PROPEL

CONTROLLED PERFORMANCE

myHelp

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1. terminology + abbreviations

The following abbreviations are used throughout this myHelp document:

- MYP – Suite of modules
- Propel – Business + personal management
- Propel Pro – Business + personal management including the advanced functionality of reports + client/adviser access
- Propel + / Propel Pro - Business + personal management including the advanced functionality of detailed cashflows, scenarios + graphs
- ARM – Administration, relationships + management module
- myDocs – Document and file management
- eMarketing – Campaigns + event management

The following terms and their definitions are used throughout this myHelp document:

- Administer – action to create, view, edit or delete an MYP function e.g. client, provider, survey etc.
- Assistant – staff who access MYP as an assistant to other staff
- Client – clients of the subscriber who use MYP under instruction from subscriber staff
- Contacts – individuals linked to a client (e.g. staff, advisers etc.) or clients who are individuals (e.g. not linked to a client organisation)
- Customer – customers of a client
- Data uploader – 3rd party who can upload financial information on behalf of clients e.g. a Bookkeeper
- Links – types of relationships that connect contacts and organisations
- MYP Champion – person appointed by an MYP subscriber to ensure that MYP modules are integrated into the organisations standard operating procedures and that all relevant staff are trained and actively using these modules. (Only the MYP Champion can re-assign the Champion role to another staff member. Refer Administer staff.)
- Role – positions applied to staff and referral partners
- Staff – staff employed by the subscriber who access MYP
- Subscriber – an organisation that has subscribed to MYP

1.1 ICON DICTIONARY

SUPPORT CENTRE	myTraining	myHelp	myTickets	Lodge ticket

1.2 PROPEL BUTTON DICTIONARY

	Access invitation accepted		Divide		Minus
	Access invitation email sent but not yet accepted		Documents		Multiply
	Add		Edit		No access provided
	Adviser access		Equals		Not display in group position on dashboard
	Agendas		Export to Excel		Notes
	Archive		Find		Organisations
	Assistant		Generate		Percent
	Back		Generate report/s		Personal
	Balance sheet		Greater than		Profit & Loss
	Meetings		Greater than or equal to		Remove / Delete
	Business dashboard		House		Return to current month
	Calculate		Info		Return to dashboard
	Calculator		Insert loan transaction		Right bracket
	Cashflow		KPI status as defined by user		Settings
Clear	Clear		KPI status as defined by user		Set back one month
	Confirm		KPI status as defined by user		Staff
	Consolidated org groups		Left bracket		Succession
	Copy		Less than		Upload/push financial data
	Create		Less than equal to		View
	Create from template		Loans		View documents/ reports
	Create new KPI		Manage actions + notifications		
	Delete		Manage KPIs		
	Display in group position on dashboard		Manage KPI templates		

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2. overview

The word Propel was selected as the name of this platform because it best reflects the impact it has on a business owner's world. It is all about accelerated performance and the ability to do this in a controlled way. So for the first time in one place, users of Propel will have:

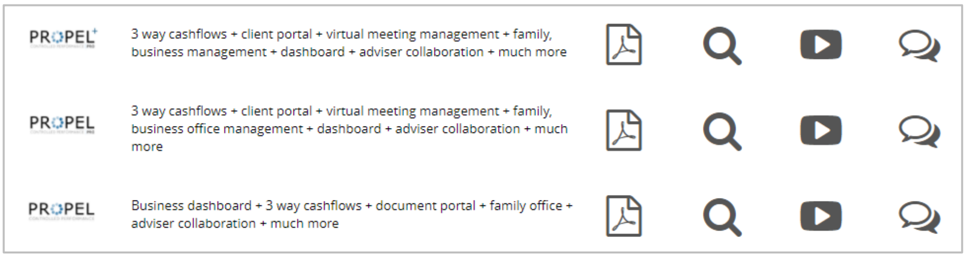
- Real time financial performance dashboards (integrated with major cloud based accounting software)
- Three way cashflow forecasting, budgeting and what if scenarios
- Business and personal document portal
- Ability to set up and manage all related party loans, schedules and documents
- Transparency around all insurances with automated notifications and reminders
- An information portal to store all critical estate planning and succession planning information for their business interests
- Real time personal KPI dashboards
- Meeting management system for Board and other key meetings
- Shared ecosystem with key advisers to enable more efficient, effective and valuable collaboration with and between advisers

The following table provides a summary of the available features for each version of Propel.

	Propel	Propel Pro	Propel Pro+
Access KPI library			✓
Access support	✓	✓	✓
Administer cashflow, inflow + expenditure	✓	✓	✓
Administer client dashboard	✓	✓	✓
Administer client + adviser permissions	✓	✓	✓
Administer clients + contacts	✓	✓	✓
Administer consolidated groups	✓	✓	✓
Administer data uploads	✓	✓	✓
Administer detailed cashflow scenarios		✓	
Administer detailed forecasts		✓	
Administer documents	✓	✓	✓
Administer estate planning	✓	✓	✓
Administer goals + KPIs	✓	✓	✓
Administer insurance	✓	✓	✓
Administer KPI templates	✓	✓	✓
Administer loans	✓	✓	✓
Administer meetings	✓	✓	✓
Administer scenarios	✓	✓	✓
Administer staff	✓	✓	✓
Administer succession	✓	✓	✓
Generate performance reports			✓
Generate scenario graphs		✓	
Manage actions + notifications	✓	✓	✓
Manage adviser access	✓	✓	✓
Manage entity permissions			✓
Manage multiple clients	✓	✓	✓
Manage personal data	✓	✓	✓

2.1. UPGRADE PROPEL VERSION

MYP Champions and Partners have the ability to upgrade a Propel subscription. Simply select Subscription + Training Management from the side navigation bar



- Select the Propel version you want to upgrade
- Select 'Upgrade'

3. MYP system set-up

This section provides an overview of the components that can be customised to suit organisational requirements. It is recommended that the system be set up appropriately prior to providing access to staff and prior to any Certified Training sessions conducted by MYP.

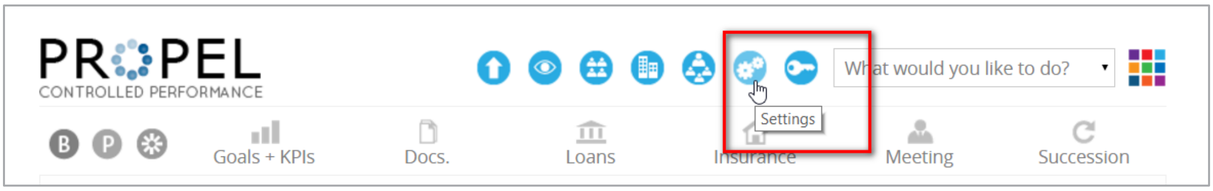
3.3 'WHITELIST' MYP GENERATED EMAIL

MYP generates a range of automated notification emails. To ensure that these are not blocked by IT security systems, the following information should be forwarded to your IT provider with the request to 'whitelist' these domains and IP addresses:

Country	Website URL	IP or Domain
Australia/NZ	www.mypcorp.com	115.165.169.204 and 115.165.174.221 or mypcorp.com

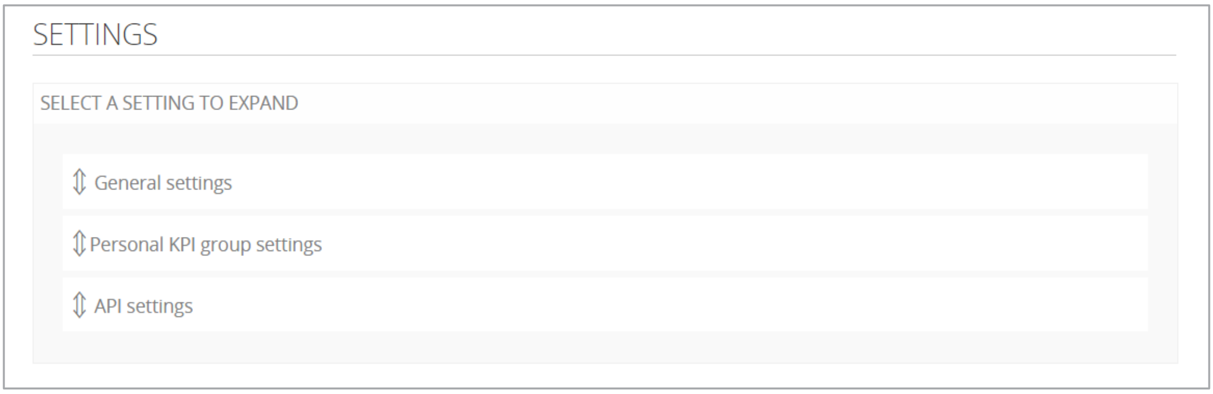
NB: Only access MYP in a SINGLE WINDOW with a SINGLE TAB.

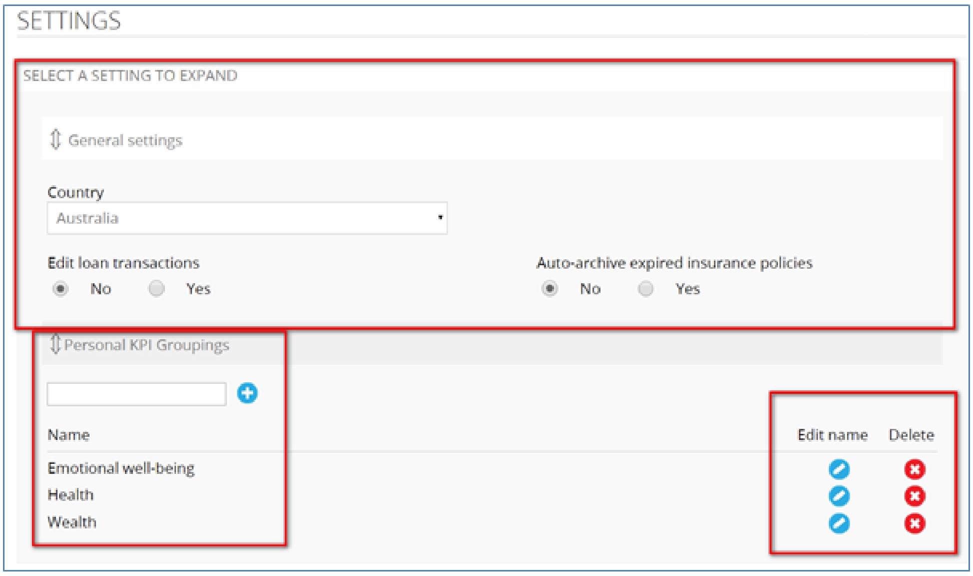
4. settings



Settings for Propel can be managed under the 'Settings' icon. The general settings provide the option to:

- set country/currency
- edit loan transactions
- auto archive expired insurance
- administer APIs

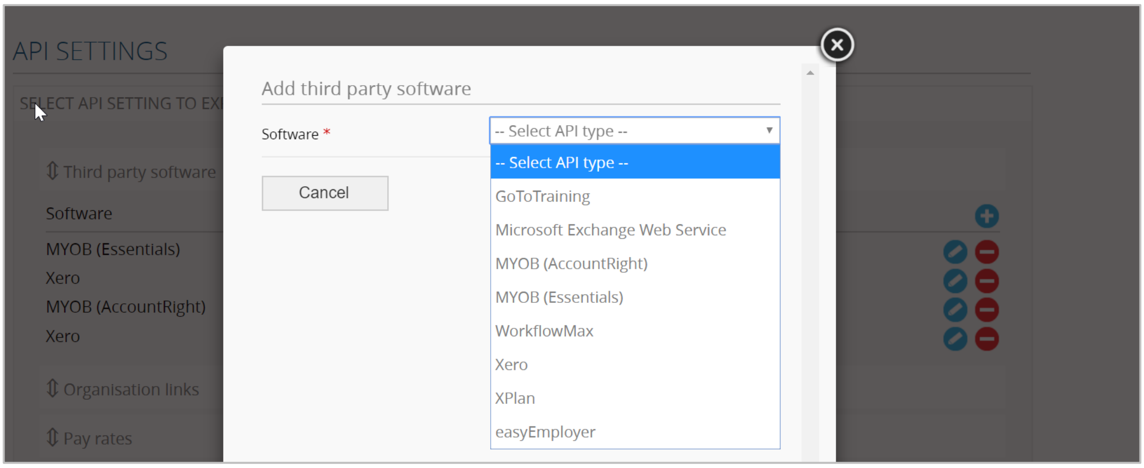




4.1 ADMINISTER APIs

- Select Third party software or relevant API
- Select 'API' type

- Follow the prompts

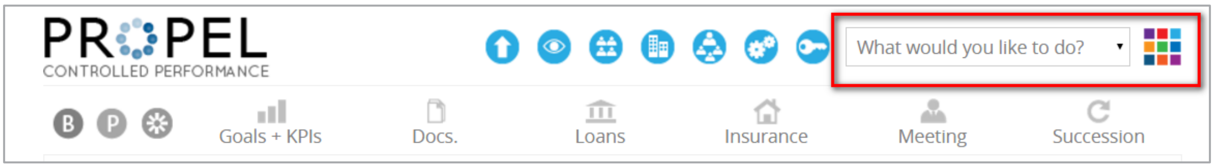


- Select 'Save'

NB: API settings will vary dependent upon subscriptions to other modules. Refer to Administer API in the relevant section of the ARM myHelp.

5. Propel wizard

myAssistant offers a quick start use and is found in two places on the front page. To start, select the Wizard button.



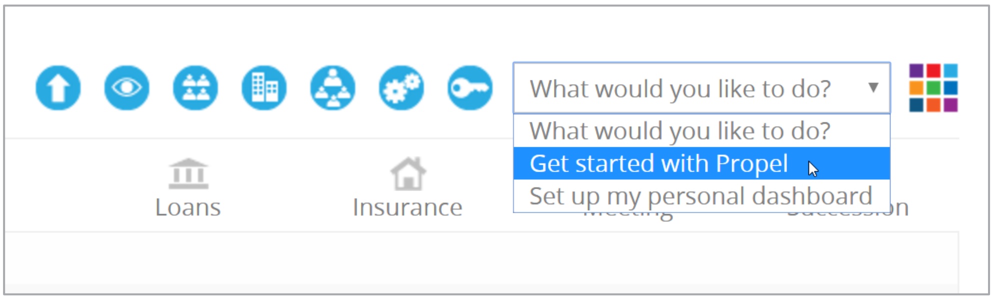
This prompt steps through both the 'Business' and 'Personal' stages of set-up.
'Get started with Propel' guides the 'Business dashboard' set-up.

- Adding staff
- Adding organisations
- Adding consolidated organisation groups
- Adding permissions
- Adding KPIs

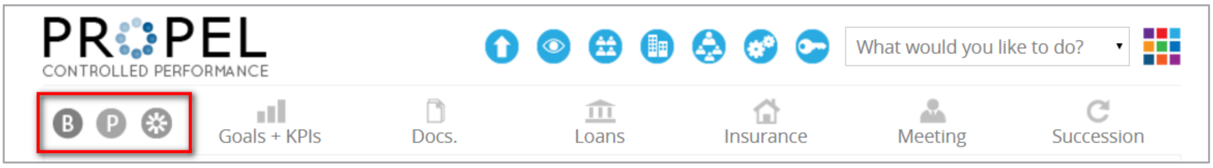
'Set up my personal dashboard' guides the 'Personal dashboard' set-up.

- Personal Assets
- Goals + KPI groups
- Goals + KPIs

The 'Propel wizard' prompt can be found at the bottom of each page through the set-up process.



The one tap access to the business and personal dashboard can be found here.



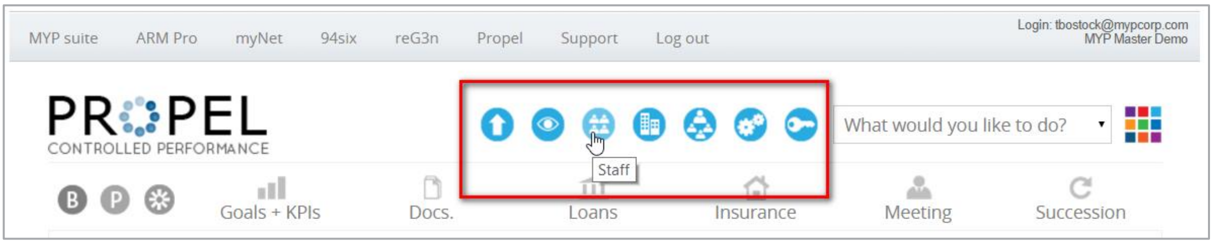
- For the business dashboard: Select 'B'
- For the personal dashboard: Select 'P'

6. staff administration

Propel provides access for all staff who have been given permission to the Dashboard. These permissions are managed and drawn directly from ARM/Administration/Staff. Refer to Support in the relevant section of the ARM Connect + Lite myHelp, ARM Pro Get Started myHelp or ARM Pro myTraining.

There are two ways to administer staff in Propel. Through:

1. the 'Propel wizard'
2. the 'Staff ' icon on the dashboard



6.1 CREATE STAFF

Refer to the relevant section of the ARM myHelp to create staff.

6.2 CHECKING STAFF PERMISSIONS

It is important to check staff permissions before adding information to Propel.

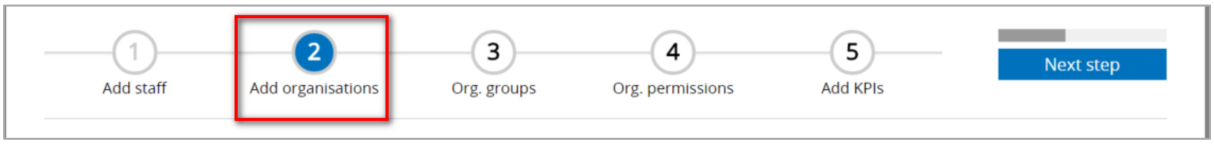
- Select ARM – Administration – 'Staff'
- Select the staff member – 'Edit'
- Scroll to the Staff permissions section – Propel
- Edit accordingly

Propel Permissions	Functionality	Propel	Propel Pro	Propel Pro+	Recommended permissions E = Executive M = Manager S = Staff
Manage business dashboard				√	E M
Manage consolidated groups	Create and edit consolidated organisation groups			√	E M
Business document portal				√	E M
Business loans				√	E M
Business insurance				√	E M
Board				√	E M S
Successions				√	E M
General settings	Administer settings, including country/currency, loan transactions, expired insurance and APIs			√	E M
Set-up wizard				√	E M

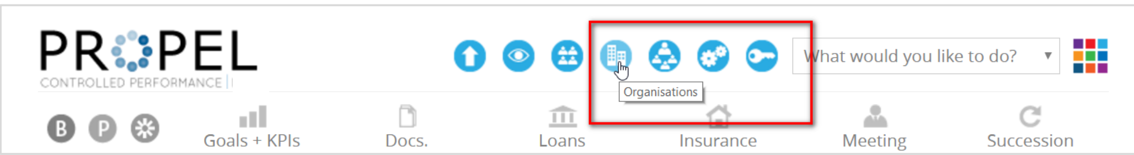
7. clients + contacts

There are three ways to add organisations in Propel.

1. Through the 'Propel wizard'



2. Through the 'Organisation' icon on the dashboard



3. Through ARM. Select the relationship Propel. Select 'Save' and enter Propel.

7.1 ADMINISTER CLIENTS + CONTACTS

Refer to the relevant section of the ARM myHelp to create clients.

7.1.1 Use of the ‘Test’ client

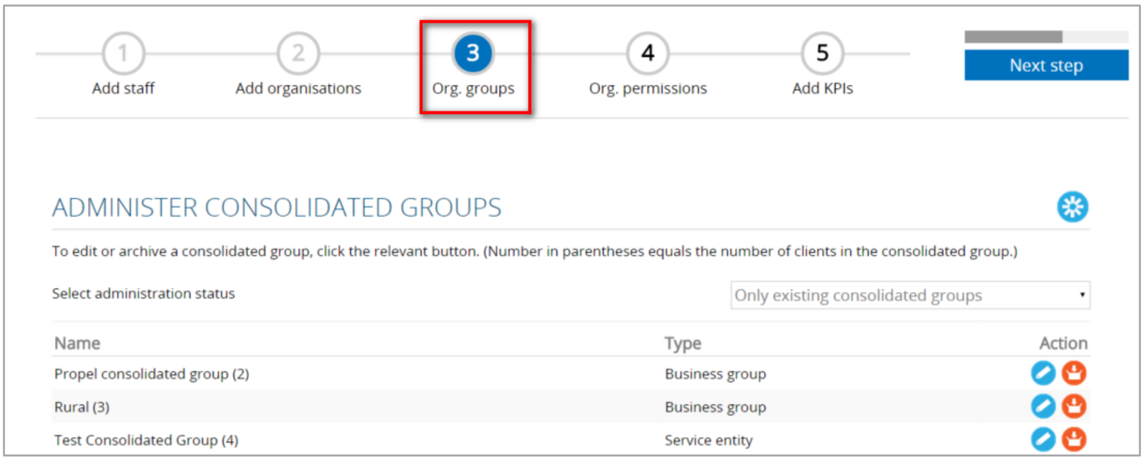
Your subscription includes a ‘Test Client for <Organisation>’ and is easily located via the search. MYP encourages the use of the test client to become familiar with MYP tools and features. The test client is partitioned from the MYP industry database so any test data uploaded under the test client will not have a detrimental effect on the industry database. Part of the process of creating a client within MYP is to link that client to the relevant industry for benchmarking purposes. It is for this reason that you must not create your own test clients as it will result in pollution of the industry database.

8. administer consolidated groups

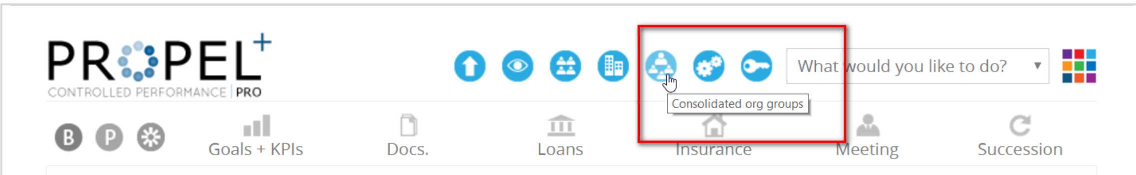
Propel provides the opportunity to create consolidated groups to which any entities within that group of entities can be attached and their financial goals and KPIs can be consolidated.

There are two ways consolidated groups can be managed in Propel.

