



myHelp



table of contents

1.	terminology + abbreviations.....	6
1.1	ICON DICTIONARY	6
1.2	PROPEL BUTTON DICTIONARY	7
2.	overview	8
2.1.	UPGRADE PROPEL VERSION.....	9
3.	MYP system set-up	9
3.3	'WHITELIST' MYP GENERATED EMAIL	9
4.	settings.....	9
4.1	ADMINISTER APIs.....	10
5.	Propel wizard	11
6.	staff administration	12
6.1	CREATE STAFF	12
6.2	CHECKING STAFF PERMISSIONS.....	12
7.	clients + contacts	13
7.1	ADMINISTER CLIENTS + CONTACTS.....	13
7.1.1	Use of the 'Test' client	14
8.	administer consolidated groups.....	14
8.1	CREATE A CONSOLIDATED ORGANISATION GROUP.....	14
9.	Propel dashboard	16
9.1	ADDING A BUSINESS TO THE 'PROPEL BUSINESS DASHBOARD'	16
9.2	ADD ASSETS TO THE 'PROPEL PERSONAL DASHBOARD'	18
9.2.1	Adviser access to the client dashboard	19
9.2.2	Adviser notifications for non-subscribers.....	21
9.2.3	View a subscribed client's Propel dashboard.....	21
9.3	NAVIGATING THE 'PROPEL BUSINESS DASHBOARD'	21

9.3.1	Entity status + actions.....	22
9.3.2	Actions + notifications.....	23
9.3.2.1	Add to 'My to-do list'	23
9.3.2.2	Edit 'My to-do list'	23
9.3.3	Financial position.....	23
9.3.4	Inflow + expenditure.....	24
9.3.5	Cashflow.....	24
9.3.5.1	Create a new scenario	25
9.3.5.2	Edit a new scenario.....	25
9.3.5.3	Edit scenario name	27
9.3.5.4	Copy a scenario.....	27
9.3.5.5	Adjust cashflow drivers.....	27
9.3.6	Edit entity settings (+ Only).....	28
9.3.7	Calculate revenue (+ Only).....	28
9.3.8	Calculate expenses (+ Only).....	29
9.3.9	Scenario Graphs (+ Only).....	29
9.3.10	Scenario Reports (+ Only).....	29
9.3.11	Cashflow Report (Propel Pro Only)	30
9.4	MANAGING A CLIENT ON THE 'PROPEL BUSINESS DASHBOARD' (PROPEL PRO ONLY)...	30
9.4.1	Subscribing a client to MYP.....	30
9.5	NAVIGATING THE 'PROPEL PERSONAL DASHBOARD'	31
9.5.1	Actions + notifications.....	31
9.5.1.1	Add to 'My To-do list'	32
9.5.1.2	Edit 'My to-do list'	32
9.5.2	Goals + KPIs	32
9.5.3	Personal financial position	32
10.	upload data	33
10.1	MANAGE UPLOADED FINANCIAL DATA	34
11.	KPIs + goals	34
11.1	ADD KPIs FOR BUSINESS	34
11.1.1	Create KPIs.....	36
11.1.2	Generate KPI display	36
11.1.3	Non-current month KPI.....	37
11.1.4	Edit KPIs.....	37
11.1.5	Copy KPIs	37
11.1.6	Archive KPIs	37
11.2	Add goals + KPIs for personal.....	38

11.2.1	Administer Personal KPI group settings	38
11.2.2	Edit a Personal KPI group setting	38
11.2.3	Delete a Personal KPI group setting	38
11.2.4	Create Goals + KPIs	38
11.2.5	Edit Goals + KPIs	38
11.2.6	Copy Goals + KPIs	39
11.2.7	Archive Goals + KPIs	39
11.3	KPI LIBRARY	39
11.3.1	Create KPI template	39
11.3.2	Assign a KPI template to an entity	39
11.3.3	Suggested KPI templates	39
12.	manage documents	40
12.1	CREATE A DOCUMENT	40
12.2	ADMINISTER EXISTING DOCUMENTS	40
12.3	ARCHIVE A DOCUMENT	41
12.4	UNARCHIVE A DOCUMENT	41
13.	loans	41
13.1	CREATE A LOAN	41
13.1.1	Add a transaction to a loan	46
13.1.2	Generate an individual loan report	46
13.1.3	Generate a summary report on all loans	47
13.1.4	Archive a loan	47
14.	insurance policies	47
14.1	CREATE AN INSURANCE POLICY	48
14.1.1	Edit an Insurance policy	49
14.1.2	Generate a summary report on all insurance	49
14.1.3	Archive an insurance policy	49
15.	meetings	49
15.1	CREATE MEETING MINUTES	49
15.2	ADMINISTER MEETING MINUTES	49
15.2.1	Edit meeting minutes	50
15.2.2	Copy meeting minutes	50
15.2.3	Archive meeting minutes	50
15.2.4	Email meeting minutes	50
15.2.5	Email meeting minutes	51
15.3	CREATE AN AGENDA TEMPLATE	51
15.4	Administer agenda templates	52

15.4.1	Edit an agenda template.....	52
15.4.2	Copy an agenda template.....	52
15.4.3	Archive an agenda template.....	52
16.	succession.....	52
16.1	CORPORATE.....	52
16.2	ENTITIES.....	56
16.2.1	Create an entity.....	56
16.2.2	Edit, copy or archive an entity	56
16.2.3	Unarchive or delete an entity.....	57
16.3	ORGANISATION CHART	57
16.4	OWNERS + FAMILY	57
16.4.1	Create owners + family	58
16.5	KEY STAFF.....	58
16.5.1	Create Key staff.....	58
16.5.2	Edit, copy or archive key staff.....	59
16.5.3	Unarchive or delete key staff.....	59
16.6	CUSTOMERS + SUPPLIERS.....	59
16.6.1	Create a customer/supplier.....	59
16.6.2	Edit, copy or archive a customer/supplier.....	60
16.6.3	Unarchive or delete a customer/supplier.....	60
16.7	ADMINISTRATION.....	60
17.	administer Estate Planning For Life	60
17.1	CREATE AN EPFL SYSTEM.....	60
17.2	EPFL METRICS	61
18.	MYP training + support centre.....	62

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		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		

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:

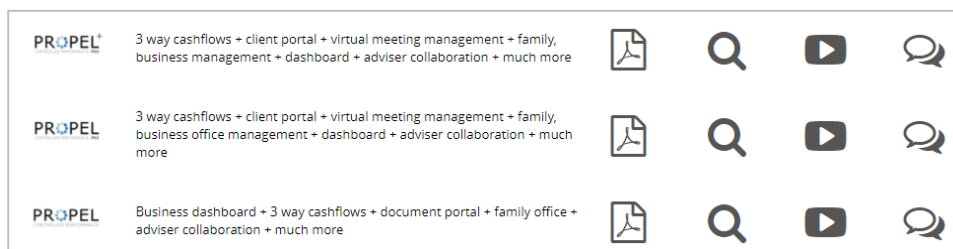
- Real time financial performance dashboards (integrated with major cloud based accounting software)
- Three way cashflow forecasting, budgeting and what if scenarios
- Business and personal document portal
- Ability to set up and manage all related party loans, schedules and documents
- Transparency 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.

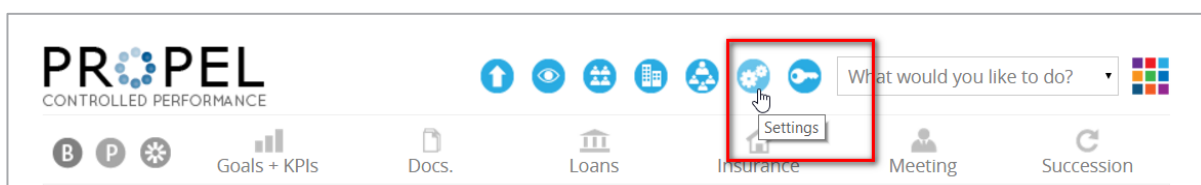
3.3 'WHITELIST' MYP GENERATED EMAIL

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

SETTINGS

SELECT A SETTING TO EXPAND

- ↕ General settings
- ↕ Personal KPI group settings
- ↕ API settings

SETTINGS

SELECT A SETTING TO EXPAND

↕ General settings

Country
Australia

Edit loan transactions
☒ No ☐ Yes

Auto-archive expired insurance policies
☒ No ☐ Yes

↕ Personal KPI Groupings

+

Name


Emotional well-being

Health

Wealth

Edit name	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4.1 ADMINISTER APIs

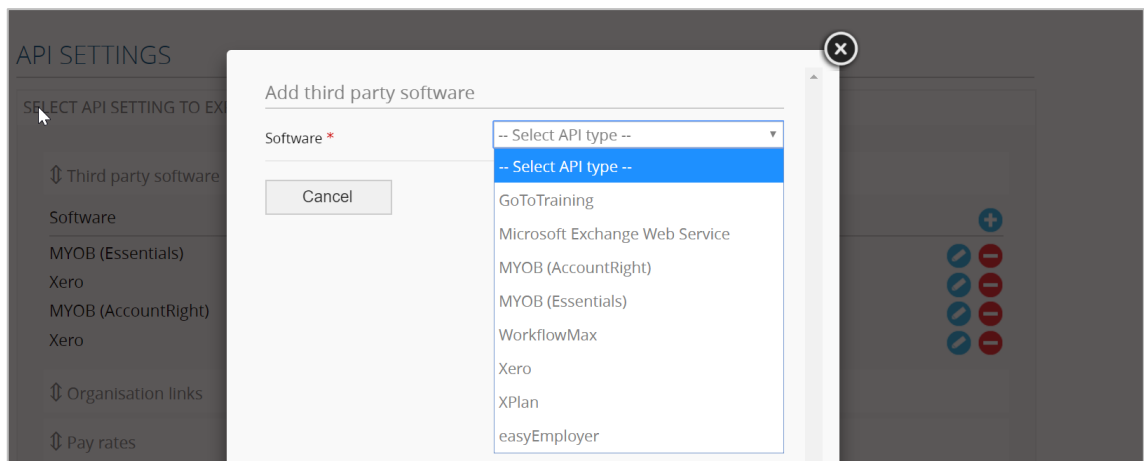
- Select  Third party software or relevant API
- Select 'API' type

API SETTINGS

SELECT API SETTING TO EXPAND

- ↕ Third party software
- ↕ Organisation links
- ↕ Pay rates
- ↕ Structure
- ↕ Staff links
- ↕ Leave type links

- Follow the prompts

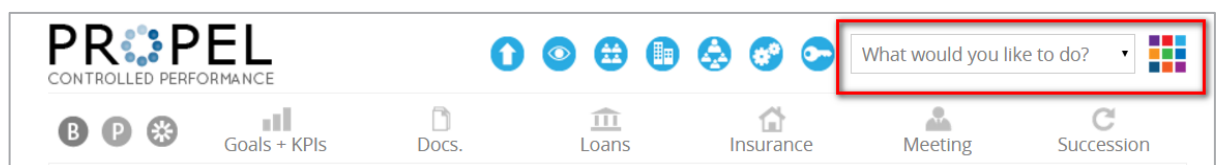


- Select 'Save'

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.



