

Template Customisation

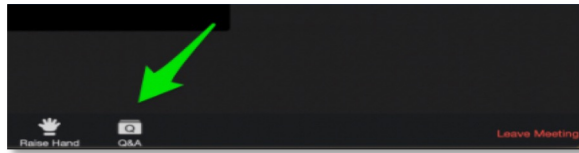
CAS 360 Education Week

Empowering professionals to automate workflows and efficiently manage company compliance.



Housekeeping

- CAS360 Education Week - <https://www.bglcorp.com/education-week/>
- Recorded and available to view on the CAS Community
- Listen only Mode
- Please ask Questions using Q&A.



Agenda

- The CAS 360 Dictionary
- Document Templates
- Document Labels
- Email Templates
- Email Settings



The CAS 360 Dictionary

- Articles that include Dictionary Codes for customising Documents/Emails
- [The CAS 360 Dictionary Link](#)



Document Templates

- Settings > Document Templates.
- Download the Master Template.
- Edit, then re-upload the Word Doc.
- Select the Template when preparing documents.



DP PTY LTD

ACN/ABN: 111 111 114

Incorporated in Australian Capital Territory on 01/07/2019 under the Corporations Act 2001 (Cth)

Registered Address:

Certificate Number: 1

606 HAWTHORN ROAD, BRIGHTON EAST, VIC 3187

Share Certificate

This is to certify that

Emily Shaj <A/C BGL CORP>**606-608 HAWTHORN ROAD, BRIGHTON EAST, VIC 3187**

Is the registered holder of

No of Shares	200
Share type	ORD - ORDINARY SHARES
Amount Payable per Share	\$1.00
Amount Paid per Share	\$1.00

In the above named company subject to the Constitution

Signed in accordance with the Constitution of the company on 30/06/2021

John Jones
Director

DP PTY LTD

ACN/ABN: 111 111 114

Incorporated in Australian Capital Territory on 1 July 2019 under the Corporations Act 2001 (Cth)

**Registered Address:**

Certificate Number: 1

**7 Laemmle Street, Dandenong
DANDENONG NORTH VIC 3175**

Share Certificate

This is to certify that

Emily Shaj <A/C BGL CORP>**606-608 HAWTHORN ROAD, BRIGHTON EAST, VIC 3187**

Is the registered holder of

No of Shares	200
Share type	ORD - ORDINARY SHARES
Amount Payable per Share	\$1.00
Amount Paid per Share	\$1.00

In **DP PTY LTD** subject to the ConstitutionSigned in accordance with the Constitution of the company on **Wednesday, June 30th, 2021**

John Jones
Director

Document Labels

- Managed on the Company Selection screen.
- Attach labels to templates.
- Select the label when preparing documents. This selects ALL templates with this label.



Email Templates

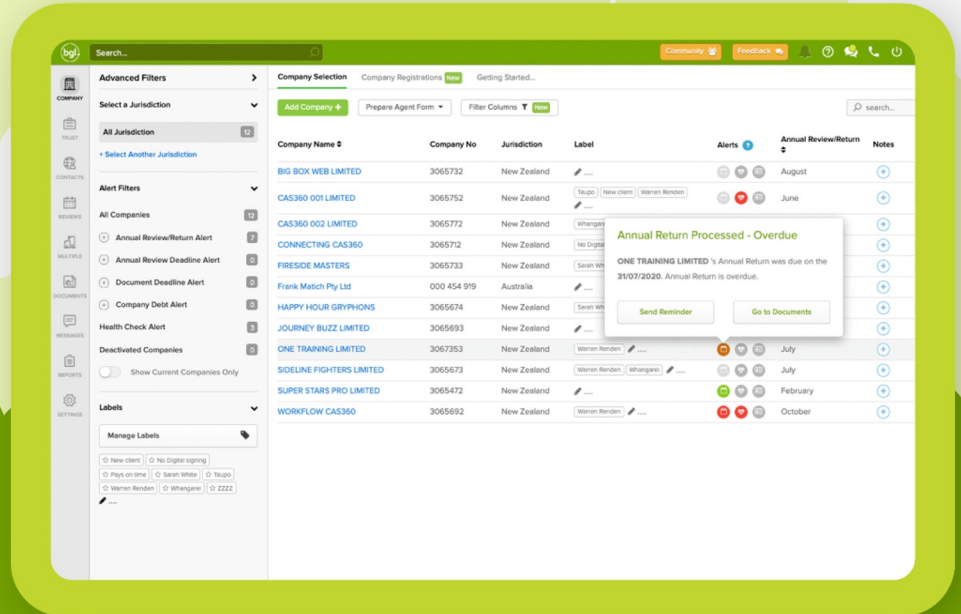
- Settings > Email Templates.
- Click “Create New” and select the new Template.
- Edit the Template, then click “Update”.
- Select the Template when sending an email for documents.





Email Settings

- Use your Firm's Domain to send emails from CAS360.
- One time purchase of \$550.
- Only one email per account.





Thank You!