1. Through the ‘Propel wizard’

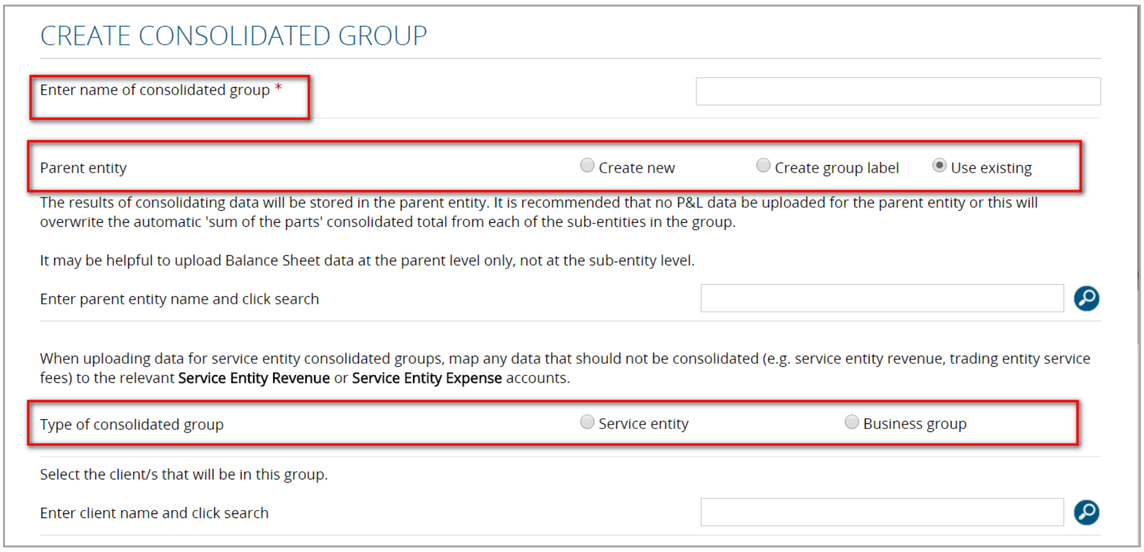


2. Through the ‘Manage consolidated org groups’ icon on the dashboard



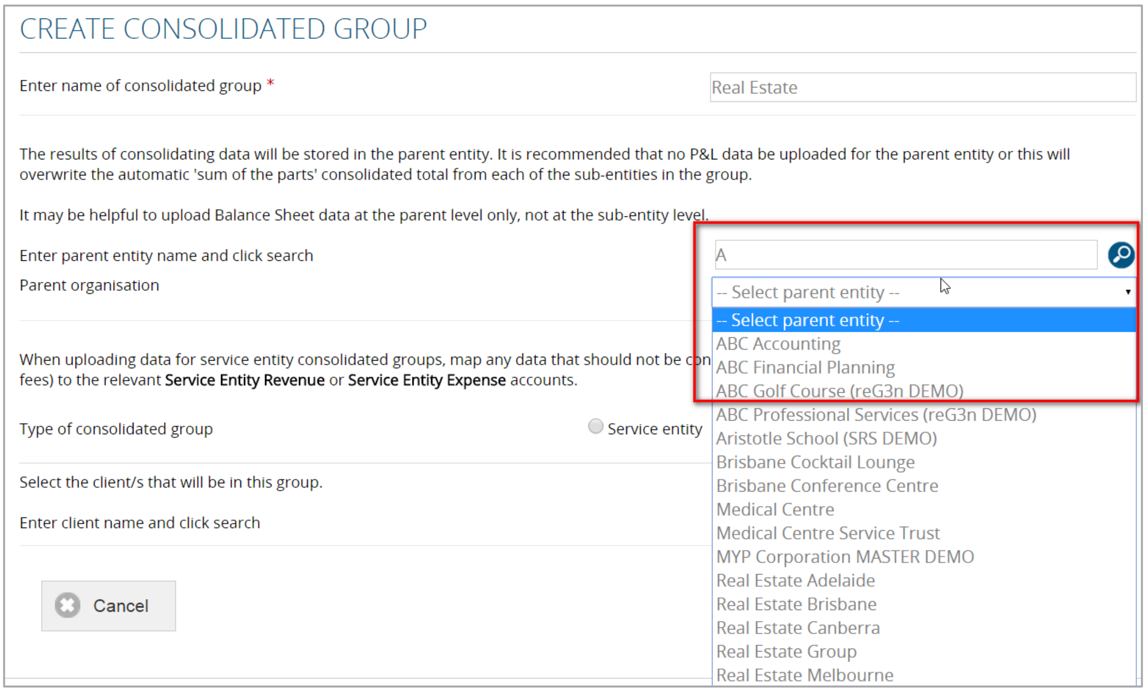
8.1 CREATE A CONSOLIDATED ORGANISATION GROUP

- Select ‘Manage consolidated org groups’
- Select ‘Create’
- Enter name of consolidated group

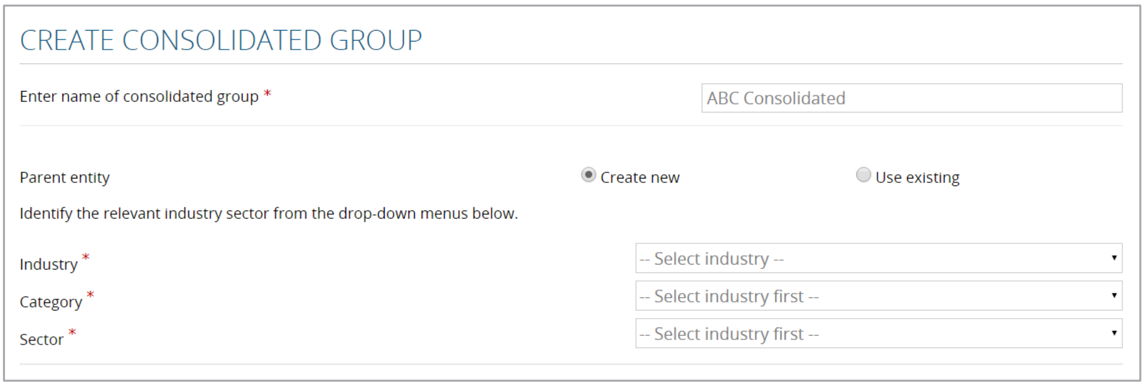


- the Parent entity is existing or new

NB: When choosing 'Existing', select 'Search'. The drop-down menu will pre-populate with ARM clients.



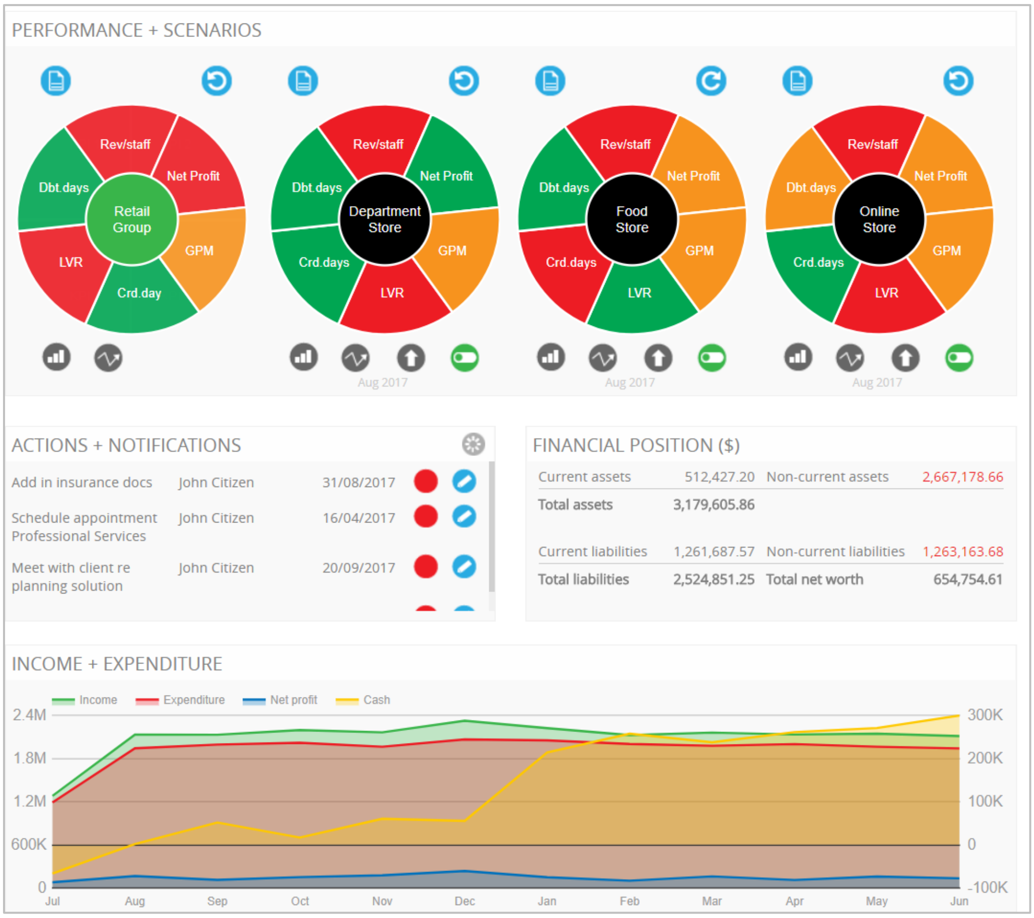
NB: When selecting 'New', an additional drop-down menu will appear to identify the relevant industry sector.



- Select the clients that will be in this group
- Enter the client name and click search
- Select 'Save'

9. Propel dashboard

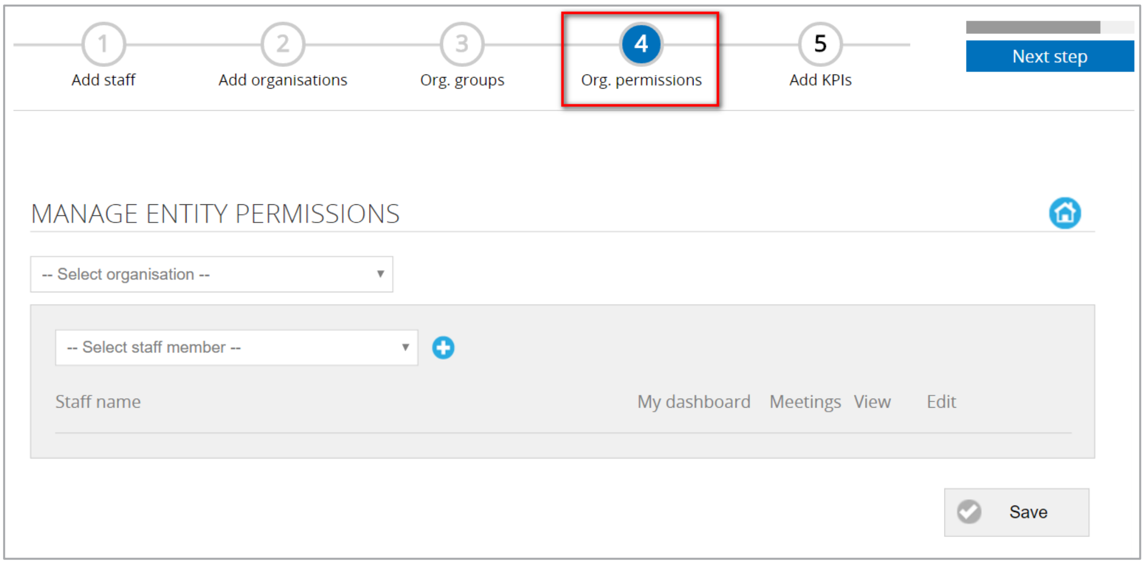
Propel provides a dashboard to enable a high level overview of both business and personal activity.



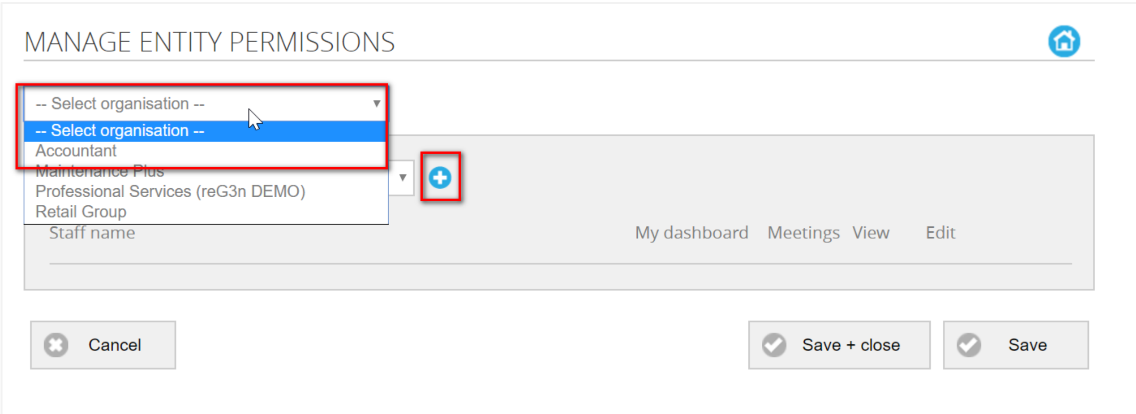
9.1 ADDING A BUSINESS TO THE 'PROPEL BUSINESS DASHBOARD'

There are two ways to add a business to the Propel business dashboard

1. Through the 'Propel wizard'



- Select 'Organisation
- Select 'Add' ⊕



- Select staff who are able to view or edit
- My Dashboard is for the Staff own business default view on entry

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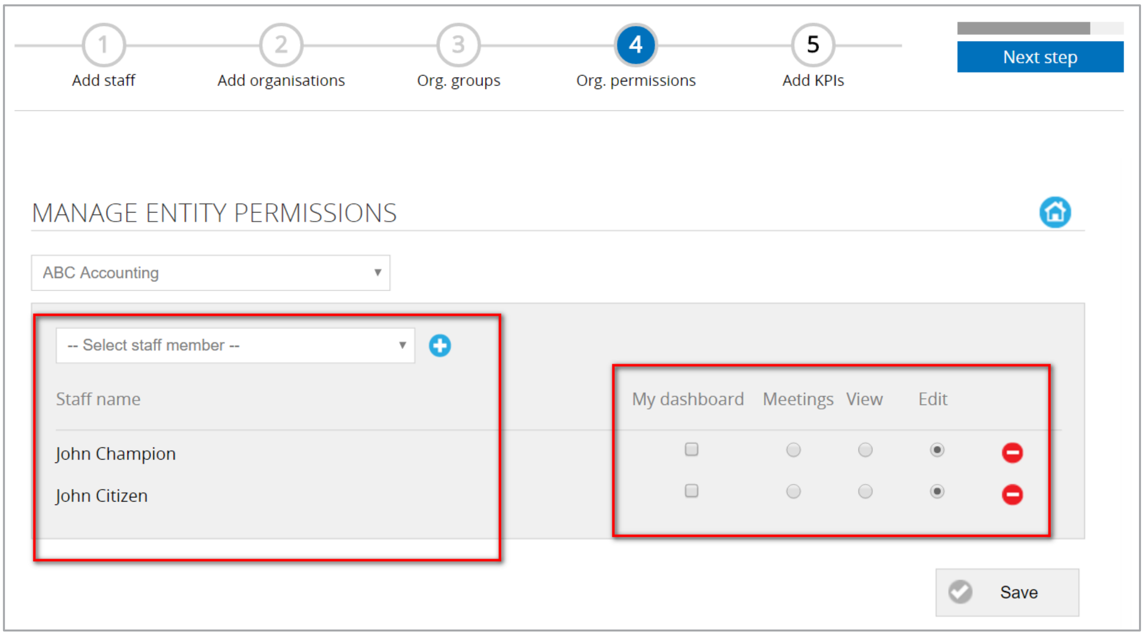


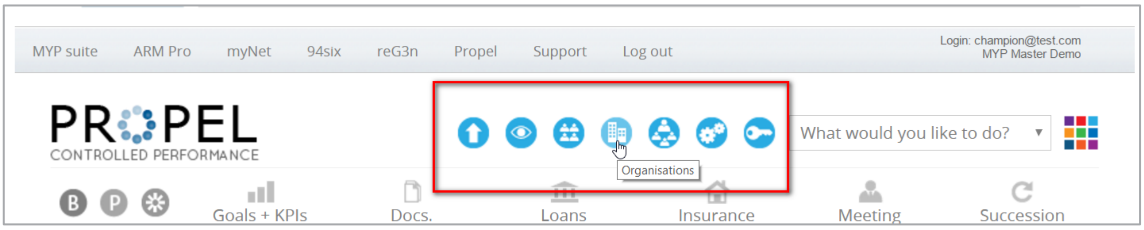
- Assign correct permissions
- Select 'Save'

NB: Meetings permission allows the user to view meeting minutes associated with that org, and be added as chairperson, attendee, apology and/or task owner.

NB: Clients added through the Propel dashboard will automatically be assigned with the group 'Propel' in ARM. Select the relationship 'Propel' for existing organisations in ARM.

NB: Selecting 'Own Dashboard' is for Propel Pro only

2. Through the 'Manage organisations' icon on the dashboard



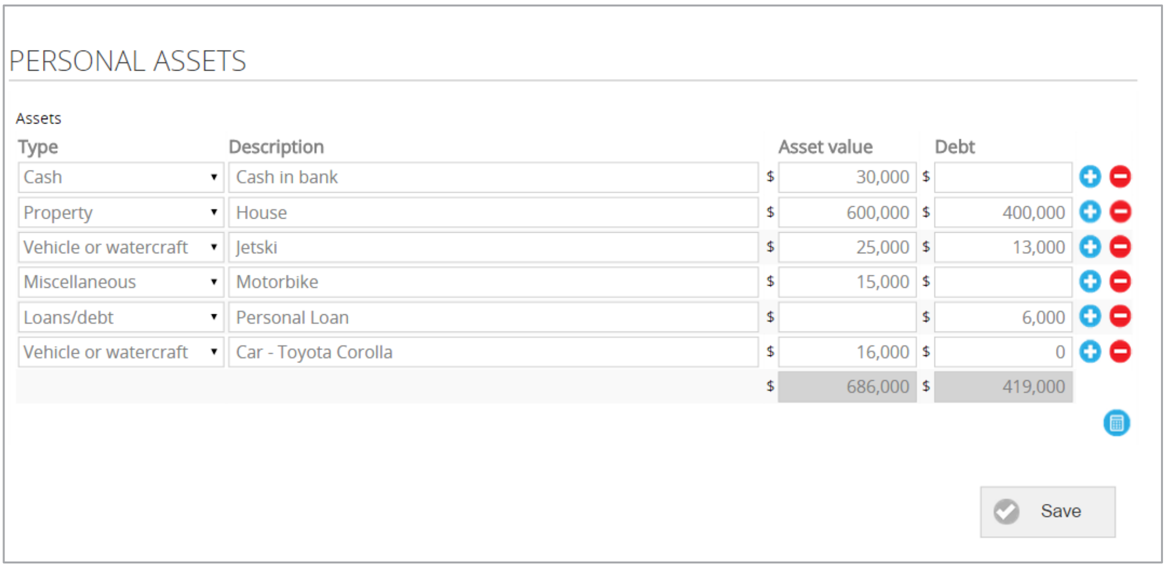
- Select relevant organisation via the search bar
- Select edit organisation
- Tick the Propel check box in relationships
- Return to Propel

9.2 ADD ASSETS TO THE 'PROPEL PERSONAL DASHBOARD'

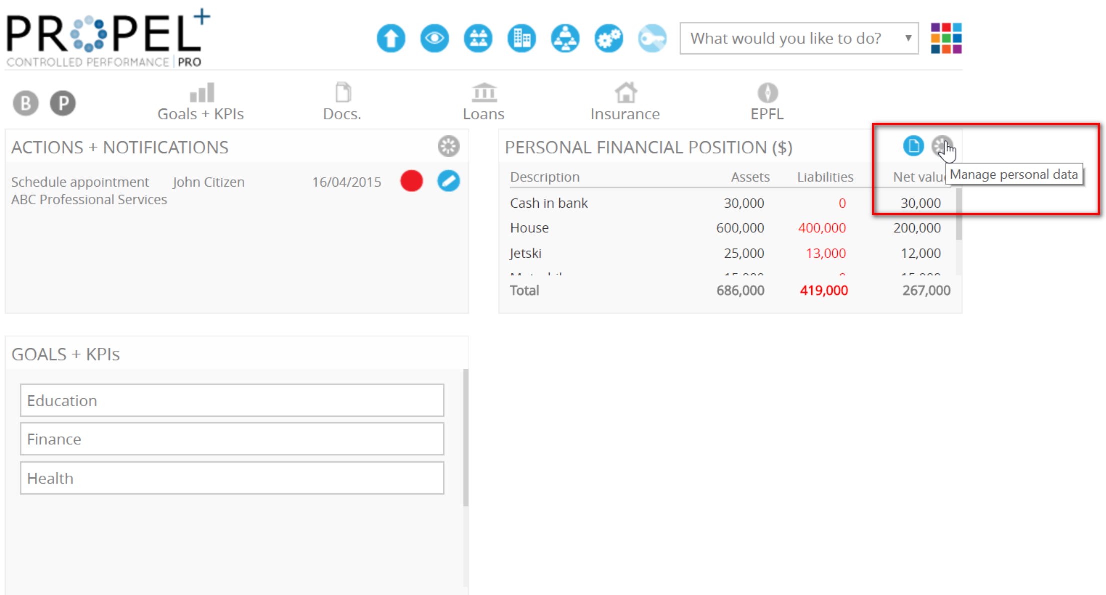
Personal assets are added to the "Propel personal dashboard' through the 'Propel wizard' 'Set up personal dashboard'.

- Select 'Add'
- Add type

- Add description
- Add asset value
- Add debt
- Select the calculator
- Select 'Save'



Alternatively, personal assets can be added directly from the personal dashboard. Select the 'Manage personal data' icon.



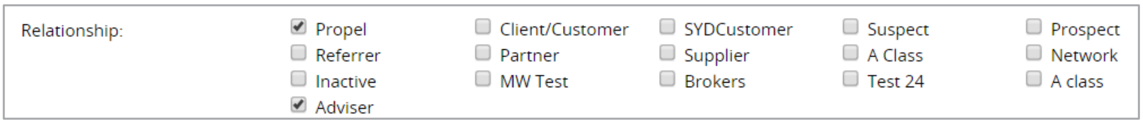
To download a personal financial history report, select 'Financial History report'.

