

# Checkpoint AU

## Annotations

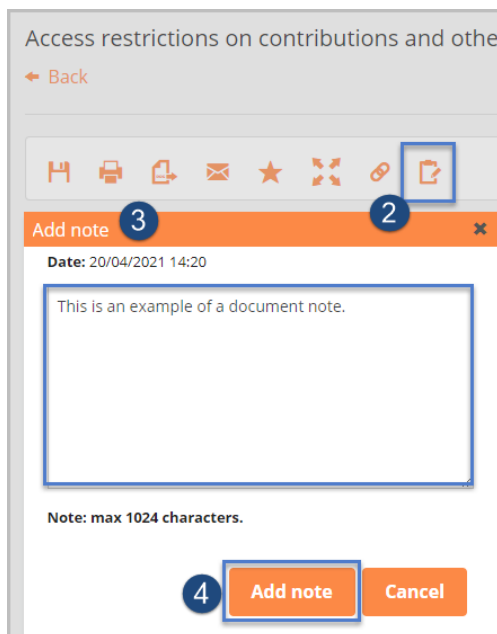
There are various ways to add Annotations to a document. This ensures important information is easily located within the document.

Annotated documents can also be saved to My Folders. See Folders Guide for further information.

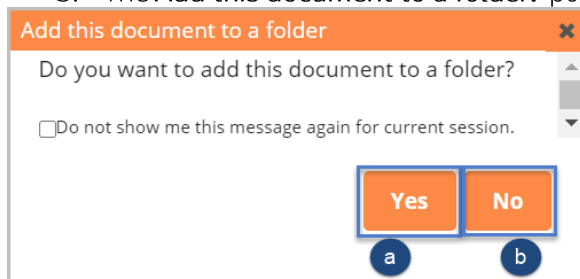
### Document Note

Creating a Document Note will apply to the overall document and will appear at the top of the document.

1. Open a document
2. Click the **Add Note** icon from the white tool bar
3. In the **Add Note** text box, enter the note
4. Click **Add Note** button to save the note

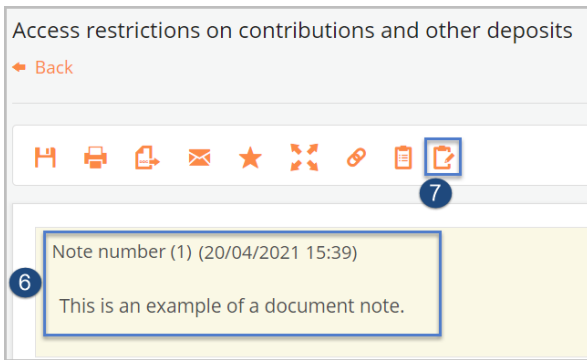


5. The **Add this document to a folder?** pop up window will prompt to save the note to a folder.



- a. Select **Yes** – You can **Create New Folder**  
**Note:** Creating a folder is optional
- b. Select **No** – return to the document

6. The note is now visible at the top of the document.
7. To add additional notes to the document, select the **Add Note** icon in the white tool bar  
**Note:** A maximum of 10 notes can be added per document.

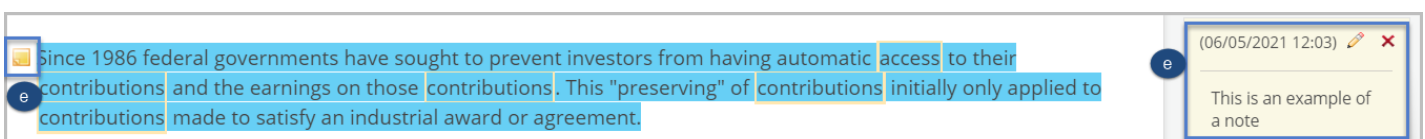
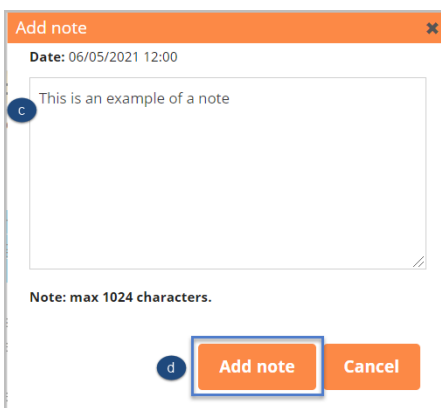
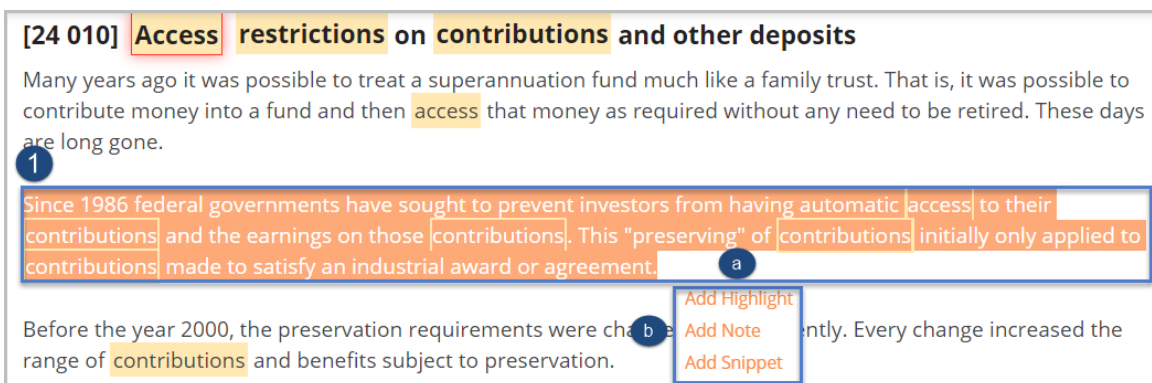


## Inline Note

Creating an Inline Note will add a note to a selected section of a document, allowing for a quick and easy reference.

