



EXPAND

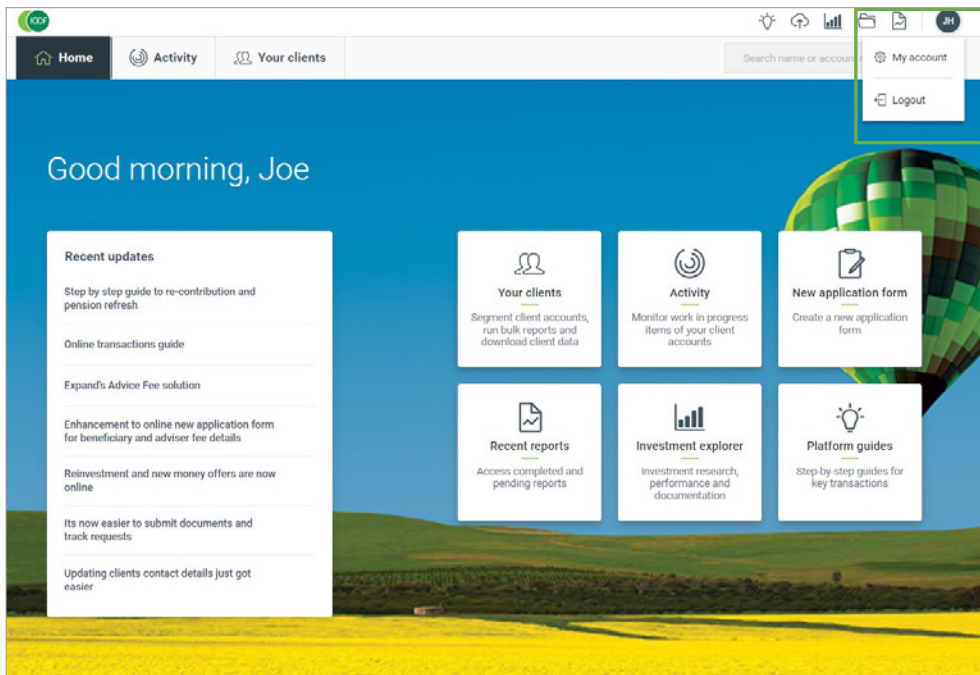
Expand Functionality – Data feeds

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myexpand.com.au

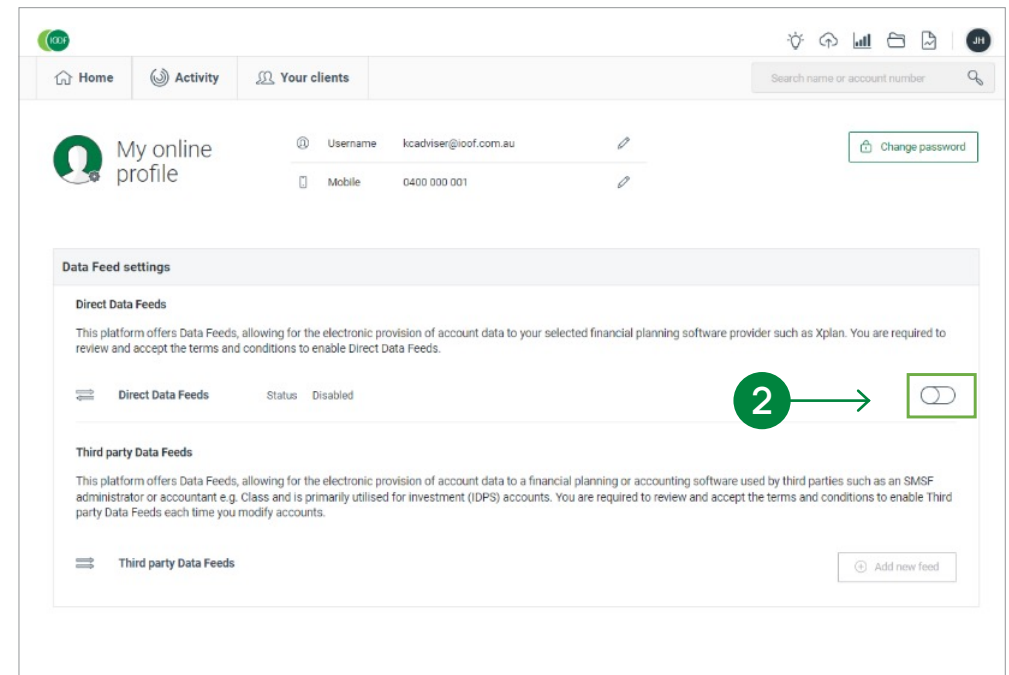
For adviser use only

Adviser data feeds

- 1 On the top right-hand corner, select the icon with your adviser initials to access the **My account** menu.



- 2 Under Data Feed Settings, select the toggle to display the tick ✓ to enable the feed



Adviser data feeds (cont.)

- 3** You will be directed to the Terms and Conditions page, where you will be required to review. If you accept, input your password to proceed and select **Enable**.