9.2.1 Adviser access to the client dashboard

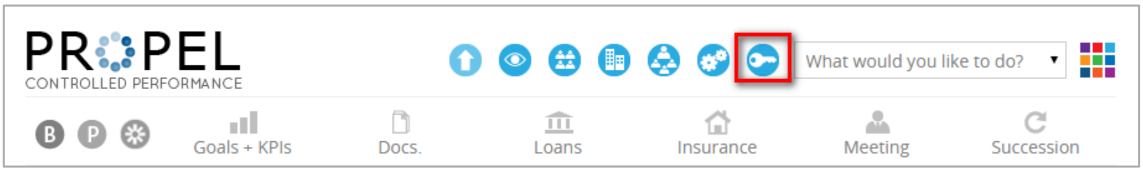
Adviser access to the Propel business dashboard allows a subscribed Propel user to provide access to their dashboard to an adviser who is also subscribed to Propel. If an advisor is not a subscriber the invitation will still be sent with a link to subscribe.

The adviser organisation must be selected as an 'Adviser' under the relationship tag in ARM.

- Select 'Organisation'
- Search the organisation
- Select 'Adviser' under the relationship tag

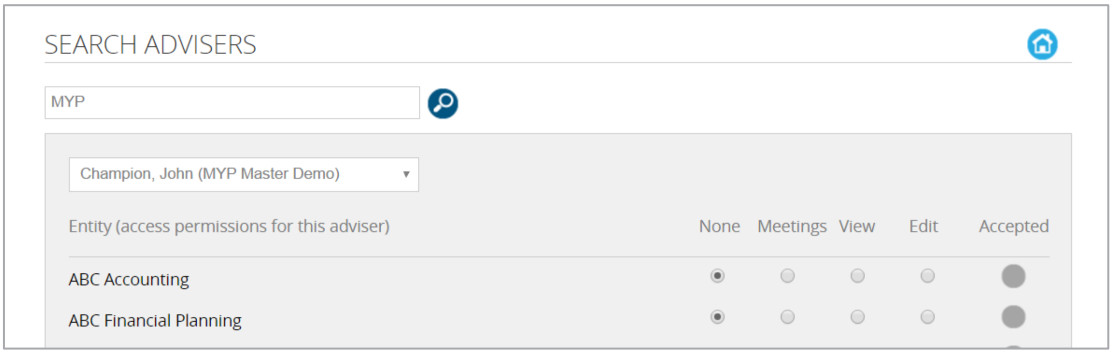


To provide access to a subscribed adviser:



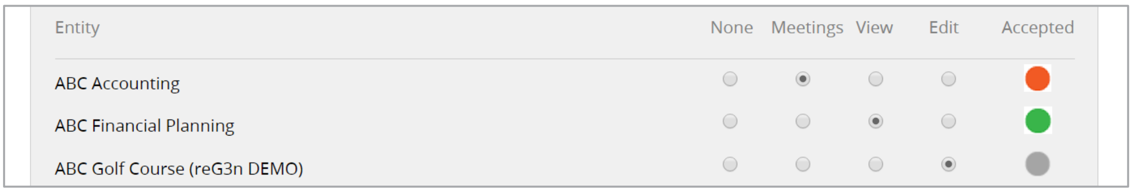
- Select 'Adviser'
- Search Advisers

NB: An adviser can be searched by their name or their subscriber organisation's name.



- Add permissions via radial buttons
- Select 'Save'

NB: Any current reG3n and EPFL data the adviser has, will be transferred to the client, though the adviser can still access the data through both the Propel dashboard and the reG3n and EPFL modules. Any updates will also be reflected. If a client removes an adviser's access to their dashboard, a copy of their EPFL/reG3n data is made copied to the adviser. The client retains full control of their information.



The adviser receives email notification of approved access and a link to accept the invitation. Once the adviser clicks accept, they will now have access to the listed entities and areas of the user's Propel dashboard from their own dashboard.

Accepted indicators:

- Grey – No access provided
- Orange – Access invitation email sent to adviser but not yet accepted
- Green – Access invitation email accepted by adviser

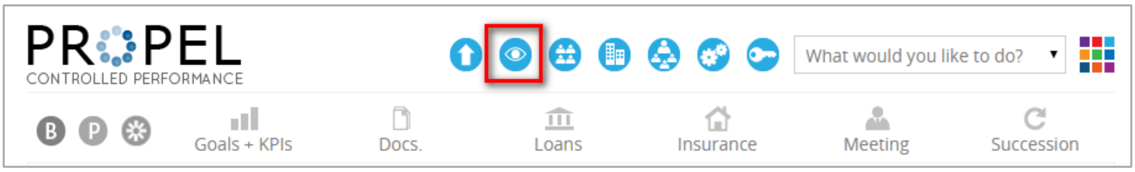
NB: The adviser must map the entities to client businesses in their own ARM. If the adviser chooses not to map any client businesses or contacts, they are automatically created in ARM.

9.2.2 Adviser notifications for non-subscribers

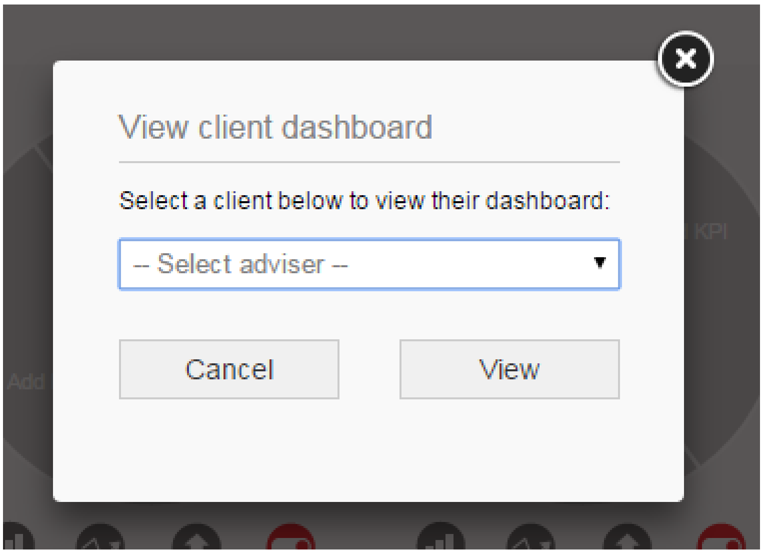
Advisers will receive an email invitation if they are not a current Propel subscriber. From the email, they will be directed the marketplace to subscribe.

9.2.3 View a subscribed client's Propel dashboard

An adviser can view a subscribed client's Propel dashboard by clicking on the 'View' button in the dashboard.



This triggers a pop-up where the adviser can choose which subscribed client's dashboard to view.



To return to your own dashboard:

- Select 'View client dashboard'
- Select 'Own dashboard' from the drop-down menu
- Select 'View'

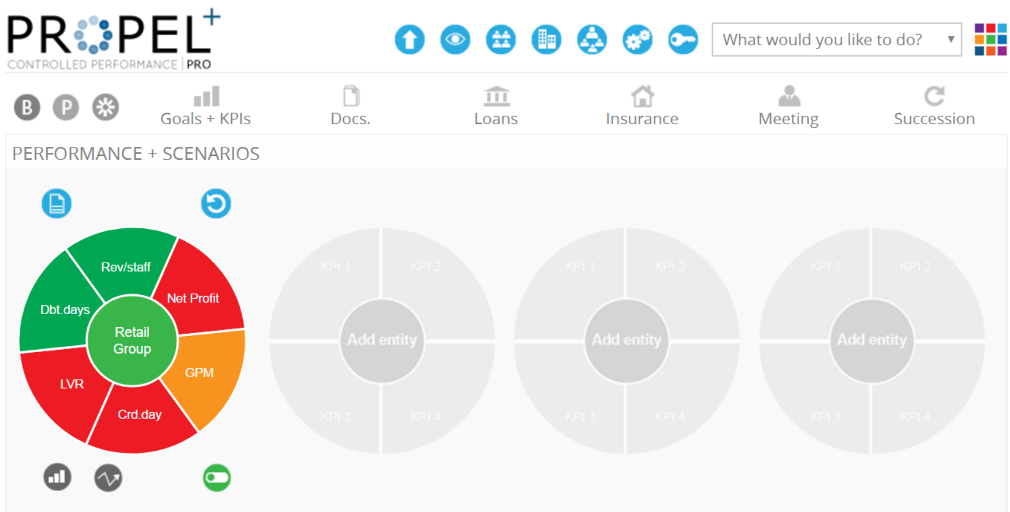
9.3 NAVIGATING THE 'PROPEL BUSINESS DASHBOARD'

9.3.1 Entity status + actions

The Entity status + action wheels provide an overall snapshot. To open the details of entities associated within a consolidated group:

- Select the middle circle of the ‘Group wheel’

To return to the overview of all entities, select the wheel again.



KPIs are colour coded to show status. Select each KPI to open and edit.
The icon menu under each entity provides quick access to.

 Create a KPI

 Monitor cashflow and create scenarios

 Upload data

Financial display in group position on dashboard

9.3.2 Actions + notifications

Actions + notifications provides 'My to-do list' with status updates and the option to add to a calendar. Status updates are determined by the due dates.

9.3.2.1 Add to 'My to-do list'

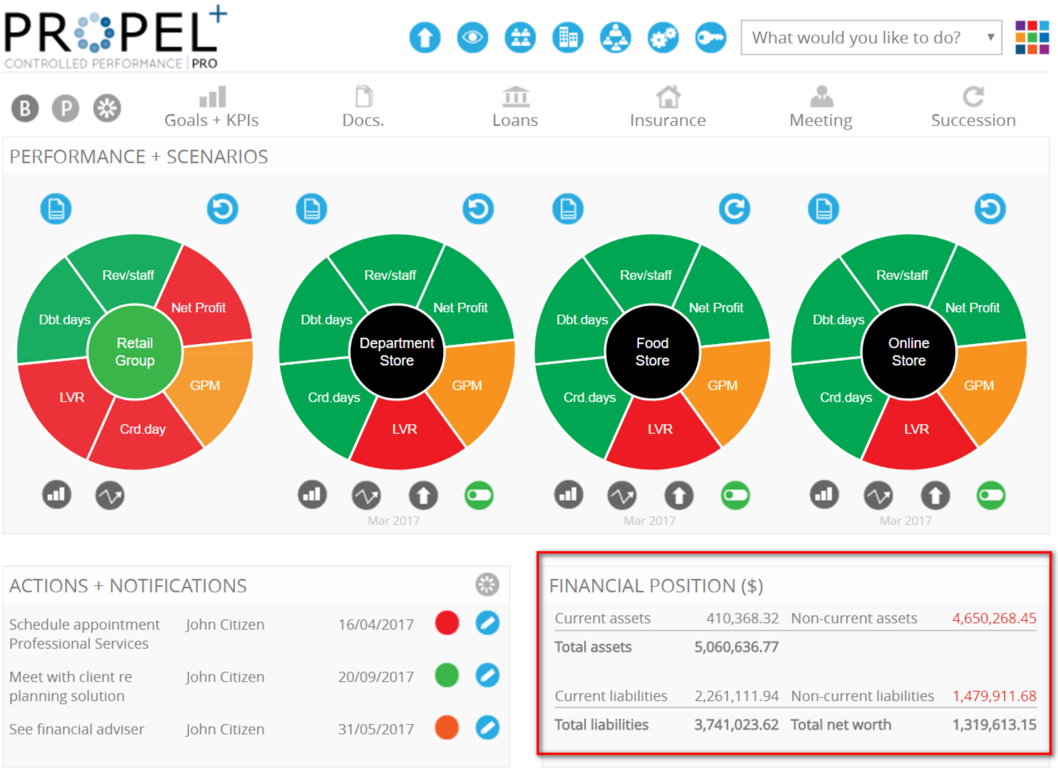
- Select 'Create'
- Enter details
- Select 'Save'

9.3.2.2 Edit 'My to-do list'

- Select 'Edit'
- Make the required changes
- Select 'Save'

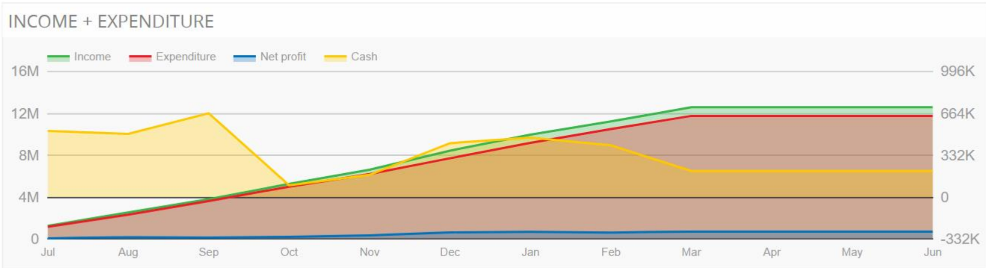
NB: ARM Pro Subscribers 'My to-do' lists sync from ARM and notifications appear in the daily reminder email.

9.3.3 Financial position



The financial position of entities and consolidated groups can be toggled on and off using the toggle icon .
Totals are updated according to the selected entities.

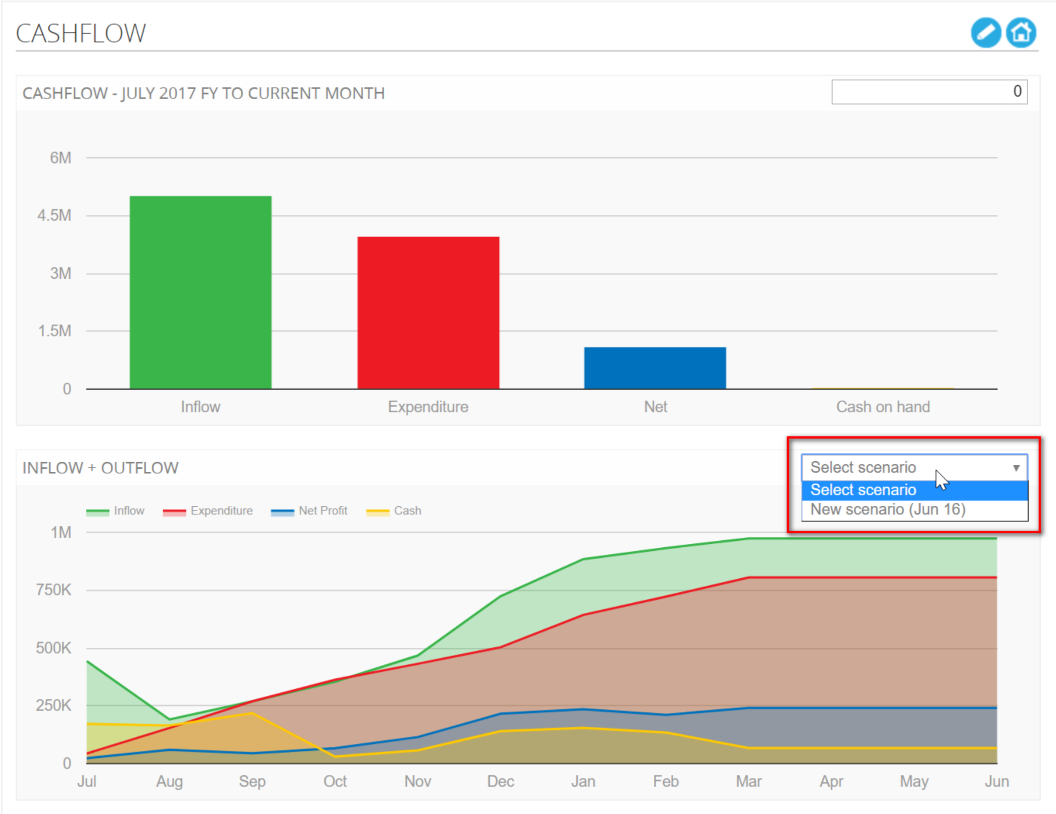
9.3.4 Inflow + expenditure



The Inflow + expenditure graph shows the data from the entities toggled on. Details can be seen when the mouse is held over the relevant data points.

9.3.5 Cashflow

Access to 'Cashflow' information/scenarios is through the cashflow icon situated under each entity.



9.3.5.1 Create a new scenario

- Select 'Add' ⊕
- Select the 'Month'
- Select the 'Financial year'
- Select 'Add'

NB: A financial projection can be created with no previously uploaded data. Enter a dollar amount for each of the scenario fields and a straight-line projection will be generated.

9.3.5.2 Edit a new scenario

- Select ⇕New scenario

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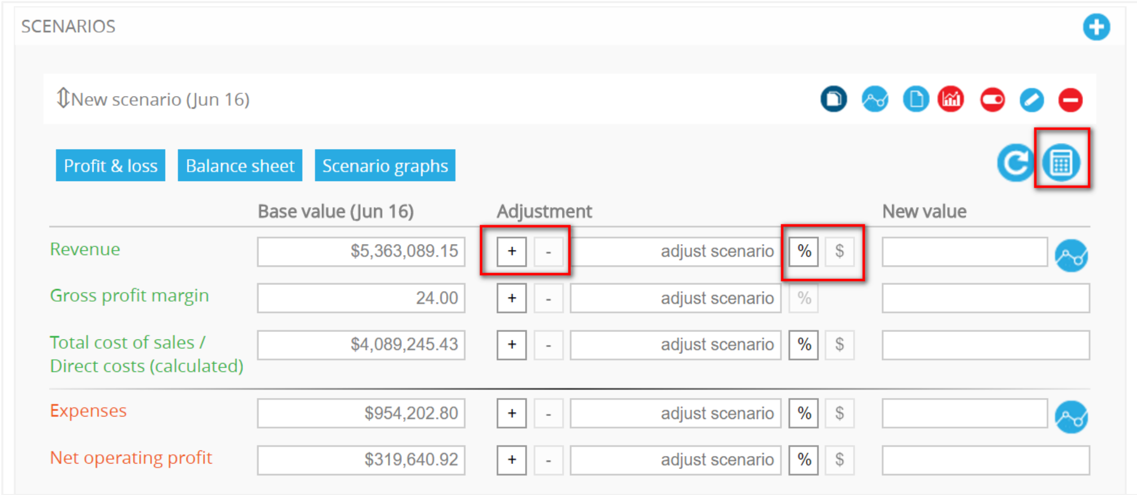
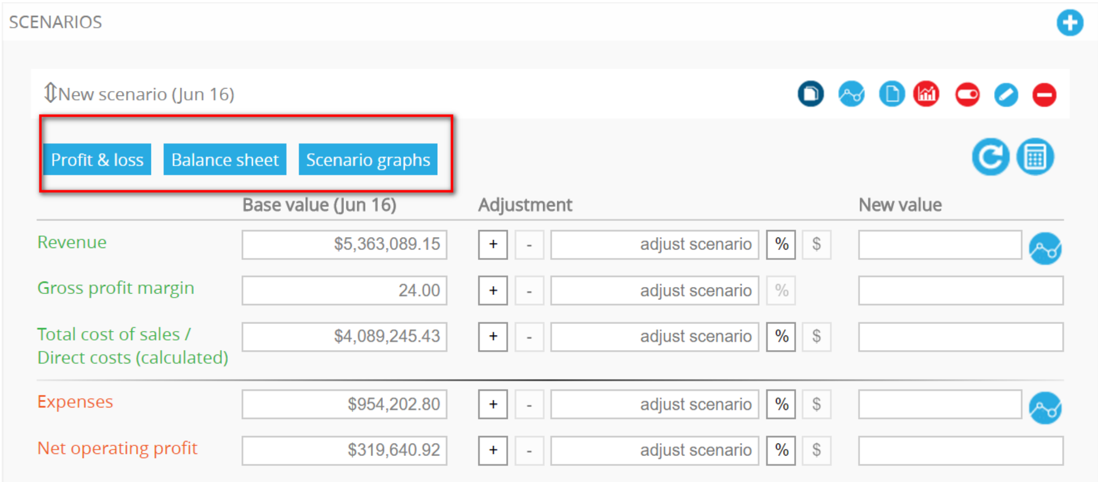


- + or – items as required by either % or $



- Access Profit & Loss overview, balance sheet and scenario graphs through the relevant text buttons

Cashflow	Base value	Sep 15 scenario
Cash from sales	$2,389,538	2,389,538
Direct costs	$1,610,436	1,610,436
Gross cash profit	$779,102	779,102
Overheads & expenses	$414,484	414,484
Change in assets & liabilities	$235,168	235,168
CASH OPERATING COSTS	$649,652	649,652
NET OPERATING INCOME	$1,428,754	1,428,754
NET CASH AFTER INCOME TAX	$1,428,754	1,428,754
Cost of funding	$28,528	28,528
Other non-operating expenses	$0	0
Owner expenses	$13,706	13,706
OVERALL CASHFLOW	$3,224,315	3,224,315

1 mth | 3 mths | EOFY

Update graphs | View forecast

- Select 'Update graphs' after any changes
- View forecast via the 'View forecast' button

9.3.5.3 Edit scenario name

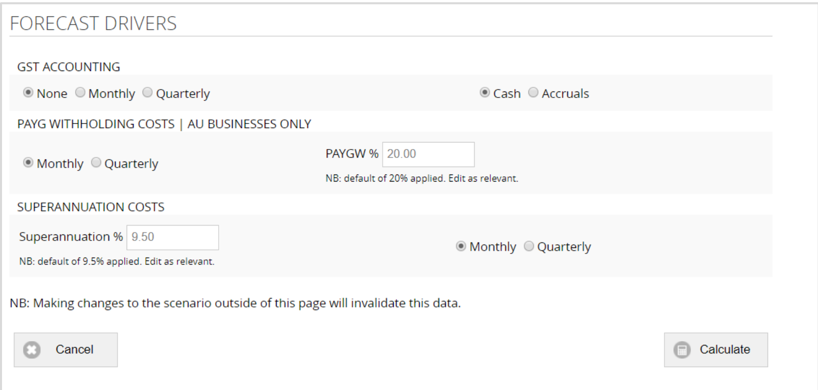
- Select 'Edit name'
- Add the new name
- Select 'Save name'
- Select 'Save' or " Save + close'

9.3.5.4 Copy a scenario

- Select 'Copy scenario'
- Select 'Save' or " Save + close'

9.3.5.5 Adjust cashflow drivers

- Select 'Cashflow drivers'
- Make adjustments



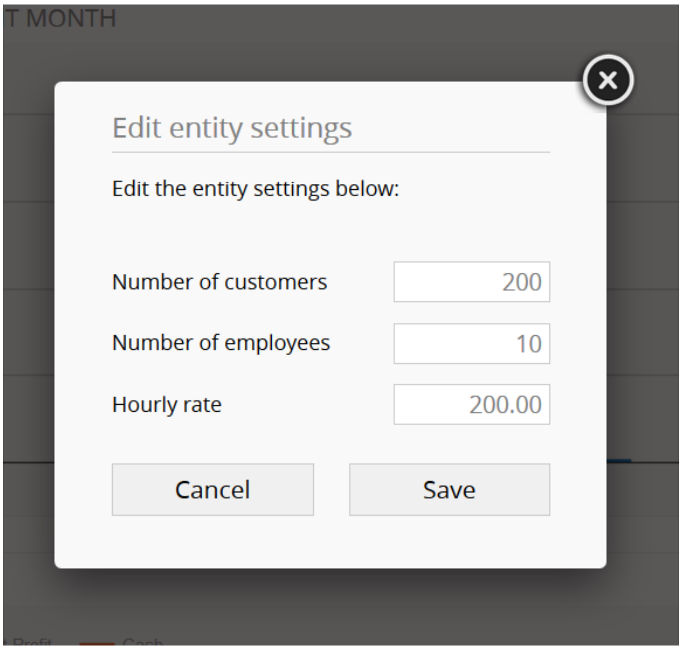
POWERED BY MYP perform

- Select 'Calculate' or 'Cancel'

9.3.6 Edit entity settings (+ Only)

To edit entity settings

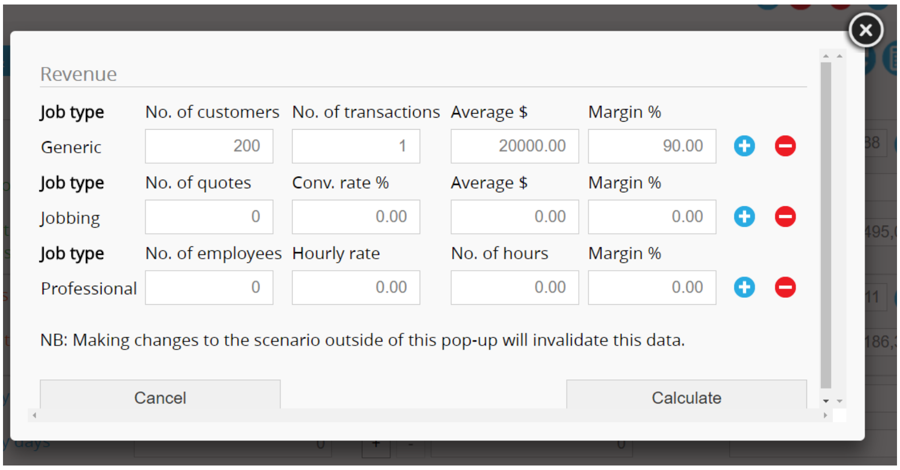
- Select the 'Cashflow' information/scenarios through the cashflow icon situated under each entity
- Select 'Edit entity settings'
- Enter details
- Select 'Save'



NB: These figures will be available under scenarios and can be overridden.

