



# HF:Getting Started Guide (CAS)

## Contents

### BGL Client Centre

The BGL Client Centre provides you with a direct connection to BGL. It is recommended that you register with the Client Centre as soon as you purchase the software.

At the Client Centre you can:

- view your details
- log a support call
- monitor the status of current support calls and mark them as resolved
- modify the problem of logged calls
- view the problem and resolution details of your past calls
- view the consultant allocated to solving your problem
- view BGL announcements
- view and pay subscription invoices
- register for training courses, user groups and update seminars
- register for BGL functions
- book a call-back time for your support calls
- access **BGL Wiki**
- access BGL Forum
- download PDF copies of Training Manuals
- provide feedback to BGL
- add or vote for enhancements to the software using the Wishlist system

### How to Register for the Client Centre

1. From an Internet browser, go to the following web address - <http://clients.bglcorp.com.au/>
2. Click on Register on the left menu.
3. Input the following information :
  - Administration Contact Email (previously provided to BGL)
  - Product ID
  - Username (create your own)
  - Password (create your own)

**Note:** For direct access to the BGL Client Centre from **CAS**, save your username and password in **Administration | Firm Details | BGL Client Centre**.

## Contacting BGL

BGL can be contacted via:

- Street Address : Suite 2, 606-608 Hawthorn Road, East Brighton VIC Australia 3187
- Phone:

Australia	+61 3 9530 6964 / 1300 654 401
Hong Kong	800 933 545
New Zealand	0800 444 488
Singapore	800 616 2148
UK	0800 028 3491

- Fax: +61 3 9530 6964

- Email:

info@bglcorp.com.au

training@bglcorp.com.au

sales@bglcorp.com.au

admin@bglcorp.com.au

clientrel@bglcorp.com.au

## BGL Support

You can receive assistance from BGL using the following methods:

### BGL Wiki

- **BGL Wiki** can be accessed from **CAS** by clicking on [Help](#) from **Quick Access Toolbar**. All BGL Help resources, including Help Files, Training Manuals, Knowledge Base Articles and Release History are online on **BGL Wiki**.
- Help Files within **CAS** can be accessed from any screen by clicking on [Help](#).

### Logging a Support Call

Click here to watch and learn how to raise a support ticket

1. Directly from **CAS** by clicking on [Help](#) from the **Quick Access Toolbar**. You must ensure your BGL Client Centre username and password has been saved in **Administration | Firm Details | BGL Client Centre**.

## Software Updates

To ensure **CAS** automatically advises you of all Updates, you must set up an Auto Update Notification within the software in **Administration | Defaults | Tasks/Help**.

All installation and updates must be completed on the server. You must first ensure you can access the program from the server before accessing it from a workstation.

Updates can be downloaded from the BGL Client Centre. Detailed instructions can also be accessed from the BGL Client Centre.

## Logging in to CAS

1. **CAS** must be installed on the server and networked to a workstation. You must first ensure you can access the program from the server before accessing it from a workstation
2. To log in to **CAS**:
  - a. Click **Start** | **All Programs** | **CAS** and select the **CAS** logo to log in to the program.

**OR**

b.

- Create a desktop shortcut on a workstation . Click on this shortcut to log into **CAS**.
3. Select **Supervisor** and click **OK**. There is no password for the Supervisor user.

**Note:** A password can be added to the Supervisor user after you have logged into **CAS**. Refer to the **Creating a new user** topic for more information.

## CAS Conventions

### Keyboard shortcuts

**CAS** uses standard windows shortcut keys:

Keyboard Shortcut	Use
<b>CTRL+C</b>	Copy
<b>CTRL+X</b>	Cut
<b>CTRL+V</b>	Paste

**CAS** has its own shortcut keys should you prefer to use the keyboard rather than the mouse. Some common shortcuts used throughout **CAS**:

Keyboard Shortcut	Use
<b>ALT+N</b>	Creates a new record
<b>ALT+E</b>	Edits the current record
<b>ALT+S</b>	post or saves the current data
<b>ALT+X</b>	exits the current screen without saving

All shortcut keys can be accessed when right clicking any record in any screen in **CAS**.

Alternatively, shortcut keys are referenced on each **CAS** button with an underlined character. For example, the Companies shortcut key is ***ALT+O***.