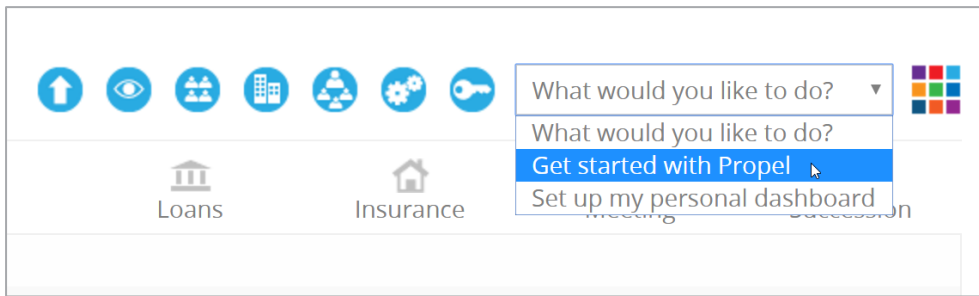
This prompt steps through both the 'Business' and 'Personal' stages of set-up. 'Get started with Propel' guides the 'Business dashboard' set-up.

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

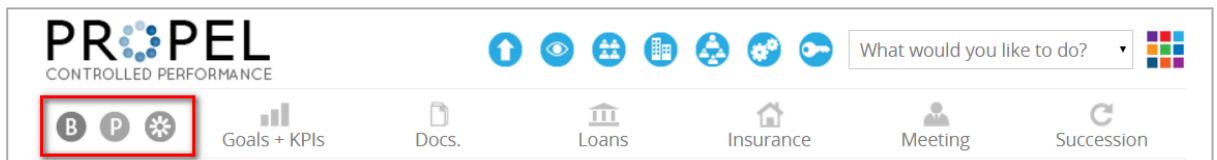
'Set up my personal dashboard' guides the 'Personal dashboard' set-up.

- 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.



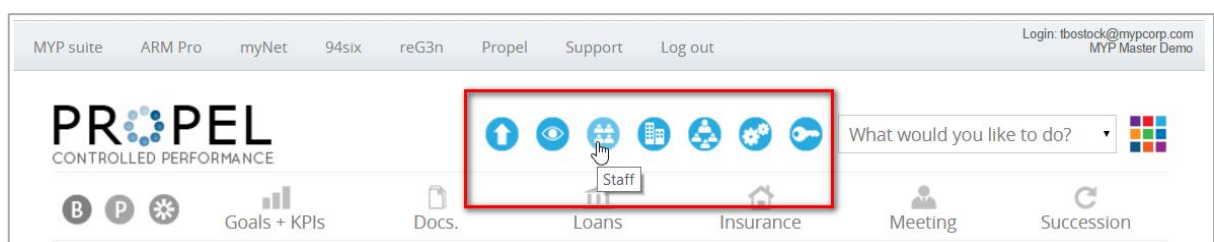
- For the business dashboard: Select 'B'
- For the personal dashboard: Select 'P'

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.

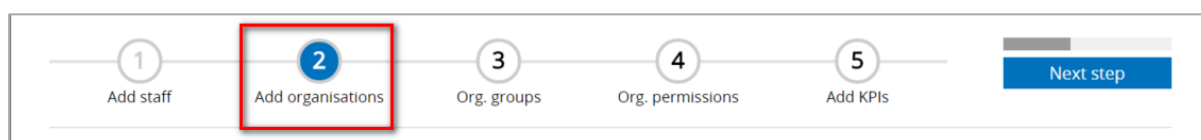
- Select ARM – Administration – ‘Staff’
- Select the staff member – ‘Edit’
- Scroll to the Staff permissions section – Propel
- Edit accordingly

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

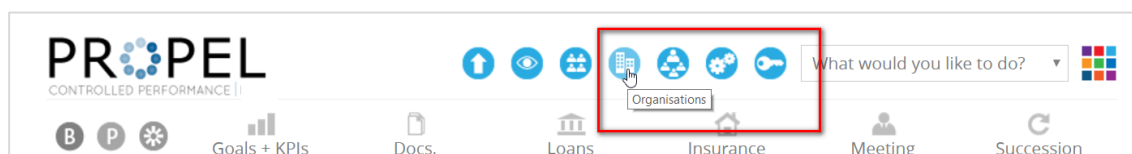
7. clients + contacts

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

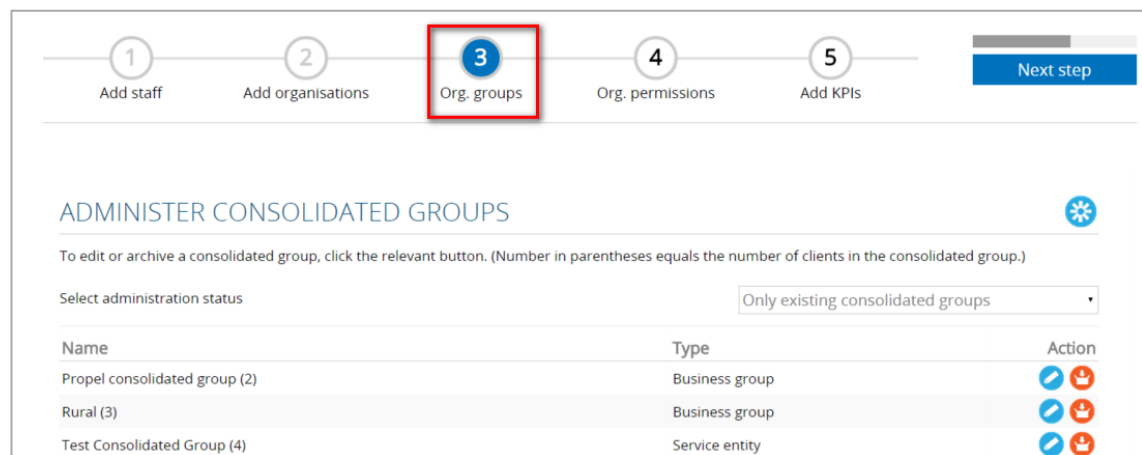
Your subscription includes a 'Test Client for <Organisation>' and is easily located via the search. MYP encourages the use of the test client to become familiar with MYP tools and features. The test client is partitioned from the MYP industry database so any test data uploaded under the test client will 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

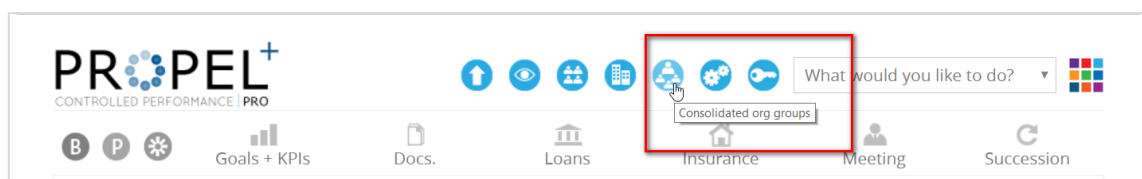
Propel provides the opportunity to create consolidated groups to which any entities within that group of entities can be attached and their financial goals and KPIs can be consolidated.

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

CREATE CONSOLIDATED GROUP

Enter name of consolidated group *

Parent entity ☐ Create new ☐ Create group label ☒ Use existing

The results of consolidating data will be stored in the parent entity. It is recommended that no P&L data be uploaded for the parent entity or this will overwrite the automatic 'sum of the parts' consolidated total from each of the sub-entities in the group.

It may be helpful to upload Balance Sheet data at the parent level only, not at the sub-entity level.

Enter parent entity name and click search

When uploading data for service entity consolidated groups, map any data that should not be consolidated (e.g. service entity revenue, trading entity service fees) to the relevant **Service Entity Revenue** or **Service Entity Expense** accounts.

Type of consolidated group ☐ Service entity ☐ Business group

Select the client/s that will be in this group.

Enter client name and click search

- the Parent entity is existing or new

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

CREATE CONSOLIDATED GROUP

Enter name of consolidated group * Real Estate

The results of consolidating data will be stored in the parent entity. It is recommended that no P&L data be uploaded for the parent entity or this will overwrite the automatic 'sum of the parts' consolidated total from each of the sub-entities in the group.

It may be helpful to upload Balance Sheet data at the parent level only, not at the sub-entity level.

Enter parent entity name and click search

Parent organisation

When uploading data for service entity consolidated groups, map any data that should not be consolidated (e.g. service entity revenue, trading entity service fees) to the relevant **Service Entity Revenue** or **Service Entity Expense** accounts.

Type of consolidated group ☒ Service entity

Select the client/s that will be in this group.

Enter client name and click search

Cancel

A

-- Select parent entity --

-- Select parent entity --

ABC Accounting

ABC Financial Planning

ABC Golf Course (reG3n DEMO)

ABC Professional Services (reG3n DEMO)

Aristotle School (SRS DEMO)

Brisbane Cocktail Lounge

Brisbane Conference Centre

Medical Centre

Medical Centre Service Trust

MYP Corporation MASTER DEMO

Real Estate Adelaide

Real Estate Brisbane

Real Estate Canberra

Real Estate Group

Real Estate Melbourne

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

CREATE CONSOLIDATED GROUP

Enter name of consolidated group *

Parent entity ☒ Create new ☐ Use existing

Identify the relevant industry sector from the drop-down menus below.

