Introduction and helpful hints on the use of Corporate Scorecard Platform

Please save your Login & Password which was sent by separate email for ongoing use.

Save the web link to your favourites www.corporatescorecard.com.au

Getting started

- Go to the website www.corporatescorecard.com.au
- Press Login
    - o Enter   Login name & Password
    - o Press Login

Header Links

- MAIN MENU:
    - o Report Options: if you know which report you wish to order, select from this list
    - o Online Services: Fast access to up to date non-financial information e.g. ASIC, PPSR Land Titles and Express Checks (see more detailed information below)
    - o Recent online Searches: - view your recent searches by selecting the "view" tab. Or check the progress of reports ordered but not yet completed by selecting "Detail Listing" you can also communicate with the analyst from here on a report currently being written.
- PRODUCTS/SAMPLES:
    - o View summaries, sample reports and pricing. To view a full sample report select "Sample". Please note that not all report options have been made available to order, if you would like access to any additional report/s seen in the products/sample area, please contact us and we will organise.
- MY ADMIN:
    - o Change your password, check usage, check current transactions, and view the last 100 reports that have been ordered.

Ordering a Report

While most fields are self-explanatory and user friendly, please call and we will guide you through & show you some short cuts when ordering your first report, we are happy to assist at any time. Please note that no order is processed until you see a final screen which has the cost, a summary of the request type and a final request button asking us to proceed.

- Select the report you require from the main menu
- Enter the ABN Number; then press "Validate", from the box provided click "Select" for the company matching your request. The Name field will be automatically populated for you.
- If a Trust Name comes up you will need to enter the ACN Number and enter the name of the company in addition to the trust.
- Subject Contact: - Make sure you enter the subject contact name and contact details. We don't need the address if the subject is in Australia.
- Purpose of Inquiry: - use the drop down arrow to select the purpose.
- We require an estimate of the $ value and term of the contract. If there are extensions just enter brief details. E.g. 3+1. If the contract has a significantly higher expenditure in one year, we need to know the maximum amount for that year.
- Service Level Required: - if you require Urgent Delivery, please select priority, note there is a price variance for this.
- Deadline Delivery: - if you have a specific requirement for the report to be delivered around the time it is due, please let us know. E.g. "*need am Thursday for a 2pm meeting".*

Corporate Scorecard Pty Ltd ABN: 33 007 527 611
PO Box 709, North Sydney NSW 2059
Sydney +61 2 9959 3318 • **Melbourne** +61 3 9016 8450 • **Brisbane** +61 7 3103 7291
Fax +61 2 9954 5603 • admin@corporatescorecard.com.au
www.corporatescorecard.com.au

- Instructions/Comments: - If you have some information that you think may be helpful, please provide it here. You may want to request the analyst to look at a particular area of concern or interest.

- Attachments: - Note we will obtain the financials from the subject directly, however if there are documents that you wish the analyst to have, please download them here. Note that the maximum size for download is 7MB, further documentation should be emailed to admin@corporatescorecard.com.au

- Matter Reference Detail; Used for Order Number/ Contract Number or Project Name etc. This information will show on your invoice.

- Next:- press this once you have completed the form, this will take you to the confirmation page.

- Press Confirm if all information is correct on "You are requesting following report".

- Your request will go straight to one of our senior business analysts. Standard delivery is 5 business days. The business analysts will notify you if there are any delays.

- Note you can communicate with the analyst and watch the progress of the report from the Main Menu "Work in Progress" by selecting "Detailed Listing".

Online Services

Gives you immediate and up to date non-financial information, either select one of the main products, ASIC, Express Check, PPSR, Land Titles, Monitoring or select quick search which will give you a wider range of search options.
- QUICK SEARCH
  - Enter the ACN, ABN or Name and press search.
  - Select the appropriate identifier
  - Select the information product required
    - Company Extract/s
    - Relational Extract
    - Company Document Listing
    - PPSR Company Search by ABN or CAN
    - Combined PPS Search/s
    - Express Check

- EXPRESS CHECKS:
  - Currently these are only available on Companies and Corporate Trustees, an alternative product will need to be used for businesses and sole traders.
  - Enter the ACN, ABN or Company Name
  - If a Trustee is involved you will be prompted to enter the Trustees ACN or Name.

Completed Reports Storage and Retrieval

- Go to My Admin
- Select "Check my Transactions" – you can select the last 100 reports you have requested or be more specific by using the range of selection options available.

Please ring us at any time for assistance or advice, prior, during or on the completion of a report being requested or written.