## CAS Icons

Every screen in **CAS** contains common icons and fields as well as screen specific icons.

Some common icons that are accessible throughout **CAS** screens:

Icons	Use
	Click to <b><i>Exit Screen</i></b>
	Click to <b><i>Select Record</i></b>
	Click to <b><i>Add New Record</i></b>
	Click to <b><i>Edit Record</i></b>
	Click to <b><i>Delete Record(s)</i></b>



To easily identify each icon and field, hover your mouse pointer on the icon or field to display a yellow bubble hint.

This function must be first enabled in **Administration | Defaults | Tasks/Help**.

## CAS Conventions

For quick data entry, the following conventions can be used in any screen in **CAS**:

- Hit the **Tab** key on the keyboard to skip to the next field
- Hit the **Enter** key on the keyboard to pre-fill fields with the details from the last transactions

## CAS Main Screen

The **CAS** Main Screen has five key regions:

1. CAS Menu
2. CAS Ribbon Toolbar
3. CAS Company Quick Search
4. CAS Quick Access Toolbar
5. CAS Custom Explorer

## CAS Menu

The **CAS** menu is located at the top left hand corner of the main screen and displays the common command functions for **CAS**. The button provides access to recent processes and companies and the help file.

## Ribbon Toolbar

The Ribbon Toolbar provides access to all **CAS** processes. The ribbon has been organised in tabs that follow a company's administration process. These tabs simplify access to the more advanced **CAS** features and modules.



## Company Quick Search

You can search for a particular company by typing in any part of the company name in the ***Company Search*** box and **CAS** will bring up a list of company names containing these letters.

Alternatively, you can click [here](#) to open the **Company Search** screen then type in the first few letters of the company name in the ***Find Box*** and **CAS** will bring up a list of company names containing these letters.

You can also right-click the highlighted company to make changes to company details.

This right click menu is also accessible from the **Company Selection** screen.

## **Quick Access Toolbar**

The Quick Access Toolbar is located at the top of the Ribbon Toolbar. It contains the help icon, the information icon and the quick access icon to log a support call.

## **CAS Custom Explorer**

The **CAS Custom Explorer** has ten items. The five top items are fixed and cannot be changed.

The five bottom items can be customised by users. You can create user shortcuts or customise these items. These shortcuts will only be accessible when the particular user logs into **CAS**.

To customise the **CAS Explorer**, you can use the drag and drop function to save these shortcuts.

Refer to the **Welcome to CAS Help File** on **BGL Wiki** for more information.

## Creating a New User

From the **Ribbon Toolbar**:

On the **Administration** tab, in the **Setup** group, click **Users**

Click  to add a new user.

## **Requirements for lodging ASIC documents electronically**

To lodge ASIC documents electronically using BGL CAS you will need to do the following:

1. Register as an ASIC Agent
2. Complete Edge Application to join ASIC's electronic document lodgement system
3. Input your ASIC Agent details and Edge Login details into BGL CAS

### **1. Register as an ASIC Agent**

Refer to the following link on ASIC's website for all you need to know about registered agents:

<http://www.asic.gov.au/asic/asic.nsf/byHeadline/What%20are%20ASIC%20Registered%20Agents>

You will receive:

- Your ASIC Agent number

### **2. Complete Edge Application to join ASIC's electronic document lodgement system**

Refer to the following link on ASIC electronic document lodgement system (EDGE):

<http://www.asic.gov.au/asic/asic.nsf/byheadline/Edge?openDocument>

You will receive:

2. Complete Edge Application to join ASIC's electronic document lodgement system

- Your Edge ID
- Your Edge Password

### 3. Input your ASIC Agent details and Edge Login details into BGL CAS

From the **Ribbon Toolbar**:

On the **Administration** tab, in the **Setup** group, click **Agent / Presenter**

Click **New** to add the ASIC agent's details.

### Selecting a Company

From the **Ribbon Toolbar**:

On the **Home** tab, in the **Company** group, click **Company Selection**.

Highlight a company and click on **Select**.

The selected company name will appear on the of the **CAS** Main screen.

Once a company has been selected, company specific screens and fields can be accessed from the **Ribbon Toolbar** or the **Explorer** screen.

For more information on creating and selecting a company, refer to **Task 1.1** of the **CAS Introduction Training Manual**.