Industry *

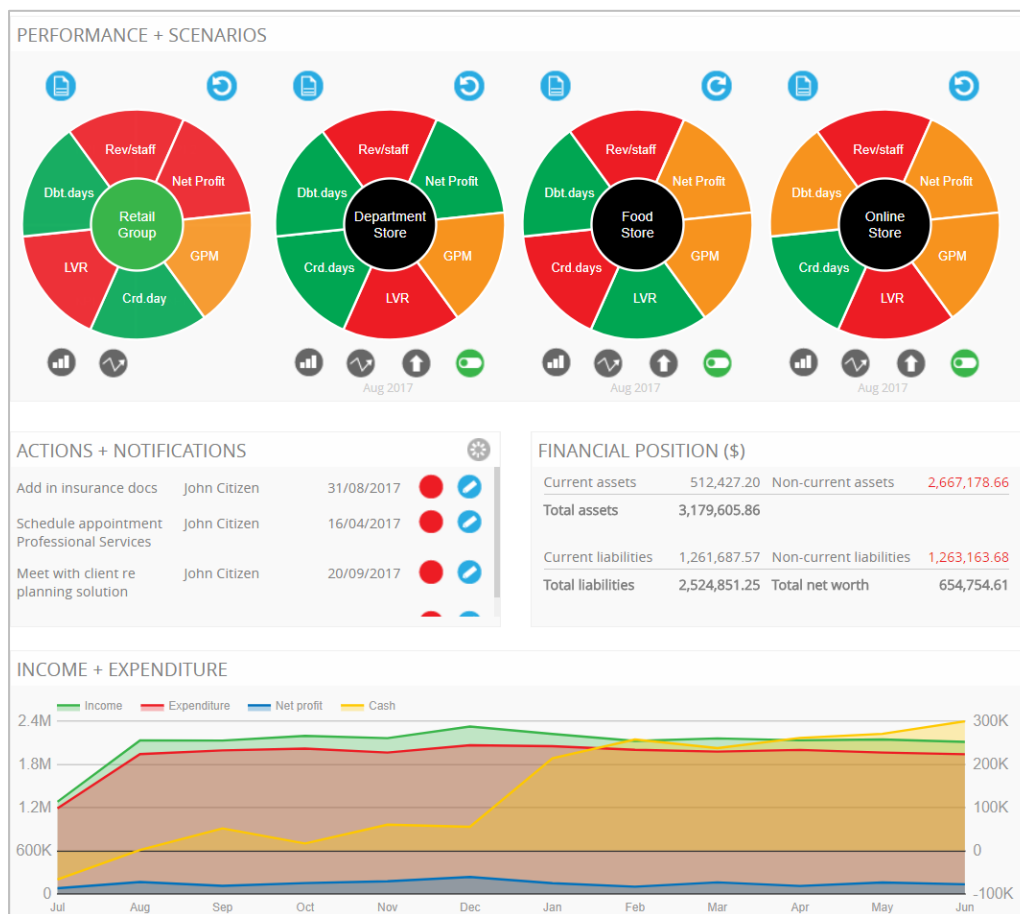
Category *

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'

The screenshot shows the 'Propel wizard' progress bar at the top with five steps: 1. Add staff, 2. Add organisations, 3. Org. groups, 4. Org. permissions (highlighted with a red box), and 5. Add KPIs. A 'Next step' button is on the right. Below the progress bar is the 'MANAGE ENTITY PERMISSIONS' form. It features a dropdown menu for '-- Select organisation --', a dropdown for '-- Select staff member --' with a blue '+' icon, and a 'Staff name' field. To the right of the 'Staff name' field are links for 'My dashboard', 'Meetings', 'View', and 'Edit'. A 'Save' button with a checkmark is at the bottom right.

- Select 'Organisation'
- Select 'Add' +

This screenshot shows the 'MANAGE ENTITY PERMISSIONS' form with the '-- Select organisation --' dropdown menu open. The dropdown list includes options: '-- Select organisation --', 'Accountant', 'Maintenance Plus', 'Professional Services (reG3n DEMO)', and 'Retail Group'. A red box highlights the dropdown menu, and another red box highlights the blue '+' icon next to the '-- Select staff member --' dropdown. The 'Staff name' field and the 'My dashboard', 'Meetings', 'View', and 'Edit' links are visible. At the bottom, there are three buttons: 'Cancel' with an 'x' icon, 'Save + close' with a checkmark icon, and 'Save' with a checkmark icon.

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

1 Add staff 2 Add organisations 3 Org. groups 4 Org. permissions 5 Add KPIs Next step

MANAGE ENTITY PERMISSIONS

ABC Accounting

-- Select staff member --

Staff name

John Champion

John Citizen

My dashboard Meetings View Edit

Save

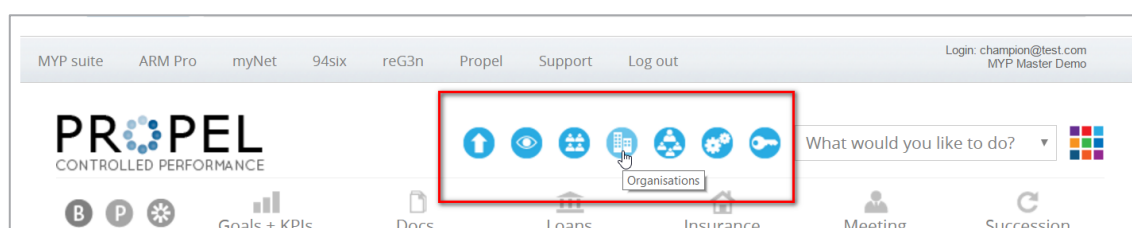
- Assign correct permissions
- Select 'Save'

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'

PERSONAL ASSETS


Assets

Type	Description	Asset value	Debt	
Cash	Cash in bank	\$ 30,000	\$	+ -
Property	House	\$ 600,000	\$ 400,000	+ -
Vehicle or watercraft	Jetski	\$ 25,000	\$ 13,000	+ -
Miscellaneous	Motorbike	\$ 15,000	\$	+ -
Loans/debt	Personal Loan	\$	\$ 6,000	+ -
Vehicle or watercraft	Car - Toyota Corolla	\$ 16,000	\$ 0	+ -
		\$ 686,000	\$ 419,000	

 Save



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

PROPEL+
CONTROLLED PERFORMANCE PRO

What would you like to do? 

Goals + KPIs Docs. Loans Insurance EPFL



ACTIONS + NOTIFICATIONS

Schedule appointment John Citizen 16/04/2015  

ABC Professional Services

PERSONAL FINANCIAL POSITION (\$)

Description	Assets	Liabilities	Net value
Cash in bank	30,000	0	30,000
House	600,000	400,000	200,000
Jetski	25,000	13,000	12,000
Motorbike	15,000	0	15,000
Total	686,000	419,000	267,000

  Manage personal data

GOALS + KPIs

Education

Finance

Health

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

9.2.1 Adviser access to the client dashboard

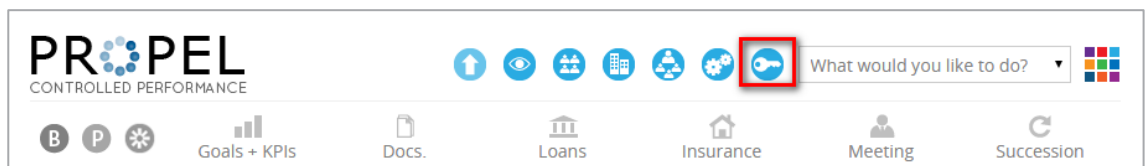
Adviser access to the Propel business dashboard allows a subscribed Propel user to provide access to their dashboard to an adviser who is also subscribed to Propel. If an advisor is not a subscriber the invitation will still be sent with a link to subscribe.

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

Relationship:	<input checked="" type="checkbox"/> Propel	<input type="checkbox"/> Client/Customer	<input type="checkbox"/> SYDCustomer	<input type="checkbox"/> Suspect	<input type="checkbox"/> Prospect
	<input type="checkbox"/> Referrer	<input type="checkbox"/> Partner	<input type="checkbox"/> Supplier	<input type="checkbox"/> A Class	<input type="checkbox"/> Network
	<input type="checkbox"/> Inactive	<input type="checkbox"/> MW Test	<input type="checkbox"/> Brokers	<input type="checkbox"/> Test 24	<input type="checkbox"/> A class
	<input checked="" type="checkbox"/> Adviser				

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.

SEARCH ADVISERS

Champion, John (MYP Master Demo)

Entity (access permissions for this adviser)	None	Meetings	View	Edit	Accepted
ABC Accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ABC Financial Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>




- 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.

Entity	None	Meetings	View	Edit	Accepted
ABC Accounting	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ABC Financial Planning	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ABC Golf Course (reG3n DEMO)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

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

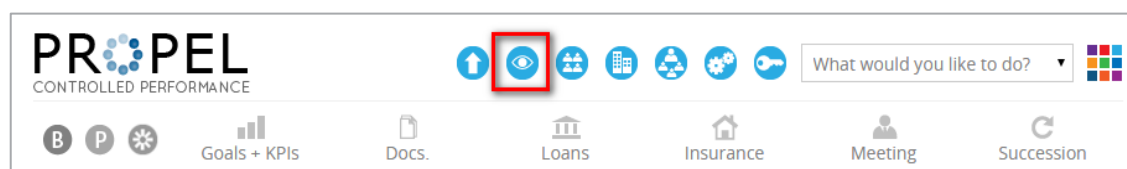
NB: The adviser must map the entities to client businesses in their own ARM. If the adviser chooses not to map any client businesses or contacts, they are automatically created in ARM.

9.2.2 Adviser notifications for non-subscribers

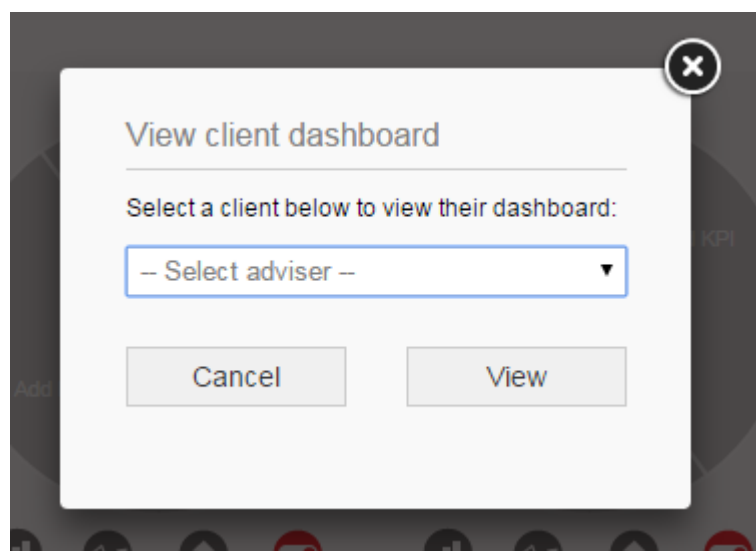
Advisers will receive an email invitation if they are not a current Propel subscriber. From the email, they will be directed the marketplace to subscribe.

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'

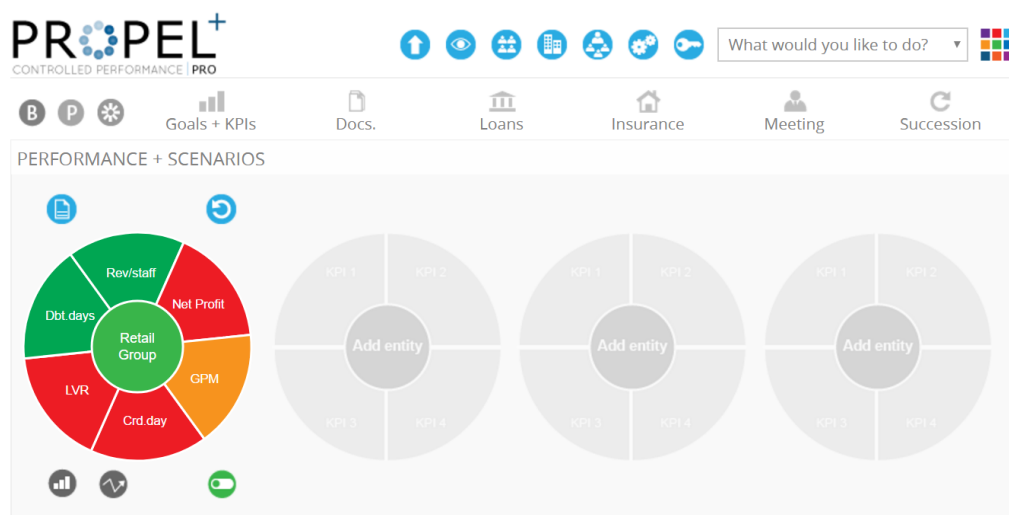
9.3.1 Entity status + actions

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.

