***Digitally Signed with BGL SmartSign*** to make it easier for users to identify that these documents have been digitally signed.

Australian Securities & Investments Commission

Form 484
Corporations Act 2001

Change to company details

Sections A, B or C may be lodged independently with this signed cover page to notify ASIC of:

A1 Change of address
A2 Change of name - officeholders and proprietary company members
A3 Change - ultimate holding company

B1 Cease company officeholder
B2 Appoint company officeholder
B3 Special purpose company

C1 Cancellation of shares
C2 Issue of shares
C3 Change to share structure
C4 Changes to the register of members for proprietary companies

If there is insufficient space in any section of the form, you may photocopy the relevant page(s) and submit as part of this lodgement

Company details

Refer to guide for information about corporate key

Company name
BGL PORTAL PTY LTD

ACN/ABN
111 111 114

Corporate key

Lodgement details

Who should ASIC contact if there is a query about this form?

Firm/organisation
BGL CORPORATE SOLUTIONS PTY LTD

Contact name/position description

ASIC registered agent number (if applicable)
1234

Telephone number
03 95306077

Postal address or DX address
SUITE 2 606-608 HAWTHORN ROAD
BRIGHTON EAST, VIC, 3187

Total number of pages including this cover sheet

Signature

This form must be signed by a current officeholder of the company.

I certify that the information in this cover sheet and the attached sections of this form are true and complete.

Name
JONES JOHN

Capacity
- [x] Director
- [ ] Company secretary

Signature

Date signed
0 9 / 1 1 / 1 1
[D D] [M M] [Y Y]

Lodgement

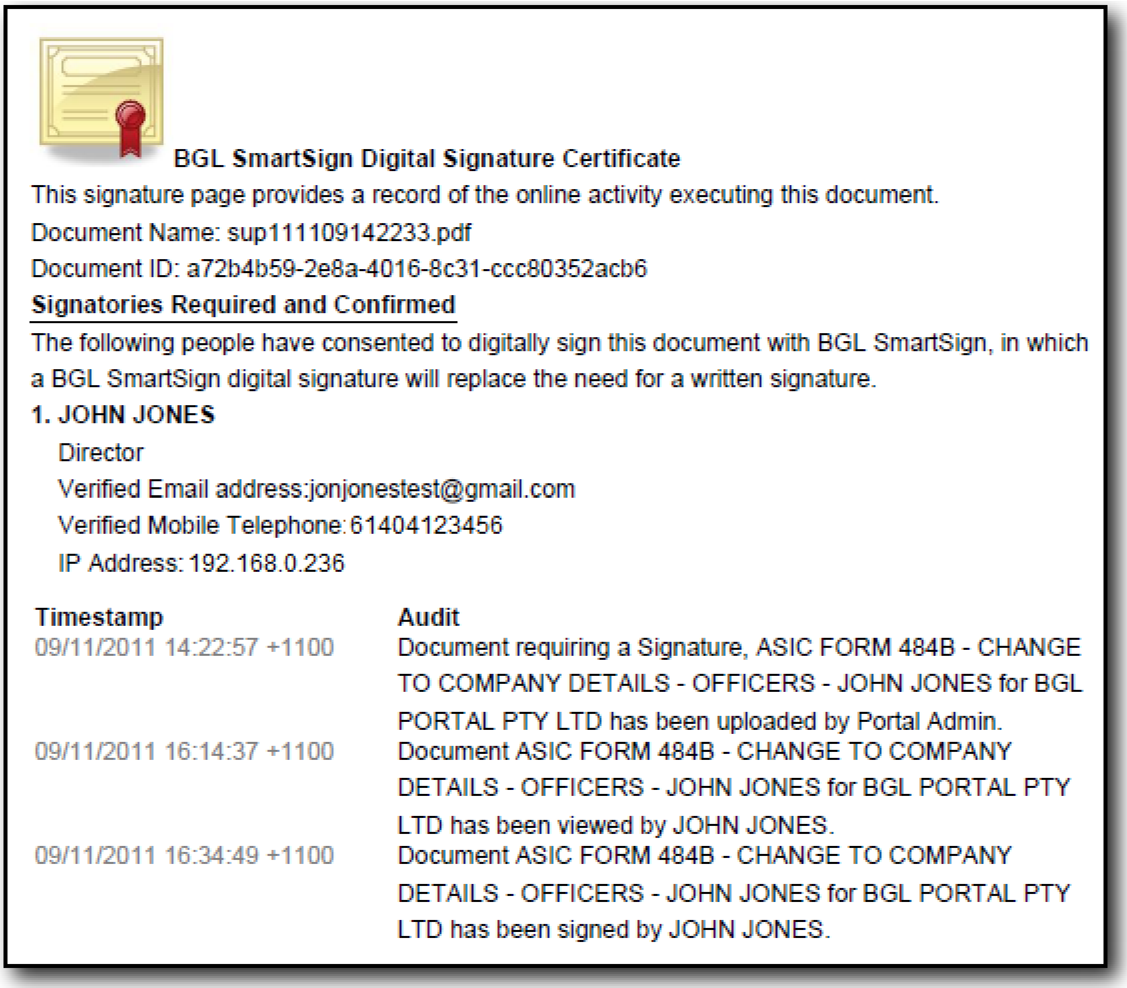
Send completed and signed forms to:
Australian Securities and Investments Commission,
PO Box 4000, Gippsland Mail Centre VIC 3841.

Or lodge the form electronically by visiting the ASIC website
www.asic.gov.au

For help or more information
Telephone 1300 300 630
Email info.enquiries@asic.gov.au
Web www.asic.gov.au

ASIC Form 484 Reference: 6 September 2007 Trace: 00447 Cover page

A BGL SmartSign Digital Certificate will be appended at the end of all digitally signed documents.


BGL SmartSign Digital Signature Certificate

This signature page provides a record of the online activity executing this document.

Document Name: sup111109142233.pdf

Document ID: a72b4b59-2e8a-4016-8c31-ccc80352acb6

Signatories Required and Confirmed

The following people have consented to digitally sign this document with BGL SmartSign, in which a BGL SmartSign digital signature will replace the need for a written signature.

1. JOHN JONES

Director

Verified Email address:jonjonestest@gmail.com

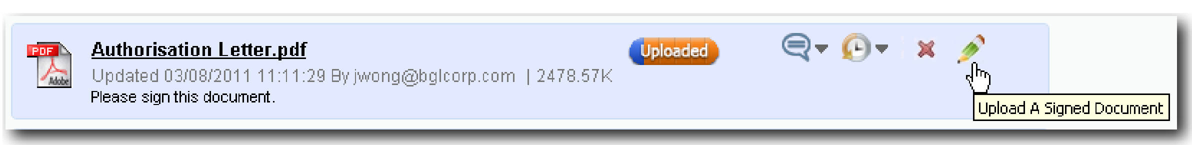
Verified Mobile Telephone:61404123456

IP Address: 192.168.0.236

Timestamp	Audit
09/11/2011 14:22:57 +1100	Document requiring a Signature, ASIC FORM 484B - CHANGE TO COMPANY DETAILS - OFFICERS - JOHN JONES for BGL PORTAL PTY LTD has been uploaded by Portal Admin.
09/11/2011 16:14:37 +1100	Document ASIC FORM 484B - CHANGE TO COMPANY DETAILS - OFFICERS - JOHN JONES for BGL PORTAL PTY LTD has been viewed by JOHN JONES.
09/11/2011 16:34:49 +1100	Document ASIC FORM 484B - CHANGE TO COMPANY DETAILS - OFFICERS - JOHN JONES for BGL PORTAL PTY LTD has been signed by JOHN JONES.

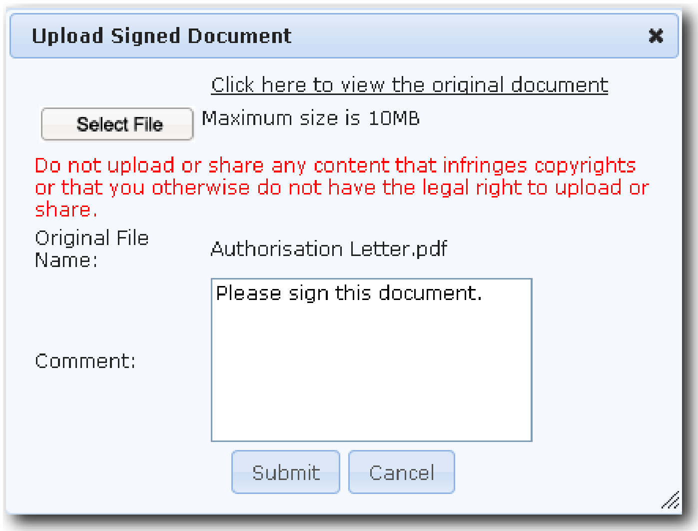
Manually sign a document

A document, that has been uploaded through Portal and requires signing, currently needs to be downloaded, signed and uploaded back to Portal. If you hover your mouse on the **Sign** icon, a bubble hint with ***Upload a Signed Document*** will appear.

