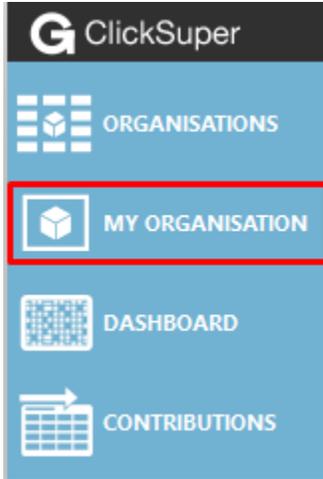


# My Organisation - Management

## Overview

The MY ORGANISATION menu allows clients to view and update their organisation information in one handy place. The MY ORGANISATIONS menu is located within the blue menu bar on the left hand side after logging in to ClickSuper.



Clients can click each tab underneath the name of their organisation to view each tab and the information within.

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This guide outlines each tab and the information that can viewed and updated in each.

## Company Details

The Company Details tab is the first tab in the MY ORGANISATION menu - it outlines basic company details at a glance. An overview is below:

Field	Description
ABN, ACN or WPN	Australian Business Number of the contributor (employer) issued by the ATO. The ABN is used to identify a contributor. The ABN cannot be updated or changed once registered so if a company has changed ABN a new account will need to be registered.
Business Name (as registered with ASIC)	The business name as registered with ASIC. This can be updated if needed.
Company Name	The Company name or trading name of an organisation. If the same as the business name the same name will be displayed in both fields. This can be updated if needed.
Time Zone	Time zone - displayed on the Dashboard menu option.
Verification Status	For an organisation to be activated - the Company Details needs to be System-Verified. For company details to be verified the following must occur: the bank account on the Branches tab needs to be verified and the Office Holders details on the Contacts tab need to be verified. If an account is not verified no superannuation can be paid. If your account is unverified please contact the Support team for help.
Apply SuperStream Validation Rules	This is a tickbox which should be ticked - this confirms that Superstream rules are applied for this account.

### On this page:

- Overview
  - Company Details
  - Address
  - Message Options
  - Default Funds
    - How to add a default fund
- Branches
  - What is a System Administrator?
  - What is an Officeholder?
- Updating Company email address
- Updating bank account details
- Contacts
- Users
  - Create a New User
    - Role Permissions
    - Access Permissions

Enable Duplicate Value Upload Warning	<p>The Duplicate Value Upload Warning detects if a upload with the same value is uploaded within a 24 hour period then a reconciliation warning will appear for the user to manually accept or reject the upload.</p> <p>If the user selects the File Upload Duplication setting then if a file is upload within a 24 hour period with the same dollar amount then instead of the file proceeding to Success, a error dialog should appear advising the user that a duplicate has been detected.</p>
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## Address

The address tab is the second tab in the MY ORGANISATION menu. This is the address registered with ClickSuper for your organisation. ClickSuper will not send postal correspondence to clients however the address listed when registering will be listed on invoices. If a change in address needs to occur, please update in this field and contact [accounts@clicksuper.com.au](mailto:accounts@clicksuper.com.au) to update the postal address for your invoice.

Field	Description
Address Line 1	The first line of the employers postal address.
Address Line 2	The second line of the employers postal address.
Suburb	The suburb of the employers postal address.
State	The state of the employers postal address.
Postcode	The postcode of the employers postal address.
Country	The country of the employers postal address.

## Message Options

The Message Options tab is the first tab in the MY ORGANISATION menu. This section just specifies message processing periods and when certain messages will be sent by the ClickSuper gateway. Nothing needs to be actioned on this tab.

Type	User Aging (days)	From Status	To Status	Regulations/ATO (days)	Message Send Time
Contribution	3	Active	Done	3	End of Day
Registration	2	Active	Done	3	End of Day
Cont + Reg	3	Active	Done	3	End of Day
Registration Outcome	3	Active	Done	3	Not Applicable
Contribution Error	3	Active	Done	3	Not Applicable

## Default Funds

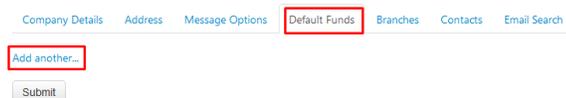
The Default Funds tab is the fourth tab in the MY ORGANISATION menu.

