



## **Synectic Super Portal**

### **User Manual for Advisers**

[www.synecticgroup.com.au](http://www.synecticgroup.com.au)

info@synecticgroup.com.au

First Floor, 49 Best Street  
Telephone (03) 6424 1451  
Facsimile (03) 6424 7144

Level 2, Shop 25  
Trafalgar Building  
110 Collins Street, Hobart 7000  
Telephone (03) 6239 4900  
Facsimile (03) 6223 2022

P.O. Box 6003  
Devonport 7310

ABN 66 137 822 372

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# Welcome to Synectic Super Portal

Portal is a secure web-based application which has been designed as part of our website to provide the following benefits to SMSF advisors:

- Immediate and secure access to your SMSF documents and reports as soon as they become available
- All of your Funds under one log on
- View Fund Details from anywhere, at any time
- Instantly and securely deliver documentation to us online
- Request reports from us at any time
- Access from anywhere in the world
- Works with both PC's and Apple's with no need to install software

Please take a few moments to explore Portal and see the benefits.

Please do not hesitate to contact us if you have any questions, suggestions or feedback.

## Minimum Software Requirements

### 1. Web Browsers

The following browsers are supported:

- Internet Explorer 7 or 8
- Firefox 3.5 or above
- Google Chrome
- Safari (for Apple)

Other Browsers have not been completely tested as yet so not all functions will work in these web browsers.

### 2. PDF Reader

A PDF Reader needs to be installed on your computer. If you do not have one installed we recommend Adobe Acrobat Reader which can be downloaded from:

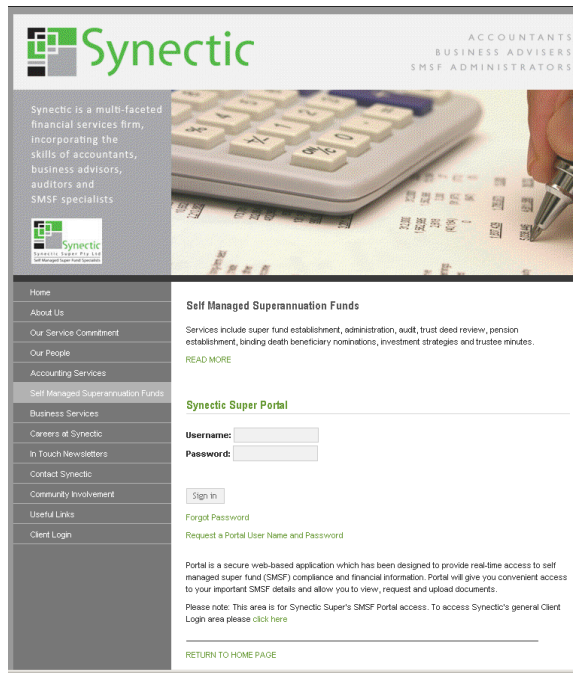
<http://get.adobe.com/reader/>

# 1. Logging into Portal

Access Synectic Super Portal at the Self Managed Superannuation Funds screen at [www.synecticgroup.com.au](http://www.synecticgroup.com.au)

Portal log in is also available at <https://bglportal.com.au/login/synecticgroup/>