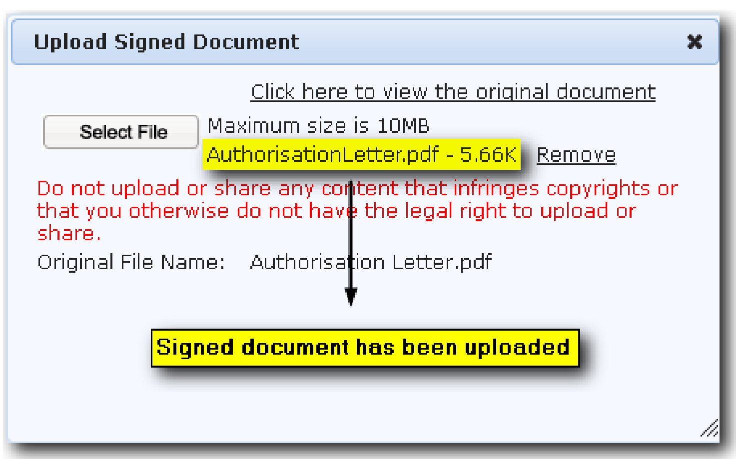


Download the document and after you have viewed it, click the **Sign** icon.

The following screen will show:



Select File	The signed document can be uploaded by clicking this icon
Progress	The progress bar will indicate when the upload process is complete after you click **Submit**.
Comment	A note can be added here on the uploaded signed document.
Submit	Click on this button to upload the signed document and save the details entered in.



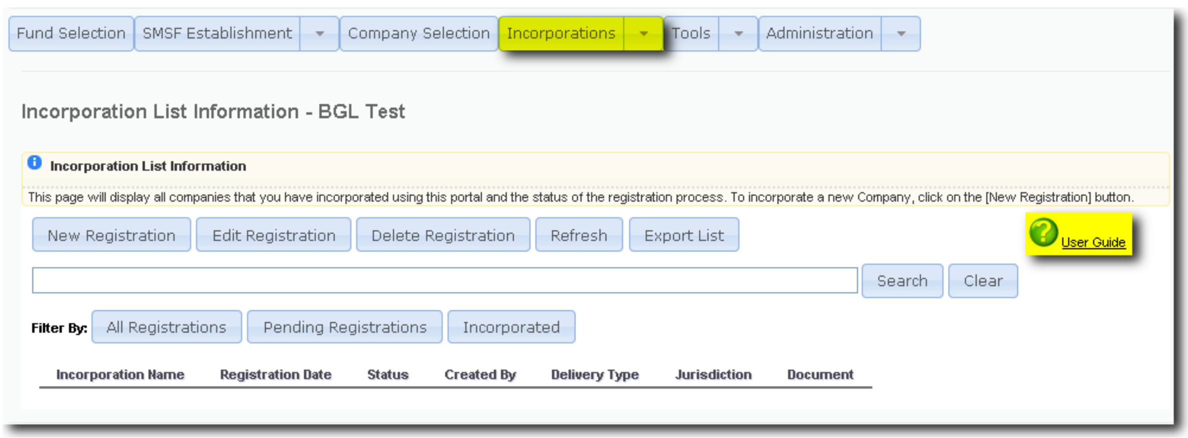
After a signed document has been uploaded, the status of the document will change to **Signed**.

11. Portal - Incorporations

11.1 Completing the Incorporation Data entry on Portal

The **Incorporations** tab provides Portal users with the ability to input details of a new company, which can then be sent from Portal to a Registered Agent using CAS to prepare the necessary Incorporation Documents.

For a list of companies that you have incorporated, click on **Incorporations**.



For a Detailed User Guide click on the User Guide link from the tab highlighted in the image above.

Click **New Registration** or **Edit Registration** to bring up the Incorporation Wizard. This will open a new window or tab (depending on your browser).

If a new tab or window will not open when clicking on New, check that your web browser allows for pop ups.

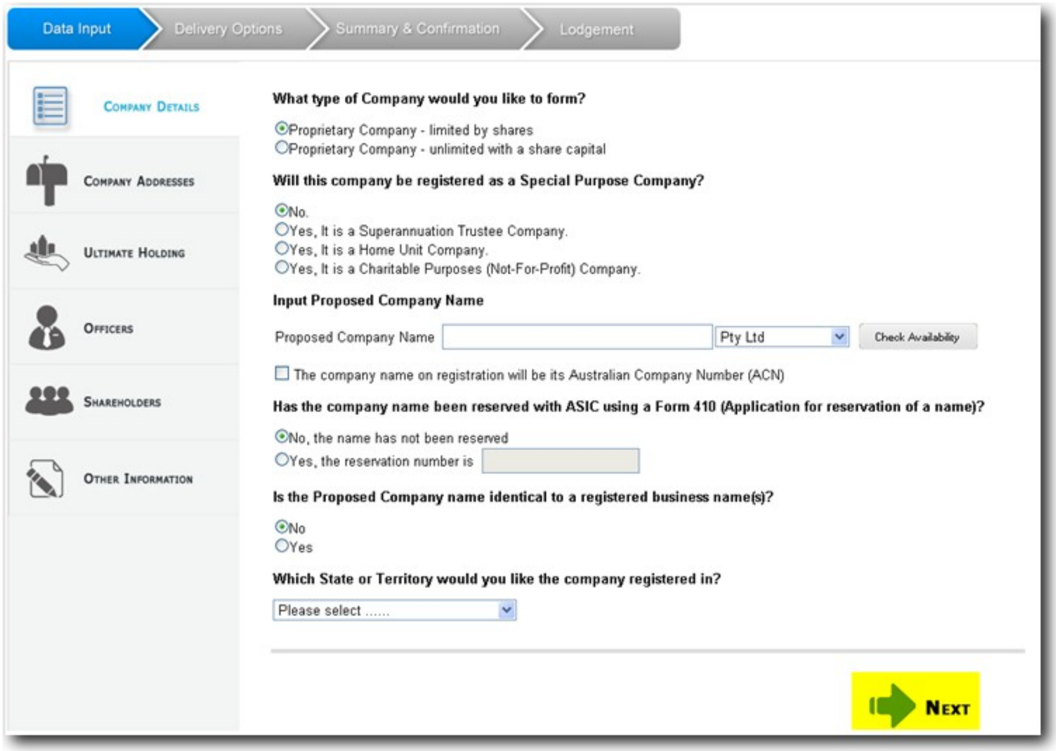
Note: Completed registrations that have been sent for lodgement, **cannot** be edited or deleted.

There are six sections, which will need to be completed, before forwarding the information to the Registered Agent.

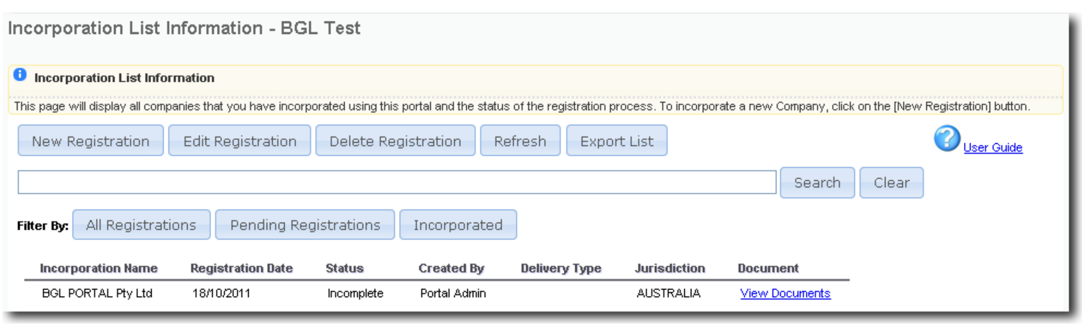
These are:

- Company Details
- Company Addresses
- Ultimate Holding Company

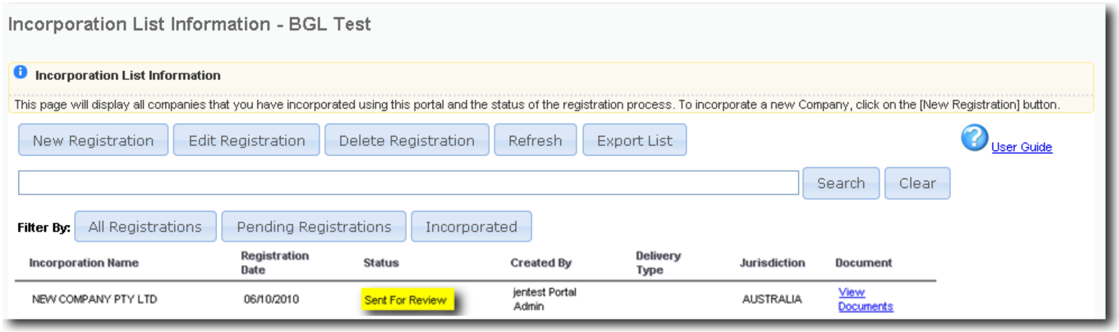
- Officers
- Shareholders
- Other information (e.g. how the company is going to be governed)



Data is saved when **Next** is selected. The **Next** button is located at the bottom of the **Incorporations** tab. The **Status** of that company will show as **Incomplete** if the company was not sent to the ASIC agent.



If you have completed all the six sections and the data has been sent to the ASIC agent for review, the **Status** will show as **Sent for Review**. An email will be sent to the Admin Account every time an incorporation is processed and the new company is sent to **CAS**.