Enable Data Feeds

corporate, do not provide any warranty, make any representation as to, or accept any responsibility for, errors or omissions (including negligence), or for the accuracy, reliability, timeliness or completeness of the information in the Data Feeds.

- To the extent permitted by law, IIML, NAL and their related bodies corporate are excluded from any liability for any loss, costs, charges and expenses suffered or incurred by you directly or indirectly arising as a result of use of this data, including any loss you or your clients may incur as a result of the Data Feed Recipient's use or misuse of information it receives from the Data Feeds.
- You acknowledge that the Data Feeds may cease to be offered, or your access to them may be terminated or temporarily suspended, at any time, without notice. Without limiting this right to terminate or suspend the service, you acknowledge that we terminate or suspend your access to the Data Feed Service in the event that we are informed or reasonably believe that:
 - you have had your Australian Financial Services Licence (AFSL) varied, suspended or cancelled
 - you are otherwise no longer authorised to deal in or provide advice in relation to our products or
 - you are no longer an authorised representative of your AFSL Licensee.
- We will cease to provide the Data Feeds to you in relation to a particular client if we are advised or reasonably believe that you are no longer the nominated servicing adviser to that client.
- Any personal information held by IIML, NAL or their related bodies corporate will be handled in accordance with the privacy policy at insigniafinancial.com.au/privacy.

Please enter your password to proceed

Show

Enable

- 4** Upon returning to My Online Profile page, you will see the feed has been activated.

Data Feed settings

Direct Data Feeds

This platform offers Data Feeds, allowing for the electronic provision of account data to your selected financial planning software provider such as Xplan. You are required to review and accept the terms and conditions to enable Direct Data Feeds.

☰ **Direct Data Feeds** Status Enabled

Third party Data Feeds

This platform offers Data Feeds, allowing for the electronic provision of account data to a financial planning or accounting software used by third parties such as an SMSF administrator or accountant e.g. Class and is primarily utilised for investment (IDPS) accounts. You are required to review and accept the terms and conditions to enable Third party Data Feeds each time you modify accounts.

☰ **Third party Data Feeds** [Add new feed](#)

Setting up data feeds with your advice software provider

You will also need to set up data feeds with your advice software provider. Please contact your advice software provider for set up support. Alternatively, you can email datafeedsupport@insigniafinancial.com.au for any issues or questions.

Third party data feeds (Class only)

Add Third Party data feeds

- 1 On the top right-hand corner, select the icon with your adviser initials to access the **My account** menu.



The screenshot shows the IOOF user interface. At the top right, there is a navigation bar with icons for Home, Activity, Your clients, and My account. A green circle with the number 1 and a downward arrow points to the 'My account' icon. Below the navigation bar, the main content area features a greeting 'Good afternoon, andy' and several service tiles: 'Your clients', 'Activity', 'New application form', 'Recent reports', 'Secure upload', and 'Investment explorer'. A 'Logout' button is visible in the top right corner.

- 2 Under Data Feed Settings, select **Add new feed** under Third party Data feeds.

The screenshot shows the 'My online profile' page. The top navigation bar includes Home, Activity, Your clients, and a search bar. Below the navigation bar, the 'My online profile' section displays user details: Username (kcadviser@ioof.com.au) and Mobile (0400 000 001). A 'Change password' button is located to the right. The 'Data Feed settings' section is highlighted and contains two sub-sections: 'Direct Data Feeds' and 'Third party Data Feeds'. The 'Direct Data Feeds' section shows a status of 'Disabled' with a toggle switch. The 'Third party Data Feeds' section has a status of 'Disabled' and a green circle with the number 2 and an arrow pointing to an 'Add new feed' button.

Select accounts to enable data feeds

- 1 You can search for accounts to include in the data feed by typing in the account number or name. Once you have located the account select the **plus + sign** symbol. This will then be added to the **Client accounts in feed list**.
- 2 Once you have added your accounts, select **Verify** and **Save**.
- 3 You will be directed to the Terms and Conditions page, where you will be required to review. If you accept, input your password to proceed and select **Enable**.

Enabling data feeds with client consent

You must only enable data feeds for clients who have given you their consent to do so.

The first screenshot, titled 'New Data Feed', shows a search box labeled 'Search by name or account number' highlighted with a green box. Below it is a table titled 'Client accounts in feed' with columns 'Name' and 'Account No.'. The text 'You have no client accounts added' is displayed in the table. A green circle with the number '1' and an arrow points to the table area. At the bottom, there are 'Close' and 'Verify and save' buttons.

The second screenshot, also titled 'New Data Feed', shows the same search box. The table below now contains two entries: 'Peter Darryl Gajnik' with account number '16484416' and 'Tamra Isobel Besic' with account number '16891671'. Each entry has a plus sign icon to its right. A green box highlights the 'Verify and save' button at the bottom.

The third screenshot, titled 'Enable Data Feed', shows a scrollable area containing terms and conditions. At the bottom, there is a password field labeled 'Please enter your password to proceed' with a 'Show' icon. A green box highlights the 'Enable' button below the password field. A green circle with the number '3' and an arrow points to the 'Enable' button.

Select accounts to enable data feeds (cont.)