ACTIONS + NOTIFICATIONS				
Schedule appointment Professional Services	John Citizen	16/04/2017	<div></div>	<div></div>
Meet with client re planning solution	John Citizen	20/09/2017	<div></div>	<div></div>
See financial adviser	John Citizen	31/05/2017	<div></div>	<div></div>

9.3.2.1 Add to 'My to-do list'

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

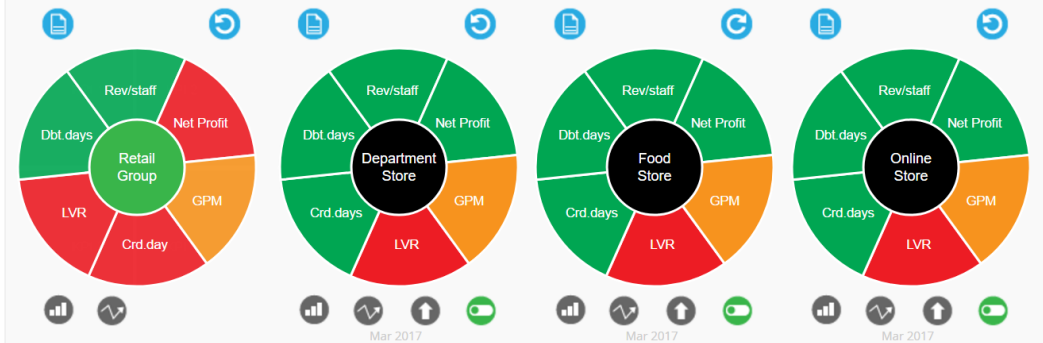
9.3.2.2 Edit 'My to-do list'

- 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

PERFORMANCE + SCENARIOS



ACTIONS + NOTIFICATIONS

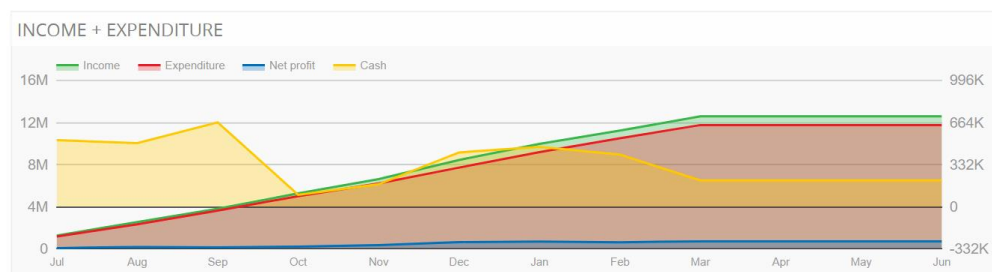
Schedule appointment Professional Services	John Citizen	16/04/2017	●	
Meet with client re planning solution	John Citizen	20/09/2017	●	
See financial adviser	John Citizen	31/05/2017	●	

FINANCIAL POSITION (\$)

Current assets	410,368.32	Non-current assets	4,650,268.45
Total assets	5,060,636.77		
Current liabilities	2,261,111.94	Non-current liabilities	1,479,911.68
Total liabilities	3,741,023.62	Total net worth	1,319,613.15

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.

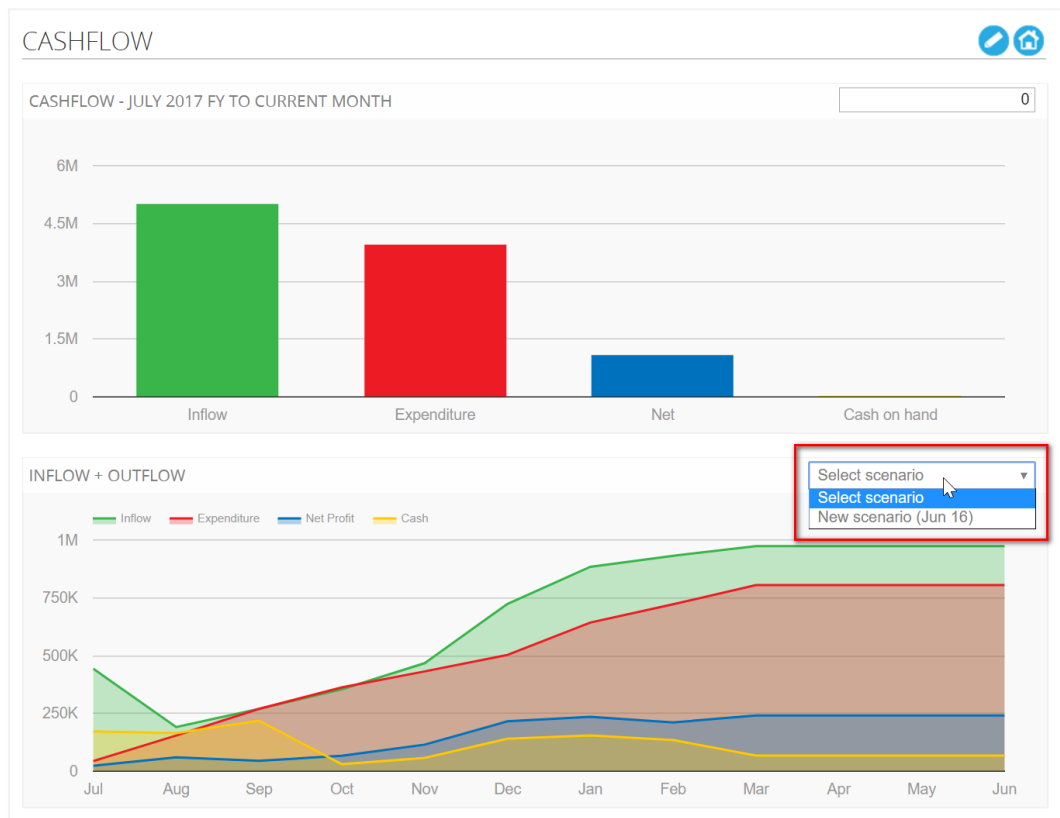
9.3.4 Inflow + expenditure




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

SCENARIOS +

↕ New scenario (Jun 16)

Profit & loss
Balance sheet
Scenario graphs

	Base value (Jun 16)	Adjustment				New value	
Revenue	<input type="text" value="\$5,363,089.15"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Gross profit margin	<input type="text" value="24.00"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Total cost of sales / Direct costs (calculated)	<input type="text" value="\$4,089,245.43"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Expenses	<input type="text" value="\$954,202.80"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Net operating profit	<input type="text" value="\$319,640.92"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>

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

SCENARIOS +

↕ New scenario (Jun 16)

Profit & loss
Balance sheet
Scenario graphs



	Base value (Jun 16)	Adjustment				New value	
Revenue	<input type="text" value="\$5,363,089.15"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Gross profit margin	<input type="text" value="24.00"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Total cost of sales / Direct costs (calculated)	<input type="text" value="\$4,089,245.43"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Expenses	<input type="text" value="\$954,202.80"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>
Net operating profit	<input type="text" value="\$319,640.92"/>	<div style="border: 1px solid red; padding: 2px;">+</div>	<div style="border: 1px solid red; padding: 2px;">-</div>	<input type="text" value="adjust scenario"/>	<div style="border: 1px solid red; padding: 2px;">%</div>	<div style="border: 1px solid red; padding: 2px;">\$</div>	<input type="text"/>

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


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

- 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

FORECAST DRIVERS

GST ACCOUNTING

☒ None
☐ Monthly
☐ Quarterly

☒ Cash
☐ Accruals

PAYG WITHHOLDING COSTS | AU BUSINESSES ONLY

☒ Monthly
☐ Quarterly

PAYGW %

NB: default of 20% applied. Edit as relevant.

SUPERANNUATION COSTS

Superannuation %

☒ Monthly
☐ Quarterly

NB: default of 9.5% applied. Edit as relevant.

NB: Making changes to the scenario outside of this page will invalidate this data.


Cancel

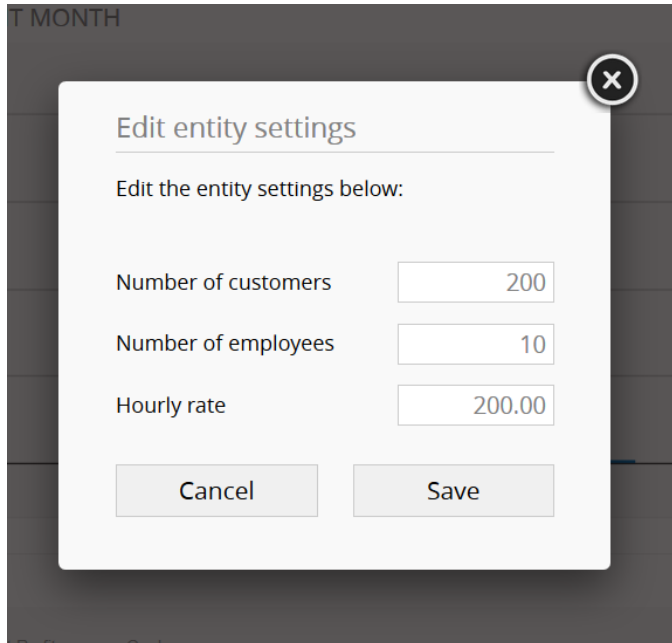
Calculate

- Select 'Calculate' or 'Cancel'

9.3.6 Edit entity settings (+ Only)

To edit entity settings

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



Edit entity settings

Edit the entity settings below:

Number of customers

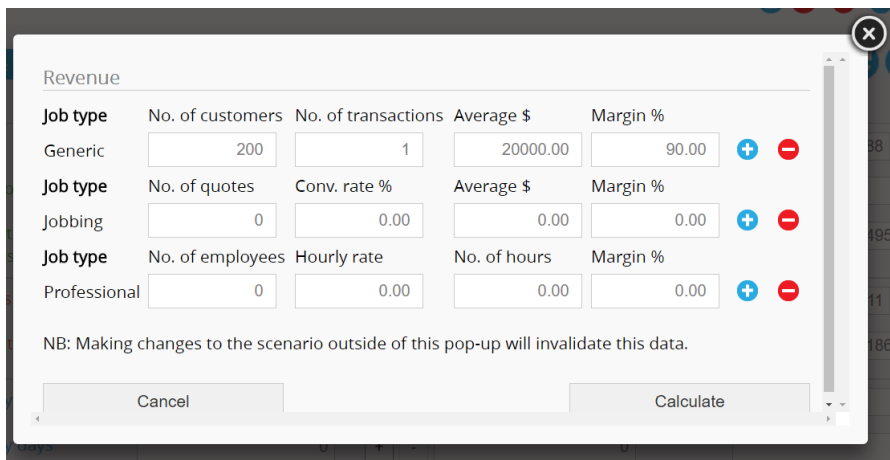
Number of employees

Hourly rate

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

9.3.7 Calculate revenue (+ Only)

- Select appropriate scenario
- Select 'Calculate revenue'



Revenue

Job type	No. of customers	No. of transactions	Average \$	Margin %
Generic	<input type="text" value="200"/>	<input type="text" value="1"/>	<input type="text" value="20000.00"/>	<input type="text" value="90.00"/> <input type="button" value="+"/> <input type="button" value="-"/>
Jobbing	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/> <input type="button" value="+"/> <input type="button" value="-"/>
Professional	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/> <input type="button" value="+"/> <input type="button" value="-"/>

NB: Making changes to the scenario outside of this pop-up will invalidate this data.