A default fund is the fund you pay your employee's super guarantee contributions into if they don't choose a fund. It must offer a MySuper option and a minimum level of life insurance. Larger companies often have more than one default fund and ClickSuper can accommodate this scenario.

When you enter into an employer-default fund relationship the fund may allocate you an account number or contributor ID which you should record within your payroll system to assist the superfund in locating and processing your member contributions in future.

### How to add a default fund

To add a default fund, please click the Default Funds tab and then click the Add another... link as shown below:



The following page will load. Under Product Name or Product Code, clients have the option of typing in the superannuation fund they are looking for under either option. When trying, a list of superannuation funds that match your typed criteria will be displayed. For example, when trying in Australian the following drop down box is displayed:

The screenshot shows a web form with tabs: Company Details, Address, Message Options, Default Funds (selected), Branches, Contacts, and Email Search. The form fields are: Product Name (containing 'Australian'), Product code, Fund Name, Fund ABN, and a delete link. A dropdown menu is open below the Product Name field, listing several superannuation funds: Australian Ethical Retail Superannuation Fund, Australian Military Bank Capital Guaranteed Super, Australian Workplaces Superannuation Fund, AustralianSuper (highlighted with a red box and a red arrow), Australian Choice Super, and Australian Railroad Group Superannuation Plan. Below the form are links for 'Add another...' and a 'Submit' button.

All of the options shown have the word Australian within them which is why they are displayed. Clients can scroll down to see more options if what they are after is not displayed. In this instance AustralianSuper is the superfund wanted, so in this example simply click the word AustralianSuper. ClickSuper will enter the details for the superfund so that clients can check to make sure this is the superannuation fund they are after and if so, simply click the Submit button to save the superannuation fund as a default fund for your account.

The screenshot shows the same web form with the following values: Product Name: AustralianSuper, Product code: STA0100AU, Fund Name: AustralianSuper, and Fund ABN: 65714394898. The fields are highlighted with a red box. Below the form are links for 'Add another...' and a 'Submit' button, which is also highlighted with a red box.

The same process is followed if wanting to search via Product Code or USI instead of Product Name. To search for Australian Super, clients should search via the Australian Super USI which is STA0100AU. In the Product Code field, entering STA0100AU will bring up any options that contain this USI within. In the dropdown box that appears, simply click on AustralianSuper to select this superannuation fund and then click the Submit button.

The screenshot shows the web form with the following values: Product Name (empty), Product code: STA0100AU, Fund Name: AustralianSuper, and Fund ABN (empty). The Product code and Fund Name fields are highlighted with red boxes. Below the form are links for 'Add another...' and a 'Submit' button, which is also highlighted with a red box.

If clients have multiple default funds to add, simply click the Add another.... link to add another default fund.

ClickSuper will automatically notify default fund(s) of any changes to member information (e.g. member address) and for new members will send a registration message with the first contribution for a given employee. If a client has a new employee, usually the member number provided is the word NEW or UNKNOWN so it is very obvious to a superannuation fund that this is a new employee and a new account should be created for them.

## Branches

The Branches tab is the fifth tab on the MY ORGANISATION menu. This tab can be quite complex as this is where clients can control contact and configuration information so we have walked through each step so client's have an ample understanding of this part of their account.

Branches are the name given for multiple accounts registered under one ABN. Majority of clients won't need multiple accounts, however multiple branches are useful for clients that need to pay superannuation from more than one bank account for one ABN - if not, then just having one branch is suitable. Having a branch name listed on both an account and within a super file allows ClickSuper to link the super with the appropriate branch, allowing ClickSuper process payments to the appropriate bank account for debit so clients can maintain control of cash flow from various bank accounts. Registering a branch means registering a new account - please let us know if this is something that you would be interested in doing and we can provide you with more information.

The below screenshot shows details of two branches - one with no branch and one with a branch of GC.

There are two rows - one row represents one branch and information within a row lists what has been provided for that given branch.

athanos consulting pty ltd Your last login was on 05/04/20

[Company Details](#) [Address](#) [Message Options](#) [Default Funds](#) **[Branches](#)** [Contacts](#) [Email Search](#) [STP Details](#)

Branch Name	System Administrator	Office Holder 1	Office Holder 2	Verified	
GC	System Administrator Alex Robertson	Peter Jones John Smith		<input checked="" type="checkbox"/>	<a href="#">Edit</a>
				<input type="checkbox"/>	<a href="#">Edit</a>

### Branch Name:

The branch name is visible in the branch name column. The branch can technically be anything - Sydney, Executives - whatever is relevant to your organisation. If a client is uploading superannuation to branch GC (as per the screenshot above), they will need to have GC listed as a branch within their file. If they do not, the superannuation will load in the branch with no branch name instead of GC.

