MASON STEVENS

GLOBAL INVESTMENT SERVICE

SWITCHING ON THE CLASS DATA FEED

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The Class Data Feed can be enabled at either:

1. Account Level
2. Adviser Level

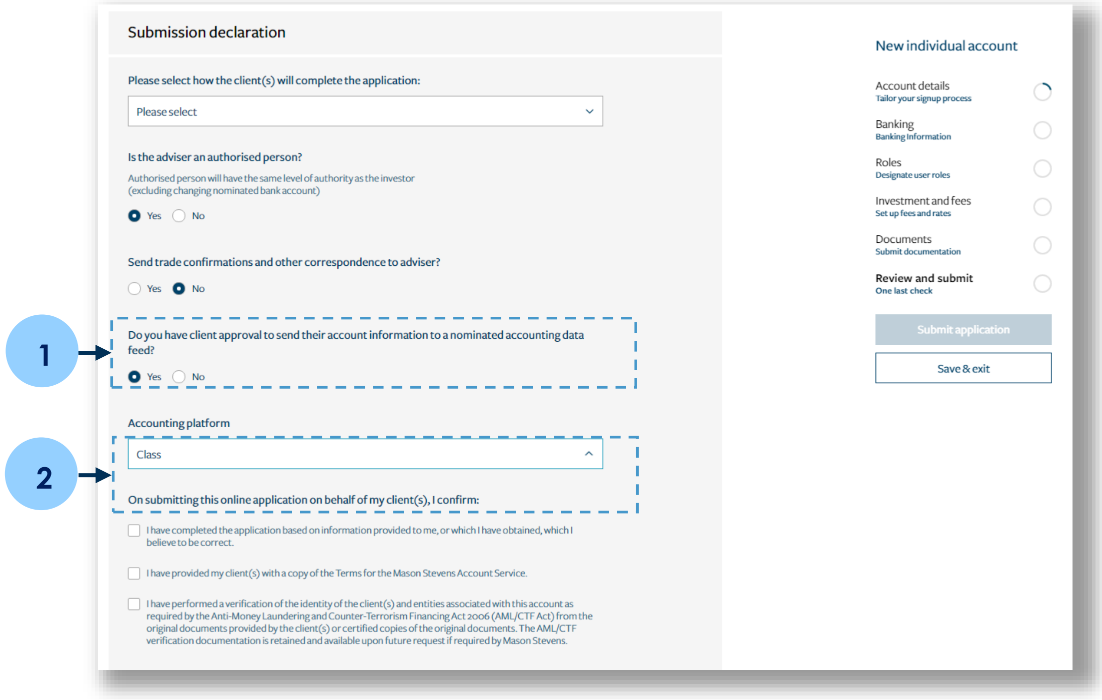
Account Level

The final step of the Account Onboarding process is where the Adviser will select whether a data feed is to be set up. The Adviser will confirm they have their client's approval and select "Class" as the Accounting platform from the dropdown menu.

Once all the necessary regulatory checks have been completed and the account is activated, then the data feed is established.

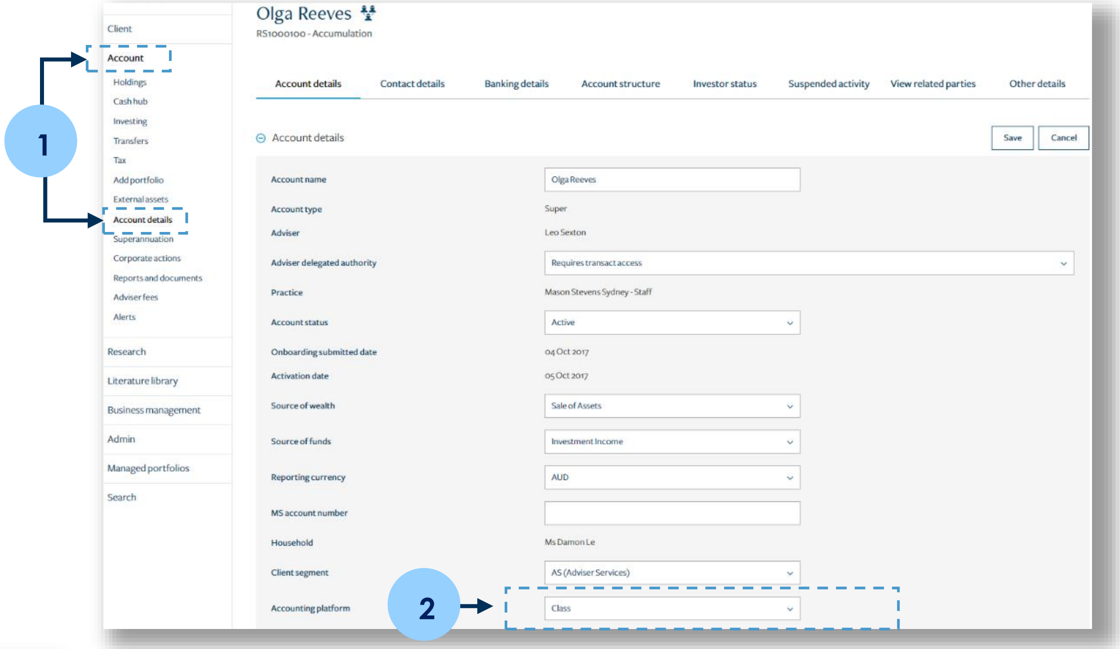
1. This page will automatically have the "No" option selected. Select "Yes" so the dropdown menu illustrated in the 2nd box appears.