- Enter figures

- 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'

Expenses	\$851,011	+	-	112.19	%	\$	\$1,805,735
Net profit	\$186,321	+	-	50.83	%	\$	\$281,022

- Enter figures


Expenses			
Staff salary & wages	0	+	0
Rent	0	+	376,477
Professional services	0	+	0
Vehicles	0	+	22,904
Sales & marketing	0	+	32,864
Software and IT	0	+	0
Telephones and mobiles	0	+	29,125

- 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'

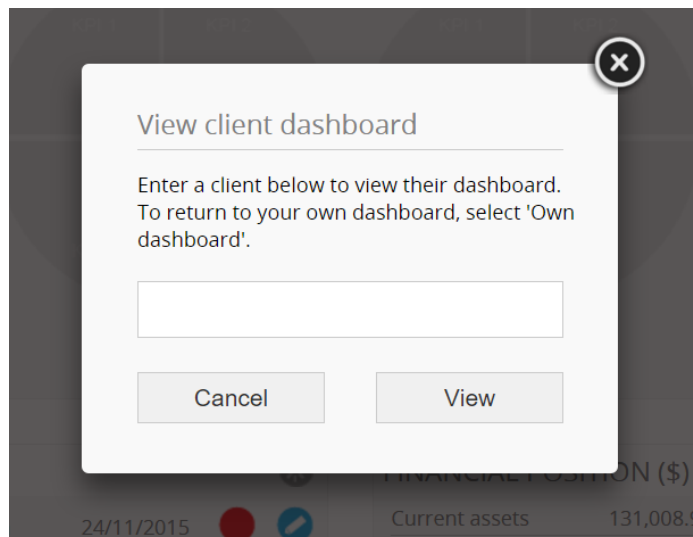
9.3.11 Cashflow Report (Propel Pro Only)

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'

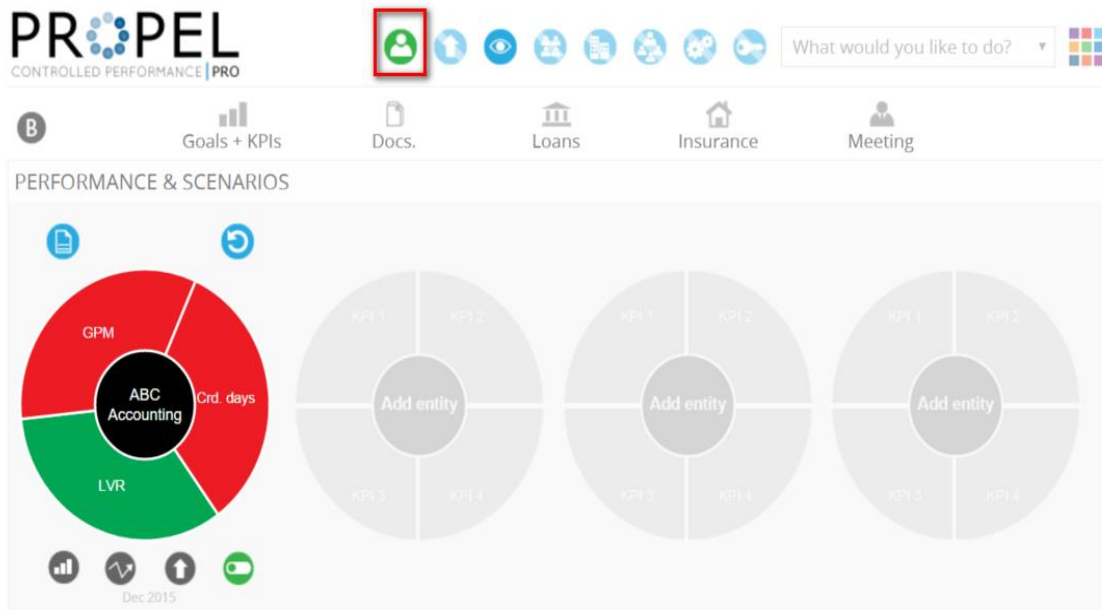
To return to your own dashboard:

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

9.4.1 Subscribing a client to MYP

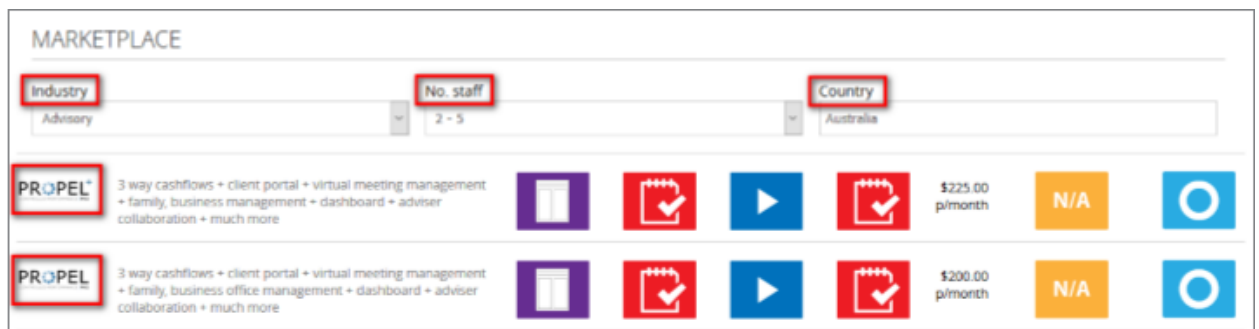
To subscribe a client to MYP from the Propel Pro dashboard:

- Select 'Subscribe client'



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.

ACTIONS & NOTIFICATIONS			
See financial adviser	John Citizen	13/10/2015	 
Meet with client about planning solution	John Citizen	30/10/2015	 
Schedule appointment with Bruce at ABC Professional Services	John Citizen	16/04/2015	 

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

GOALS & KPIS	
Education	
MBA	  
Maintain GPA	  
Finance	
Health	

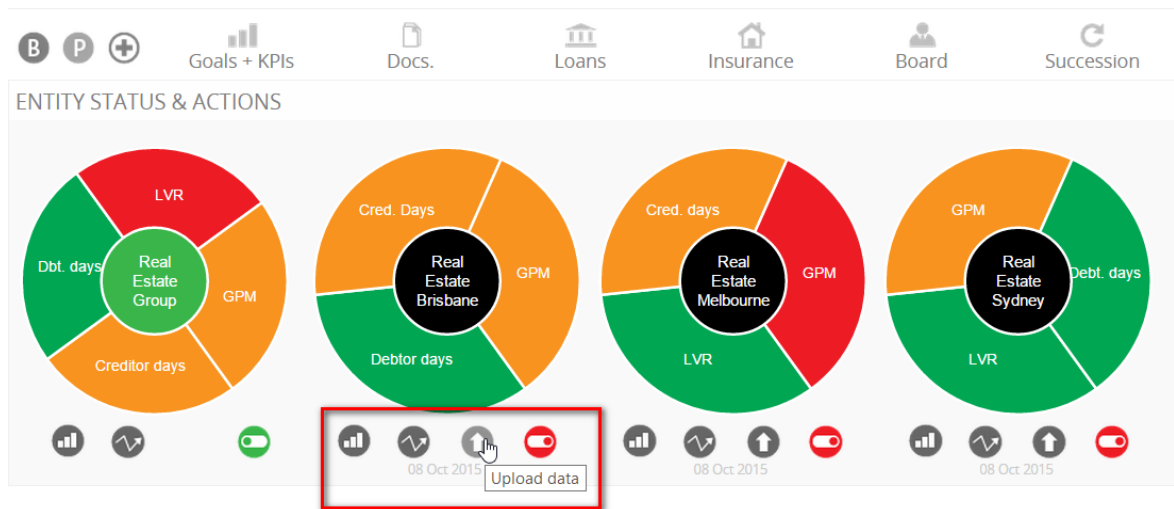
- KPIs are colour coded to show status
- Select each KPI to view and edit

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.



UPLOAD DATA

Enter client name or create new client

Cancel

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

UPLOAD DATA

ABC Accounting

Data can be uploaded in four ways:

1. Single month spreadsheet (e.g. YTD January)
2. Multiple month spreadsheet (e.g. monthly data from July to January)
3. Combined, single month spreadsheet for multiple jobs/projects/profit centres (e.g. YTD January)
4. Accounting software

Upload type:

-- Select upload type --
-- Select upload type --
Single month spreadsheet (2 column, leftmost and rightmost columns)
Multiple month spreadsheet (upload data from first month of financial year to selected month)
Combined spreadsheet - 2 column (large spreadsheet, multiple jobs/projects/profit centres)
Xero

UPLOAD DATA

Real Estate 1

Data can be uploaded in four ways:

1. Single month spreadsheet (e.g. YTD January)
2. Multiple month spreadsheet (e.g. monthly data from July to January)
3. Combined, single month spreadsheet for multiple jobs/projects/profit centres (e.g. YTD January)
4. Accounting software

Upload type:

Single month spreadsheet (2 column, leftmost and rightmost columns)

Select the month and year that you are uploading data for

Month: October Year: 2015

Select data type for submission

Profit & loss KPI data Balance sheet

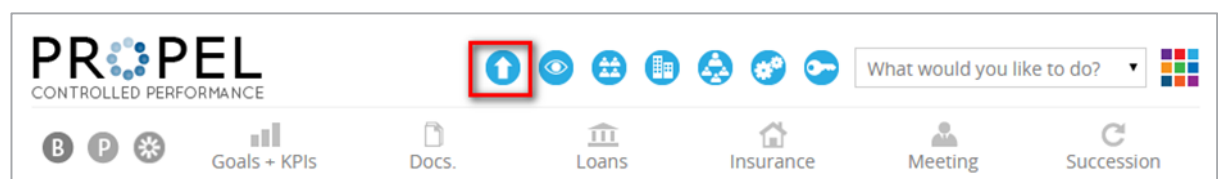
Once the selection has been made and the data has been copied/pasted (if using Excel) or imported (if using Xero):

