Integration checklist

We have created this checklist to assist you for the integration process. Please ensure you take the time to understand the integration process and clarify any issues or questions you might have with our integration support specialist.

This will help to prevent any duplicate contacts when you initiate the integration.

Step 1: Understand the Integration Process

To help you understand our integration process, please refer to the following help articles:

Simple Fund 360 with CAS 360:
- See Simple Fund 360 and CAS 360 Contact Integration

CAS360 with Xero:
- See BGL and Xero Practice Manager (XPM) Integration

Simple Fund 360 with Xero:
- See Xero Practice Manager

CAS360 with Sage:
- See Sage Accountant Cloud Integration

Simple Fund 360 with Sage:
- See Sage Integration

Step 2: Get your databases ready

To ensure all the contacts data are free of duplicate records. Please refer to the following individual product approach to achieve it:

CAS 360	Simple Fund 360	External Platform
• Review the Contact Type "other entity" to ensure they are updated to the sub-type entity that you wish to integrate them. • Please use Find Matches Screen to check the following: ➢ Review contacts with the same name and address ➢ Review contacts with the same name	Export Contact Report ➢ Select from Settings Contacts ➢ Admin Access required to export report ➢ Review contacts with the same name using Excel Duplicate Values Function	Refer to the help article specific to the platform you are integrating with ➢ Xero Practice Manager ➢ Sage Accountant Cloud

Step 3: Any Questions or Ready to Initiate the Integration?

Once you have completed the above two steps and are ready to initiate the integration, please contact our BGL support and one of our support specialists will assist you further and organise a time to initiate the integration.

BGL support contact number AU: 1300 654 401 | NZ: 0800 444 408