- 4 You will be directed back the My online profile page where you will be able to confirm the status and number of accounts in the data feed.

Add your data feed to Class

Once you have enabled third party data feeds on IOOF Online, you will need to also set up the data feed with Class. For more information please click [here](#) or contact support@class.com.au for support.

The screenshot shows the 'My online profile' page in IOOF Online. The user's profile information is visible at the top, including the username 'kcadviser@ioof.com.au' and mobile number '0400 000 001'. Below this, the 'Data Feed settings' section is displayed. It contains two main sections: 'Direct Data Feeds' and 'Third party Data Feeds'. The 'Direct Data Feeds' section shows a toggle switch for 'Direct Data Feeds' which is currently 'Disabled'. The 'Third party Data Feeds' section shows a table with one entry for 'Class'. The 'Class' entry has a status of 'Enabled' and 'Accounts: 2'. A green box highlights the 'Status Enabled' and 'Accounts: 2' fields. A green arrow points from a green circle with the number '4' below the screenshot to the 'Accounts: 2' field.

| Data Feed settings | |
|---|---|
| Direct Data Feeds | |
| This platform offers Data Feeds, allowing for the electronic provision of account data to your selected financial planning software provider such as Xplan. You are required to review and accept the terms and conditions to enable Direct Data Feeds. | |
| ☰ Direct Data Feeds | Status Disabled <input type="checkbox"/> |
| Third party Data Feeds | |
| This platform offers Data Feeds, allowing for the electronic provision of account data to a financial planning or accounting software used by third parties such as an SMSF administrator or accountant e.g. Class and is primarily utilised for investment (IDPS) accounts. You are required to review and accept the terms and conditions to enable Third party Data Feeds each time you modify accounts. | |
| ☰ Third party Data Feeds | <input type="button" value="Add new feed"/> |
| Class | Status Enabled Accounts: 2 <input type="checkbox"/> |

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Edit Third Party Data Feed

1 If you need to edit the data feed, select the **pencil** icon. Here you can add new accounts using the search bar or delete accounts by selecting the cross against the listed account. Once updated, select **Verify and save**.

2 You will be directed to the Terms and Conditions page, where you will be required to review. If you accept, input your password to proceed and select **Enable**.

Advisers are responsible for the accounts registered

You are responsible for ensuring that clients and their associated accounts enabled under the third-party data feed continue to consent to their information being made available to Class.

The screenshot shows the 'My online profile' page. Under 'Data Feed settings', there are two sections: 'Direct Data Feeds' and 'Third party Data Feeds'. The 'Third party Data Feeds' section is expanded, showing a table with one entry: 'Class' with status 'Enabled' and 'Accounts: 2'. A pencil icon is highlighted with a green box and a green arrow pointing to a '1' in a green circle below the screenshot.

The screenshot shows the 'New Data Feed' modal window. The 'Data Feed name' is 'Class'. The 'Select the accounts you want to include' section is highlighted with a green box. Below it, a table lists 'Client accounts in feed' with columns 'Name' and 'Account No.'. Two accounts are listed: 'Peter Darryl Gajnik' with account number '16484416' and 'Tamra Isobel Besic' with account number '16891671'. The 'x' delete icon for the first account is highlighted with a green box. At the bottom, there are 'Close' and 'Verify and save' buttons.

Delete and Disable Data Feed

- 1 You can also delete or disable the data feeds.
- 2 To disable the feed, select the toggle with the tick ✓ icon. You will be directed to confirm your selection. Input your password to proceed and select **Disable**.
- 3 To delete the feed, select the bin icon. You will be directed to confirm your selection. Input your password to proceed and select **Delete**.

Disabling or deleting a third-party data feed

If you disable a data feed, we will cease sending any account data. You can re-enable the data feed at any time and your previous client list will be retained.

If you delete the data feed, we will cease sending any account data and **all accounts will be removed** and will need to be readded.

Support

If you have any questions or issues, please email datafeedsupport@insigniafinancial.com.au or upload your query to <https://dataservices.ioof.com.au/>

The screenshot shows the 'My online profile' page with navigation tabs for Home, Activity, and Your clients. The user's profile information is visible, including Username (kcadviser@ioof.com.au) and Mobile (0400 000 001). The 'Data Feed settings' section is expanded, showing 'Direct Data Feeds' with a status of 'Disabled' and a toggle switch. Below this, 'Third party Data Feeds' are listed, with a table containing one entry. A green circle with the number 1 points to the bin icon in the table row.

The 'Disable Data Feed' dialog box contains the following text: 'Are you sure you want to disable this feature? IOOF will cease sending all client data via Data Feeds once this action is complete.' Below this is a password field with a 'Show' icon and a green 'Disable' button. A green circle with the number 2 points to the 'Disable' button.

The 'Delete Data Feed' dialog box contains the following text: 'Are you sure you want to delete the Feed for this provider? IOOF will remove all accounts and cease sending client data via Data Feeds once this action is complete. In the event you recommence this Data Feed, you will be required to manually re-add client/s.' Below this is a password field with a 'Show' icon and a green 'Delete' button. A green circle with the number 3 points to the 'Delete' button.

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