bgl.

⊙ CAS360

Top 50 *Features*

1300 654 401   ✉ info@bglcorp.com   🖥 bglcorp.com.au

SUSTAINABLE CERTIFICATION ✓ISO 27001
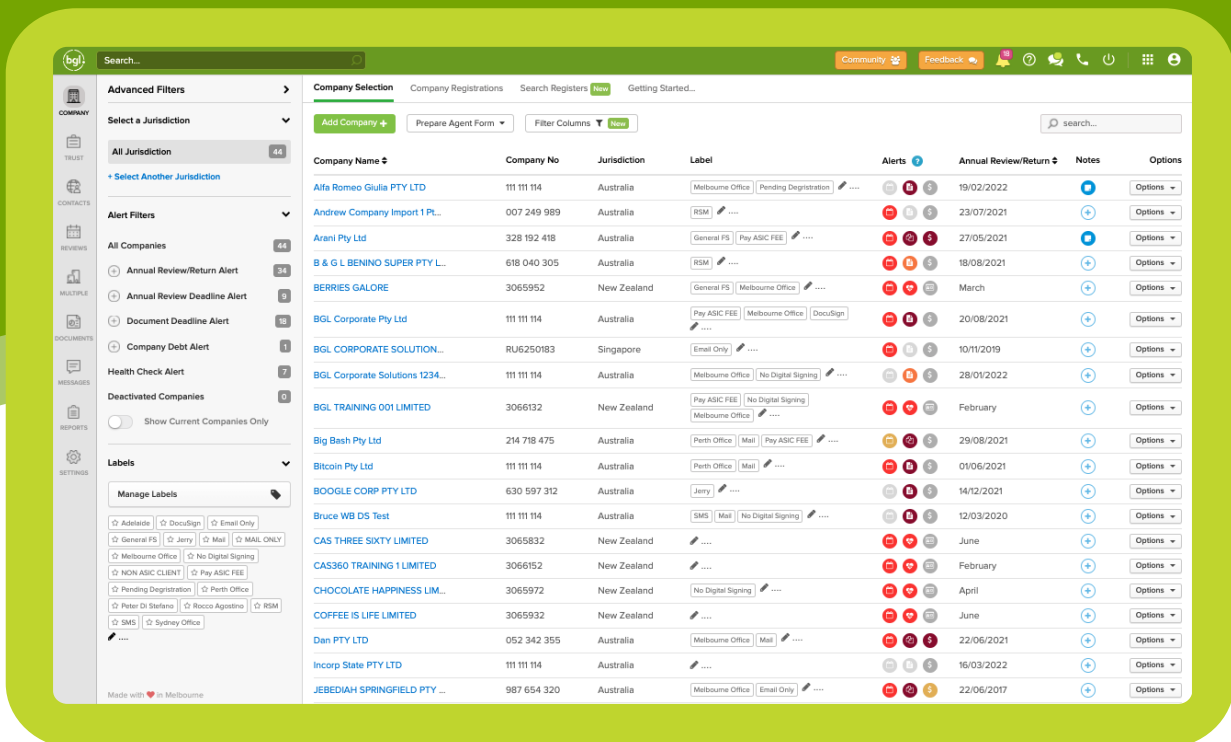
Company and Trust Management

1   Automatic comparison of CAS 360 company data with ASIC company data.

2   Full share registers with support for all transactions that ASIC supports, with ASIC forms for these transactions and supporting documents.

3   The most advanced share transactions screen with full transaction history, pie charts, beneficial owners, partly paid shares and shareholders %'s across multiple classes of shares. Ability to export registers to MS Excel.

4   The most advanced unit trust transactions screen with full transaction history, pie charts, beneficial owners, partly paid units and unitholder %'s across multiple classes of units. Ability to export registers to MS Excel.

5   Support for large companies and trusts with over 5,000 shareholders/unitholders supported.

6   Support for options transactions for companies and trusts including issue options, exercise options and cancel options.

7   Full unit trust registers with support for all the transactions that are allowed.

8   Full trust management support for unit, discretionary, bare and hybrid trusts.

9   Trust distributions for all trust types include trust distribution minutes/resolutions for discretionary trusts with support for 20+ income tax components.