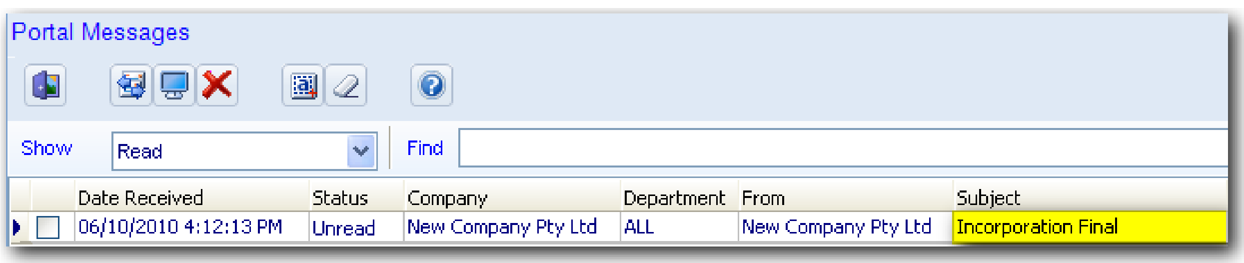
Current incorporation statuses are as follows:

Status	***Meaning***
Incomplete	*Data entry has not been completed.*
Sent For Review	*Data has been sent to ASIC Agent for review and Lodgement.*
Prepared for Lodgement	*ASIC Agent has reviewed Company Data and lodged to ASIC.*
Accepted by ASIC	*Certificate of Incorporation has been received by ASIC.*
Rejected by ASIC	*Lodgement has not been accepted by ASIC.*

11.2 Preparing the Company for Incorporation in CAS

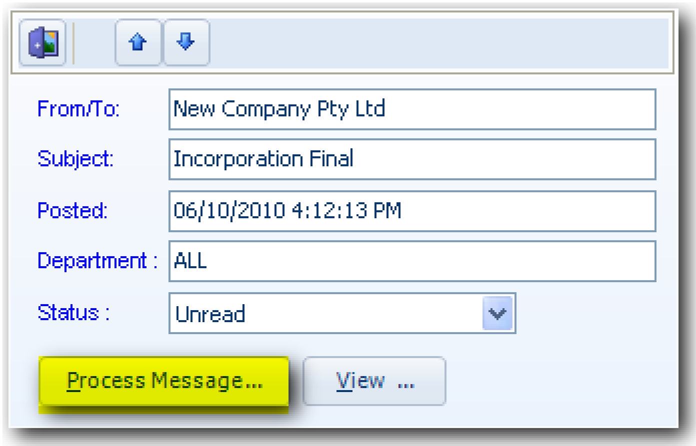
Once a completed incorporation has been sent from Portal to CAS, the Agent will receive a Portal Message in **CAS** with the subject **Incorporation Final**.

To read the notification sent to CAS, select **Portal Messages** located on the **Portal** tab.

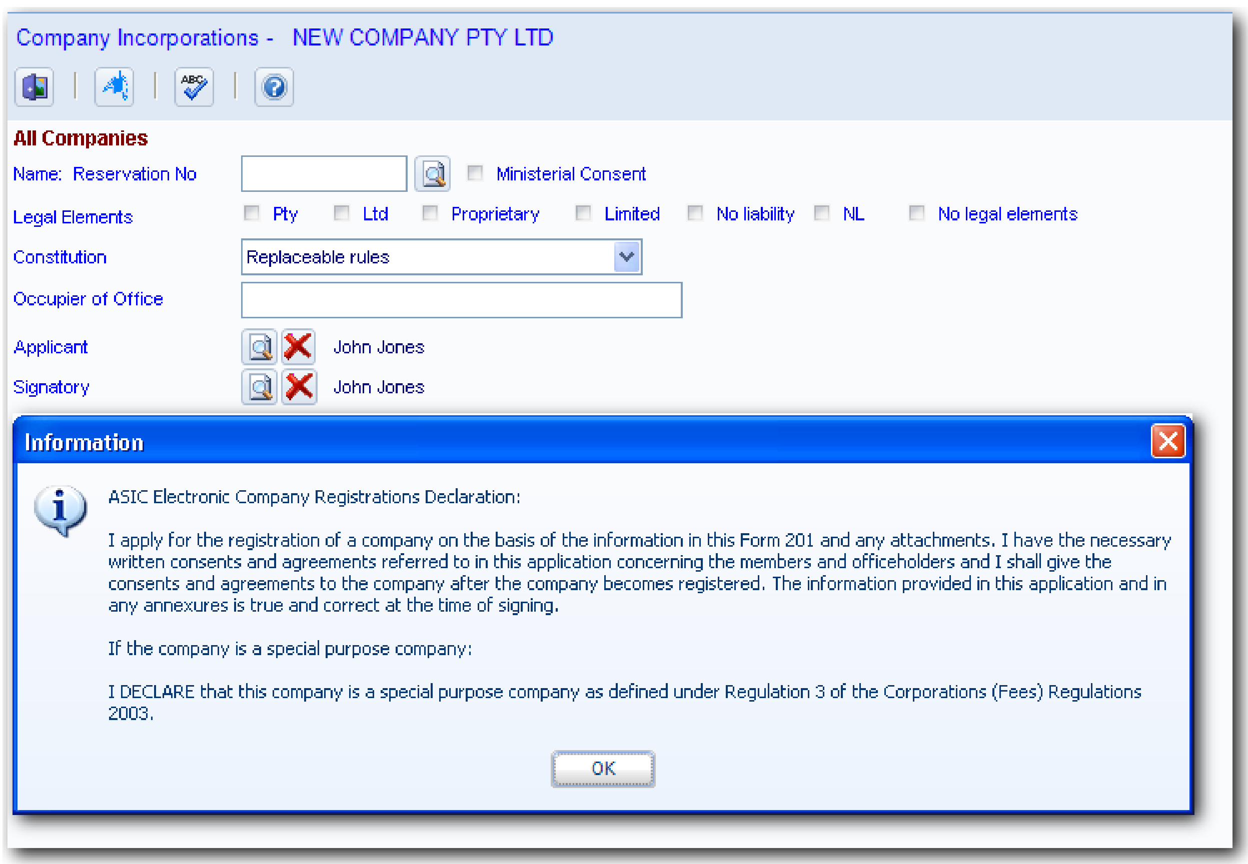


By double-clicking on the portal message you will have two options on how to process the message:

(i) By selecting **View**, **CAS** will produce a summary to screen of the company. Once you have reviewed the report if you wish to import the company and start the incorporation process, click **Process Message…**

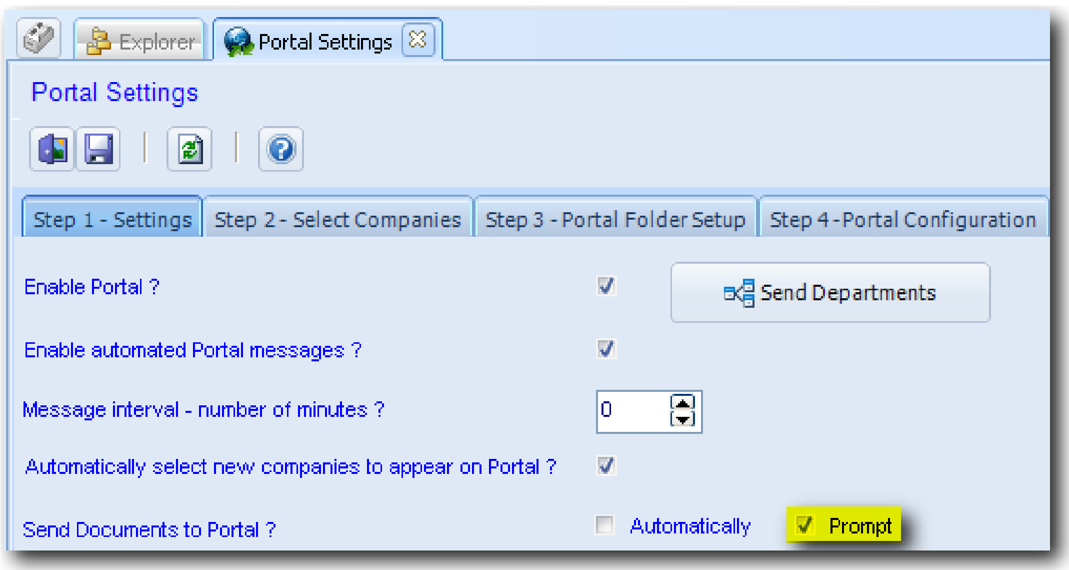


(ii) By selecting **Process Message…**, CAS will take the Agent to the Company Incorporations screen and the ASIC Electronic Company Registrations Declaration will appear:

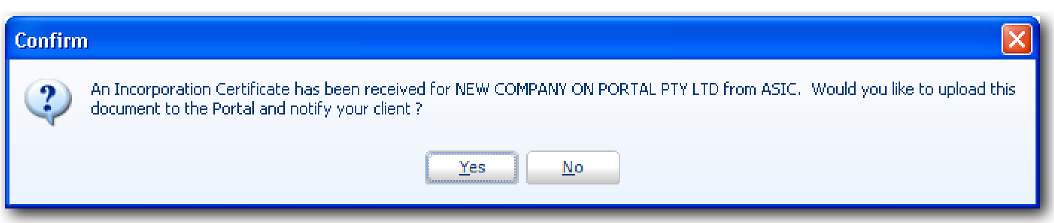


Clicking **OK** will prepare the Form 201 and will also send any documents prepared to Portal. These documents will appear in the **Documents** tab for the incorporated company. Once the Form 201 has been prepared CAS will then load the **Electronic Document Selection** screen where the Form 201 will need to be selected and lodged to ASIC.