9.3.7 Calculate revenue (+ Only)

- Select appropriate scenario
- Select 'Calculate revenue'



- Enter figures

POWERED BY MYP perform

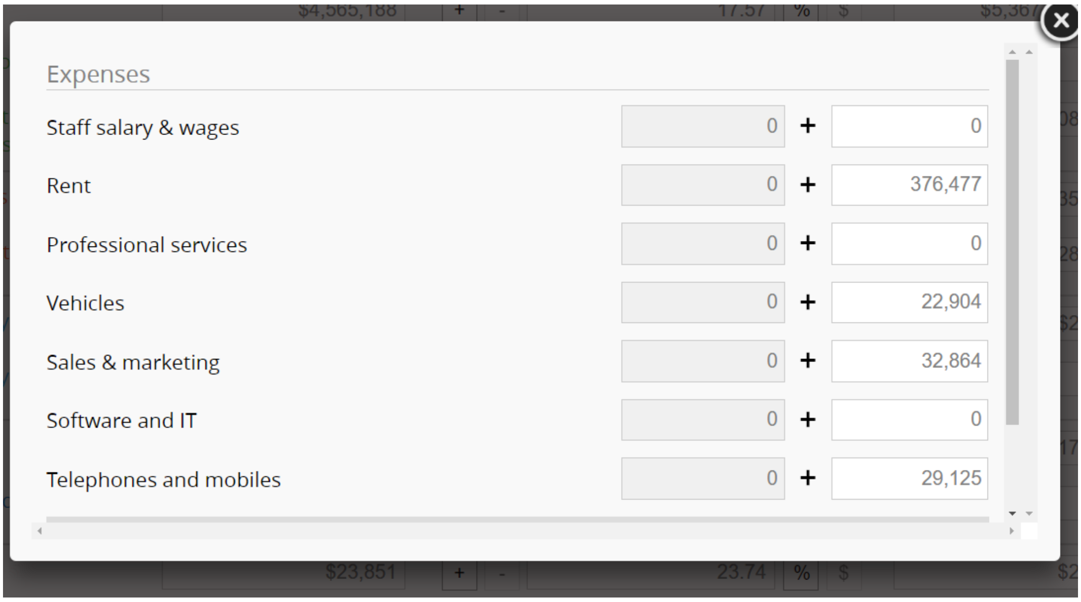
- Select 'Calculate'

NB: Data entered at the 'Edit entity settings will populate in this screen and can be adjusted.

9.3.8 Calculate expenses (+ Only)

- Select appropriate scenario
- Select 'Calculate expenses

- Enter figures



- Select 'Calculate'

NB: Additional expenses can be included by scrolling down

9.3.9 Scenario Graphs (+ Only)

To generate scenarios:

- Select the 'Cashflow' information/scenarios through the cashflow icon situated under each entity
- Select 'Scenario'
- Select Scenario Graph"
- Select 'Save'

9.3.10 Scenario Reports (+ Only)

To generate scenarios reports:

- Select the 'Cashflow' information/scenarios through the cashflow icon situated under each entity

- Select 'Scenario'
- Select 'Scenario graph'
- Select 'Scenario report'

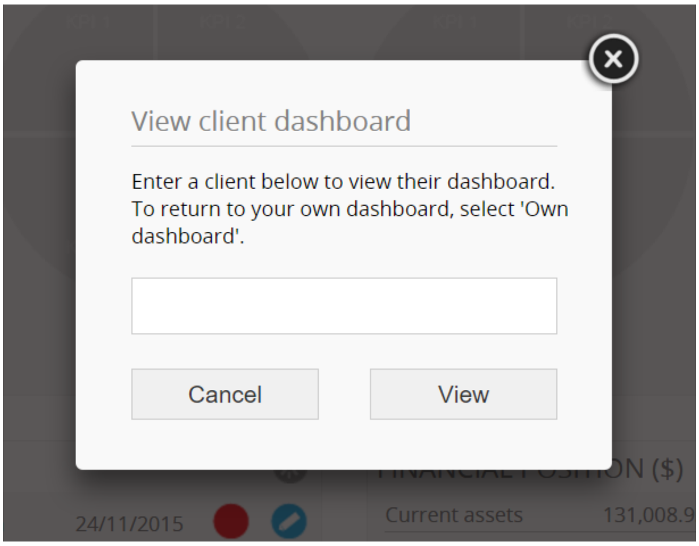
9.3.11 Cashflow Report (Propel Pro Only)

Cashflow reports can be generated from the front dashboard of Propel Pro.

- Select the Cashflow report icon
- Add any additional notes
- Select the required file type PDF or Word

9.4 MANAGING A CLIENT ON THE 'PROPEL BUSINESS DASHBOARD' (PROPEL PRO ONLY)

An adviser has the ability through Propel Pro, to manage organisations for multiple clients. Once an organisation has been added to the dashboard, the adviser can view a specific client's dashboard by selecting the view button.



- Enter client name
- Select relevant client from the drop-down menu
- Select 'View'

To return to your own dashboard:

- Select 'View'
- Select 'Own Dashboard'
- Select 'View'

9.4.1 Subscribing a client to MYP

To subscribe a client to MYP from the Propel Pro dashboard:

- Select 'Subscribe client'

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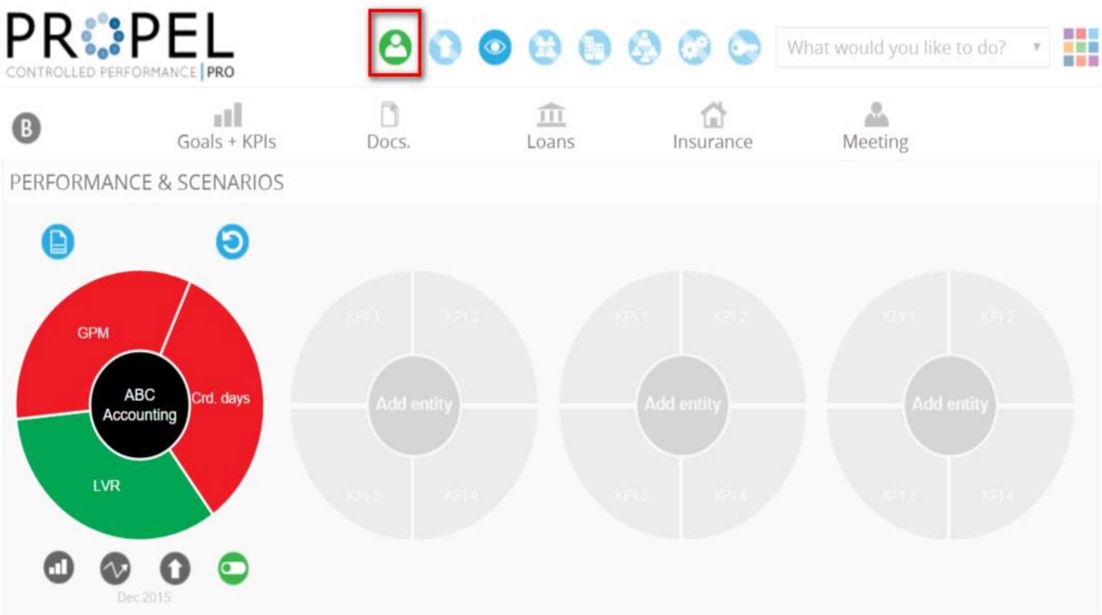
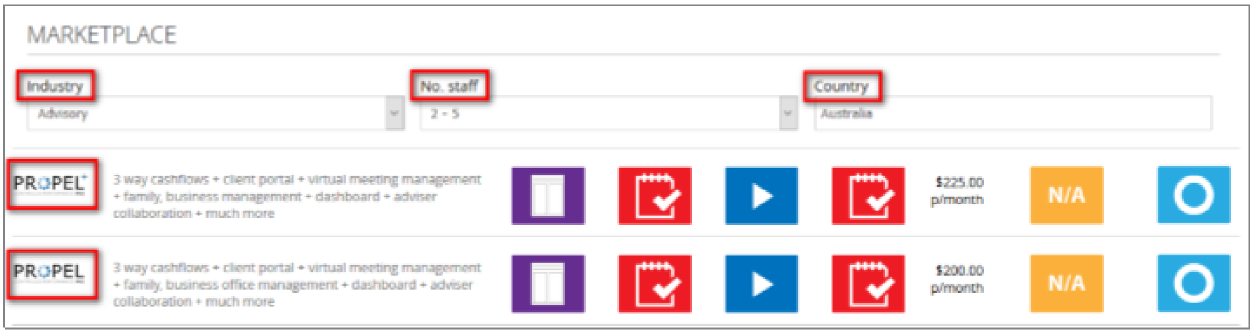


This icon redirects to the Partner site.

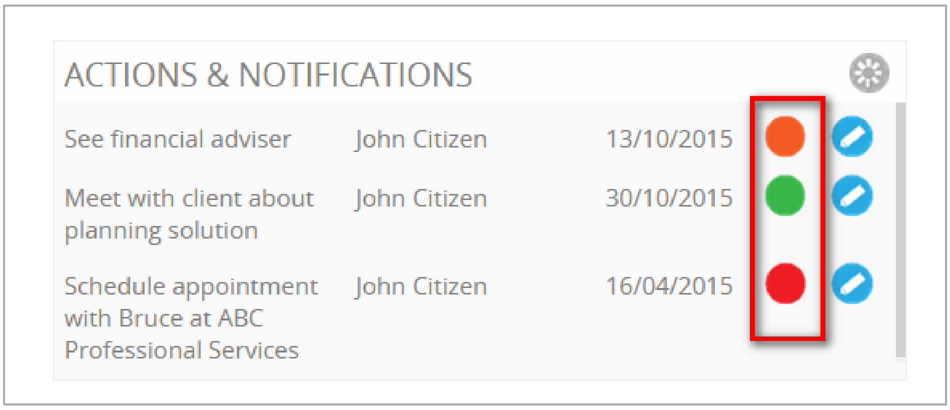
- Select the industry
- Select the number of staff from the drop-down menu
- Select the country
- Select the appropriate subscription



9.5 NAVIGATING THE 'PROPEL PERSONAL DASHBOARD'

9.5.1 Actions + notifications

Actions + notifications provides 'My to-do list' with status updates and the option to add to a calendar. Status updates are determined by the due dates.



NB: ARM Pro Subscribers 'My to-do list' sync from ARM and notifications appear in the daily reminder email.

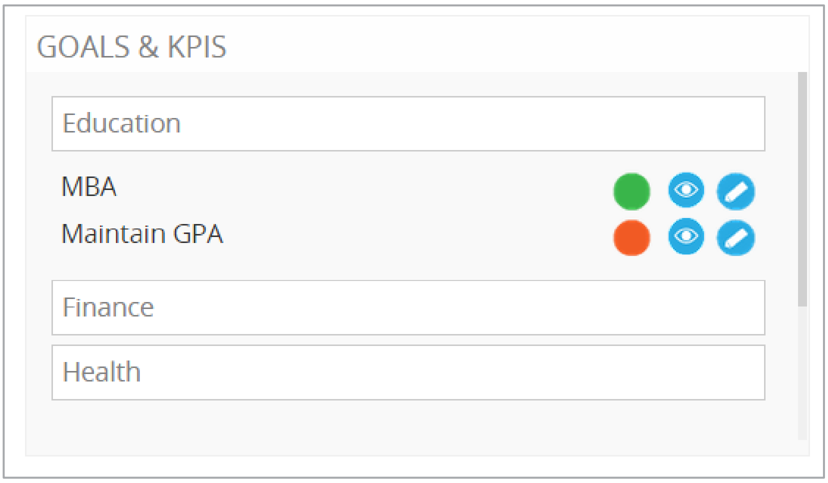
9.5.1.1 Add to 'My To-do list'

- Select 'Create'
- Enter details
- Select 'Save'

9.5.1.2 Edit 'My to-do list'

- Select 'Edit'
- Make the required changes
- Select 'Save'

9.5.2 Goals + KPIs



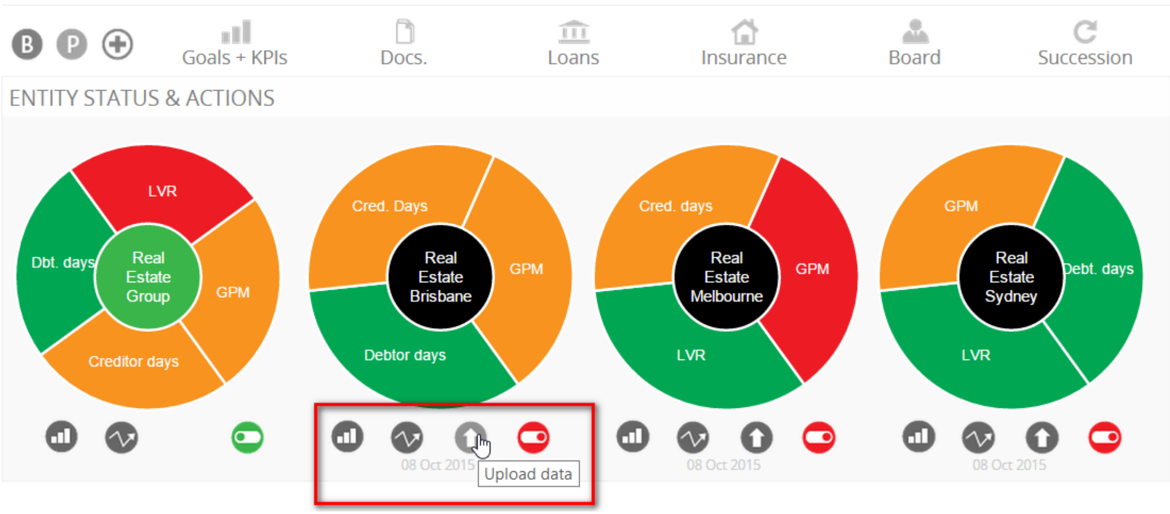
- KPIs are colour coded to show status
- Select each KPI to view and edit

9.5.3 Personal financial position

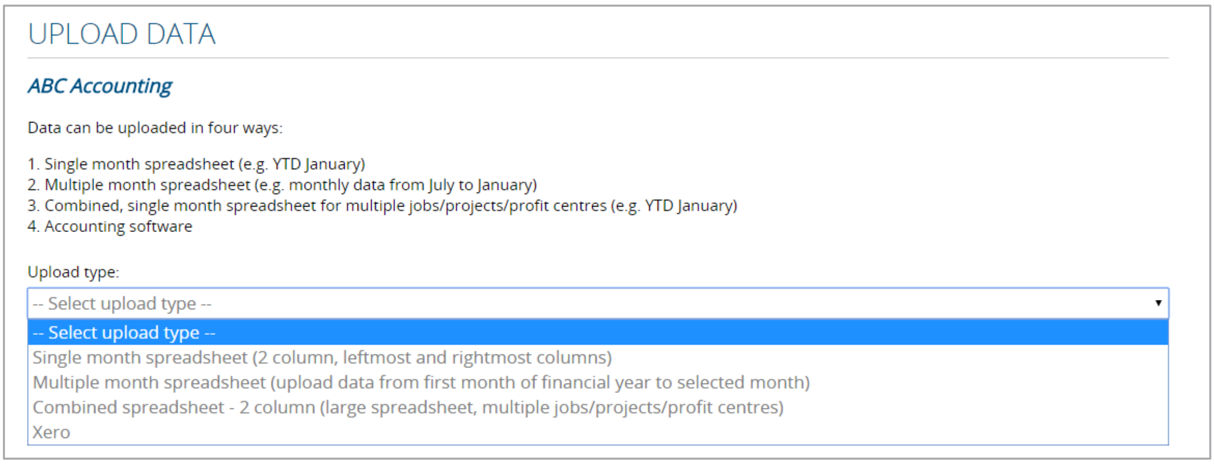
The personal financial position table is provided from the personal Asset's page.

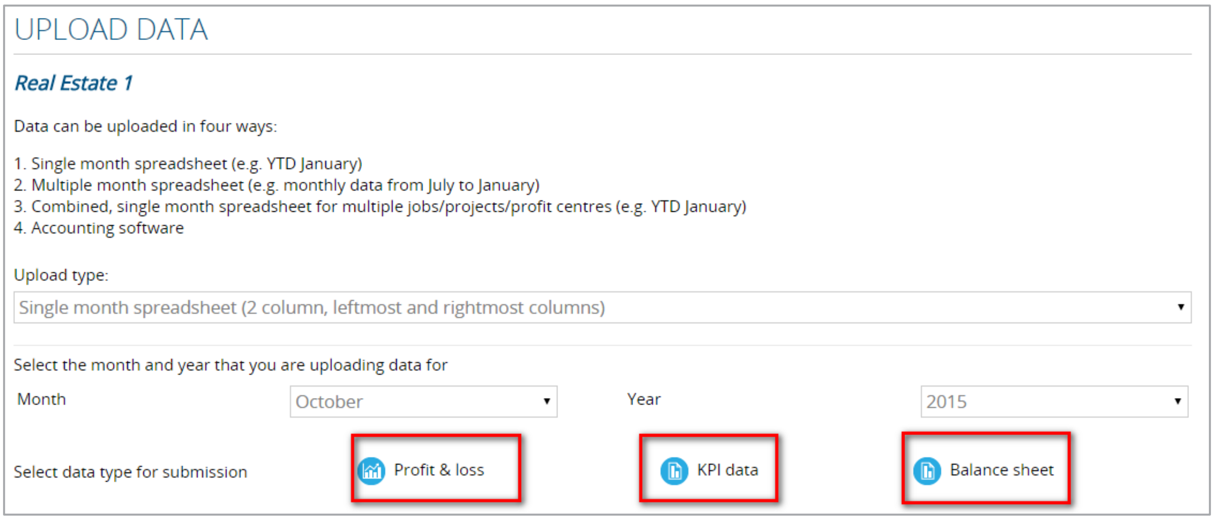
10. upload data

Data is uploaded through the 'upload data' icon under each entity.



- Enter the client name or Select 'Create'
- Select the relevant option from the drop-down menu





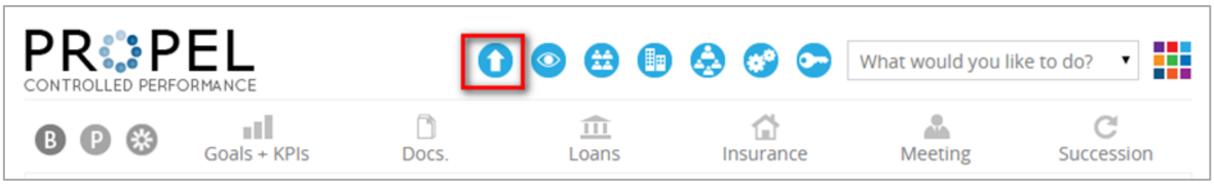
Once the selection has been made and the data has been copied/pasted (if using Excel) or imported (if using Xero):

- Map to the relevant chart of accounts by selecting/checking the head account first, then the relevant sub-account
- Map any sub-totals and totals to N/A or they will be double counted

Once the mapping has been completed:

- Select 'Next' to verify the upload
- If using the Excel method to upload data, check totals against spreadsheet
- If incorrect, select 'Previous' to re-map and correct
- If correct, select 'Next' then 'Finish'

10.1 MANAGE UPLOADED FINANCIAL DATA



- To view uploaded financial data
- Select ' Uploaded financial data'

NB: Edit permissions is required to adjust the uploaded data and/or upload new data.