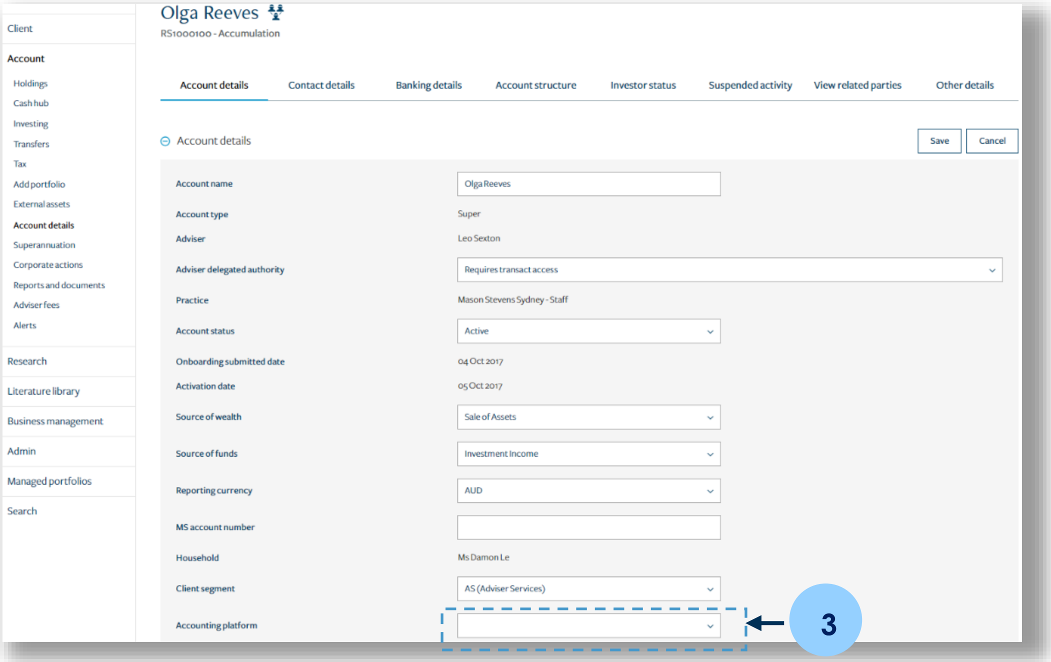
2. In the "Accounting platform" section, use the dropdown menu to select "Class".



1. Once the account is active and the data feed is established, the Adviser can easily switch the data feed off from the Account details page in **Edit** mode.

2. If you had selected a nominated accounting platform in the account set-up process, the name of the platform will appear here.





3. To stop the data feed, remove the existing option by selecting "[Blank]" in the dropdown menu.

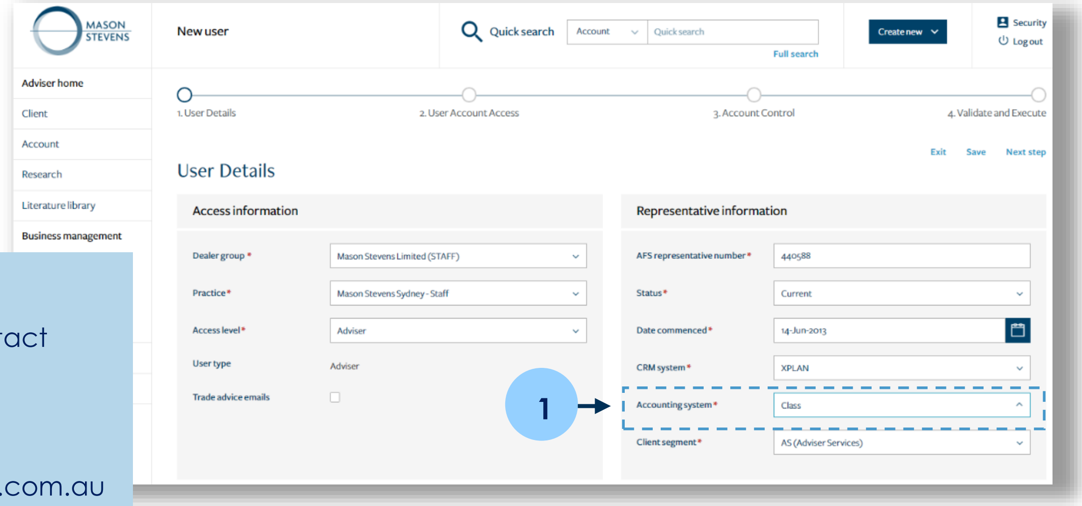
Click "Save" in the top right-hand corner once finished.

Adviser Level

If an Adviser wants all of their accounts on the Class data feed, this is also possible without having to update every single account individually. Mason Stevens Admin staff will switch on the Class data feed from the Adviser user screen in **Edit** mode. The Adviser will have to contact Mason Stevens to do this.

ADMIN DASHBOARD

1 Selecting "Class" will switch on the data feed for all of the Adviser's accounts.



Adviser Tip

Adviser will need to contact Mason Stevens first at:

P 1300 988 878

E admin@masonstevens.com.au

Adviser Code

The Adviser Code is input in Class upon setting up the data feed. It is required at the point of set up only and is used for the password to establish the feed. Mason Stevens Admin staff have access to the codes (e.g. MAAAAH000001) but currently this is not displayed on the platform. In the meantime, if the Adviser does not know their code, Mason Stevens Admin can easily provide this.