### System Administrator:

The System Administrator is visible in the System Administrator column.

### What is a System Administrator?

A System Administrator is the main contact for the account in which if needed, will be the first point of contact and receive notifications relating to your organisation. For the blank branch, the system administrator listed is called Alex Robertson; this means that Alex is the main contact for this branch.

### Officeholder 1 and Officeholder 2:

The first Officeholder and second Officeholder take up the next two columns.

### What is an Officeholder?

An Officeholder is a director or an individual in your company that is a signatory of the bank account ClickSuper will debit superannuation from on behalf of your organisation. ClickSuper accepts a minimum of one Officeholder or a maximum of two Officeholders listed on an account. For the blank branch in the above example the Officeholder listed is John Smith. The second Officeholder is blank; this means that this account only has one Officeholder.

### Verified:

The Verified column indicates whether a branch has been verified and can pay employee superannuation. If a green tick is listed this means that the account is verified and can pay employee superannuation. If there is no tick, then the account is not verified and will be unable to make payment. If your organisation is not verified, please contact the Support team and we can help assist with this. In the above example, branch GC is verified however blank branch is not - this means that only payments on GC can be paid.

Clicking the Edit button will allow clients to review the details for their account and if needed update. An example of the pop up window that is displayed when Edit is clicked is below:

The screenshot shows an 'Edit' form for a branch. The fields are as follows:

- Branch Name: [Empty text box]
- Branch Contact: [Alex Robertson (dropdown)]
- Office Holder 1: [John Smith (dropdown)]
- Office Holder 2: [Empty dropdown]
- Verification Status: [Unverified (dropdown)]
- System Administrator: [Alex Robertson (dropdown)]
- Commencement Date: [Empty date field]
- Created Date: [Fri Sep 18 2015 09:50:54 GMT+ (timestamp)]

The 'Details' section includes:

- Address Line 1: [120 Test St]
- Address Line 2: [Empty text box]
- Suburb: [Testington Hill]
- State: [NSW (dropdown)]
- Postcode: [2218]

At the bottom of the form, there are three elements:

- File Upload Code: [CLOSE (button)]
- Auto Accept (UI): [checkbox]
- Auto Accept (API): [checkbox]

### Branch Name:

In the branch name field the name of the branch is entered. If there is no branch then the field is blank as the example above.

### Verification Status:

There are three possible statuses: Unverified, Human Verified and System Verified. If Unverified this means that the account cannot make payments - please contact ClickSuper Support for assistance. If Human Verified or System Verified then payments can be made - it was either process of a member of staff (Human Verified) or automatically by our system (System Verified).

### Branch Contact:

This indicates the best contact for a branch if different from System Administrator. Clicking the drop down menu allows clients to choose another person - but only if they are already on the account. If a new person needs to be added, this occurs on the Contacts tab.

### System Administrator

This indicates the best contact for the account - usually is the same as branch contact. Clicking the drop down menu allows clients to choose another person - but only if they are already on the account. If a new person needs to be added, this occurs on the Contacts tab.

### Officeholder 1 and Officeholder 2

This indicates the Officeholders listed on the account for this branch. Clicking the drop down menu allows clients to choose another person - but only if they are already on the account. If a new person needs to be added, this occurs on the Contacts tab.

Commencement Date and Created Date - some of our payroll providers required these fields to be created to assist their clients. The created date is the date a branch was registered. It cannot be altered.

### Details

Under the Details section is the address; this can be edited as needed. Please also send an email to [accounts@clicksuper.com.au](mailto:accounts@clicksuper.com.au) to update the address on invoices.

### File Upload Code

The file upload code represents a channel that an account is on. A channel specifies a particular configuration - for example, if a client using payroll software A, all clients that use payroll software A will be put on the same channel to ensure that their configuration is accurate. The file upload code cannot be changed. If a client is changing payroll providers please let our Support Team know at [support@clicksuper.com.au](mailto:support@clicksuper.com.au) and we can assist.