Form 201 accepted by ASIC



Under the **Portal Settings** tab if you have **Prompt** selected for send documents to portal, then after the lodgement of Form 201, **CAS** will display the following message:



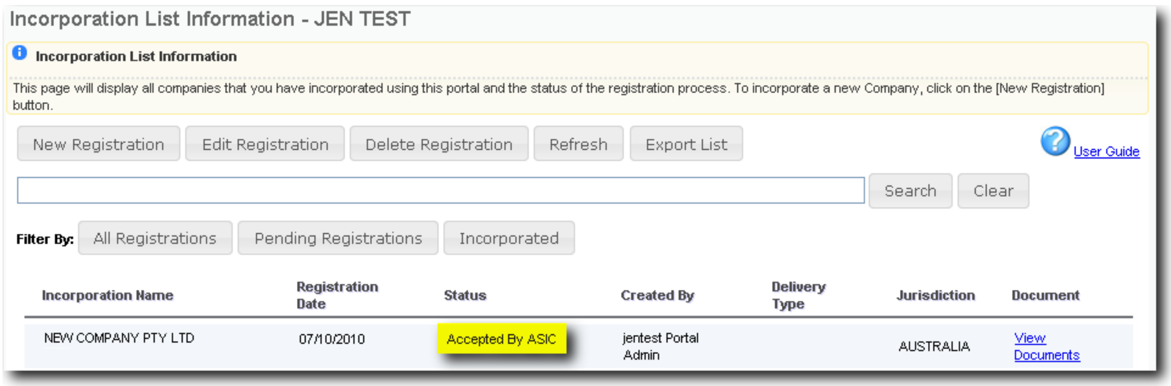
Clicking **Yes** will send the Incorporation Certificate to Portal and a notification email to the portal client.

Clicking **No** will not upload the Incorporation Certificate to Portal and the portal client will not receive a notification email.

If **Automatic** is selected under **Portal Settings** for **Send Documents to Portal?** then **CAS** will send the Incorporation Certificate to Portal and send a notification email to the portal client.

.

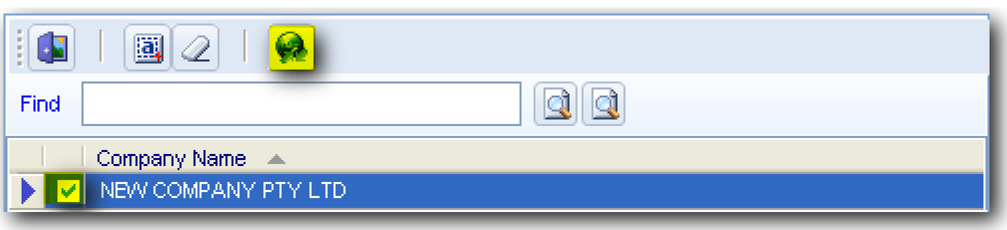
The status in Portal will change to **Accepted By ASIC**.



To make the company appear under **Company Selection** tab in Portal, the company will need to be updated.

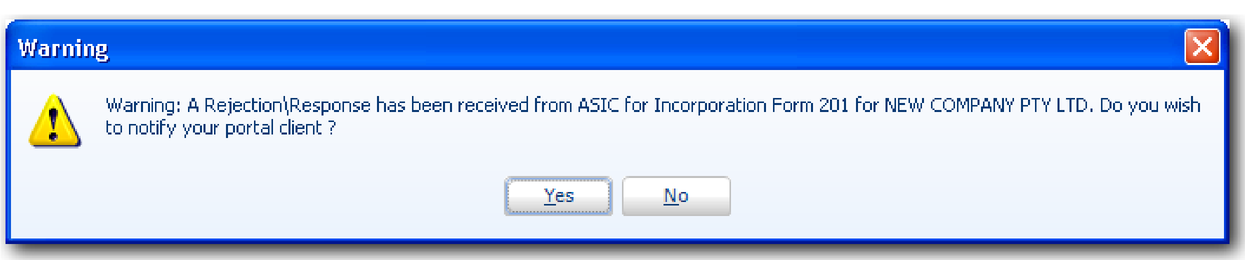
To update a company from **CAS** navigate to the **Company Selection** screen and click on the **Portal** icon from the toolbar.

You can then select the companies you wish to update on Portal by ticking the box on the left hand side and clicking .



Form 201 rejected by ASIC

After Form 201 has been lodged but rejected by ASIC, the following message will appear:



Clicking **Yes** will send a notification email to the portal client that Form 201 has been rejected.

Clicking **No** will not send any notification to the portal client.

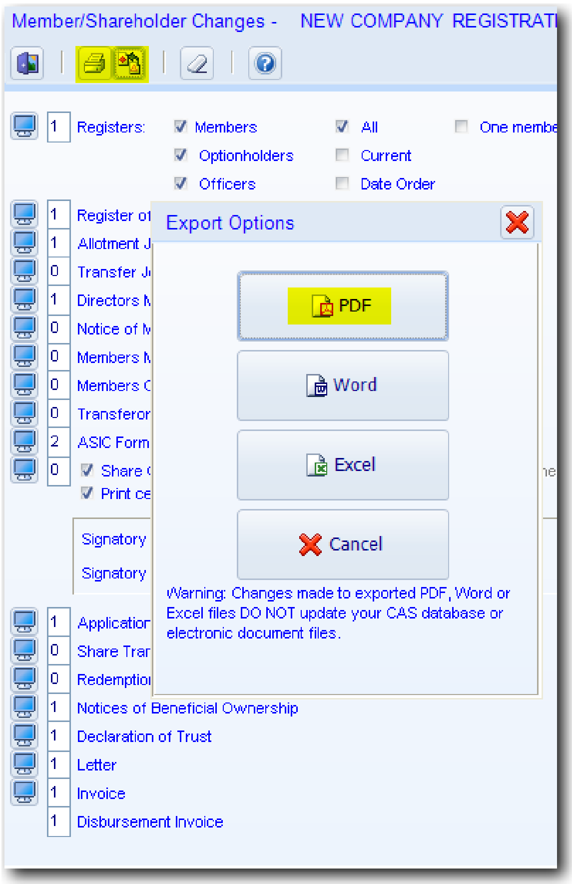
The status in Portal will change to **Rejected by ASIC**.

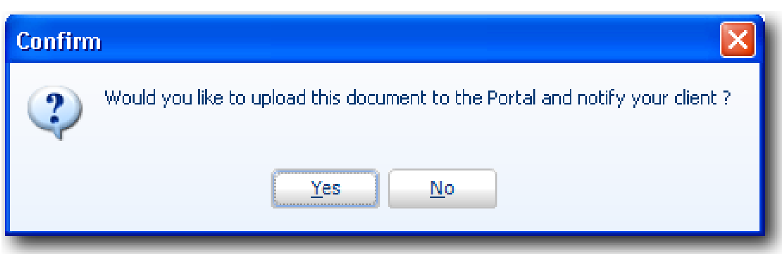
If **Automatic** is selected under **Portal Settings** for **Send Documents to Portal?** then CAS will send a notification email to the portal client that Form 201 has been rejected and change the status to **Rejected by ASIC**.

12. CAS - Forms and Documents

12.1 Pushing CAS Documents to Portal

CAS has the ability to export the selected document(s) from the print/export/validation screen directly onto Portal. For Portal enabled companies, clicking on the export or print icon will validate the document and give you the option to send it directly to Portal, ready for your clients to view.



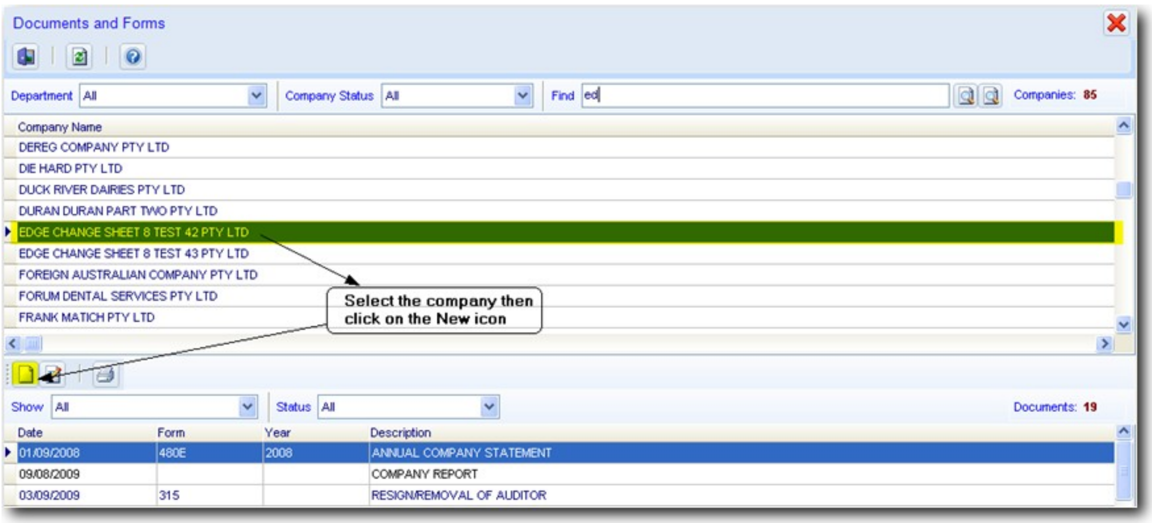


The reports will automatically be saved in the **Document Management** and **All Documents and Forms** screens. These screens and the messaging system will allow you to know at any given time whether your Portal client has viewed or printed the Reports and Forms without having to leave CAS.