11. KPIs + goals

11.1 ADD KPIs FOR BUSINESS

There are two ways to add KPIs to the Propel business dashboard

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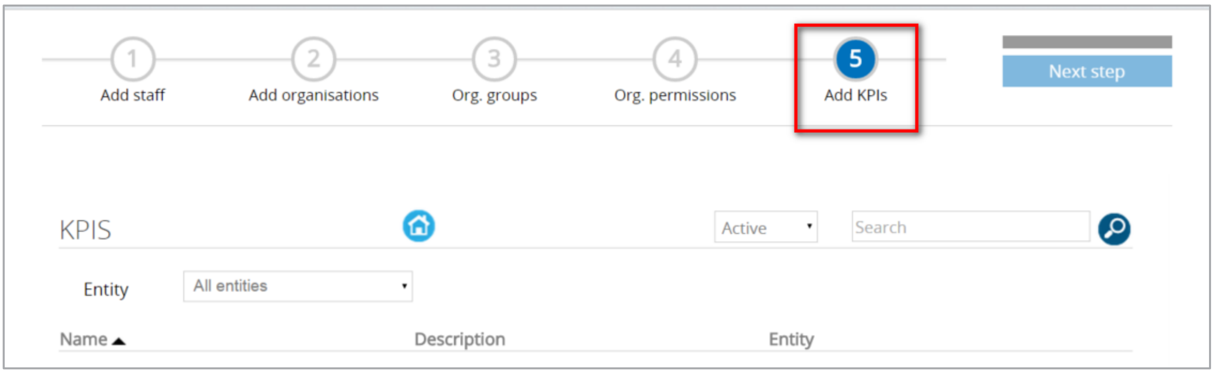
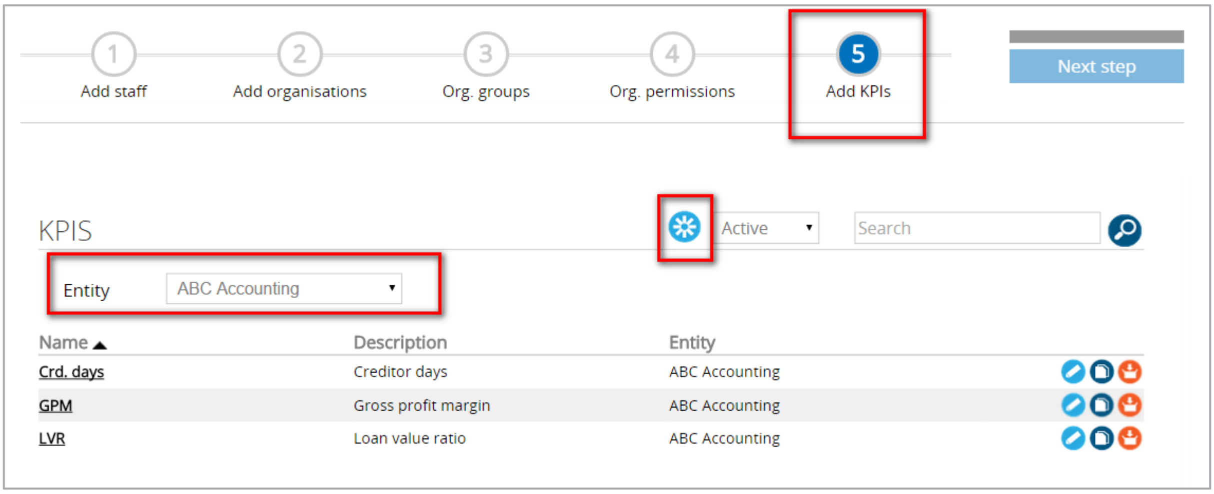
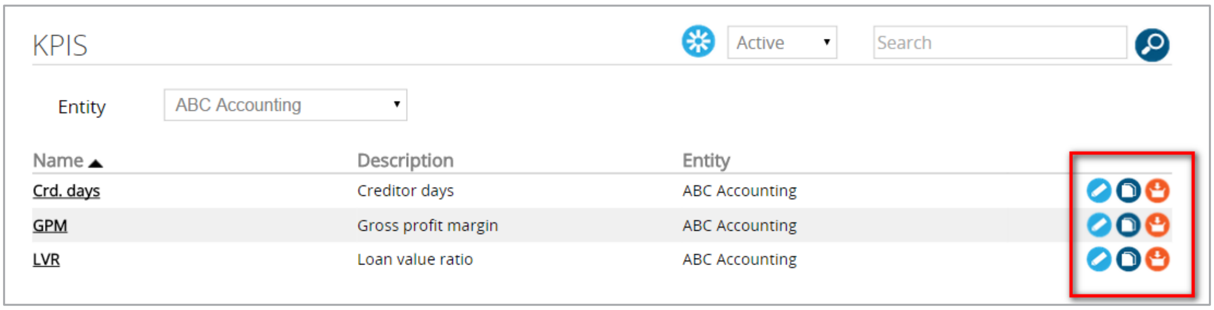
1. Through the 'Propel wizard'

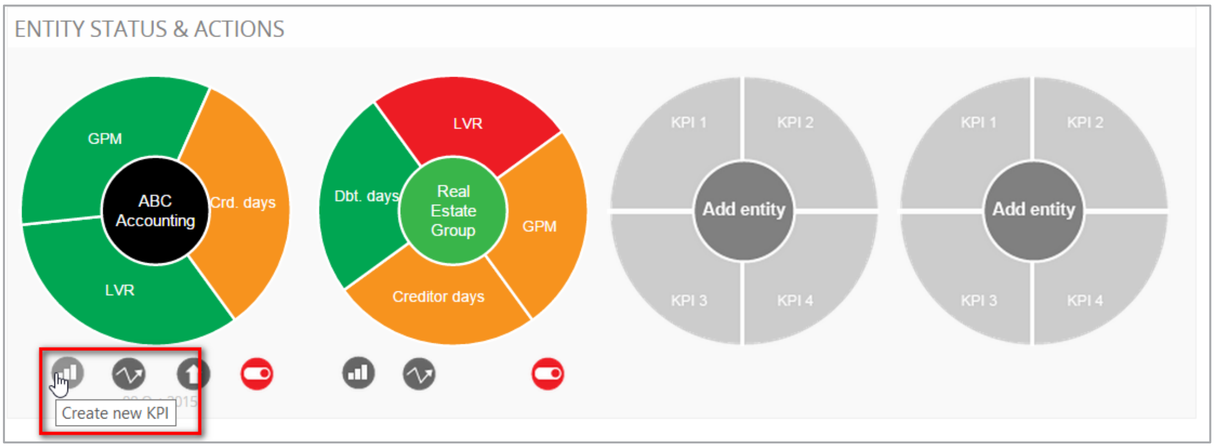




- Select 'Entity'
- Select 'Create'

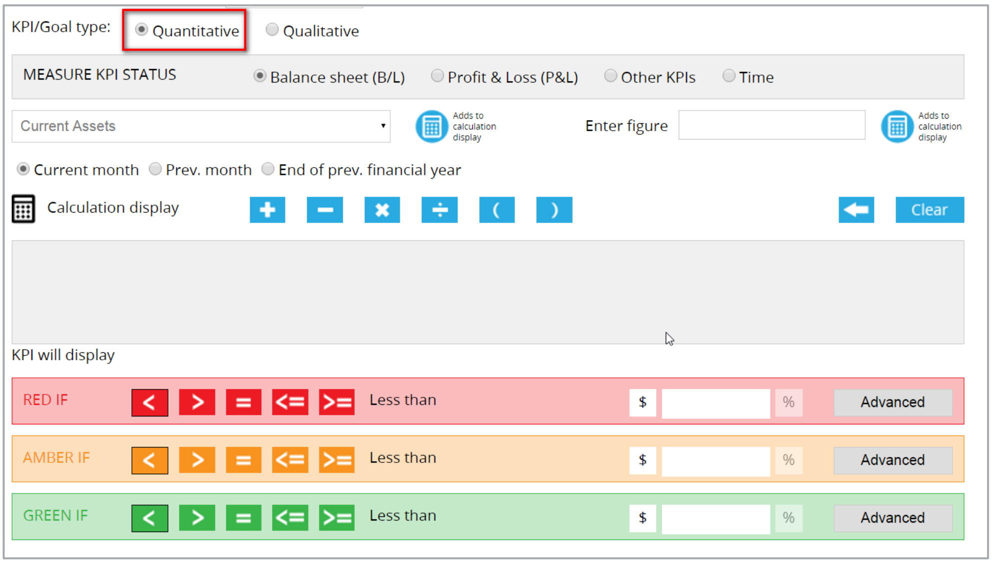


2. KPIs can also be created from the dashboard under each "Entity'



11.1.1 Create KPIs

- Select 'Create new KPI'
- Select 'Create'
- Enter description
- Enter a label
- Choose 'Quantitative' or 'Qualitative' and complete details



11.1.2 Generate KPI display

KPI status is determined by a check for the red, then amber then green. It is recommended to enter the KPI display in the follow order for clarity.

- Enter the formula for 'red'
- Enter the formula for 'green'
- Reverse the green to determine 'amber'

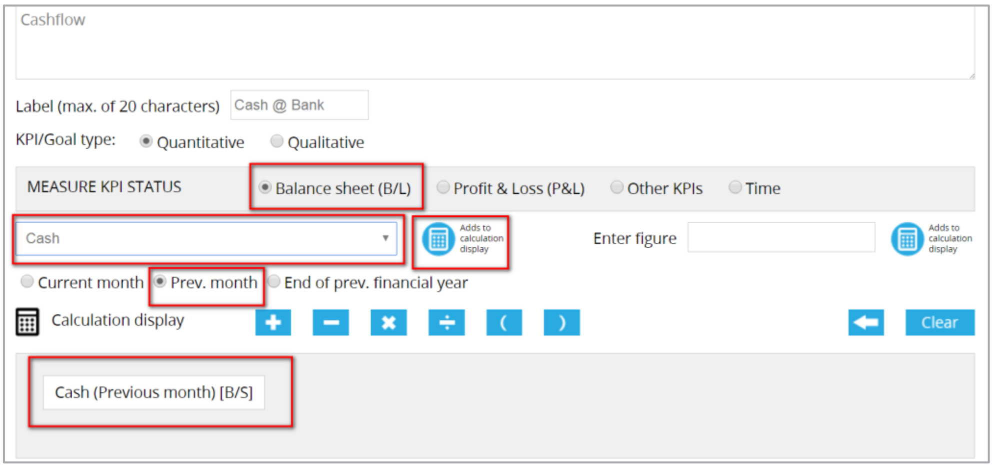
Creditor days - Payables [B/S] / Total Cost of Sales/Direct Costs [P&L] * 365

Red <= 15   Amber <= 30   Green > 30

11.1.3 Non-current month KPI

To add a KPI that is related to a previous month or end of financial year, select the relevant period prior to selecting the account item.

- Select relevant period
- Select measure of KPI status - B/S P&L
- Select relevant account item
- Select 'Add to calculation display'
- Select 'Save'



11.1.4 Edit KPIs

- Select 'KPIs'
- Select the appropriate KPI
- Select 'Edit' from the 'Action' drop-down menu on right
- Enter relevant changes
- Select 'Save + close'

11.1.5 Copy KPIs

- Select 'KPIs'
- Select the appropriate KPI
- Select 'Copy' from the 'Action' drop-down menu on right
- Edit as required following the Edit KPI process

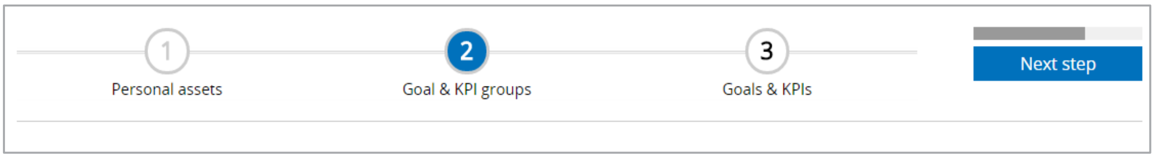
11.1.6 Archive KPIs

- Select 'KPIs'
- Select the appropriate KPI

- Select 'Archive' from the 'Action' drop-down menu on right

11.2 Add goals + KPIs for personal

Goals + KPIs are added to the Propel Personal dashboard through the 'Propel wizard' 'Set up my personal dashboard' in two steps – Goal + KPI groups and Goals + KPIs.



11.2.1 Administer Personal KPI group settings

- Select Personal KPI group settings
- Enter Name
- Select 'Add'
- Select 'Save'

11.2.2 Edit a Personal KPI group setting

- Select 'Set up my personal dashboard'
- Select 'Goal + KPI groups'
- Select 'Personal KPI settings'
- Select 'Edit' from the 'Action' drop-down menu on the right
- Enter relevant changes
- Select 'Save + close'

11.2.3 Delete a Personal KPI group setting

- Select 'Set up my personal dashboard'
- Select 'Goal + KPI groups'
- Select 'Personal KPI settings'
- Select 'Delete' from the 'Action' drop-down menu on right
- Select 'Save + close'

11.2.4 Create Goals + KPIs

- Select 'Goals + KPIs'
- Select 'Create'
- Enter description
- Enter a label
- Choose quantitative or qualitative and complete the details
- Select 'Save'

11.2.5 Edit Goals + KPIs

- Select 'Goals + KPIs'
- Select the appropriate Goal/KPI
- Select 'Edit from the 'Action' drop-down menu on right
- Enter relevant changes

- Select 'Save + close'

11.2.6 Copy Goals + KPIs

- Select 'Goals + KPIs'
- Select the appropriate Goal/KPI
- Select 'Copy' from the 'Action' drop-down menu on right
- Edit as required following the Edit Goals + KPI process

11.2.7 Archive Goals + KPIs

- Select 'Goals + KPIs'
- Select the appropriate Goal/KPI
- Select 'Archive' from the 'Action' drop-down menu on right

NB: Personal KPIs can also be accessed through the KPI Icon on the Propel personal dashboard.

11.3 KPI LIBRARY

All KPIs for entities can be viewed, edited, copied and archived in the KPI library. A KPI library can also be created.

To access the KPI library select 'Goals + KPIs'.

11.3.1 Create KPI template

KPI templates provide the ability to efficiently allocate KPIs to entities via the template, rather than create them individually each time. To create a KPI template:

- Select 'Manage KPI templates' or
- Select 'Create'
- Complete relevant details
- Select 'Save'

11.3.2 Assign a KPI template to an entity

To assign a KPI template:

- Select 'Goals + KPIs'
- Select the Entity from the drop-down menu
- Select Create KPI from templates
- Hold down the shift key and select any number of KPI templates
- Select 'Confirm'

11.3.3 Suggested KPI templates

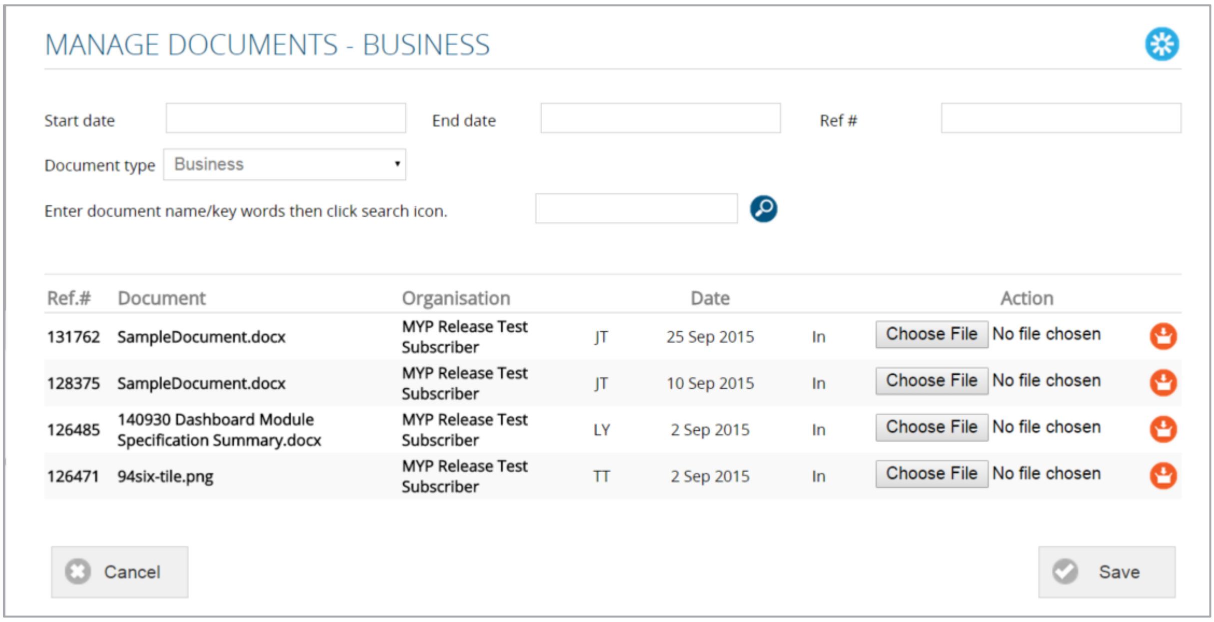
KPIs need to be written with a time frame included. You can choose whether to use the current month, the previous month, or the end of the previous financial year.

For ease of use it is recommended that a template related to each time is included in the library.

e.g. Debtor Days Current
Debtor Days EOFY

12. manage documents

Documents are managed the same way for both the Personal and Business dashboards. Access to business documents is only available through the Business dashboard and personal documents through the personal dashboard.



12.1 CREATE A DOCUMENT

To upload a document:

- Select 'Documents'
- Select 'Create'
- Select the 'Organisation' from the relevant drop-down menu
- Enter document name
- Browse and select the document for upload
- Add notes if required
- Select 'Save'

Documents can also be created via the 'Manage documents' page. (This method is used for quick document creation via a simplified document creation page.)

NB: File size limit of 150MB applied for document upload. mp3 files can also be uploaded.

12.2 ADMINISTER EXISTING DOCUMENTS

To administer existing documents:

- Select 'Documents'
- Select the appropriate filters to refine the search for the document and select Search'
- Identify the relevant document and select the appropriate hyperlink
- Complete details and select 'Save'

NB: myDocs Subscribers have additional functionality on this page enabling them to assign document categories and types and to set additional permissions for staff access.

12.3 ARCHIVE A DOCUMENT

To archive an existing document:

- Select 'Documents'
- Select the appropriate filters to search for the relevant document
- Select 'Archive' from the 'Action' drop-down menu on the right

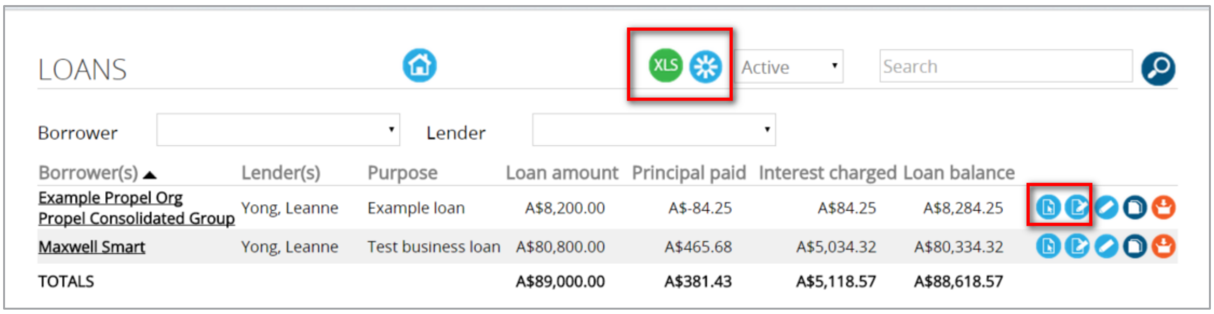
12.4 UNARCHIVE A DOCUMENT

To unarchive document:

- Select 'Documents'
- Select Only archive documents' or 'Current + archived documents' from the 'Admin status' drop-down menu
- Select 'Unarchive' on the right of the appropriate document

13. loans

Loans are managed the same way for both the Personal and Business dashboards. Access to business loans is only available through the Business dashboard and personal loans through the personal dashboard.