- 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

1. Through the 'Propel wizard'

1 Add staff 2 Add organisations 3 Org. groups 4 Org. permissions 5 Add KPIs Next step

KPIs Active Search

Entity All entities

Name Description Entity

1 Add staff 2 Add organisations 3 Org. groups 4 Org. permissions 5 Add KPIs Next step

KPIs Active Search

Entity ABC Accounting

Name	Description	Entity	
<u>Crd. days</u>	Creditor days	ABC Accounting	
<u>GPM</u>	Gross profit margin	ABC Accounting	
<u>LVR</u>	Loan value ratio	ABC Accounting	

- Select 'Entity'
- Select 'Create'

Edit KPI

KPI description

Creditor days

Label (max. of 20 characters) Crd. days

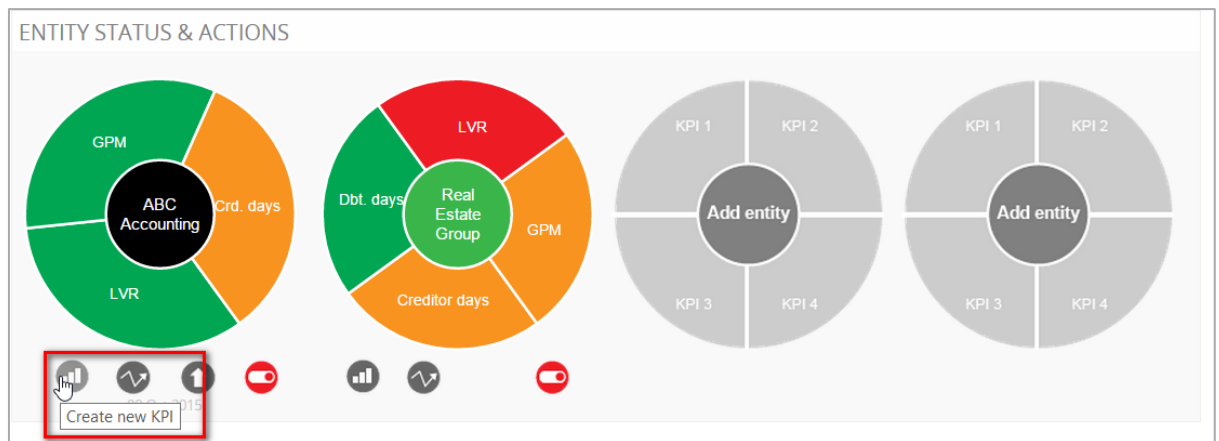
KPI/Goal type: ☒ Quantitative ☐ Qualitative

KPIs Active Search


Entity ABC Accounting

Name	Description	Entity	
<u>Crd. days</u>	Creditor days	ABC Accounting	
<u>GPM</u>	Gross profit margin	ABC Accounting	
<u>LVR</u>	Loan value ratio	ABC Accounting	

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

KPI/Goal type: ☒ Quantitative ☐ Qualitative



















MEASURE KPI STATUS ☒ Balance sheet (B/L) ☐ Profit & Loss (P&L) ☐ Other KPIs ☐ Time

Current Assets  Enter figure 

☒ Current month ☐ Prev. month ☐ End of prev. financial year

Calculation display        

KPI will display

RED IF	    	Less than	\$	<input type="text"/>	%	
AMBER IF	    	Less than	\$	<input type="text"/>	%	
GREEN IF	    	Less than	\$	<input type="text"/>	%	

KPI/Goal type: ☐ Quantitative ☒ Qualitative

Assign status 	<input type="text"/>
Assign status 	<input type="text"/>
Assign status 	<input type="text"/>

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'

Cashflow

Label (max. of 20 characters)

KPI/Goal type: ☒ Quantitative ☐ Qualitative

MEASURE KPI STATUS ☒ Balance sheet (B/L) ☐ Profit & Loss (P&L) ☐ Other KPIs ☐ Time

☐ Current month ☒ Prev. month ☐ End of prev. financial year

Enter figure

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

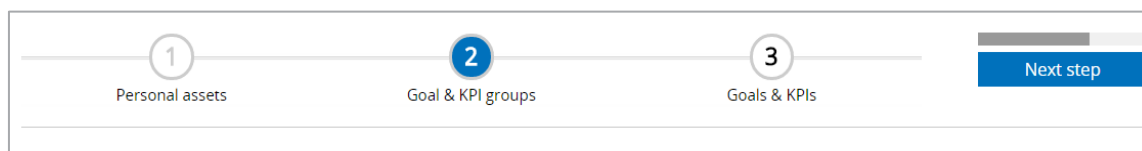
11.1.6 Archive KPIs

- 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

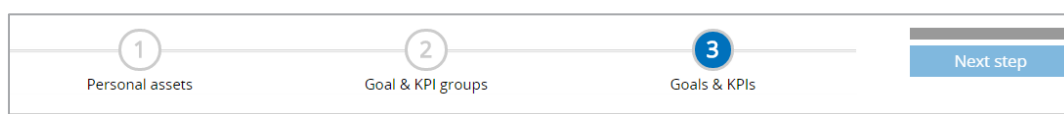
- Select  Personal KPI group settings
- Enter Name
- Select 'Add'
- Select 'Save'

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.

MANAGE DOCUMENTS - BUSINESS

Start date
End date
Ref #


Document type Business

Enter document name/key words then click search icon.

Ref.#	Document	Organisation		Date		Action
131762	SampleDocument.docx	MYP Release Test Subscriber	JT	25 Sep 2015	In	<input type="button" value="Choose File"/> No file chosen
128375	SampleDocument.docx	MYP Release Test Subscriber	JT	10 Sep 2015	In	<input type="button" value="Choose File"/> No file chosen
126485	140930 Dashboard Module Specification Summary.docx	MYP Release Test Subscriber	LY	2 Sep 2015	In	<input type="button" value="Choose File"/> No file chosen
126471	94six-tile.png	MYP Release Test Subscriber	TT	2 Sep 2015	In	<input type="button" value="Choose File"/> No file chosen

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.

LOANS						
Borrower		Lender		Active		
Borrower(s) ▲	Lender(s)	Purpose	Loan amount	Principal paid	Interest charged	Loan balance
Example Propel Org Propel Consolidated Group	Yong, Leanne	Example loan	A\$8,200.00	A\$-84.25	A\$84.25	A\$8,284.25
Maxwell Smart	Yong, Leanne	Test business loan	A\$80,800.00	A\$465.68	A\$5,034.32	A\$80,334.32
TOTALS			A\$89,000.00	A\$381.43	A\$5,118.57	A\$88,618.57

13.1 CREATE A LOAN

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

- 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'

Loan terms
Loan schedule
Loan transactions
Prev. schedules
Loan agreement

LOAN TERMS

Page timeout: 239:56

Loan purpose

Inter-entity loan

Borrower/s

Real Estate Brisbane

Lender/s

Real Estate Melbourne

Loan structure

☐ Principal & interest
☒ Interest only
☐ Line of credit

Repayment schedule

☒ Monthly
☐ Quarterly
☐ Annual

Loan amount

\$ 60,000.00

Fees to add onto loan

\$ 0.00

Repayment day (day of month)

1

Interest rate (annual percentage)

6.5

Start date

16 Jun 2016

Loan term (number of periods)

48

Recalculate loan

>>

First payment date

01 Nov 2015

Total loan amount

\$60,000.00

Initial repayment

\$325.00

Repayment amount

\$325.00

Repayments due

On the 1st of each month

Cancel

Save + close

Next

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

LOAN SCHEDULE

Page timeout: 239:42

Next repayment date

16 Sep 2016

Download schedule



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	+ -

Cancel

Save + close

Next

- 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

LOAN TRANSACTIONS

Page timeout: 239:56

Add a journal entry. You must enter a date, entry type and amount. Including the word "Interest" in a withdrawal entry will mark it as interest charged.

Date

Transaction type

☐ Deposit
☐ Withdrawal

Amount

\$

Notes

Add entry

This is the history of transactions for the loan.

Transaction history

Date	Withdrawals	Deposits	Loan balance	Notes
	\$		\$	\$60,000.00
16 Jun 2016	\$		\$	\$60,000.00 Opening balance
17 Jul 2016	\$320.55		\$	\$60,320.60 Interest charged
17 Jul 2016	\$320.55		\$	\$60,641.10 Interest charged
17 Jul 2016	\$319.67		\$	\$60,960.80 Interest charged
17 Jul 2016	\$319.67		\$	\$61,280.40 Interest charged
17 Jul 2016	\$319.67		\$	\$61,600.10 Interest charged
29 Jul 2016	\$	\$3,000.00		\$58,600.10 Repayment
16 Aug 2016	\$450.95		\$	\$59,051.10 Interest charged

Cancel

Save + close

Next

- 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

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

LOAN AGREEMENT

Page timeout: 239:56

This is an optional section to enter details to create a loan agreement.

Agreement date: 24 Jun 2016

Country under which the loan is executed: Australia

State under which the loan is executed: VIC

City under which the loan is executed: Melbourne

Lender/s

Type	Name	Address	ACN (if corp.)	Directors (if corp.)
Corporation	Real Estate Melbourne	10 Example St, MELBOURNE, VIC, 3000	123456789	John Citizen

Borrower/s

Type	Name	Address	ACN (if corp.)	Directors (if corp.)
Corporation	Real Estate Brisbane	15 Station Rd, BRISBANE, QLD, 4000	987654321	John Citizen Jane Citizen

Is there a guarantor (or guarantors) for the loan? ☐ Yes ☒ No

Is there any security for the loan? ☐ Yes ☒ No

Are there any additional clauses? ☐ Yes ☒ No

- 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

LOANS

Active

Borrower: Lender:

Borrower(s)	Lender(s)	Purpose	Loan amount	Principal paid	Interest charged	Loan balance
Example Propel Org Propel Consolidated Group	Yong, Leanne	Example loan	A\$8,200.00	A\$-84.25	A\$84.25	A\$8,284.25
Maxwell Smart	Yong, Leanne	Test business loan	A\$80,800.00	A\$465.68	A\$5,034.32	A\$80,334.32
TOTALS			A\$89,000.00	A\$465.68	A\$5,034.32	A\$80,334.32

- 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

The screenshot shows the 'LOANS' section of a software interface. At the top, there are filters for 'XLS', 'Active', and a search bar. Below these are dropdowns for 'Borrower' and 'Lender'. A table lists loans with columns: Borrower(s), Lender(s), Purpose, Loan amount, Principal paid, Interest charged, and Loan balance. Two loans are listed: 'Example Propel Org' and 'Maxwell Smart'. To the right of the table is a 'Generate reports' button. At the bottom are 'Cancel' and 'Finish' buttons.