12.2 Pushing Non CAS Documents to Portal

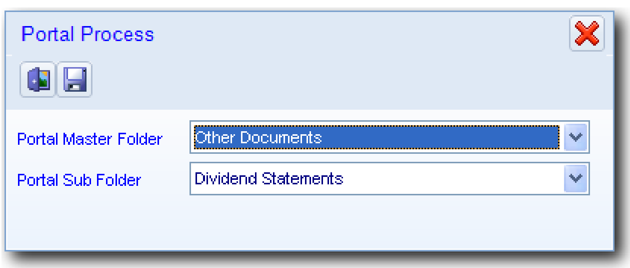
Any document such as a dividend statement, invoice or letter can be securely pushed to Portal ready for your client to view and print. The **All Documents and Forms** screen can be accessed from the **Ribbon Toolbar,** under the **Home** tab.

In this screen, you can select the company for which to push the document up for and then click ***New***.



You will then need to select the file from your computer/server and complete the remaining details. Once this is done, click on the Portal button.

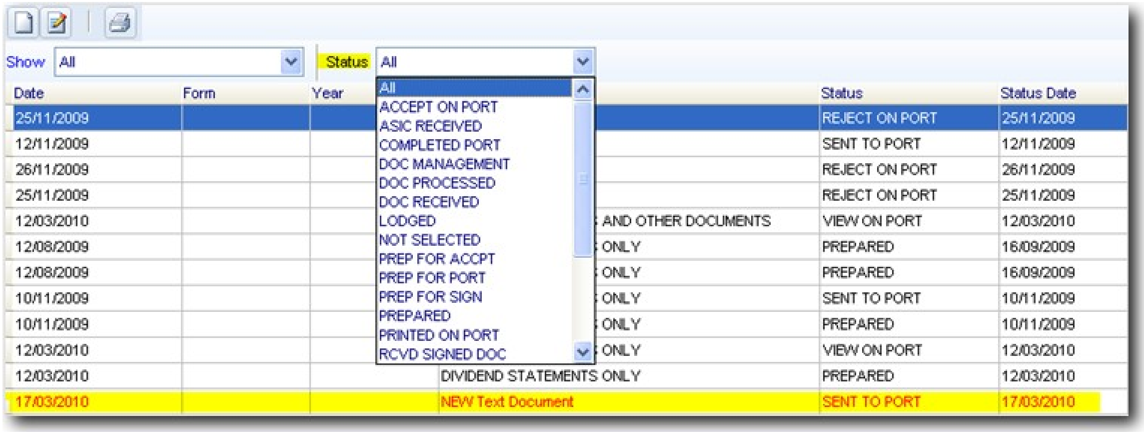
The final step is to select the Folder on Portal in which you want the document to appear and then click **Yes** to push the document.



12.3 Checking Document Status

To check the status of a document which has been uploaded from CAS to Portal, click **Documents and Forms** on the **Home** tab.

From the **Documents and Forms** screen you will be able to check if a document has been successfully uploaded on Portal or if the client has actually viewed the uploaded documents.



13. Portal Log in on your website

You are given a URL of a generic log in page which you can provide to your clients to log in.

You can also redirect users to this site from a link on your website.

Alternatively you can use a standard HTML Form login

The following example shows the basic codes required to add the form into a HTML Page.

```
<html>
<body>
<form name="form_login" method="post" action="https://bglportal.com.au/login_check">
Username: <input name="j_username" type="text" class="edits"/><br>
Password: <input name="j_password" type="password" class="edits"/><br>
<input type="hidden" name="firm" value="Your Firm Short Name"><br>
<input type="hidden" name="returnurl" value="http://your return URL"><br>
<input name="btn_submit" type="submit" value="Sign in"><br>
```

```
<a href="https://bglportal.com.au/login/resetpassword.html?firm=Your Firm Short
Name">Forgot Password</a><br>
</form>
</body>
</html>
```

Example 1 - Firm Theme (Add this HTML file to your own web site)

Replace **Your Firm Short Name** with your firm’s short name URL e.g. If your URL given was https://bglportal.com.au/login/abc/ then your short name would be **‘abc’**
The **returnurl** parameter must start with "http://" or "https://". This parameter is the web page that Portal returns the user to when the click log out.

```
<html>
<body>
<form name="form_login" method="post" action="https://bglportal.com.au/login_check">
Username: <input name="j_username" type="text" class="edits"/><br>
Password: <input name="j_password" type="password" class="edits"/><br>
<input type="hidden" name="firm" value="Your Firm Short Name"><br>
<input type="hidden" name="depart" value="Your Department Code"><br>
<input type="hidden" name="returnurl" value="http://your return URL"><br>
<input name="btn_submit" type="submit" value="Sign in"><br>
<a href="https://bglportal.com.au/login/resetpassword.html?firm=Your Firm Short
Name">Forgot Password</a><br>
</form>
</body>
</html>
```

Example 2 - Firm and Department Themes Replace **Your Firm Short Name** with your firm’s short name URL e.g. If your URL given was https://bglportal.com.au/login/**abc**/ then your short name would be **‘abc’** Replace **Your Department Code** with the Department Code of the Department e.g. OUTSOURCE

The **returnurl** parameter must start with "http://" or "https://". This parameter is the web page that Portal returns the user to when the click log out.

14. Data Connector Installation Instructions

DO NOT install the Data Connector:

- **If you have not purchased Portal by BGL or have not registered for the 30 Day Free Trial of Portal,**
- **Until you have installed the latest Versions of CAS and Simple Fund.**

Please read these instructions in full before installing the Data Connector.

Overview of Portal by BGL

Portal is a web based data access and client collaboration tool that is fully integrated with your CAS and Simple Fund software.

The Data Connector is the software that facilitates the communication with Portal by BGL. The Data Connector is installed on your server and automatically delivers documents to your clients via the web and reminds your client to process documents. It also informs you when your client has processed the document and automatically updates your BGL software document tracking and management systems for all stages of document processing.

These instructions explain how to install the BGL Data Connector.

Click the below link to find out more information about Portal

http://www.bglcorp.com.au/products/other/portal/

Part 1: Before Installation

1.1 Ensure your CAS and Simple Fund software have been updated to the latest release.

1.2 Obtain you Portal Username, Password and URL from BGL.

1.3 The Data Connector must be installed on the same server and Local drive as your CAS or Simple Fund software. You will need to log in as Administrator to the server to install the data connector. Ensure you have the Administrator user name and password.

1.4 DO NOT install the Data Connector on a mapped network drive.

1.5 DO NOT install the Data Connector more than once on your network.

1.6 If you use Terminal Services to access your CAS or Simple Fund software, the Data Connector must be installed on the file server NOT the terminal server.

1.7 Install the Data Connector on the same local drive as the NexusDB Server Service. If you have installed the NexusDB Server Service into C:\Program Files\Nexus then the Data Connector should also be setup on the same local drive e.g. C:\Program Files\Data Connector.

1.8 Check that the Nexus DB Server Service is running before proceeding with the installation of the Data Connector.

If you are unsure of any of any of the items or receive an error at any stage during the installation process, please contact BGL Support on 1300 654 401.

Part 2: New Installation of Data Connector

2.1 Log on to your Server Console where Nexus (database that runs CAS and Simple Fund) is installed. The Data connector will not install correctly if installed on a workstation.

2.2 Log in to the BGL Client Centre. http://clients.bglcorp.com.au/ You will need your BGL Client Centre Username and Password.

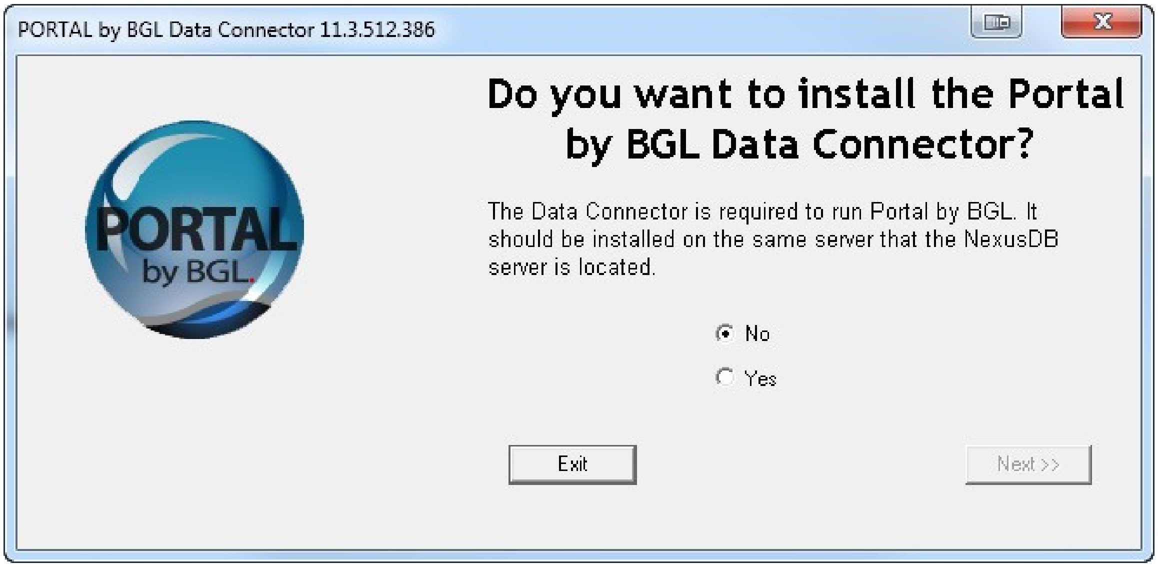
2.3 Select the **Software Downloads** then **Portal Downloads**.