13.1 CREATE A LOAN

- Select 'Create'
- Enter loan purpose
- Choose the borrowers or lenders

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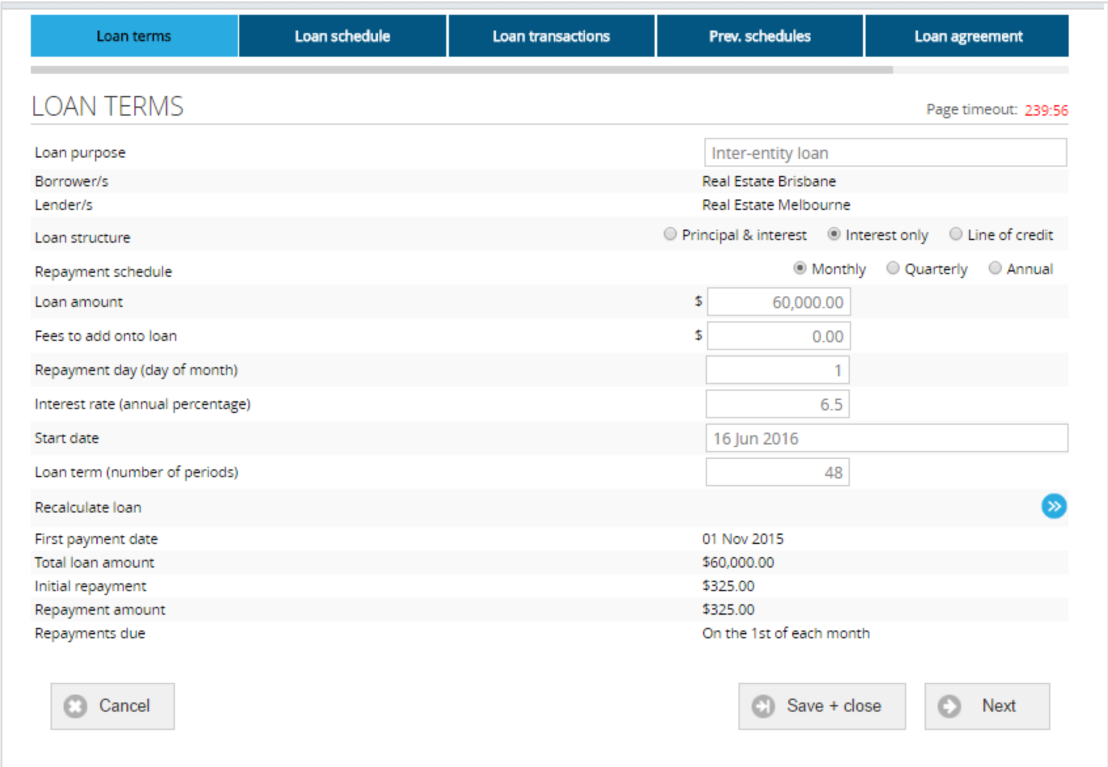
- Select entity from the drop-down menu
- Select 'Add'
- Select 'Confirm'

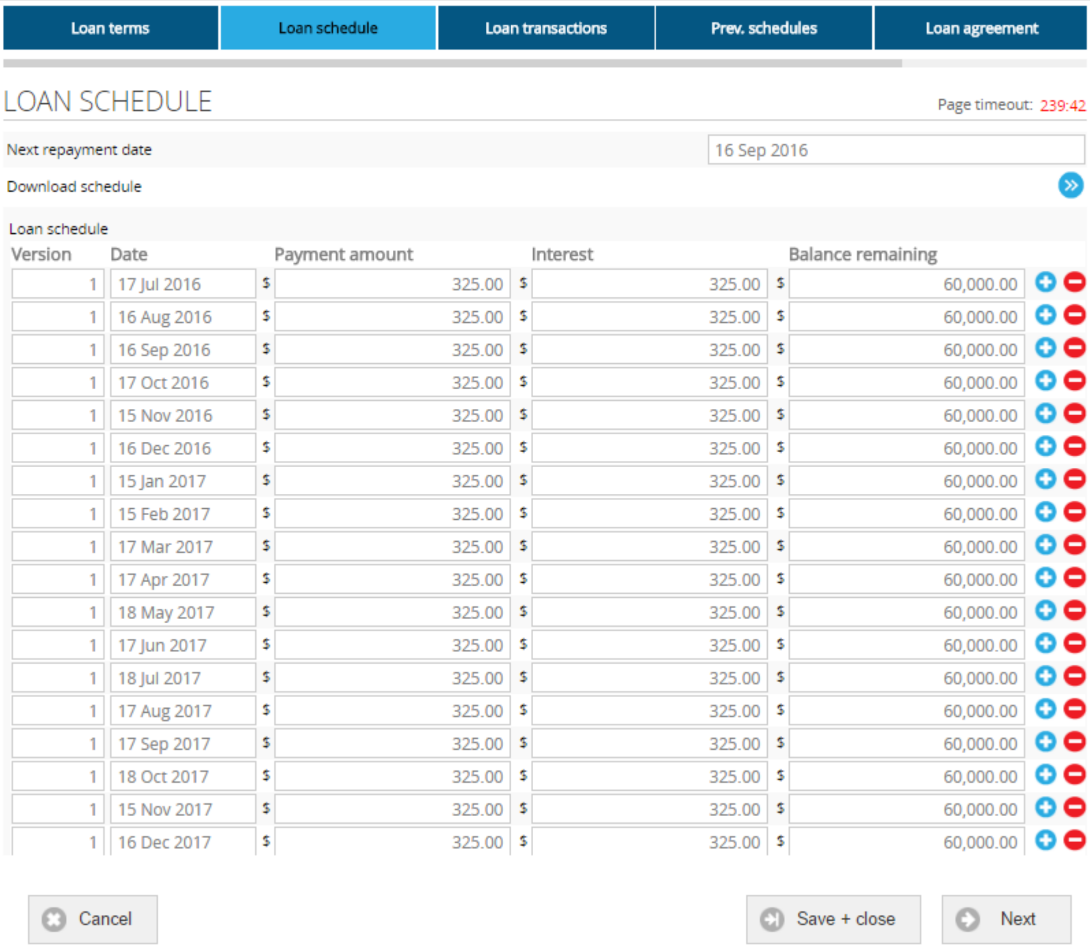
NB: Once you have confirmed borrower/s lenders, the information is not editable.

- Select 'Next'



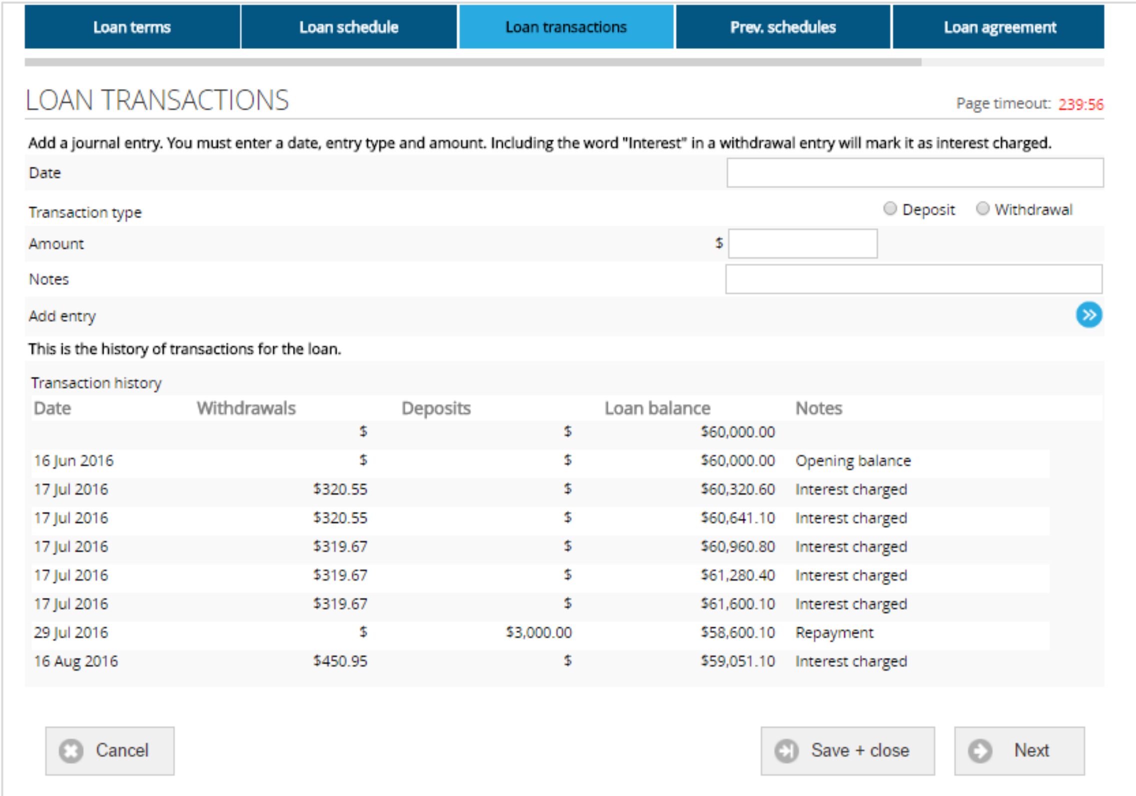
- Enter the relevant information
- Proceed through each page of navigation bar
- Select 'Next' on each page

POWERED BY MYP perform



Version	Date	Payment amount	Interest	Balance remaining
1	17 Jul 2016	$ 325.00	$ 325.00	$ 60,000.00
1	16 Aug 2016	$ 325.00	$ 325.00	$ 60,000.00
1	16 Sep 2016	$ 325.00	$ 325.00	$ 60,000.00
1	17 Oct 2016	$ 325.00	$ 325.00	$ 60,000.00
1	15 Nov 2016	$ 325.00	$ 325.00	$ 60,000.00
1	16 Dec 2016	$ 325.00	$ 325.00	$ 60,000.00
1	15 Jan 2017	$ 325.00	$ 325.00	$ 60,000.00
1	15 Feb 2017	$ 325.00	$ 325.00	$ 60,000.00
1	17 Mar 2017	$ 325.00	$ 325.00	$ 60,000.00
1	17 Apr 2017	$ 325.00	$ 325.00	$ 60,000.00
1	18 May 2017	$ 325.00	$ 325.00	$ 60,000.00
1	17 Jun 2017	$ 325.00	$ 325.00	$ 60,000.00
1	18 Jul 2017	$ 325.00	$ 325.00	$ 60,000.00
1	17 Aug 2017	$ 325.00	$ 325.00	$ 60,000.00
1	17 Sep 2017	$ 325.00	$ 325.00	$ 60,000.00
1	18 Oct 2017	$ 325.00	$ 325.00	$ 60,000.00
1	15 Nov 2017	$ 325.00	$ 325.00	$ 60,000.00
1	16 Dec 2017	$ 325.00	$ 325.00	$ 60,000.00

- Enter the relevant information
- Proceed through each page of navigation bar
- Select 'Next' on each page



- Enter the relevant information
- Proceed through each page of navigation bar
- Select 'Next' on each page

Loan terms | Loan schedule | Loan transactions | Prev. schedules | Loan agreement

PREVIOUS SCHEDULES

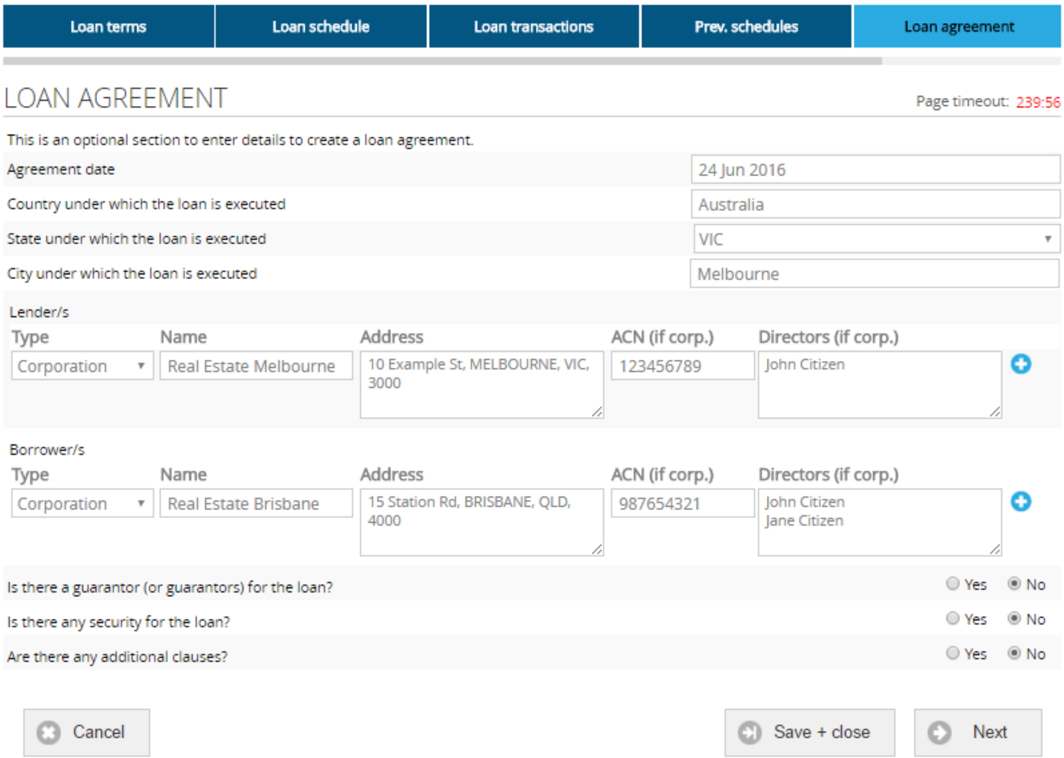
Page timeout: 239:49

All versions of the loan schedule

Version	Date	Payment amount	Interest	Balance remaining
1	17 Jul 2016	$325.00	$325.00	$60,000.00
1	16 Aug 2016	$325.00	$325.00	$60,000.00
1	16 Sep 2016	$325.00	$325.00	$60,000.00
1	17 Oct 2016	$325.00	$325.00	$60,000.00
1	15 Nov 2016	$325.00	$325.00	$60,000.00
1	16 Dec 2016	$325.00	$325.00	$60,000.00
1	15 Jan 2017	$325.00	$325.00	$60,000.00
1	15 Feb 2017	$325.00	$325.00	$60,000.00
1	17 Mar 2017	$325.00	$325.00	$60,000.00
1	17 Apr 2017	$325.00	$325.00	$60,000.00
1	18 May 2017	$325.00	$325.00	$60,000.00
1	17 Jun 2017	$325.00	$325.00	$60,000.00
1	18 Jul 2017	$325.00	$325.00	$60,000.00
1	17 Aug 2017	$325.00	$325.00	$60,000.00
1	17 Sep 2017	$325.00	$325.00	$60,000.00
1	18 Oct 2017	$325.00	$325.00	$60,000.00
1	15 Nov 2017	$325.00	$325.00	$60,000.00
1	16 Dec 2017	$325.00	$325.00	$60,000.00
1	15 Jan 2018	$325.00	$325.00	$60,000.00
1	15 Feb 2018	$325.00	$325.00	$60,000.00
1	17 Mar 2018	$325.00	$325.00	$60,000.00
1	17 Apr 2018	$325.00	$325.00	$60,000.00
1	18 May 2018	$325.00	$325.00	$60,000.00
1	17 Jun 2018	$325.00	$325.00	$60,000.00

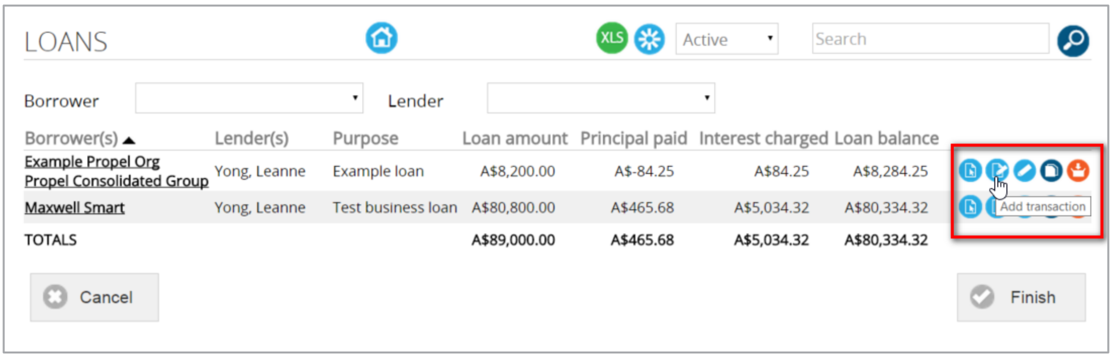
Cancel | Save + close | Next

- Enter the relevant information
- Proceed through each page of navigation bar
- Select 'Next' on each page



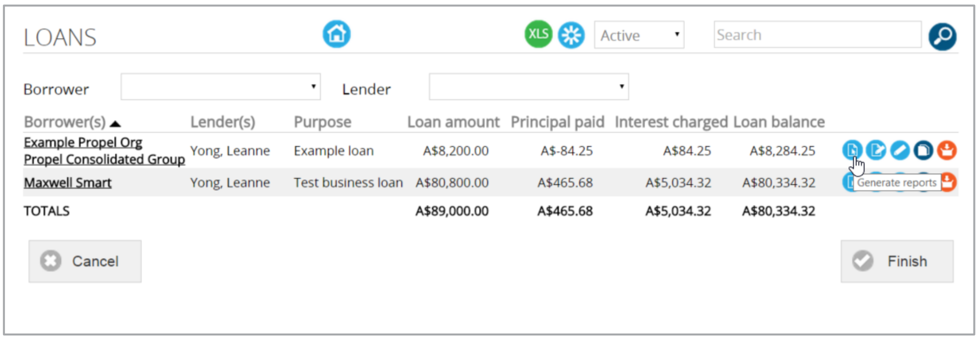
- Enter the relevant information
- Proceed through each page of navigation bar
- Select 'Next' on each page, selecting 'Save + close' on the last page

13.1.1 Add a transaction to a loan



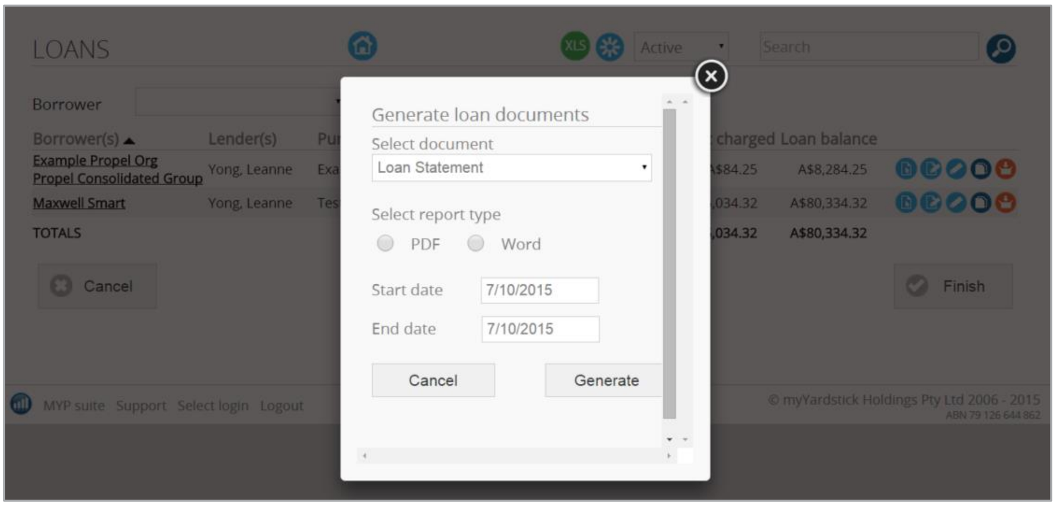
- Select 'Loans'
- Select 'Add transaction' from the 'Action' drop-down on right
- Add relevant notes
- Select 'Confirm'

13.1.2 Generate an individual loan report



- Select 'Loans'
- Select 'Generate reports' from the 'Action' drop-down menu on right
- Select document
- Select report type
- Select start and end date
- Select 'Generate'

13.1.3 Generate a summary report on all loans



- Select 'Loans'
- Select 'XLS'

NB: Wait until the Excel report has generated before selecting finish.

13.1.4 Archive a loan

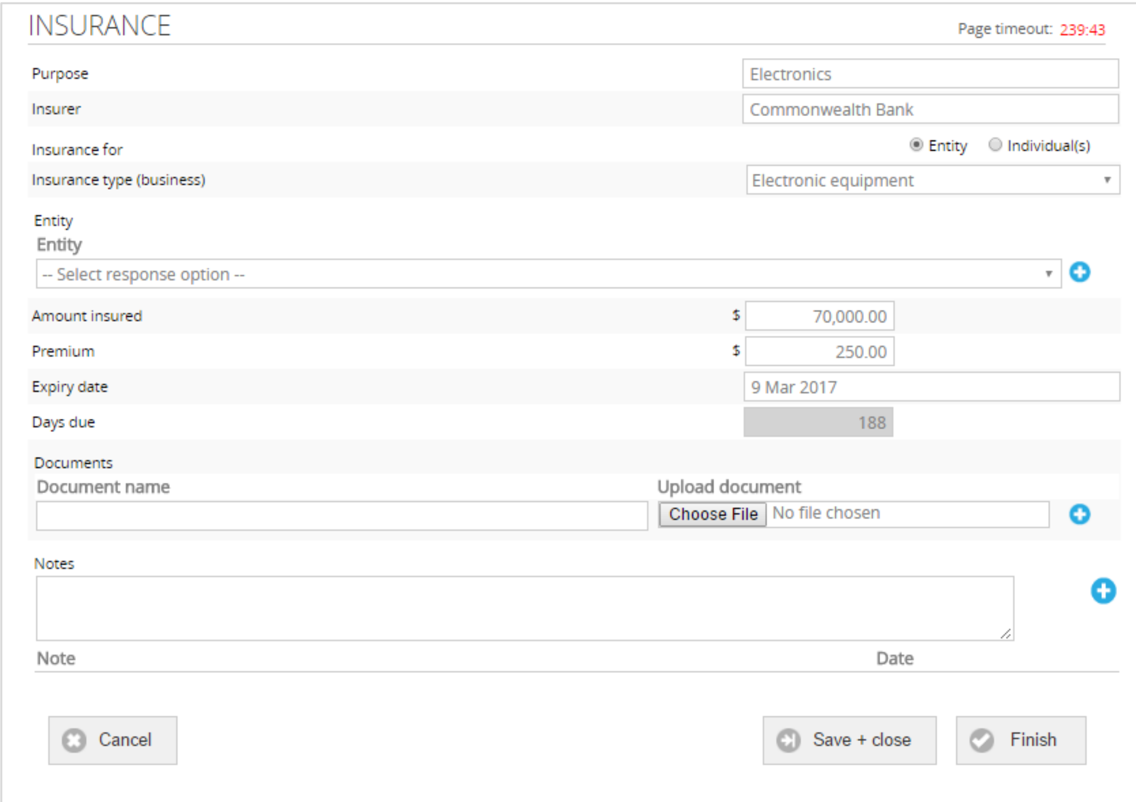
- Select 'Loan
- Select the appropriate loan
- Select 'Archive' from the 'Action' drop-down menu on right

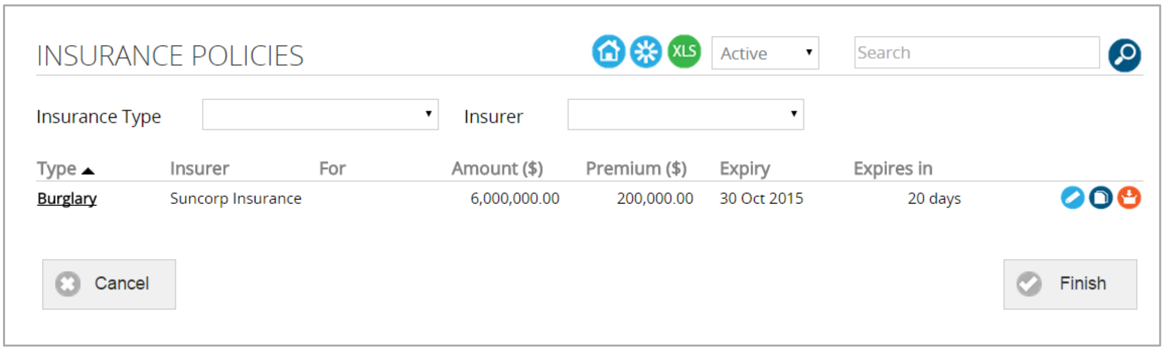
14. insurance policies

Insurance policies are managed the same way for both the Personal and Business dashboards. Access to business insurance is only available through the Business dashboard and personal insurance through the personal dashboard.

14.1 CREATE AN INSURANCE POLICY

- Select 'Create'
- Enter Insurance purpose
- Select entity or individual
- If entity from the drop-down menu
- Select 'Add'
- Enter
  - Amounts insured
  - Premium Expiry date
  - Days due
- Upload relevant documents
- Click 'Save + close'





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14.1.1 Edit an Insurance policy

- Select 'Insurance'
- Select the appropriate insurance
- Select 'Edit from the 'Action' drop-down menu on the right
- Enter relevant changes
- Select 'Save + close'

14.1.2 Generate a summary report on all insurance

- Select 'Insurance'
- Select 'XLS'

NB: Wait until the Excel report has generated before selecting 'Finish'.

