



NowInfinity to CAS 360 Guide

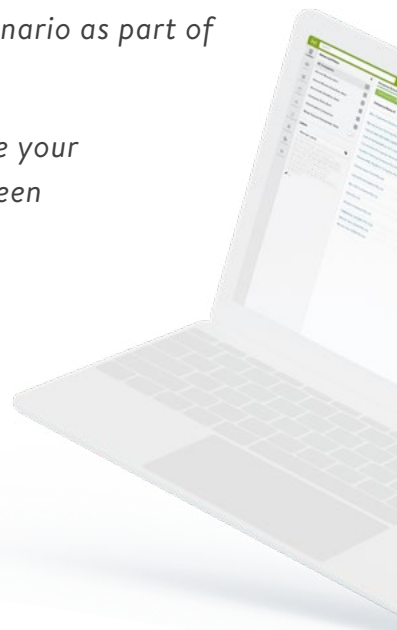
This guide is for users who are transitioning from NowInfinity to CAS 360.

There are 3 key processes which are listed in the table below. A more detailed explanation of how BGL can assist with each process is provided further on in the guide.

Item Number	Process
1	Companies
2	Historical documents
3	Trusts

NOTE: This guide is intended to act as general information only. Your dedicated Client Success consultant will be able to provide more specific guidance in relation to your scenario as part of your transition from NowInfinity to CAS 360.

We also recommend reviewing the CAS 360 Post Onboarding Guide to complete your transition from NowInfinity to CAS 360 once the processes in this guide have been completed.



Item 1. Companies

Companies are imported into CAS 360 using your existing ASIC EDGE credentials from NowInfinity. We highly recommend that before you move to CAS 360, that the following items are checked:

- all outstanding forms (where possible) have been lodged to ASIC
- all annual reviews received into NowInfinity have been processed and sent to the client

It is recommended to nominate a particular date for the EDGE details to be moved from NowInfinity to CAS 360. Once the EDGE details are input into CAS 360, they should be removed from NowInfinity to avoid ASIC sending any further annual reviews to NowInfinity.

Depending on the number of companies you are importing from ASIC, it may take 1-3 business days to successfully download and import all companies.

Your dedicated Client Success consultant can discuss this process with you and how BGL can assist with this process.

NOTE: Companies downloaded from ASIC do not contain historical information. ASIC will only send through current information for your companies.

NOTE 2: Please note that any reminders/automatic notifications for annual reviews, debt payments etc that may have been set up in NowInfinity will not be transferred to CAS 360. You can utilise the CAS 360 Alerts Feature to help stay on top of annual reviews, debt payments etc.

For more information on CAS 360 Alerts, please click [here](#).

Item 2. Historical Documents

As part of your transition from NowInfinity to CAS 360, we are able to assist with extracting documents from NowInfinity.

We will extract documents from the following NowInfinity screens:

1. Documents >> Completed Documents (Legal documents, company establishments)
2. Lodgements >> Completed Lodgements (ASIC Lodged forms)
3. Lodgements >> incomplete* (prepared but unlodged forms)
4. Companies screen >> Annual Reviews (solvency resolutions)

*incomplete documents are only extracted if they were created within the last 12 months

NOTE: When the historical documents are uploaded into CAS 360, they will generally be uploaded as a bulk document (instead of individual forms)

NOTE2: Any documents with the status as DRAFT cannot be extracted from NowInfinity.

Item 3. Trusts

Depending on where your trusts are currently administered will determine how we can assist to import them into CAS 360

A) Trusts are currently in NowInfinity*

Our conversions team can assist with extracting the relevant trust information from NowInfinity and this will then be imported by the CAS 360 Development Team. This import INCLUDES the following:

- Trust Documents (extracted from NowInfinity and uploaded to CAS 360 by our conversions team)
- Trust name and address (including both discretionary and unit trusts)
- Trustee
- Appointor
- Settlor
- Trust Beneficiaries (for discretionary trusts)

However, for UNIT TRUSTS, unitholder and beneficial owner information are excluded from the import. If you would like this information to be imported, there will be a cost associated with the extraction process.

Alternatively, we can provide instructions on how to extract the relevant trust information from NowInfinity.

***NOTE: Trusts that are incomplete in NowInfinity will not be included in the import into CAS 360.**

B) Trusts are currently outside of NowInfinity

If your trusts are currently administered outside of NowInfinity, your Client Success Specialist can provide you with a template spreadsheet that can be filled out with all the relevant trust information. Once completed, this spreadsheet will be used to import the trust information into CAS 360 for you.