2.4 Download the BGLPortalDataConnector.exe file from the website to a TEMP directory on your Server.

2.5 Run the BGLPortalDataConnector.exe file

2.6 The BGL Data Connector installer will then open.

Click **Yes** then click **Next >>**

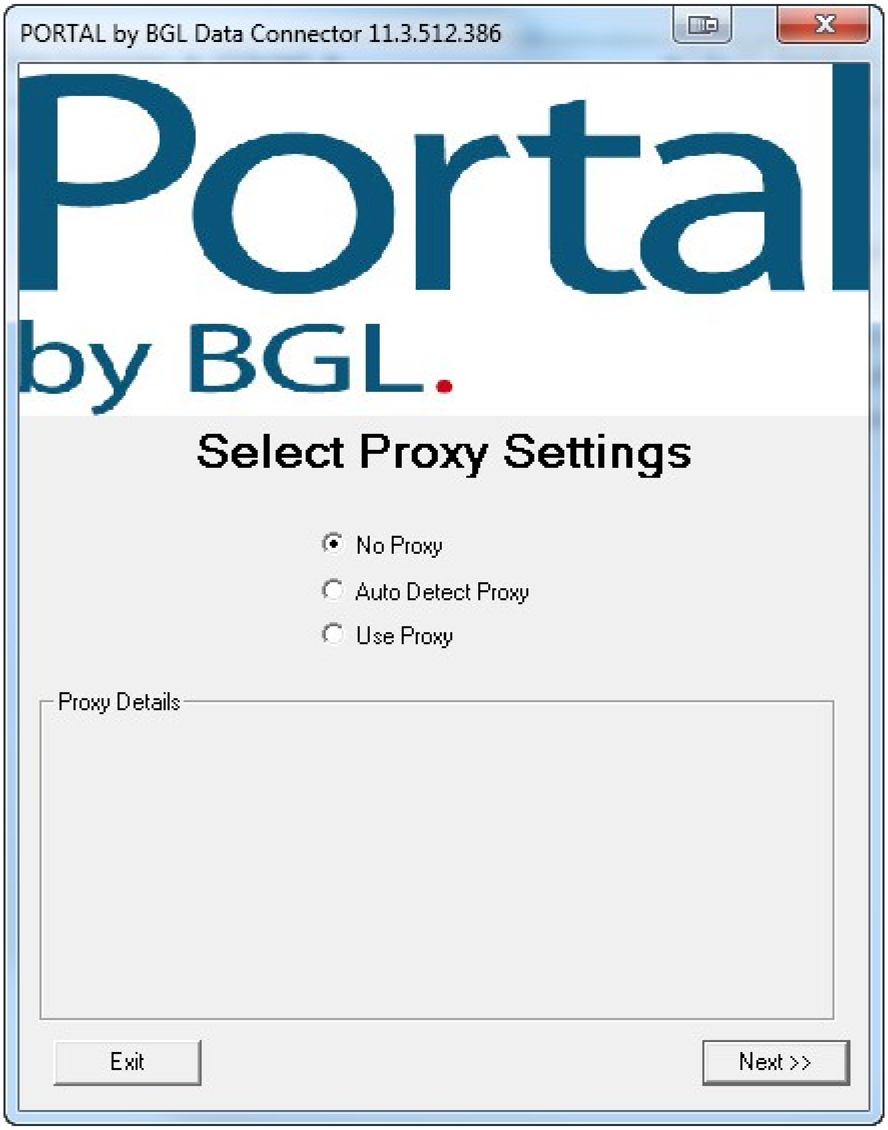


2.7 The installer will look for the root directory location for your CAS and Simple Fund software. If the installer does not detect the location or the location is not correct, manually select the correct locations by clicking on Browse. For Simple Fund browse to your **SFUND** folder and for CAS browse to your **CASWIN** folder.

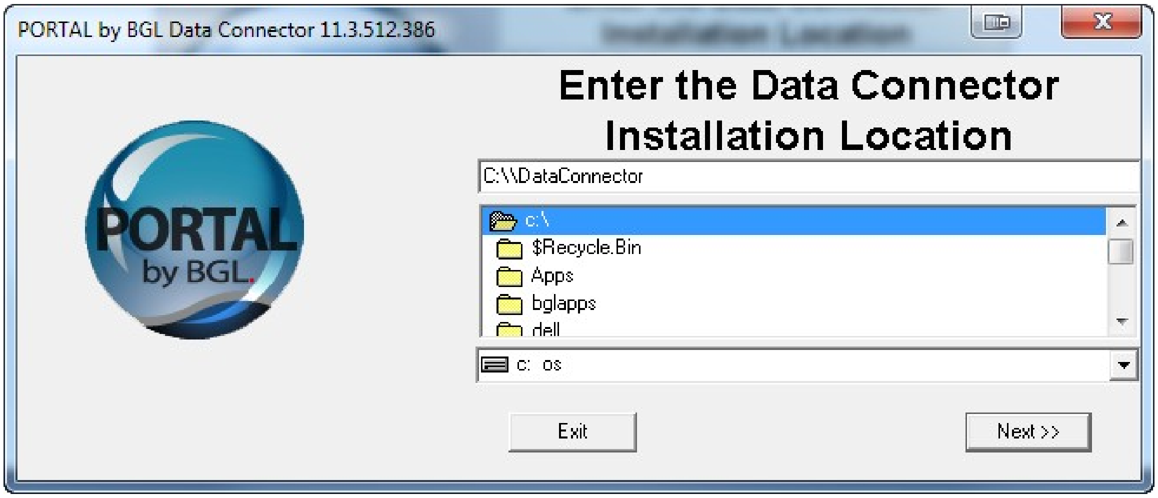
Select the applications (CAS, Simple Fund or both) that are to use the Data Connector and then click **Next >>**.


PORTAL by BGL Data Connector 11.3.512.386
Portal
by BGL.
BGL Product Location(s)
Please confirm product location(s) below.
If locations are correct click Next >>.
If locations are not correct, click Browse and select the correct product location, then click Next >>.
Simple Fund Program Location
C:\BGLAPPS\SFUND
Browse
CAS Program Location
C:\BGLAPPS\CASWIN
Browse
Simple Fund
CAS
Simple Fund and CAS
Exit
Next >>

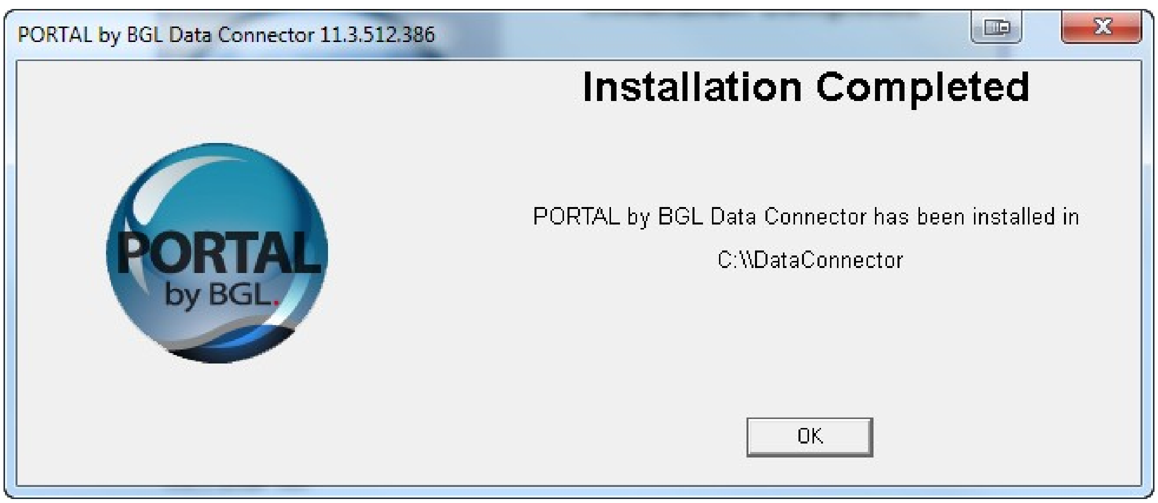
2.8 The installer will now determine if proxy Settings are applicable to your installation. If you are not using a Proxy Server click **No Proxy** and **Next>>**. However if you are running a Proxy Server and would like the installation to Auto Detect your settings please select **Auto Detect Proxy** and **Next>>**.



2.9 Select the location to install the Data Connector. Click **Next >>**. BGL recommends you accept the default location. However, if the location is changed, ensure the location is on the same local drive as the Nexus Server.