14.1.3 Archive an insurance policy

- Select 'Insurance'
- Select the appropriate insurance
- Select 'Archive' from the 'Action' drop-down menu on right

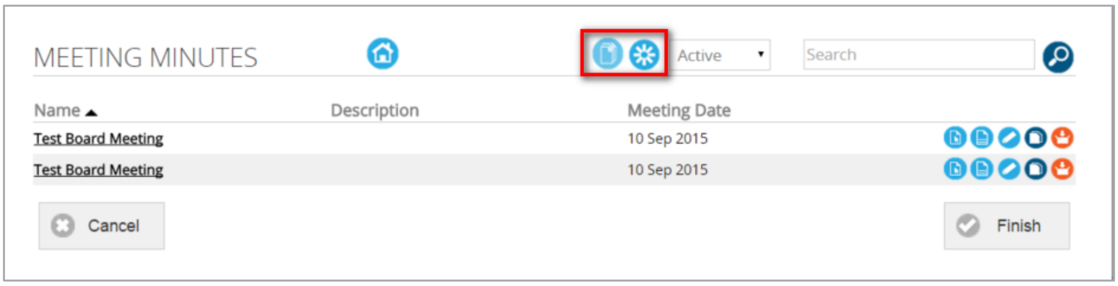
15. meetings

15.1 CREATE MEETING MINUTES

- Select 'Meetings'
- Select 'Create meeting minutes'
- Enter meeting name
- Enter meeting date
- Select an agenda if relevant from the drop-down menu

NB: Agendas in this drop-down menu are templates created in the 'Manage Agenda section'

- Select previous minutes if relevant from the drop-down menu
- Select 'Entity' from the drop-down menu
- Select 'Confirm'
- Enter the relevant information
- Select 'Save + close'



15.2 ADMINISTER MEETING MINUTES

Select 'Meetings'

15.2.1 Edit meeting minutes

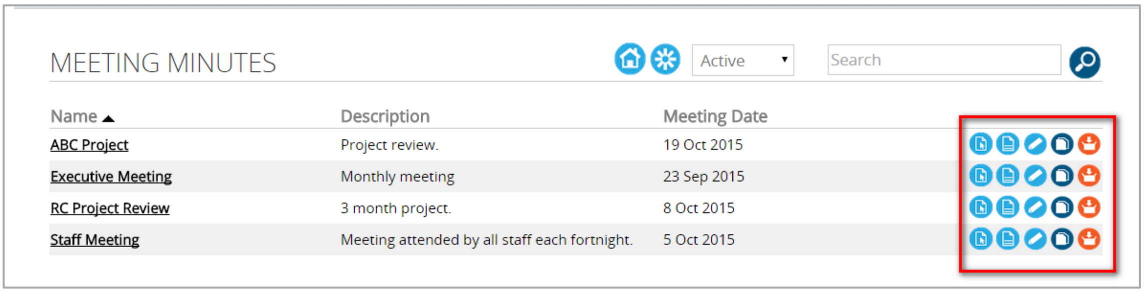
- Select 'Meetings'
- Select the appropriate minutes
- Select 'Edit' from the 'Action' drop-down menu on the right
- Enter relevant changes
- Select 'Save + close'

15.2.2 Copy meeting minutes

- Select 'Meetings'
- Select the appropriate minutes
- Select 'Copy' from the 'Action' drop-down menu on right
- Edit as required

15.2.3 Archive meeting minutes

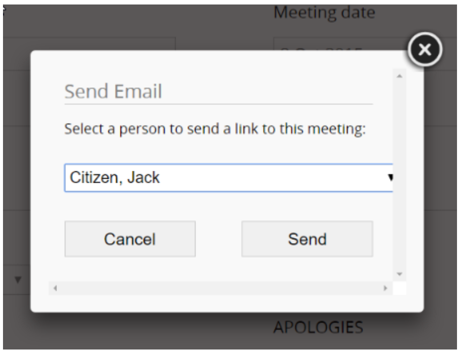
- Select 'Meetings'
- Select the appropriate minutes
- Select 'Archive from the 'Action' drop-down menu on right

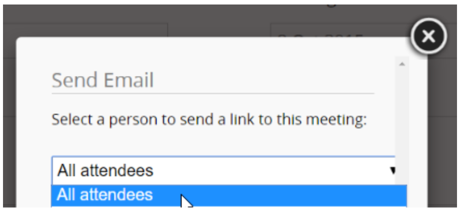


15.2.4 Email meeting minutes

- Select 'Meetings'
- Select the appropriate minutes
- Select 'Edit'

- Select 'Email'
- Select individual names from the drop-down menu or select 'All attendees'



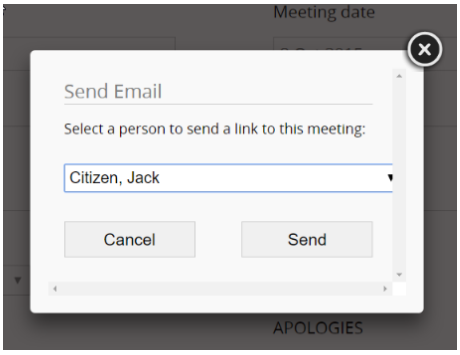


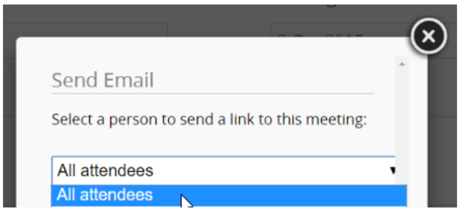
- Select
- Select 'Send'

15.2.5 Email meeting minutes

- Select 'Meetings'
- Select the appropriate minutes
- Select 'Edit'

- Select 'Email'
- Select individual names from the drop-down menu or select 'all attendees'





- Select
- Select 'Send'

15.3 CREATE AN AGENDA TEMPLATE

- Select 'Meetings'
- Select 'Manage agendas'
- Select 'Create'
- Enter Agenda template name
- Enter Agenda Item/s and timing
- Select 'Save + close'

15.4 Administer agenda templates

- Select 'Meetings'
- Select 'Manage Agendas'

15.4.1 Edit an agenda template

- Select 'Meetings'
- Select 'Manage Agendas'
- Select the appropriate Agenda template
- Select 'Edit from the 'Action' drop-down menu on right
- Enter relevant changes
- Select 'Save + close'

15.4.2 Copy an agenda template

- Select 'Meetings'
- Select 'Manage Agendas'
- Select the appropriate Agenda template
- Select 'Copy' from the 'Action' drop-down menu on right
- Edit as required following the Edit an agenda process

15.4.3 Archive an agenda template

- Select 'Meetings'
- Select 'Manage Agendas'
- Select the appropriate Agenda template
- Select 'Archive' from the 'Action' drop-down menu on right

NB: Agenda templates are only visible for the entities on added to the dashboard.

NB: Tasks assigned via Propel meetings appear in the daily reminder email. To stop them appearing, mark the tick box as completed. Notifications begin from the notification date.

16. succession

The 'Succession' area forms the basis of the information collection process. The reG3n section of Propel contains relevant organisational information that flows through to other parts of Propel. This critical organisation information should be created and administered by a select few with relevant permission.

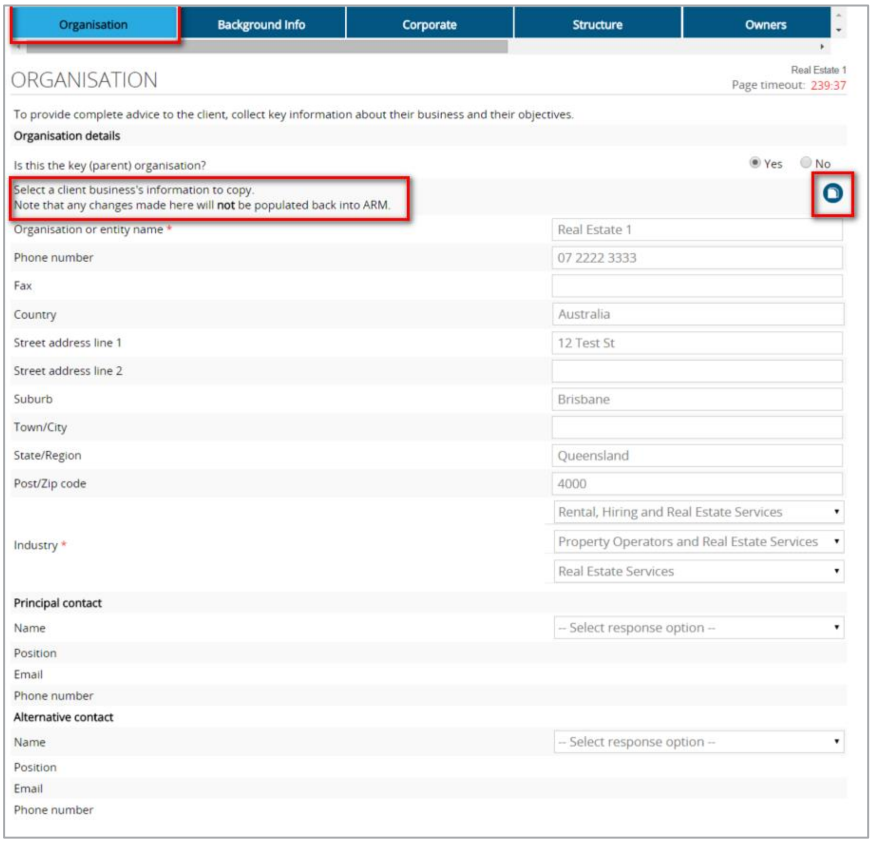
16.1 CORPORATE

To commence entering corporate information:

- Select 'Corporate'
- Select 'Organisation'
- Select 'Copy from ARM' if the organisation already exists in ARM

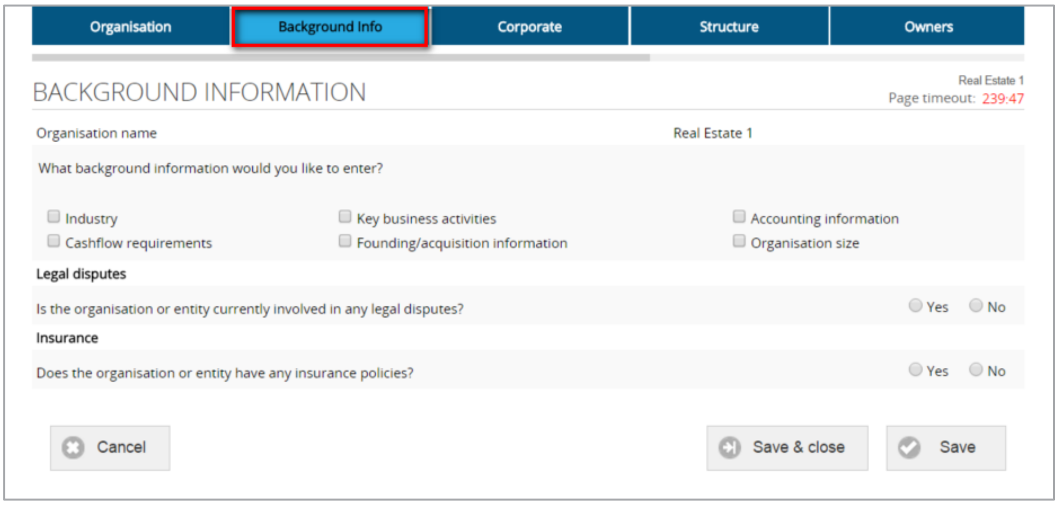
NB: Any changes made here will not be populated back into ARM. Only the first page in the navigation bar will be pre-populated from ARM.

- Enter any relevant corporate information
- Select 'Save'

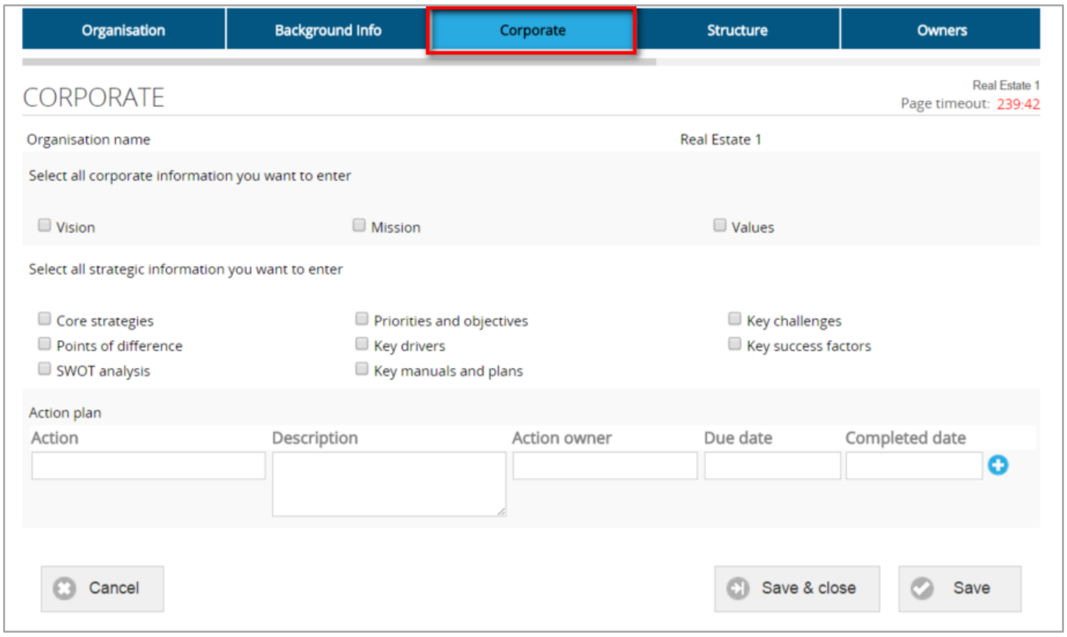


NB: Once the Organisation page has been updated from ARM, it is recommended that the 'Owners + family', 'Key staff' and 'Advisers' be entered prior to returning to complete the remaining organisation pages in the navigation bar. This will pre-populate a number of the drop-down menus on 'Organisation' pages. Links on the following pages make this process more convenient.

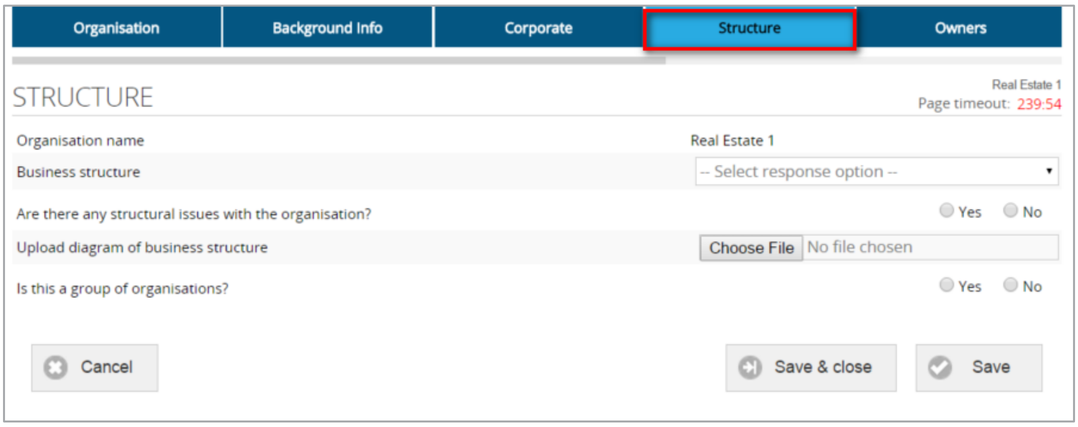
- Progress through the following pages on the blue Navigation bar



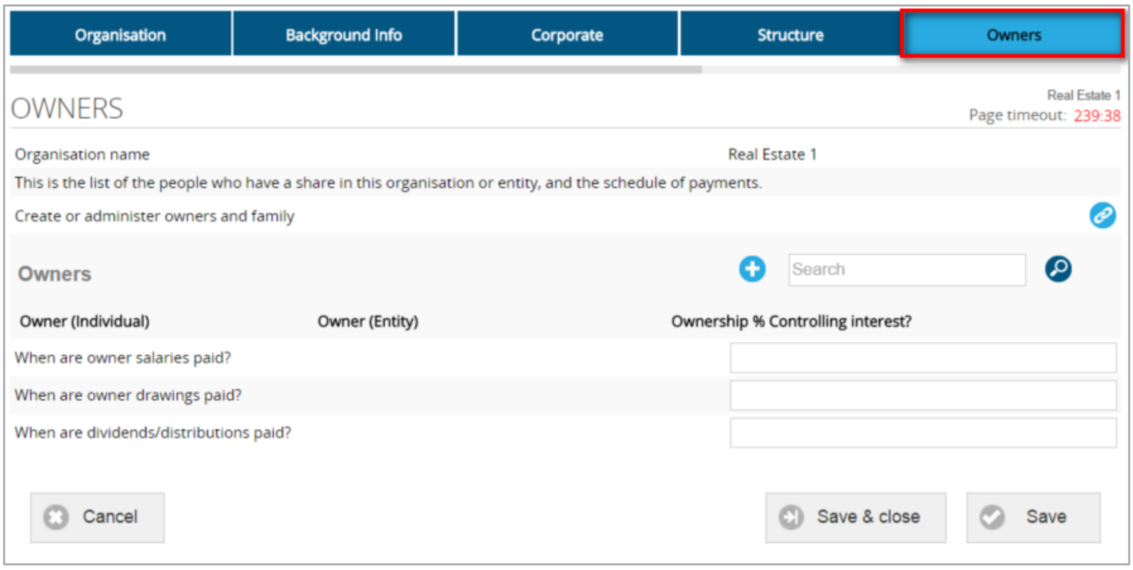
- At the end of each page, select 'Save'



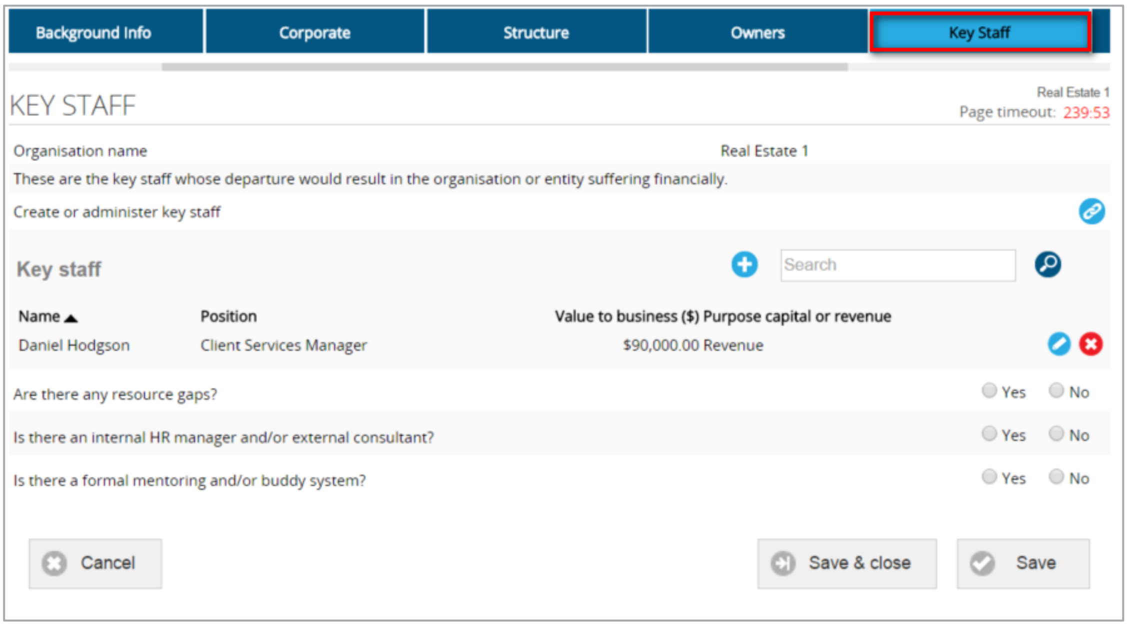
- At the end of each page, select 'Save'



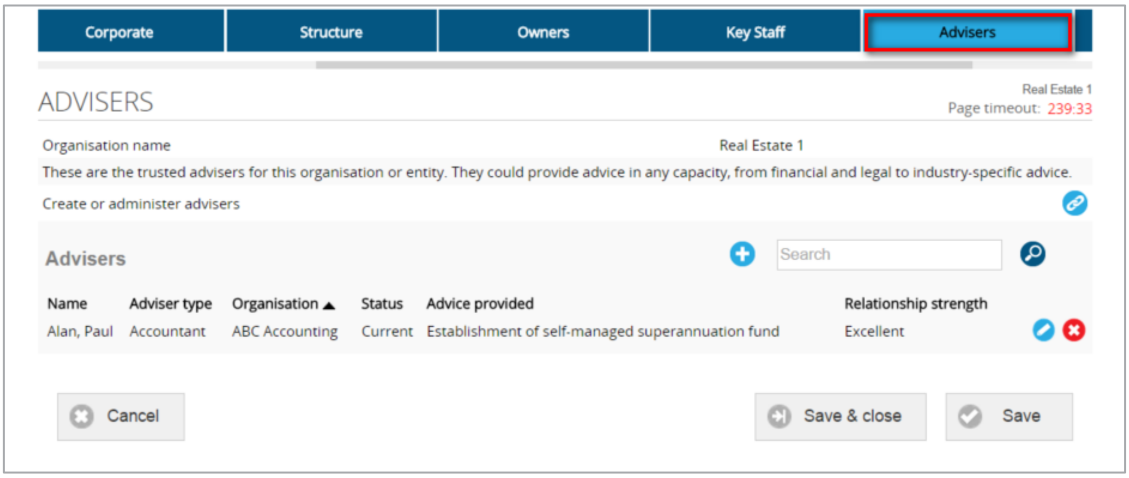
- At the end of each page, select 'Save'