Self Managed Superannuation Funds ►

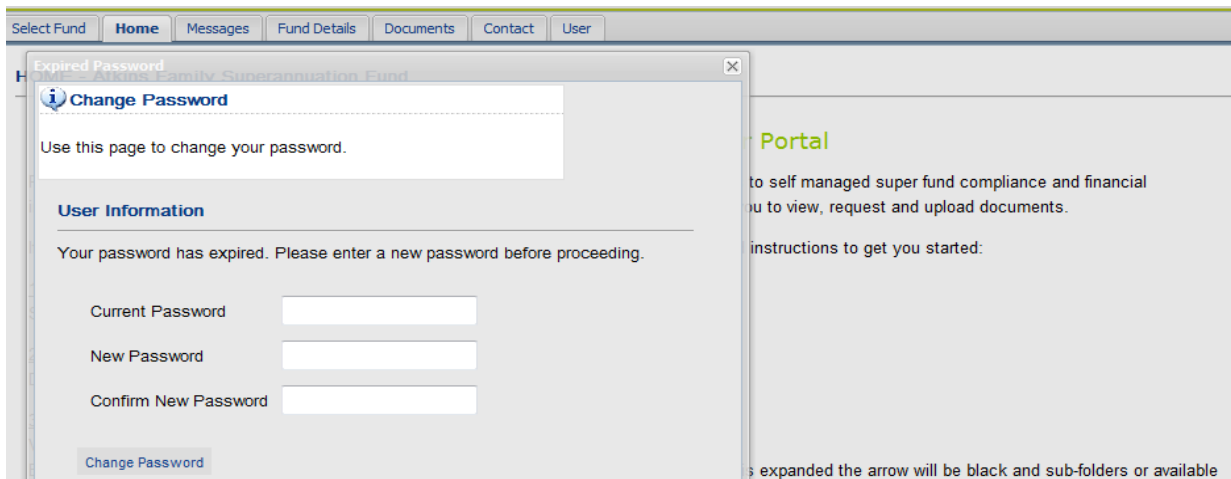


You will need to enter your Username and Password which will be in your registration email.

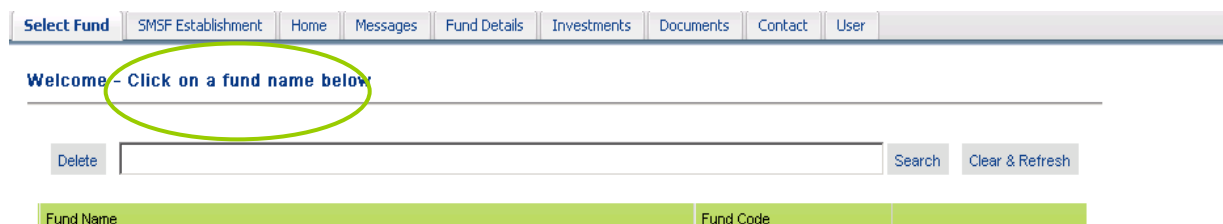
Your Username will always be your email address.

Please note that due to security surrounding Portal, our staff do not have access to your password. Reset your password by clicking on the Forgot Password link on the Sign In page.

The first time you log in you will be prompted to enter a new password. This can be any password of your choice and needs to be a minimum of 6 characters.

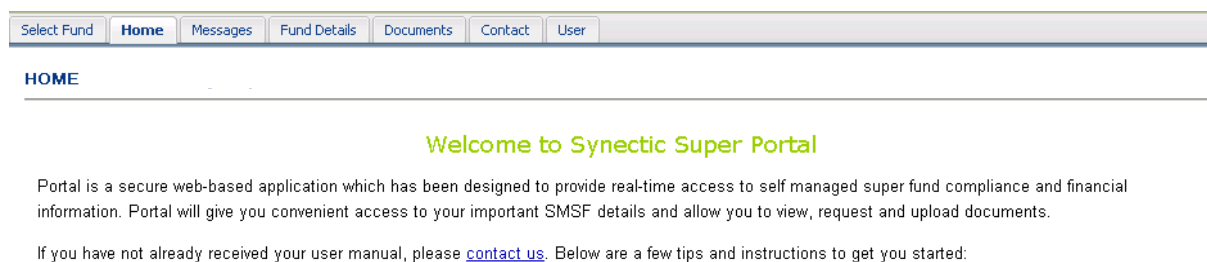


If you have access to more than one SMSF you will be directed to the Select Fund screen to choose which fund you wish to access. Enter the fund's name in the Search box and then click Search. Click on the fund name to open that fund.



## 2. Home Screen

Once you have logged in you will be directed to the home page. This page will provide information regarding our services and general information pertaining to SMSF's and Portal. The page may change periodically.



## 3. Fund Details

The Fund Details screen makes available all of the important SMSF details, including Fund Name, Date Formed, Tax File Numbers and other ATO details, Contact, Trust Deed, Exempt Pension Income and other relevant information.

As soon as any of these details change in our internal system they will be automatically updated on your Portal.



## 4. Documents

The Documents screen allows you to view all the reports and documents made available on Portal. There is no need to save the documents onto your computer unless the document requires signing – Portal will act as a filing cabinet for you. You may receive emails advising you when documents are made available from our internal system.

### - 4.1 Find a document

Documents are filed in folders, including Permanent, Correspondence and Year. You can select a folder to view the relevant documents in that folder.