2.10 When the installation is complete, the message below is displayed. Click **OK**.

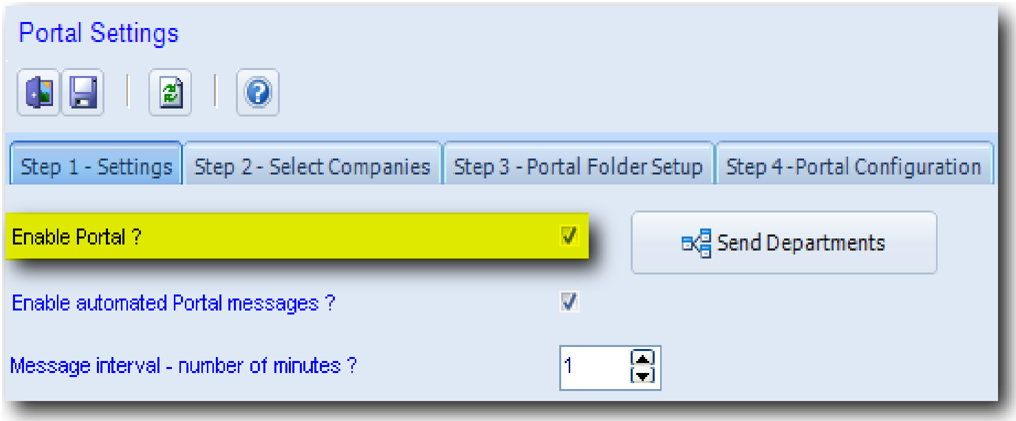


2.11 Start CAS or Simple Fund and log in to your program with a Supervisor user account.

2.12 CAS: log into CAS and select **Portal Settings** from the **Portal** group on the **Porta**l tab.

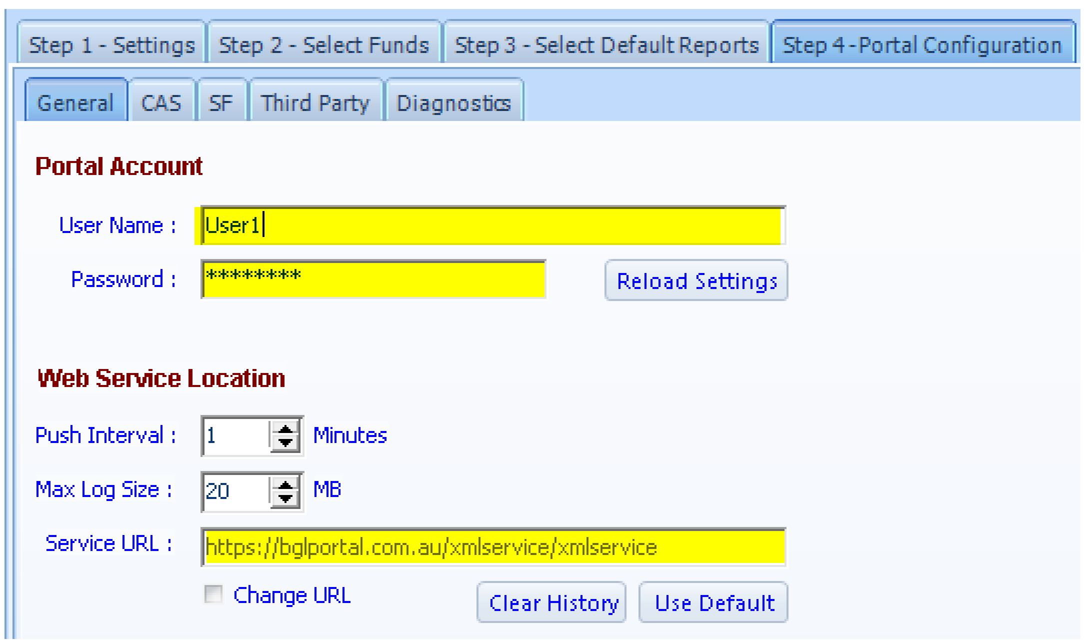
2.13 Simple Fund: Log into Simple Fund and select **Portal Settings** from the **Portal** group on the **Help and Web Access** tab.

2.14 On the **Step 1 – Settings** tab, select the *Enable Portal?* check box.



2.15 Select **Step 4 – Portal Configuration** tab.

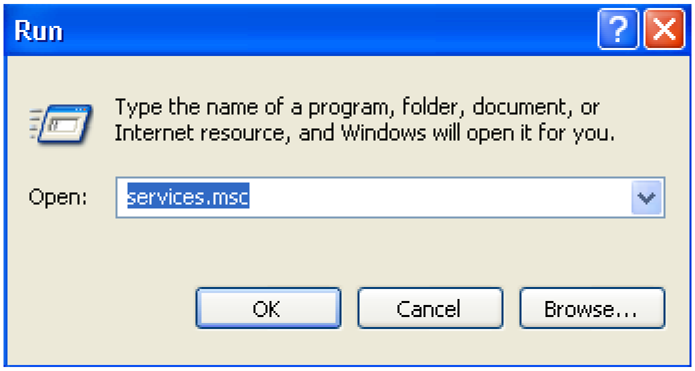
2.16 Input your Portal Username and password provided by BGL.
DO NOT change the Portal URL otherwise your service will not work.



2.17 Click ***Save***.

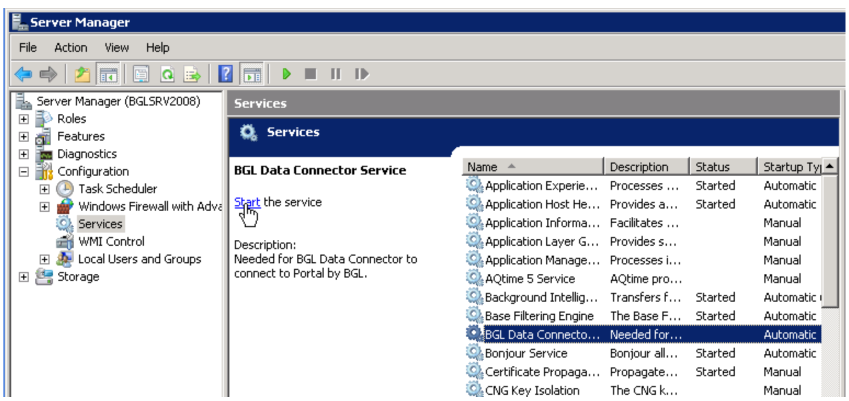
2.18 Next, start the Data Connector service from the Server Manager on your server.

To open the Server Manager click on Windows start ⇒ Select RUN ⇒Type "Services.msc" and OK.



In the list of services locate the BGL Data Connector right click and start the service.

***Note**: When the server restarts, these services will start automatically.*



Congratulations. Your Data Connector should now be successfully installed and your BGL application(s) is ready to communicate with Portal.

If no data is being sent to Portal please refer to BGL Wiki article 5249 located at http://wiki.bglcorp.com.au/KB:Portal_Data_Connector_-_No_data_being_sent_to_Portal_or_connection_issues

Please read the Portal User Guide for more information on how to get started with Portal by BGL.

Part 3: Updating the BGL Data Connector

The Data Connector will automatically update in most cases. In certain circumstances we will get you to run the Installer again which will update the exes.

Please note: If you are a Simple Fund client and run the latest Simple Fund update version 2010.1.1, this process will automatically update your Data Connector to the latest release. If you have not run the latest update of Simple Fund or you use CAS please follow the steps below to update your Data Connector to the latest release.

3.1 Log into your Server Console where Nexus and the BGL data connector are installed as an Administrator.
If you have the data Connector running as an Application you will need to close the application.

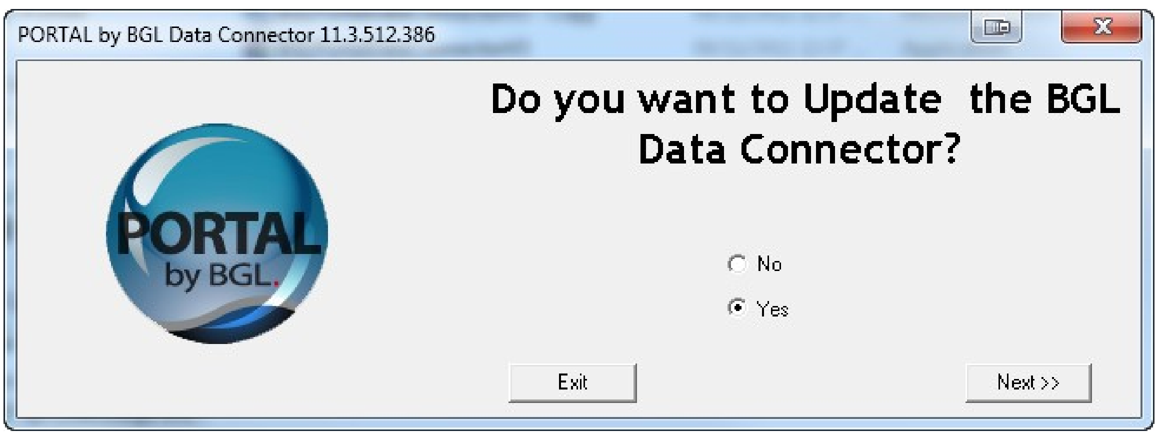
3.2 Log into the BGL Client Centre - http://clients.bglcorp.com.au/. You will need your BGL Client Centre Username and Password.