10   Multi company document support with the ability to prepare changes once and have these apply across all your companies. Multi company changes include contact name change, contact address change, business address change, registered address change and multiple officer transaction changes.

11   Full company register reporting, including historical registers. Users can pick a date and see the company information at that date.

12   Support for all legally required company registers.

13   Multi Company Annual Review processing.

14   Director ID screen and alerts to help you manage and streamline the new Director ID requirements.

Contacts, Addresses and Relationship Management

15   Support for company relationships including accountant, auditors, holding company, liquidator, local agent, other positions, powers of attorney and public officer.

16   Detailed contacts screen showing all contact information and their relationships and holdings with other entities.

17   Automated contact duplicate identification and one-click consolidation.

18   Automated address duplicate identification and one-click consolidation.

User Management and Workflow

19 Detailed user profiles for super users, accountants or view-only users.

20 Company labels allow you to group companies however your firm would like them grouped (i.e. user, manager, partner).

21 Notifications, companies and trusts are then all filtered by labels so users only see the companies that are important to them.

22 Automated smart document deadline alerts with automatic calculation of all ASIC document deadlines due today, in 7 days and in 14 days.

23 Automated smart Annual Review alerts and filters to help manage received, upcoming and missed Annual Reviews.

24 Automated smart company debt alerts powered by information provided by ASIC showing current debt, late debt and ASIC account credits.

Client Communication

Emails

25 Email reminders to clients for upcoming document deadlines, with documents or Adobe Sign / DocuSign / FuseSign links attached.

26 Email reminders to clients for debt balance owing to ASIC, with the official ASIC invoice attached and a 'Pay Now' link for easy payment to ASIC.

27 Detailed email success responses including if the email sent to a client was delivered successfully or rejected by their email server.

28 Full tracking of every email that has been sent from CAS 360. This works as a firm-wide outbox, showing who sent the email and what time it was sent with the ability to re-send.

SMSs

29 SMS reminders to clients for upcoming document deadlines, with documents included in the SMS. Also, if using Adobe Sign, DocuSign or FuseSign, clients can sign and return documents from the SMS on their smartphone.

30 SMS reminders to clients for debt balance owing to ASIC, with the official ASIC invoice included in the SMS, and a 'Pay Now' link for easy payment to ASIC.

31 Ability to have 2-way SMS conversations with clients from within CAS 360, allowing your client to reply. Includes emoji support.

32 Detailed SMS screen showing all SMS's sent and received by clients. All history is kept.

Document Management

33 Full document management inside CAS 360. Every company and trust document prepared in CAS 360 is automatically tracked. Easily searchable, by company/trust name, trace number or even a person involved.

34 Upload and store all company and trust historical documents.

35 Get every document reviewed by a partner/manager before it is sent to a client.

Document Workflow

36 Full supporting documents when preparing document packs for any company or trust change.

Integrations

37 Digital signing integration with Adobe Sign, DocuSign and FuseSign.

38 Document management integration with FYI and Virtual Cabinet.

39 Document provider integration with Abbots, Acis, Cleardocs, Entity Makers, LightYear Docs and Smarter SMSF.

40 2-way integration with GreatSoft, Xero Practice Manager (XPM) and XPM Jobs.

41 2-way integration with BGL's Simple Fund 360 and Simple Invest 360.

42 Advanced open free API.

Customisation

43 Customise every document template prepared by CAS 360 via Microsoft Word.

44 Customise every email template prepared by CAS 360 with the most advanced email template editor.

45 Customise every SMS message template prepared and sent by CAS 360.

Reporting

46 Management reporting allows reports to be prepared to show all companies and then filter options such as Annual Review, label, etc.

47 Detailed company reporting including the ability to prepare reports across a whole company, a whole trust and an individual to show all these relationships.

Help, Training, Other

48 Free, unlimited access to software support via live chat, phone and/or email.

49 Free, unlimited access to on-demand training via the BGL Learning Channel.

50 BGL is 100% Australian owned and CAS 360 is built in Australia, by Australians, for Australian accounting firms. A local success story.

Want to learn *more?*

Visit *bglcorp.com.au* or call us at *1300 654 401.*

CAS360