You can search for a specific document using the text search box at the top of the screen.

You are also able to filter by:

- All Documents
- Documents which need signing
- Documents which have been signed
- Documents which need to be uploaded
- Documents which have been requested through Portal

Document Name	Updated	By	Size	Status
Investment Summary Report	08/06/2010 18:56:15	webdemo	7.26K	Ready
Investment Income Report	08/06/2010 18:56:09	webdemo	7.12K	Ready
Detailed Investment Disposals Report	08/06/2010 18:56:09	webdemo	5.01K	Ready
Projected Investment Disposals Profit/(Loss) R	08/06/2010 18:56:03	webdemo	7.22K	Ready
Investment Disposals Report	08/06/2010 18:56:02	webdemo	4.91K	Ready
Investment Movement Report	08/06/2010 18:56:02	webdemo	7.12K	Ready

### - 4.2 View a document

To view a document, simply click on the document name.



Investment Summary Report  
Updated 08/06/2010 18:56:15 By webdemo | 7.26K

There is no need to save the document onto your computer as it remains on your Portal. The document may be printed once it is open.




## - 4.3 Document status

Document statuses are colour coded and show the progress of the document.



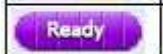
### Documents Made Available

	Document has been uploaded to Portal
	Document has been viewed



### Documents Requiring Signature

	Document requiring a signature has been uploaded
	Document requiring a signature has been viewed
	Document has been signed and uploaded by Portal user

### Report Requests

	Report has been requested by Portal user
	Request received and is being automatically processed by Synectic Super
	Requested report is available to view

### Source Document Requested

	Source document has been requested by Synectic Super
	Source document has been uploaded by Portal user

## - 4.4 Comments and History

**Comments** can be added and viewed by clicking on the speech icon to the right of the document.



The screenshot shows a document titled "Feb 2010 Bank Statement.pdf" with an "Uploaded" status icon circled in green. To the right of the document are icons for comments, history, and other actions. Below the document, there are two comments: "webdemo at 27/07/2010 15:29:30 Hi Geoff. Pages 2 and 3 are missing from this document" and "webdemo at 27/07/2010 15:29:57 Hi Max. I will upload it later tonight". At the bottom, there is a text input field with the placeholder "Input any comments or questions you have about the Document" and a blue "Add Comment" button circled in green.

The **history** of different versions of the document, e.g. signed or uploaded, can be viewed by clicking on the history icon to the right of the document. The View History hyperlink will open that version of the document.



The screenshot shows a document titled "Feb 2010 Bank Statement.pdf" with a "Signed" status icon circled in green. To the right of the document are icons for comments, history, and other actions. Below the document, there is a "View History" link circled in green. The document details show it was updated on 27/07/2010 at 15:30:43 by webdemo, with a size of 123.11K. A comment below reads "Max, here is the complete statement".

## - 4.5 Uploading a Source or General Document

Portal users can upload a document, such as a requested source document, by selecting the relevant folder or subfolder and then clicking on the Upload icon.



This will bring up the Upload Document screen:

A screenshot of the 'Upload Document' form. The 'Select File' button is highlighted with a yellow circle. The 'Submit' button is also highlighted with a yellow circle. The form includes fields for 'File Please select a file', 'Progress', 'Signature Required', 'Folder', 'Date Due', 'Reminder Interval (Days)', and 'Comment'. A disclaimer at the bottom reads: 'Do not upload or share any content that infringes copyrights or that you otherwise do not have the legal right to upload or share.'

Select File	Browse to the document on your PC. The maximum file size is 10mb. See below for allowable file types
Progress	Indicates when the upload process is complete
Signature Required	Tick this checkbox if the document you are uploading requires a signature
Date Due	Only complete if a signature is required
Reminder Interval	Only complete if a signature is required; a reminder email will be sent if the signed document has not been uploaded to Portal
Folder	This is not editable – it is the upload folder chosen from the document screen
Comment	A short comment or description can be entered
Submit	Click to finalise the upload. A message will confirm that the file has been successfully placed on Portal.