### Auto Accept (UI)

Clients have two main ways of uploading to ClickSuper - the upload comes directly from payroll into ClickSuper, or the client exports the upload onto their computer and then manually uploads the file. For clients that export the super file from their payroll and then manually upload to ClickSuper, this is called uploading via the UI - user interface.

When a file has been uploaded, the end result is either Success (no errors) or Failed (errors in the file that need to be fixed and the file to be re-uploaded). Some payroll configurations however require clients to check the file reconciliation first before allowing the file to be successful - this is called Waiting User Response. More information about this is located here: [Uploads#WaitingUserResponse](#)

Ticking this box will ensure that reconciliation is not needed in order for the file to progress to Success.

We advise that clients do not change the configuration they have on their accounts unless extremely confident with the change to process.

### Auto Accept (API)

This option is for clients that do not manually export their super file from their payroll - their payroll software sends the super file directly to ClickSuper without ever touching it. This is called API - application programming interface - which simply means that your payroll software communicates directly with ClickSuper.

When a file has been uploaded, the end result is either Success (no errors) or Failed (errors in the file that need to be fixed and the file to be re-uploaded). Some payroll configurations however require clients to check the file reconciliation first before allowing the file to be successful - this is called Waiting User Response. More information about this is located here: [Uploads#WaitingUserResponse](#)

Ticking this box will ensure that reconciliation is not needed in order for the file to progress to Success.

We advise that clients do not change the configuration they have on their accounts unless extremely confident with the change to process.

The screenshot shows a web form with two main sections: 'Email Notifications' and 'Bank Account Details'. The 'Email Notifications' section has three input fields, all containing the email address 'testaccount@clicksuper.com.au'. The 'Bank Account Details' section includes fields for 'Account Name' (HAMEOFACCU), 'BSB' (012345), and 'Account Number' (12345678977). Below these are 'Payment Method' (DirectCredit), 'Auto Schedule' (checkbox), 'Debit interval in days' (3), and 'Credit interval in days' (0). At the bottom right are 'Update' and 'Cancel' buttons.

### Email Notifications

There are three email notification options listed in ClickSuper. Clients can choose where specific notifications are sent and cater to their company needs.

Email address for notifications - this is the email address to be used for general notifications such as file upload failures or successes.

Email address for contribution responses - this is the email address to be used for notifications of messages received from a superfund called Contribution Responses or Contribution Errors. For more information please see the following link: [New Contribution Error Message](#)

Return Notification Email - this is the email address to be used for notifications regarding refunds for your organisation.

### Updating Company email address

To update email addresses for notifications, please log in to ClickSuper, click on the MY ORGANISATION menu, click on the Branches tab and then click on the edit button. From here, please scroll down to the Email Notifications section and edit the email addresses listed for the appropriate scenario. Once updated, please click the Update button at the bottom of the page to save your changes.

### Bank Account Details

This is the bank account held with ClickSuper for debiting superannuation for your organisation. If the bank account needs to be changed, the bank account is updated here.

### Updating bank account details

To view or change bank details, simply log in to the ClickSuper account Dashboard you wish to change, then click the "MY ORGANISATION" menu. Then click the Branches tab and click the edit button.

The banking details will be displayed on this page and can be updated accordingly. If changes are made, an email will be sent to the listed Officeholders on the account for them to verify the changes made - if it isn't verified within 10 days the account will be deactivated, so it is important that verification of the changes made occur as soon as possible.

Please make sure to check the details provided as ClickSuper will attempt to debit the bank account recorded.

### Payment Method

The default will be direct debit as this is the only option available for paying super. There may be different options for our clients that make salary payments through ClickSuper.

### Auto Schedule

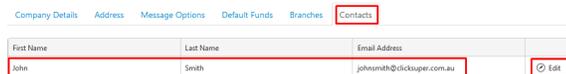
After a super file is uploaded successfully to ClickSuper, some clients have to manually schedule/authorise a payment for debiting and other clients do not have to - it happens automatically. The automation is due to the Auto Schedule button being ticked. It means that instead of scheduling a payment for debiting, clients are happy for ClickSuper to debit the superannuation uploaded. This should only be done by a confident user of ClickSuper as it does remove some of the reconciliation in place.

Once any updates are made, please click the Update button in the bottom left hand corner to save the updates made.