Borrower(s)	Lender(s)	Purpose	Loan amount	Principal paid	Interest charged	Loan balance
Example Propel Org	Yong, Leanne	Example loan	A\$8,200.00	A\$-84.25	A\$84.25	A\$8,284.25
Propel Consolidated Group	Yong, Leanne	Test business loan	A\$80,800.00	A\$465.68	A\$5,034.32	A\$80,334.32
TOTALS			A\$89,000.00	A\$465.68	A\$5,034.32	A\$80,334.32

- 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

The screenshot shows a 'Generate loan documents' dialog box overlaid on the LOANS interface. The dialog has a title bar with a close button. It contains a 'Select document' dropdown menu with 'Loan Statement' selected. Below this is a 'Select report type' section with radio buttons for 'PDF' and 'Word'. There are input fields for 'Start date' and 'End date', both set to '7/10/2015'. At the bottom are 'Cancel' and 'Generate' buttons. The background interface is dimmed.

- 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'

INSURANCE
Page timeout: 239:43

Purpose Electronics

Insurer Commonwealth Bank

Insurance for ☒ Entity ☐ Individual(s)

Insurance type (business) Electronic equipment ▼

Entity
Entity
-- Select response option -- ▼ +

Amount insured \$ 70,000.00

Premium \$ 250.00

Expiry date 9 Mar 2017

Days due 188

Documents

Document name Upload document

Choose File
No file chosen
+

Notes +




Note
Date

✖ Cancel


➔ Save + close

✔ Finish

INSURANCE POLICIES




  
Active ▼

Search



Insurance Type ▼

Insurer ▼

Type ▲	Insurer	For	Amount (\$)	Premium (\$)	Expiry	Expires in	
Burglary	Suncorp Insurance		6,000,000.00	200,000.00	30 Oct 2015	20 days	  

✖ Cancel

✔ Finish

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'

Name	Description	Meeting Date	
Test Board Meeting		10 Sep 2015	[Icons]
Test Board Meeting		10 Sep 2015	[Icons]

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

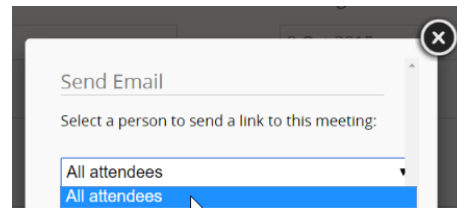
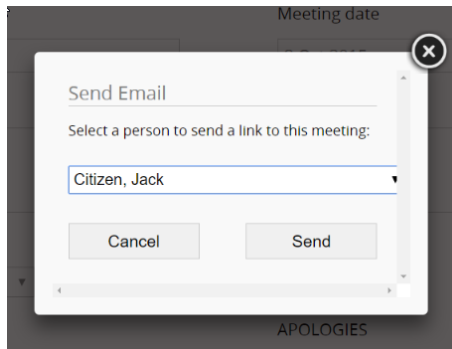
MEETING MINUTES			  Active <input type="text" value="Search"/> 
Name ▲	Description	Meeting Date	
<u>ABC Project</u>	Project review.	19 Oct 2015	    
<u>Executive Meeting</u>	Monthly meeting	23 Sep 2015	    
<u>RC Project Review</u>	3 month project.	8 Oct 2015	    
<u>Staff Meeting</u>	Meeting attended by all staff each fortnight.	5 Oct 2015	    

15.2.4 Email meeting minutes

- Select 'Meetings'
- Select the appropriate minutes
- Select 'Email'

MEETING MINUTES		 
Name of meeting minutes	Meeting date	

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



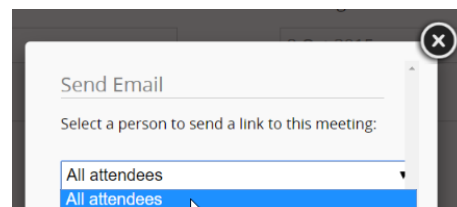
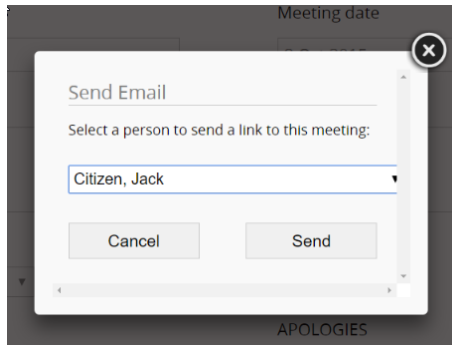
- Select
- Select 'Send'

15.2.5 Email meeting minutes

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


MEETING MINUTES		 
Name of meeting minutes	Meeting date	

- 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'

Organisation	Background Info	Corporate	Structure	Owners
--------------	-----------------	-----------	-----------	--------

CORPORATE

Real Estate 1
Page timeout: 239:42

Organisation name: Real Estate 1

Select all corporate information you want to enter

☐ Vision
 ☐ Mission
 ☐ Values

Select all strategic information you want to enter

☐ Core strategies
 ☐ Priorities and objectives
 ☐ Key challenges

☐ Points of difference
 ☐ Key drivers
 ☐ Key success factors

☐ SWOT analysis
 ☐ Key manuals and plans

Action plan

Action	Description	Action owner	Due date	Completed date

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

Organisation	Background Info	Corporate	Structure	Owners
--------------	-----------------	-----------	-----------	--------

STRUCTURE

Real Estate 1
Page timeout: 239:54

Organisation name: Real Estate 1

Business structure: -- Select response option --

Are there any structural issues with the organisation? ☐ Yes ☐ No

Upload diagram of business structure: No file chosen

Is this a group of organisations? ☐ Yes ☐ No

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

Organisation	Background Info	Corporate	Structure	Owners
--------------	-----------------	-----------	-----------	--------

OWNERS

Real Estate 1
Page timeout: 239:38

Organisation name: Real Estate 1

This is the list of the people who have a share in this organisation or entity, and the schedule of payments.

Create or administer owners and family

Owners

Owner (Individual)	Owner (Entity)	Ownership %	Controlling interest?
When are owner salaries paid?			
When are owner drawings paid?			
When are dividends/distributions paid?			

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

Background InfoCorporateStructureOwnersKey Staff

KEY STAFF

Real Estate 1
Page timeout: 239:53

Organisation name

Real Estate 1

These are the key staff whose departure would result in the organisation or entity suffering financially.

Create or administer key staff

Key staff

+

Search

Name ▲	Position	Value to business (\$)	Purpose capital or revenue
Daniel Hodgson	Client Services Manager	\$90,000.00	Revenue

Are there any resource gaps?

☐ Yes
 ☐ No

Is there an internal HR manager and/or external consultant?

☐ Yes
 ☐ No

Is there a formal mentoring and/or buddy system?

☐ Yes
 ☐ No

✖ Cancel

➕ Save & close

✓ Save

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

CorporateStructureOwnersKey StaffAdvisers

ADVISERS

Real Estate 1
Page timeout: 239:33

Organisation name

Real Estate 1

These are the trusted advisers for this organisation or entity. They could provide advice in any capacity, from financial and legal to industry-specific advice.

Create or administer advisers

Advisers

+

Search

Name	Adviser type	Organisation ▲	Status	Advice provided	Relationship strength
Alan, Paul	Accountant	ABC Accounting	Current	Establishment of self-managed superannuation fund	Excellent

✖ Cancel

➕ Save & close

✓ Save

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

StructureOwnersKey StaffAdvisersKey Documents

KEY DOCUMENTS

Real Estate 1
Page timeout: 239:52

Organisation name

Real Estate 1

Key documents are those that address the ownership, financial and operational aspects of the business.

Key documents

Category

Name

Description

Upload document

Choose File

No file chosen

+

Are there any key documents that are still required?

☐ Yes
 ☐ No

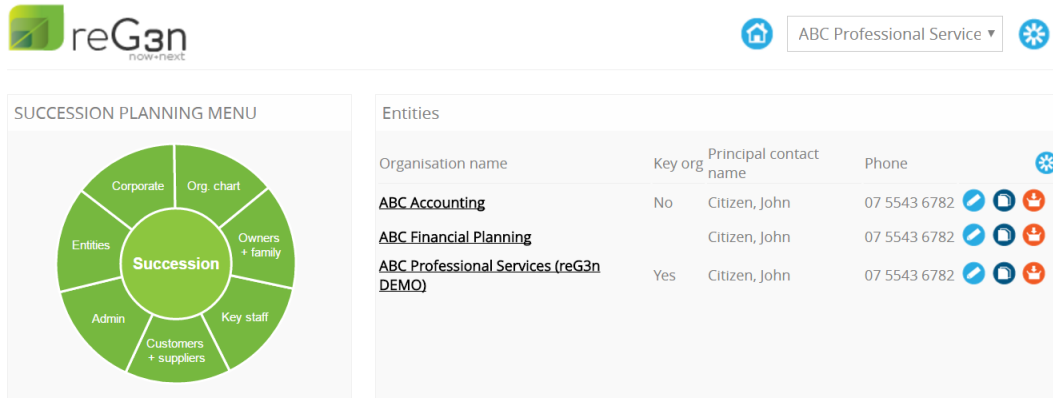
✖ Cancel

➕ Save & close

✓ Save

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

16.2 ENTITIES



The screenshot shows the reG3n interface. On the left is the 'SUCCESSION PLANNING MENU' with a circular diagram containing 'Corporate', 'Org chart', 'Owners + family', 'Key staff', 'Customers + suppliers', 'Admin', and 'Entities'. The 'Entities' section on the right displays a table of entities.

Organisation name	Key org	Principal contact name	Phone
ABC Accounting	No	Citizen, John	07 5543 6782
ABC Financial Planning		Citizen, John	07 5543 6782
ABC Professional Services (reG3n DEMO)	Yes	Citizen, John	07 5543 6782

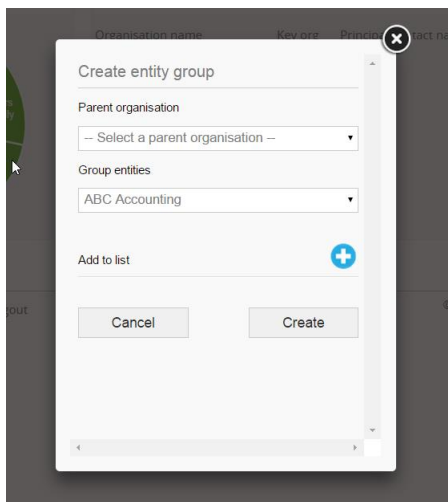
The reG3n section of Propel provides the ability to create entities within a corporate structure. These entities then form drop-down menu options for selection in other areas of Propel. To enter entity information:

- Select 'Entities'

16.2.1 Create an entity


To create an entity:

- Select 



The dialog box titled 'Create entity group' has the following fields and buttons:

- Parent organisation:** A dropdown menu with the text '-- Select a parent organisation --'.
- Group entities:** A dropdown menu with 'ABC Accounting' selected.
- Add to list:** A blue plus icon button.
- Buttons:** 'Cancel' and 'Create' buttons at the bottom.