The following file types can be uploaded to Portal:

File Type	File Extension
Images:	.jpg, .jpeg, .gif, .bmp, .png, .tif
Documents:	.pdf, .txt, .xls / .xlsx, .csv, .doc / .docx, .htm / .html, .xml, .ods (OpenDocument Spreadsheet), .odt (OpenDocument Text document), .ods (OpenDocument Spreadsheet), .odp (OpenDocument Presentations)
Archives:	.zip

## - 4.6 Uploading a Signed Document

Documents requiring a signature can easily be found using the 'Requires Signature' search filter:



Click on the document name to view, print and sign the document.



A 'sign' link will appear to the right of documents requiring a signature. Click on this link to upload the document once it has been signed and scanned.

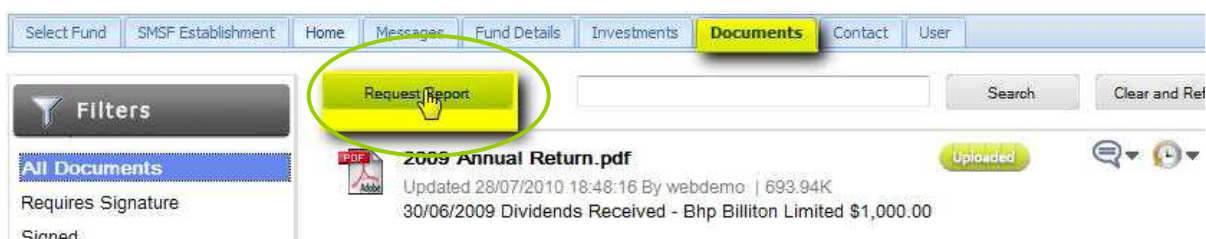
After a signed document has been uploaded, the status will change to Signed



## - 4.7 Request a document

This feature (if enabled) enables reports to be requested in Portal, directly from Synectic Super's accounting system (Simple Fund), 24/7.

To request a report, click on the Request Reports icon on the Documents Tab.

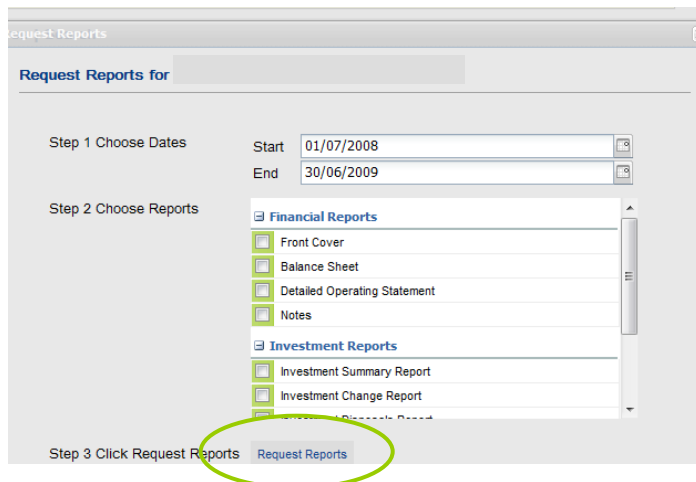


A Request Reports window will pop up.

Step 1: Choose the dates by entering specific dates or selecting a date range (recommended).

Step 2: Select which reports you want to request. Only the reports which you have been granted access to will display here. Multiple reports can be selected in a single request.

Step 3: Click the Request Report button to send the request.



A request will now be sent to our accounting system to create the reports.

You will be automatically redirected to the “Requested Reports” search filter. The status of the request can be viewed here and will refresh every 5 seconds.

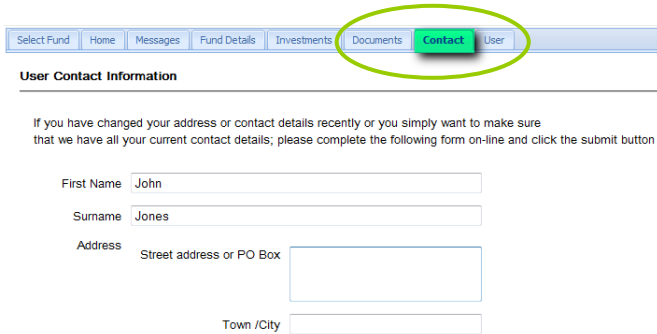


Within a few minutes, the report will be made available and the report status will change to “Ready”.