## Contacts

Contacts is the sixth tab on the MY ORGANISATION menu. On this tab the listed contacts for your organisation are displayed. Contacts include Officeholders and System Administrators that are listed for your organisation.

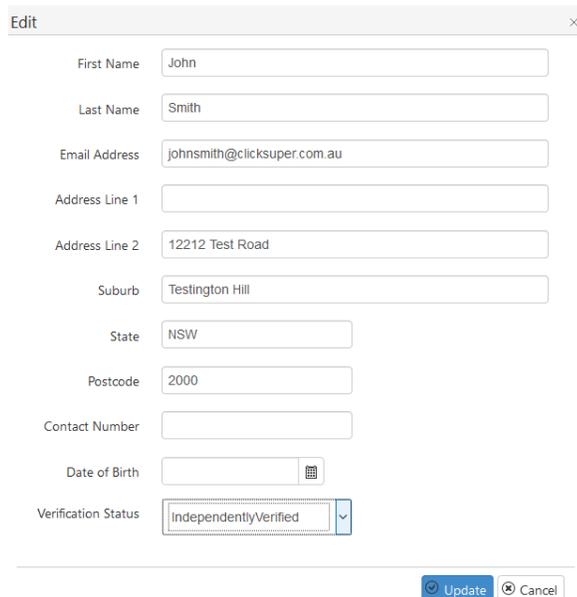
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Company Details	Address	Message Options	Default Funds	Branches	Contacts
First Name	Last Name	Email Address			
John	Smith	johnsmith@clicksuper.com.au			Edit

Contacts cannot be deleted - only edited. If there is a contact which is longer appropriate, please click on the Edit button in the very the right hand column and edit the details now displayed for this contact.

An example of the edit box is shown below. To edit, simply update the details provided and click the Update button to save the changes made.



Edit

First Name: John

Last Name: Smith

Email Address: johnsmith@clicksuper.com.au

Address Line 1:

Address Line 2: 12212 Test Road

Suburb: Testington Hill

State: NSW

Postcode: 2000

Contact Number:

Date of Birth:

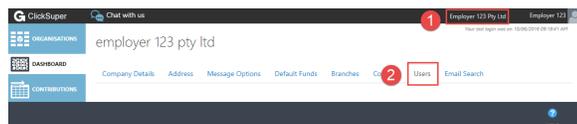
Verification Status: Independently Verified

Update Cancel

## Users

The Users tab is the seventh tab on the MY ORGANISATION menu. Providing access for an individual means that they can log in to ClickSuper and view the superannuation information on your account so please ensure that access is only provided to necessary parties within your organisation.

To be able to Invite Users to your organisation you must have access to the Users tab (2) on your organisation screen.



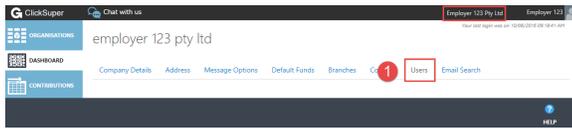
The System Administrator for your organisation will automatically have access to the Users tab.

You have the ability to grant permissions at the Role and Access Permissions.

If you do not have access to the Users tab then please contact [support@clicksuper.com.au](mailto:support@clicksuper.com.au) and supply your ABN/Organisation and your Username and email address for the Support staff to grant you access.

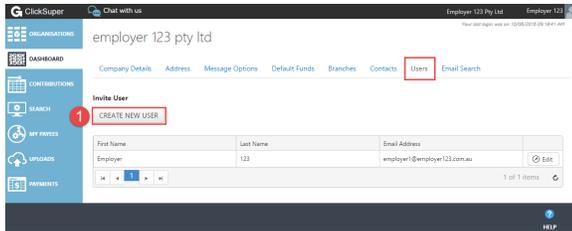
## Create a New User

Creating a new user is easy. On the Manage Organisation select the Users tab (1)



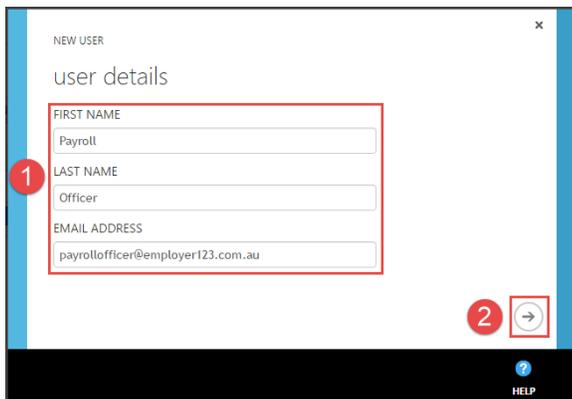
The users tab will display all users already granted access to your organisation.