- 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

Entities				
Organisation name	Key org	Principal contact name	Phone	
<u>Example Propel Org</u>	No			
<u>Real Estate 2</u>	No			
<u>Real Estate 1</u>	Yes			

16.2.3 Unarchive or delete an entity

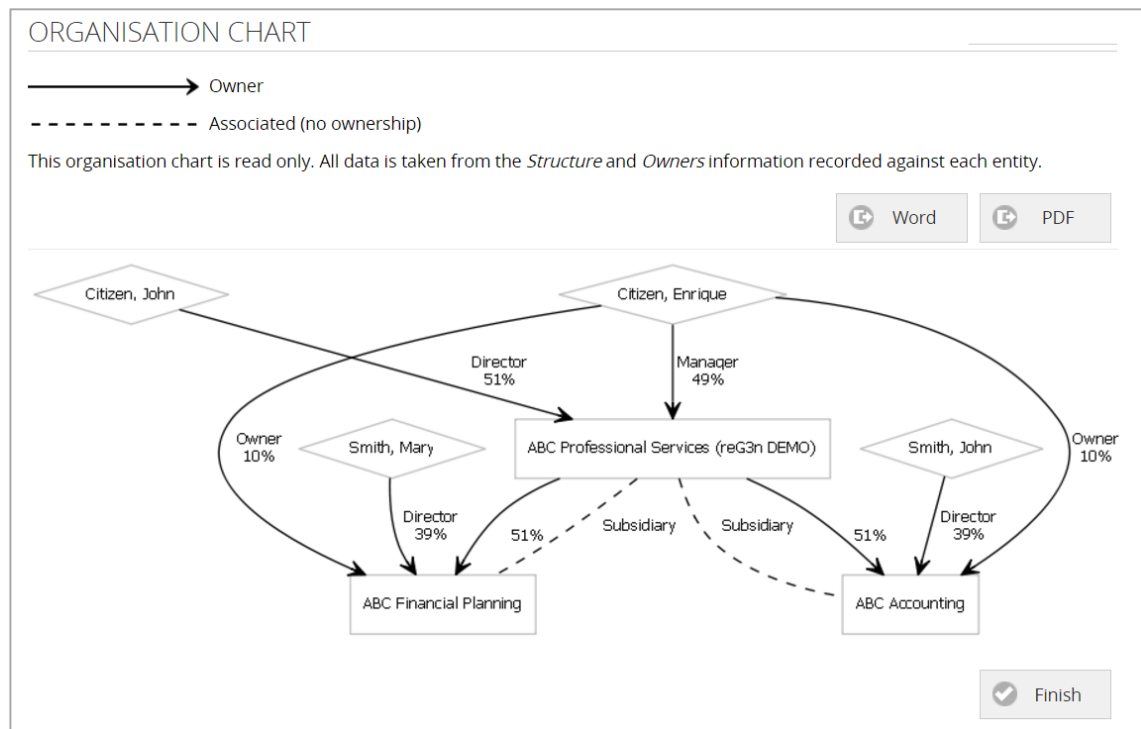
- Select 'Archived' status
- Identify relevant entity and select the appropriate button
- Select 'Confirm' in the warning pop-up box

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' ❄️

First name	Last name	business	Family
Enrique	Citizen	shareholder	Yes
John	Citizen	shareholder	Yes
John	Smith	Director	Minority shareholder
Mary	Smith	Director	Minority shareholder

- 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' ❄️

First name	Last name	Position
Enrique	Citizen	
John	Citizen	
John	Smith	
Mary	Smith	

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

ABC Professional Services (reG3n DEMO)
Page timeout: 119:36

Key staff

Title: M

First name: Enrique

Last name: Citizen

Role in organisation: Associate

- 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

Key staff -- Select a client contact -- Active

First name	Last name	Position
Enrique	Citizen	
John	Citizen	
John	Smith	
Mary	Smith	

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'

CUSTOMERS AND SUPPLIERS Real Estate 1
Page timeout: 238:46

Is this a customer or a supplier? ☒ Customer ☐ Supplier



Entity: Real Estate 1

Organisation information

Organisation name:

16.6.2 Edit, copy or archive a customer/supplier

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

Customers & suppliers				
<div> Active <input type="text"/> </div>				
Category ▲	Organisation name	Contact first name	Contact last name	Contact phone
<u>Customer</u>	Westfield	Fred	Jones	02 3333 6666
<u>Supplier</u>	XYZ Software	Bruce	Tucker	02 6666 7777



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

ADMINISTRATION

Page timeout: 238:26

General settings

Country

Australia


Balance date


30 Jun 2015

Default FY start month

July

 Cancel

 Save & close

 Save

- 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.

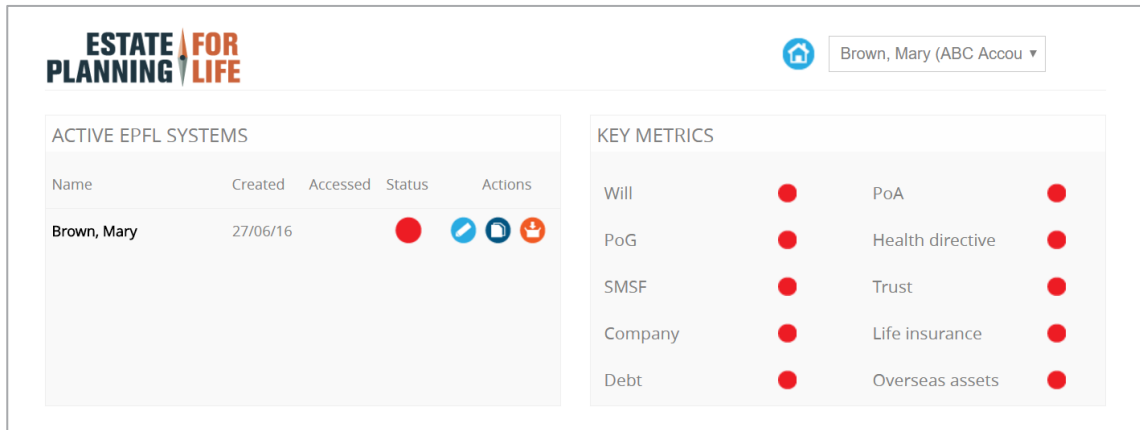
17.1 CREATE AN EPFL SYSTEM

To create an EPFL system for an existing client:

Propel + Propel Pro myHelp V200527 | Page 60




POWERED BY
 **MYP**
perform

- 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



The screenshot shows the 'ESTATE PLANNING FOR LIFE' interface. At the top right, there is a user profile dropdown for 'Brown, Mary (ABC Accou)'. Below this, the interface is divided into two main sections: 'ACTIVE EPFL SYSTEMS' and 'KEY METRICS'.

ACTIVE EPFL SYSTEMS

Name	Created	Accessed	Status	Actions
Brown, Mary	27/06/16		●	  

KEY METRICS

Will	●	PoA	●
PoG	●	Health directive	●
SMSF	●	Trust	●
Company	●	Life insurance	●
Debt	●	Overseas assets	●

- Select 'Edit'

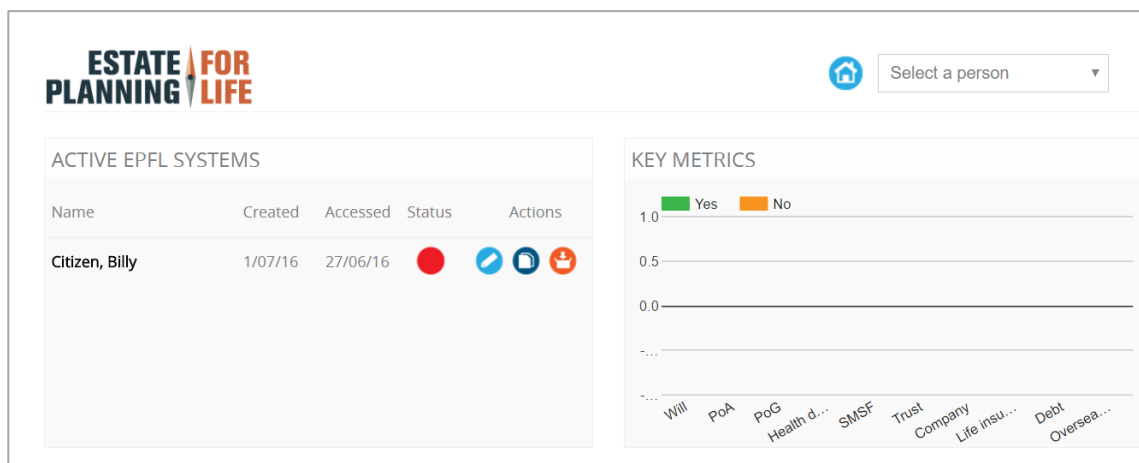
Complete each of the following screens:

Basic data

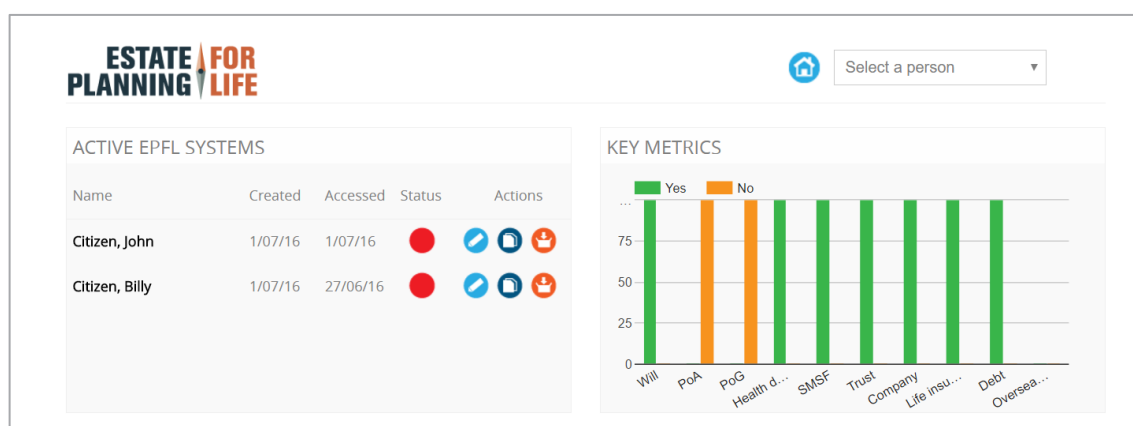
- ✓ Your health
 - ✓ People
 - ✓ Notifications
 - ✓ Testamentary
 - ✓ Funeral Wishes
 - ✓ Inheritance
 - ✓ Documents – Estate, Personal, Uploaded documents.
 - ✓ Bills
 - ✓ Internet logins
- Select 'Next' to progress through screens
 - Select 'Save + close'

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.