*Please Note: The time it takes for reports to be generated is dependent on the number of requests our accounting system is currently processing. At peak times, e.g. End of Financial Year, the time taken to process the request may be longer than usual.*

## 5. Change your Contact Details

To inform us of changes to your contact details, select the 'Contact' tab (if enabled). Complete the details which have changed and click 'Submit'. This will automatically send Synectic Super a notification of the changes.



Select Fund Home Messages Fund Details Investments Documents **Contact** User

**User Contact Information**

If you have changed your address or contact details recently or you simply want to make sure that we have all your current contact details; please complete the following form on-line and click the submit button

First Name

Surname

Address

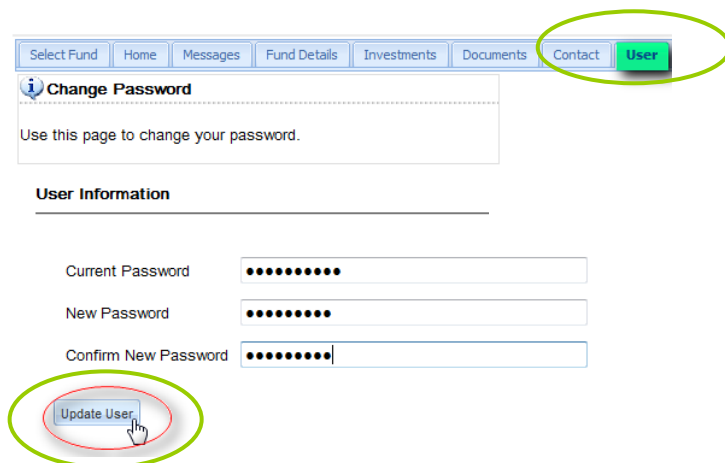
Town /City

As your email address is also your Portal password you will need to contact us directly to change your email details. Your email will be updated and new Portal login details will be issued to your new email address. Our contact information is listed on the front cover of this User Manual.

## 6. Change your Password

To change your password whilst in Portal, select the 'User' tab.

Enter your current password and new password (including 'confirm new password') and the change will take place instantly. An email will be sent confirming that your password has been changed.



Select Fund Home Messages Fund Details Investments Documents Contact **User**

**Change Password**

Use this page to change your password.

**User Information**

Current Password

New Password

Confirm New Password

If you have forgotten your password, please click on the Forgot Password link on the login page. For your security Synectic Super staff do not have access to your password.

## 7. Security and Specifications

### Portal Application

Portal has been developed by BGL Corporate Solutions who are the leading SMSF Software provider in Australia with over 325,000 SMSFs being administered using the market leading Simple Fund product. BGL has been producing compliance software for accountants for over 20 years. The High Grade 128 bit SSL security certificate issued on Portal and the domain that Portal runs under is owned by BGL Corporate Solutions.

### Security

Only you will know your user account password. Our staff do not have access to this.

All documents and information sent between Portal and our accounting system (located on our internal servers) are transferred securely using the strongest 128 bit SSL encryption.

### Data Location

Portal is hosted in a secure data centre located in Sydney.

The hosted data centre provides:

- World class infrastructure and managed services through Tier 1 backbones with diverse path connectivity
- ISO 27001 Compliant Data Centre
- Formal monitoring, logging and event management processes to maintain advanced tiers of technical support.
- Additional accreditations for the Data Centre and Network Operations Centre engineers include DSD highly protected, ASIO T4, VMware, Suntone, EMC, Microsoft Gold & RedHat
- Every Data Centre employee undergoes thorough and multiple background security checks before they are hired
- Mantraps, keycard protocols, biometric scanning protocols and round-the-clock interior and exterior surveillance monitors protect access to the Data Centre
- There is constant supervision of all doors, riser cupboards and plant rooms with CCTV including motion detection and fixed cameras with digital recording capability and HDD archive
- The Data Centre is equipped with redundant power components to guarantee continuous power availability. Uninterruptible power supply systems (UPS) and diesel-powered generators provide the necessary power during utility interruptions, such as weather-related events or transmission system failures
- Data backups are maintained by the data centre

### Third-Party access

To enhance the administration of SMSF's, we have the ability to grant Portal access to Advisors, Trustees and other third-parties such as Auditors. Please discuss with us if you do *not* wish for this to happen.