To create a new user select Create New User button.

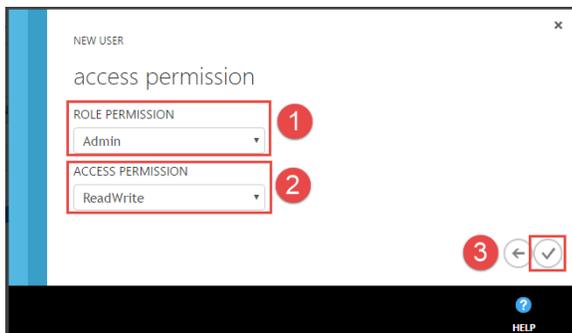


This will bring up the User Details dialog.

Enter the users First Name, Last Name and Email Address (1) then select the arrow button (2) to go to the next step.



On the Access Permission screen select the Role (1) and Access Permission (2) from the drop down menus for the new user. Then click on the tick icon(3) to set up the new user.



### Role Permissions

Role Permissions relate to which function/menu item you want your user to have access to:

Permission	Allows
------------	--------

Admin	Access to all role functions except for 'Manager - Users'
Contribution Download	Access to download contribution data (Super Funds Only)
Contribution Manager	Access to <a href="#">Contributions</a> menu
Contribution Payments	Access to <a href="#">Payments</a> menu
Contribution Uploader	Access to <a href="#">Uploads</a> menu
Manage - Address	Access to Organisations > Address menu
Manage - Branches	Access to Organisations > Branches menu
Manage - Company Details	Access to Organisations > Company Details menu
Manage - Contacts	Access to Organisations > Contacts menu
Manager - Default Funds	Access to Organisations > Default Funds menu
Manage - Payment Options	Access to Organisations > Payment Options menu
Payees	Access to My Payee menu
Search	Access to <a href="#">Search</a> menu

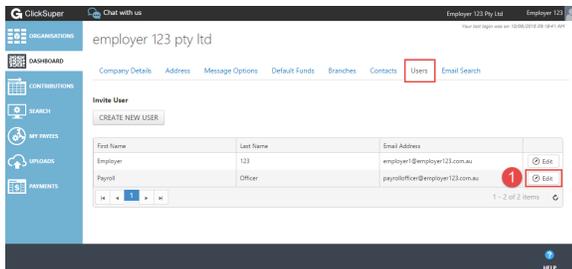
### Access Permissions

Access Permissions relate for each role you can grant the user either Read Only access or Read/Write Access.

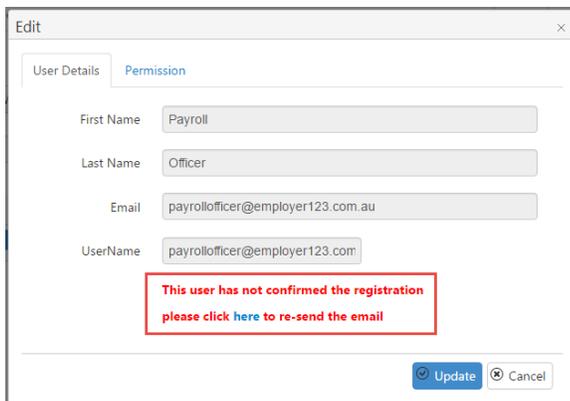
If you grant a user Read Only access then the user can only view the data.

The user will appear on the grid and a User Activation email will be sent to the user to activate their account.

Select the user and select Edit.



The User Details tab will advise if the user has confirmed registration and allows you the ability to resend the User Activation email.



Select the Permission tab (1) to add or delete Permission roles for the user. Click Update (4) to save the changes.

Edit

User Details **Permission** 1

Role Permission Manage - Branches 2

Access Permission ReadWrite 2

Add 3

Branch Name	Role Permission	Access Permission	
	Admin	ReadWrite	X Delete

1 - 1 of 1 items

4 Update Cancel