3.3 Select the **Software Downloads** then **Portal Downloads**.

3.4 Download the BGLPortalDataConnector.exe file from the website to a TEMP directory on your Server.

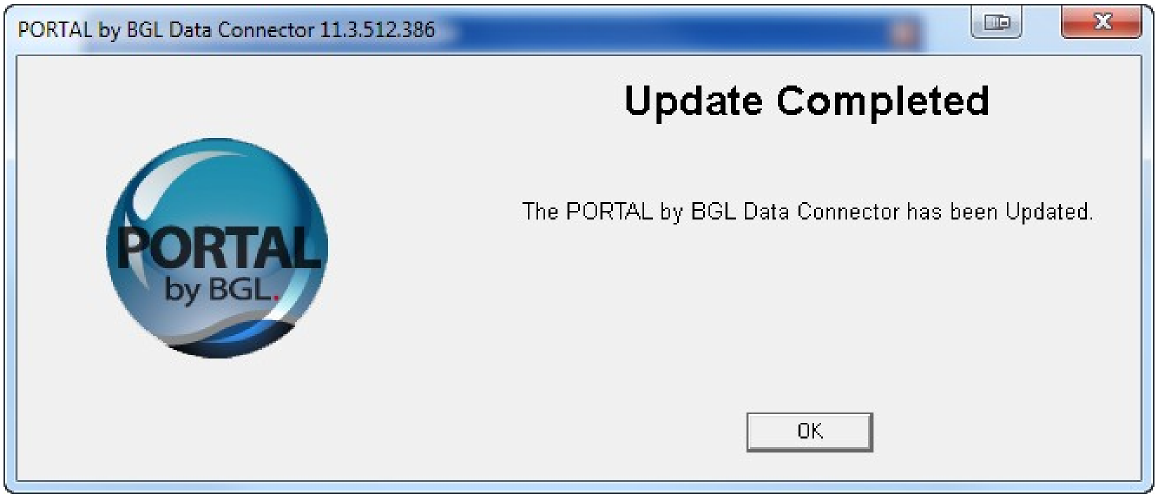
3.5 Run the BGLPortalDataConnector.exe file

The BGL Data Connector installer will then open.



3.6 Click **Yes** then click **Next >>**.

3.7 The installer will now update your Data Connector to the latest release. Once complete click **OK**.


PORTAL by BGL Data Connector 11.3.512.386
Update Completed
PORTAL
by BGL.
The PORTAL by BGL Data Connector has been Updated.
OK

Part 4: System Administrator Information

4.1 Problem: NO Data is being sent to Portal?

Please refer to BGL Wiki article 5249 located at
http://wiki.bglcorp.com.au/KB:Portal_Data_Connector_-_No_data_being_sent_to_Portal_or_connection_issues

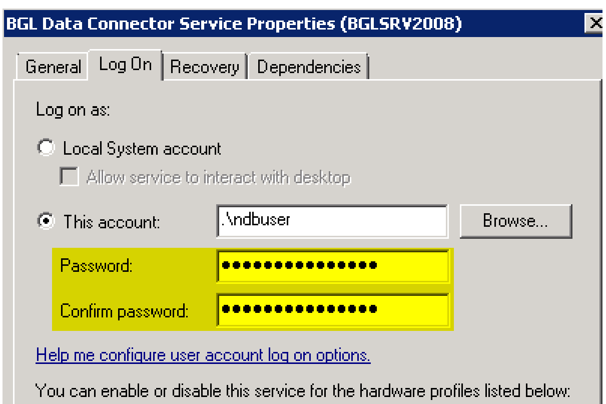
4.2 What is installed?

The following takes places during the installation process for the Data Connector.

1. The Data Connector Program file and database files are installed to the directory specified.

2. The installation creates an alias for the Data Connector in the Nexus Database.

3. The Data Connector is added to Windows Services. The Data Connector uses the user name **.\ndbuser** to log in. If you have changed the password for this account, you will need to add the new password to the service properties.



4. The location of the Data Connector is added to the Windows Registry under HKEY_LOCAL_MACHINE\SOFTWARE\Nexus

4.3 Optional Settings:

There are three optional settings System Administrators can use to configure the Data Connector. These settings are found in the setup.cfg file located in the Data Connector program folder.

Option 1 - Service Mode Re-launch

Clients who use Simple Fund with Portal and wish to use the live report request function need to run Simple Fund as a Service Application. It is possible to change the service mode frequency which determines how often this services restarts.

To change this setting, add the following line to set up.cfg file found in the Data Connector directory.

Service Mode Interval=180

The default setting is 180 **minutes**. A setting of 0 will disable the periodic re-launch of Simple Fund. Changing the Service Mode Interval to 0 is only recommended if the Simple Fund live report request function is not used in Portal.

Option 2 - Query Timeout

The Query Timeout setting determines how long the data connector will query the Nexus Database before timing out. If the Data Connector is unable to process database requests, then the Query Timeout should be increased. The DataConnector.log file found in the Data Connector directory will show any Query Timeout issues.

To change this setting, edit the following line in setup.cfg

Query Timeout=120

The default setting is 120 **seconds**.

Option 3 - Soap Timeout

The Soap Timeout determines how long the data connector will retry the web connection before timing out. If the Data Connector is failing to send or retrieve data from Portal, the Soap Timeout should be increased. The DataConnector.log file found in the Data Connector directory will show any Soap Timeout issues.

To change this setting, edit the following line in *setup.cfg* which is found in the Data Connector directory.

SOAP Timeout=600

The default setting is 600 **seconds**.

4.4 Proxy Server

If your Internet Connection uses a proxy server you need to add your Proxy settings to the **setup.cfg** file found in the Data Connector directory. You will need to add the following three lines:

Proxy=http://serveraddress:serverport
ProxyUser=username
ProxyPassword=password

e.g. Proxy=http://192.168.0.51:8080
ProxyUser=test
ProxyPassword=test01

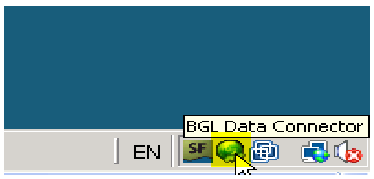
4.5 Debug Mode

The Data Connector can operate in Debug Mode. To start the Data Connector in Debug Mode, complete the following steps:

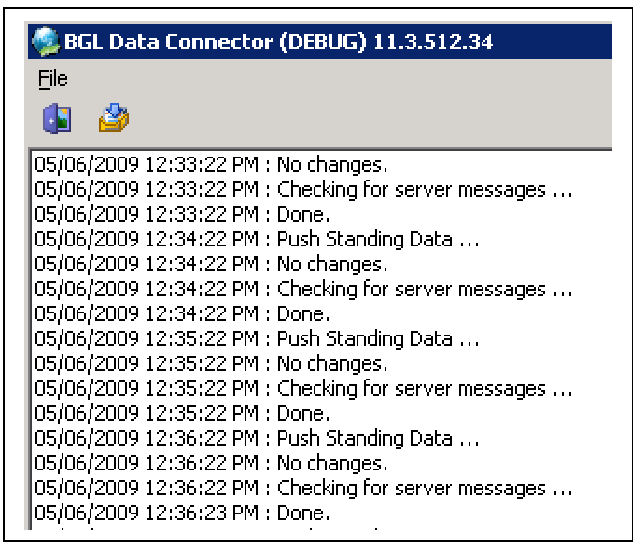
1. Stop the Data Connector service

2. Double click the DataConnector.exe file. This will run the Data Connector in application mode.

3. Double click the Data Connector icon in the System Tray.



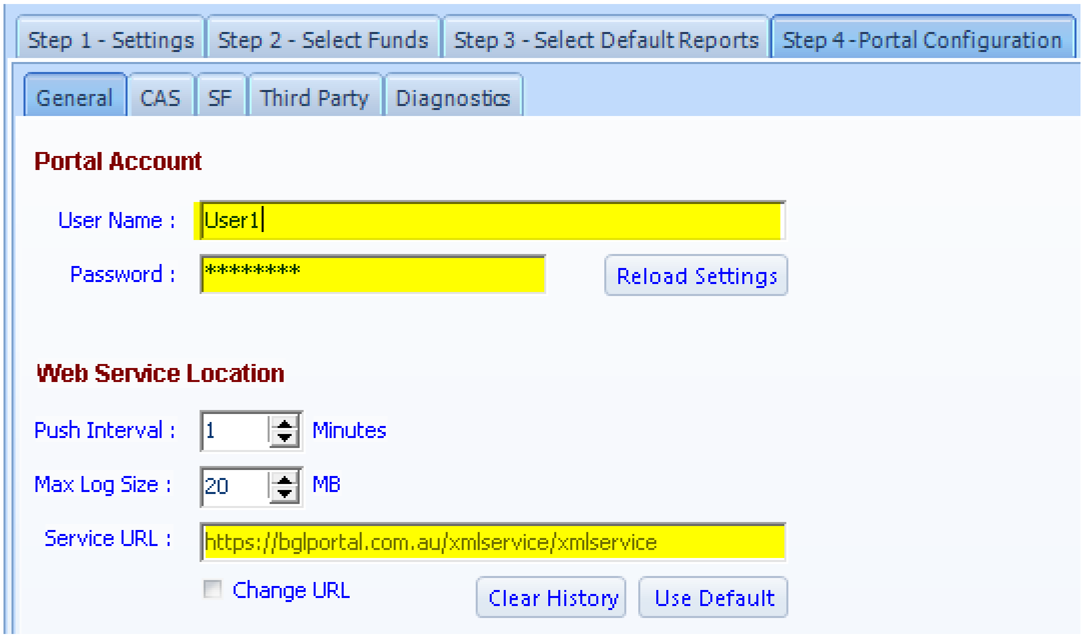
The Data Connector real time log will be displayed.



4.6 Changing Portal Configuration information

Usernames, passwords push interval, program (CAS and / or Simple Fund) locations, database aliases and other configuration information can be changed in the CAS and Simple Fund Portal Settings screens.

Important Note: If any changes are made to the **Portal Settings** or **Portal Configuration** screen in CAS or Simple Fund, the Data Connector must be restarted.



For further information on the installation process please refer to the Portal User Guides or contact BGL Support on 1300 654 401.