## Member Changes

All Member Changes can be accessed:

From the **Ribbon Toolbar**:

On the **Home** tab, in the **Company** group, click **Company Selection**.

Right click the company, highlight **Members** from the list and select the relevant transaction from the list.

The following member transactions can be completed in **CAS**:

Transaction	Instructions
Allotments	Task 3.1 - CAS Introduction Training Manual
Cancellations	Help File on Cancellation - BGL Wiki
Consolidations and Return of Capital	Help file on Share Restructures- BGL Wiki
Conversions	Task 6.2 - CAS Advanced 1 Training Manual
	Help file on Share Restructure - BGL Wiki
Member Balances	Help File on Share Balances ? BGL Wiki
Non Share Members	Help File on Non Share Members - BGL Wiki
Share Buybacks	Task 7.3 - CAS Advanced 1 Training Manual
	Help File on Share Buy-backs - BGL Wiki
Subdivisions	Task 7.1 - CAS Advanced 1 Training Manual

	<b>Help File on Share Restructures - BGL Wiki</b>
<b>Subscriptions</b>	<b>Task 1.4 - CAS Introduction Training Manual</b>
<b>Transfers</b>	<b>Task 3.2 - CAS Introduction Training Manual</b>

## Officer Changes

All Officer Changes can be accessed:

From the **Ribbon Toolbar**:

On the **Home** tab, in the **Company** group, click **Company Selection**.

Right-click the company highlight **Officers** from the list and select the relevant transactions from the list.

<b>Transaction</b>	<b>Instructions</b>
<b>Appointment</b>	<b>Task 2.1 - CAS Introduction Training Manual</b>
<b>Resignation</b>	<b>Task 2.1 - CAS Introduction Training Manual</b>
<b>Deceased Director</b>	<b>Help File on Officer Changes - BGL Wiki</b>
<b>Removal of Director</b>	<b>Help File on Officer Changes - BGL Wiki</b>

## Annual Reviews

### Collecting Annual Reviews from ASIC

ASIC will place the Annual Reviews in the ASIC electronic lodgement system (EDGE) mailbox.

To download it into **CAS**, click **Connect to ASIC Mailbox** from the Customised Explorer.

### Viewing Annual Reviews in CAS

From the Ribbon Toolbar:

On the **Annual Documents** tab, in the **Multi-Company Returns** group, click **Annual Review**.

Highlight the company name and click on the top of the screen to view the ASIC Annual Review and Invoice.

Alternatively, click on to the left of the documents to preview the **CAS** generated Annual Company Statement, ASIC Invoice and Solvency Minutes/Resolution.

**Note:** To avoid ASIC penalties, ensure you have a list of all your companies and the annual review dates.

Refer to **Lesson 5** of the CAS Introduction Training Manual for more information on Annual Reviews.

## Company Reports

The **Company Report** screen allows you to view various details of your company. From the company report screen you can:

- View on screen information for a specific company
- Prepare a company report for multiple companies
- Select only certain options to print on the company report

The **Company Report** screen can be accessed:



From the **Ribbon Toolbar**:

On the **Enquiries & Reporting** tab, in the **Enquiries** group, click **Company Report**.

## Viewing on Screen Data

1. Click on **Search** to select a company.
2. Click on any option under Data Type to view specific information of the company.

## Preparing a Company Report

1. Click the **Reporting** tab.
2. Select the relevant information to include in the company report.
3. Click **Search** to select a single company or multiple companies to generate a company report for.
4. Click on **Print** or **Export** to prepare the company report.

For more information on preparing company reports, refer to **Task 7.1'** of the *CAS Introduction Training Manual*.

## Company Registers



The Company Registers screen allows you to prepare various company registers. Some common registers are:

- Register of Officers
- Register of Members
- Register of Charges
- Share Allotment Journal

The Company Register screen can be accessed:

From the **Ribbon Toolbar**:

On the **Enquiries & Reporting** tab, in the **Enquiries** group, click on **Company Registers**.

1. Click on  to select a single company or multiple companies to generate company registers for.
2. Input a number between 0-9 next to the register name to change the number of printed copies.
3. To clear the registers selected, click **Clear**.
4. To print all registers selected, click **Print**.
5. To export registers, click  to export the registers to PDF, Word or Excel.

Refer to the **Help File on Company Registers** on BGL Wiki for more information.