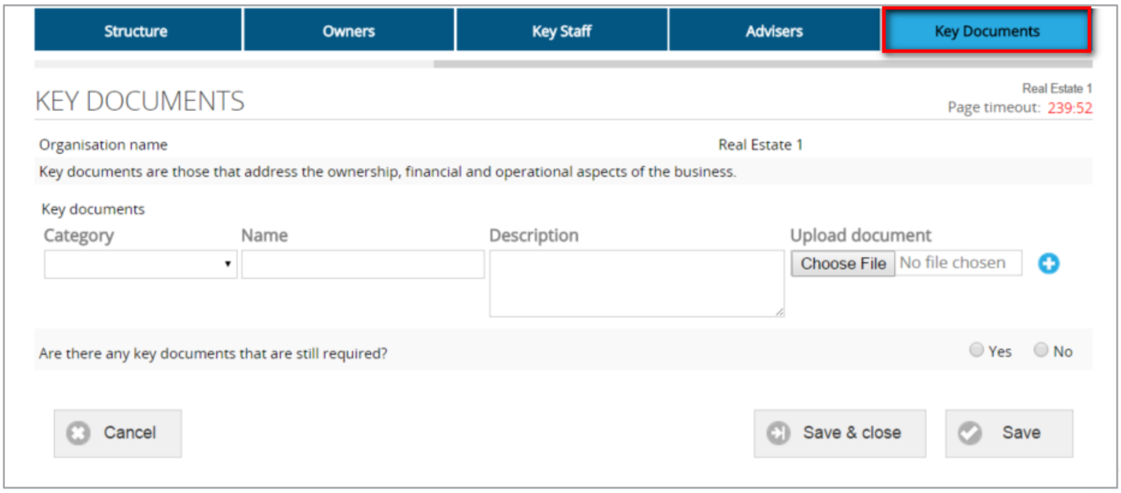
- At the end of each page, select 'Save'



- At the end of each page, select 'Save'



- At the end of each page, select 'Save'



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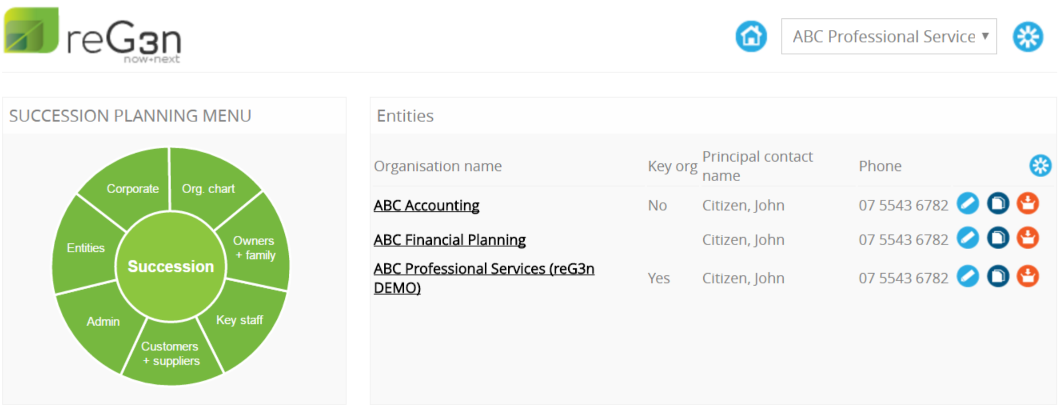
- On the last page (Key Documents), select 'Save + close'

16.2 ENTITIES



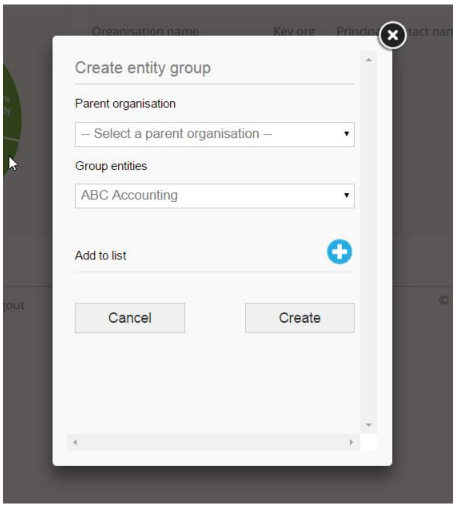
The reG3n section of Propel provides the ability to create entities within a corporate structure. These entities then form drop-down menu options for selection in other areas of Propel. To enter entity information:

- Select 'Entities'

16.2.1 Create an entity

To create an entity:

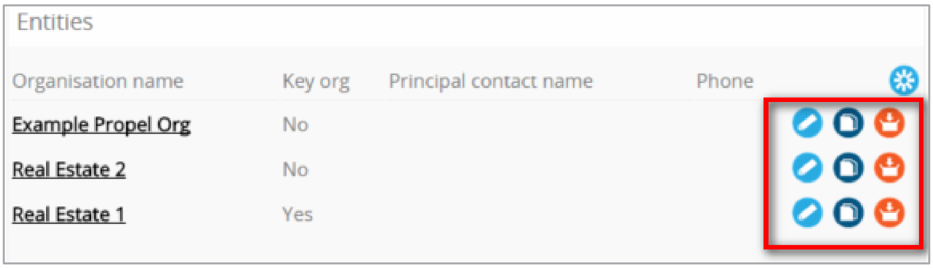
- Select



- Choose from the drop-down menu
- Select 'Add'

16.2.2 Edit, copy or archive an entity

- Identify relevant entity and select the appropriate button



16.2.3 Unarchive or delete an entity

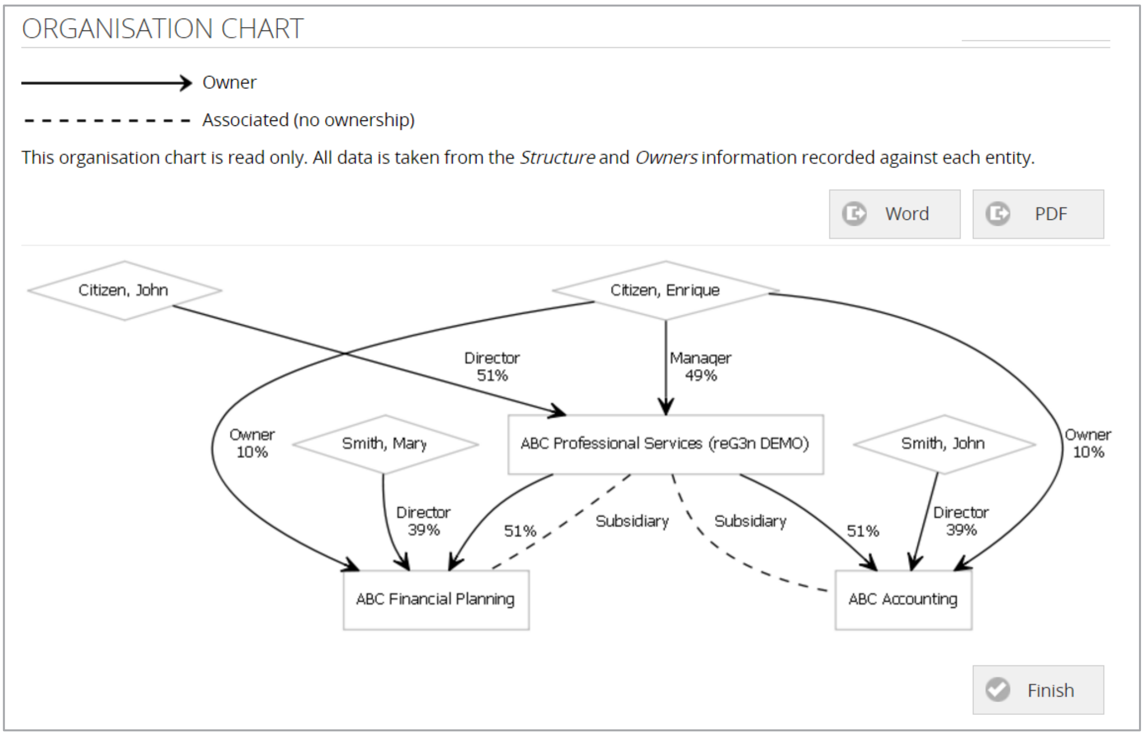
- Select 'Archived' status
- Identify relevant entity and select the appropriate button
- Select 'Confirm' in the warning pop-up box

NB: Advisers created in the 'Adviser' section of Propel will also appear in the drop-down menus for each entity.

16.3 ORGANISATION CHART

The organisation chart in the reG3n section of Propel is a read only image. The data is drawn from the 'Structures' and 'Owners' information recorded within each entity. To view the Organisation chart:

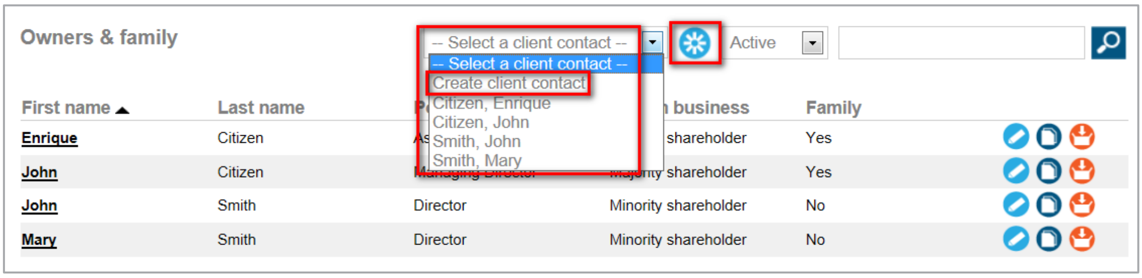
- Select 'Org. chart'



16.4 OWNERS + FAMILY

16.4.1 Create owners + family

- Select 'Owners + family'
- If the contact is in ARM, select from the drop-down menu and select 'Create'
- If not in ARM, Select 'Create' client contact' from the drop-down menu and select 'Create'



- Enter the relevant information

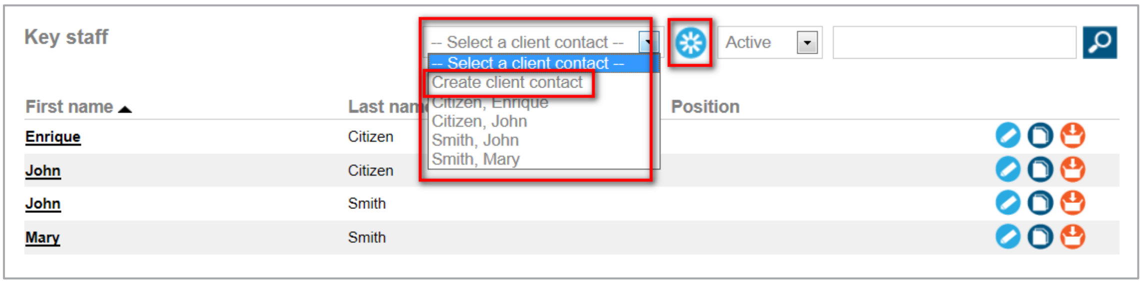
16.5 KEY STAFF

The reG3n section of Propel provides an efficient structure to capture key staff information including accrued leave entitlements, insurances, leadership capability, competencies, and limitations and required training.

16.5.1 Create Key staff

- Select 'Key staff'

- If the contact is in ARM, select from the drop-down menu and select 'Create'
- If not in ARM, Select 'Create' client contact' from the drop-down menu and select 'Create'



- Enter the relevant information
- Proceed through each page of navigation bar

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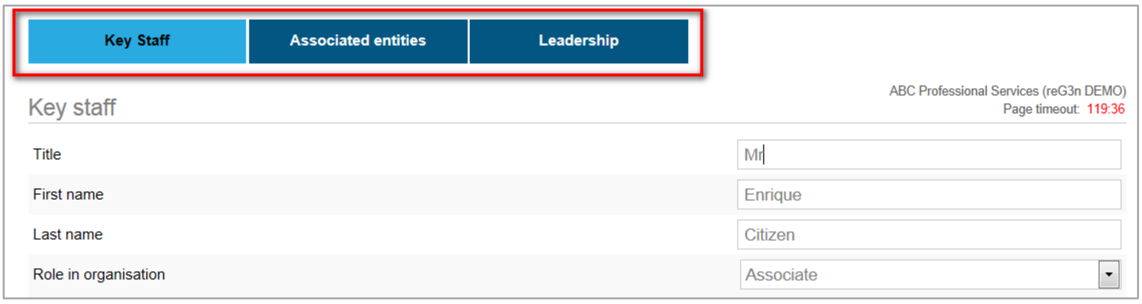
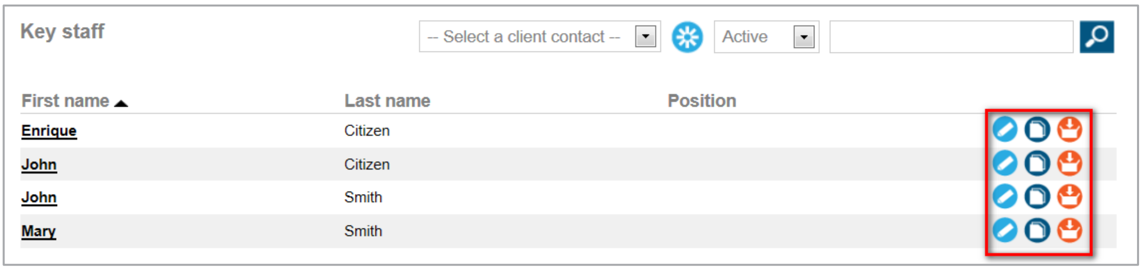


- Select 'Save' on each page
- Select 'Save + close' on last page

16.5.2 Edit, copy or archive key staff

- Select 'Key staff'
- Identify relevant person and select the appropriate button



16.5.3 Unarchive or delete key staff

- Select 'Key staff'
- Select 'Archived' status
- Identify relevant person and select the appropriate button
- Select 'Confirm' in the warning pop-up box

16.6 CUSTOMERS + SUPPLIERS

The reG3n section of Propel provides the ability to capture key customer and supplier information for all the entities within a corporate structure. To enter customer and supplier information:

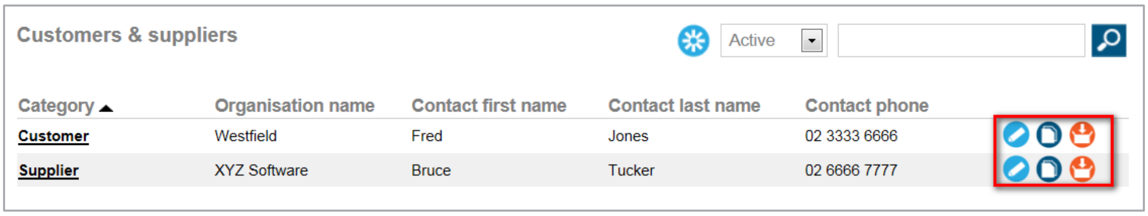
- Select 'Customers + suppliers'

16.6.1 Create a customer/supplier

- Select 'Create'
- Select 'Customer' or 'Supplier'
- Enter details and select 'Save'

16.6.2 Edit, copy or archive a customer/supplier

- Identify the relevant customer/supplier and select the appropriate button



16.6.3 Unarchive or delete a customer/supplier

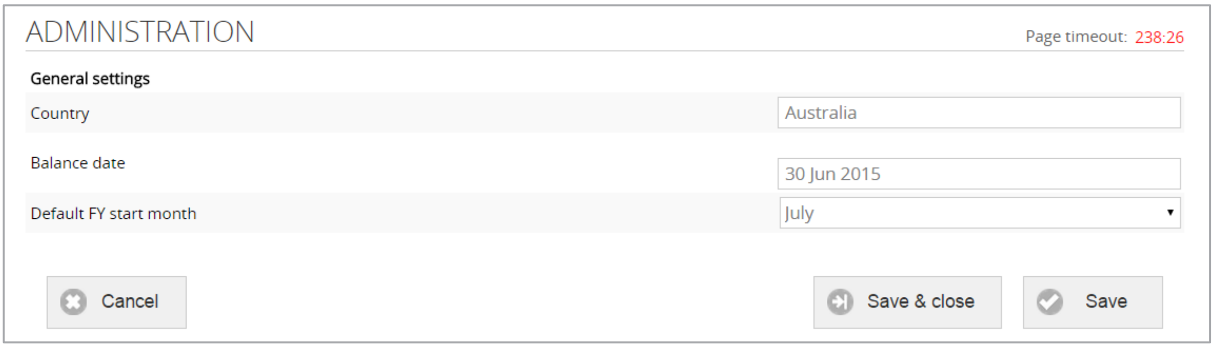
- Select 'Archived' status
- Identify the relevant customer/supplier and select the appropriate button
- Select 'Confirm' in the warning pop-up box

16.7 ADMINISTRATION

The reG3n section of Propel has the ability to customise the general settings for the client organisation. The options selected on this page will flow through to relevant documents and reports.

To administer reG3n for a client organisation:

- Select 'Admin'
- Enter details as required



- Select 'Save'

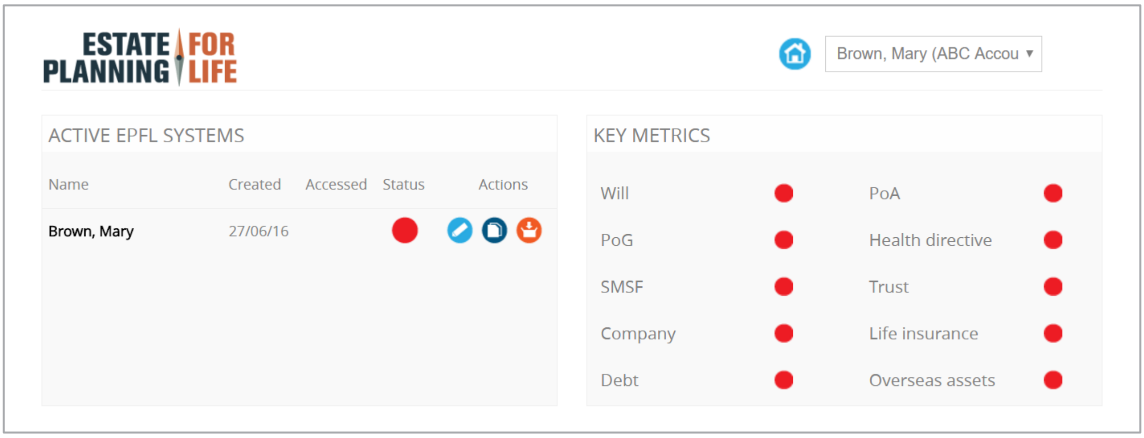
17. administer Estate Planning For Life

The Estate Planning for Life section of Propel contains relevant personal information that flows through to other parts of Propel. This critical organisation information should be created and administered by a select few with relevant permission.

17.1 CREATE AN EPFL SYSTEM

To create an EPFL system for an existing client:

- Begin to type client name in the auto-complete box
- Select the relevant client from the drop-down selection
- Select 'Create'
- Enter System Name - Recommended client name
- Complete the details
- Confirm



- Select 'Edit'

Complete each of the following screens:

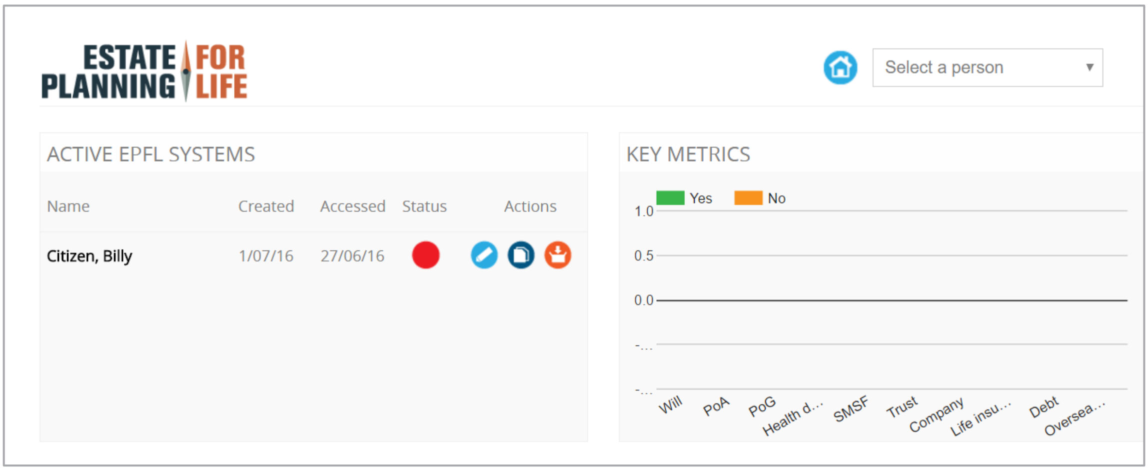
Basic data

- ✓ Your health
- ✓ People
- ✓ Notifications
- ✓ Testamentary
- ✓ Funeral Wishes
- ✓ Inheritance
- ✓ Documents – Estate, Personal, Uploaded documents.
- ✓ Bills
- ✓ Internet logins

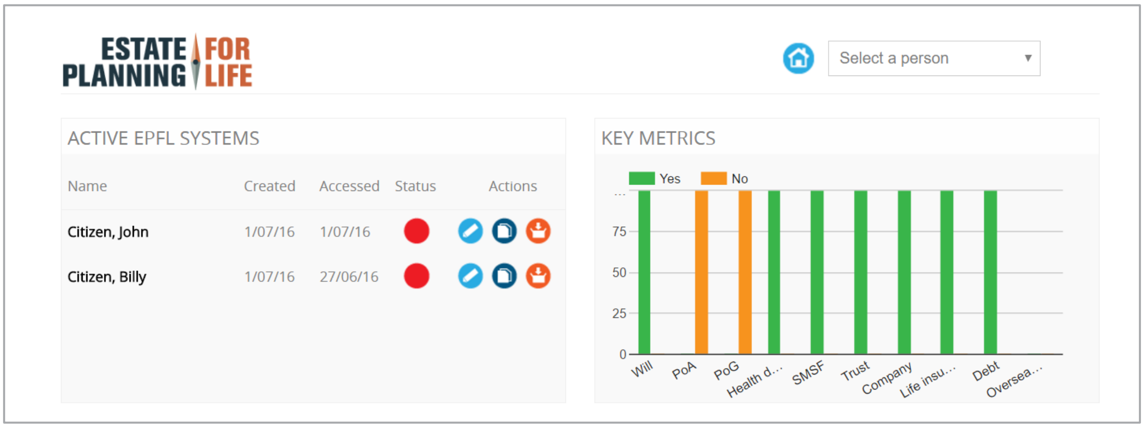
- Select 'Next' to progress through screens
- Select 'Save + close'

17.2 EPFL METRICS

A summary for individual clients are shown with red or green status.



An overall summary of Key Metrics for all clients is provided in a bar graph on the front screen.



18. MYP training + support centre

For training and support options, please refer to MYP Administration, Relationships + Management (ARM) myHelp.