1. To add an **Inline Note**, select text
  - a. Three options will appear beside the highlighted text.
  - b. Select the **Add Note** option
  - c. Enter the note into text box
  - d. Select **Add note** button to save
  - e. The note will appear on either side of the text selected

**Note:** If prompted to save the document to a folder, make your selection and follow the steps.



## Highlight

You can apply a Highlight to selected text within a document making it easy to visually single out

specific text for use later, prompt further research and reduce the risk of missing important information.

1. To add a highlight, select the text
2. Select the **Highlight** option

**[24 010] Access restrictions on contributions and other deposits**

Many years ago it was possible to treat a superannuation fund much like a family trust. That is, it was possible to contribute money into a fund and then **access** that money as required without any need to be retired. These days are long gone.

1

Since 1986 federal governments have sought to prevent investors from having automatic **access** to their **contributions** and the earnings on those **contributions**. This "preserving" of **contributions** initially only applied to **contributions** made to satisfy an industrial award or agreement.

2

Before the year 2000, the preservation requirements were changed **contributions** and benefits subject to preservation.

Add Highlight  
Add Note  
Add Snippet

3. Select OK to save the highlight  
**Note:** If prompted to save the document to a folder, make your selection and follow the steps.

**SUCCESS** x

The highlight has been saved to this document.

3

OK

4. The highlighted text will appear in blue

4

Since 1986 federal governments have sought to prevent investors from having automatic **access** to their **contributions** and the earnings on those **contributions**. This "preserving" of **contributions** initially only applied to **contributions** made to satisfy an industrial award or agreement.

## Snippet

A section of text within a document can be saved to your **Folders** as a **Snippet** for easy identification of important information.

1. To add a **Snippet**, select text
2. Select the **Snippet** option

	Preserved benefits
Member contributions	All new contributions are preserved benefits from July 1999 onwards
Spouse contributions	
Employer contributions	
Small business CGT exempt components	
Amounts rolled over or transferred into a superannuation fund	Any amount clearly identified as a preserved benefit or amounts whose preservation status is unclear and a trustee is unable to receive clarity that satisfies the trustee of an amount's real preservation status
Fund earnings	All earnings are preserved from July 1999 onwards
Employment termination payments	All employer benefits rolled over from July 2004 onwards are preserved

Effectively this means all contributions made to a superannuation fund after June 1999 have been preserved

Add Highlight  
 Add Note  
 Add Snippet

3. Add Snippet to Folder pop-up box appears
  - a. Enter a folder name and select the **Create New Folder** button, or;
  - b. From the Folders listing, select the folder to save the snippet into
  - c. Enter the **Name**
  - d. Selecting **Save** will place the snippet into the selected folder

Add Snippet to Folder 3

Snippet
 

a
Create New Folder

Folders

- [-] Annotated Documents - List
  - Snippet
  - Client X
- [-] Deductions
- [-] GST

Name:

Access restrictions on contributions and other dep

c

d
Save
Cancel

4. To view saved snippets, navigate to the folder saved into by selecting **Folders** from the orange toolbar.

4
History
Preferences
Alerts
Folders
Contacts
Client ID

## Managing Annotations



### Show/Hide Note(s)

You can view your document with or without your notes being visible.

**Note:** By default, notes added to a document are visible

1. To hide the note(s), click the **Note** icon from the document **Tool Bar**
2. To show the note(s), click on the same **Note** icon



### Edit a note

1. Click the **Pencil** icon against the note
2. Edit your note in the **Add Note** window
3. Click the **Confirm** button to save your changes



### Delete a note

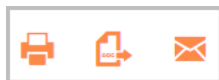
1. Click on the X icon against the note
2. Click on the **Delete** button when prompted 'Are you sure you want to delete the note?'
3. The note will be deleted
4. Alternatively, click **Cancel** to exit

### Delete Highlight

#### Delete a highlight

1. Select the highlighted text section
2. Choose **Delete Highlight** from the options list
3. Click the **Delete** button when prompted "Are you sure you want to remove the highlight?"
4. The highlight will be deleted from this section of text
5. Alternatively, click **Cancel** to exit

**Note:** When deleting highlights, any associated notes will also be deleted



### Print/Export/Email notes

1. Select the **Print/Export** or **Email** icon from the document tool bar
2. From the pop-up window, select, "Include Document Annotations" from the **Output Options** list
3. Click **OK**. The generated document will include any added notes and/or highlights

**Note:** You can print/export or email your document with or without your notes being visible.



### Managing multiple notes for the same text selection

You can add multiple notes to a selected section of text.

1. Click on any highlighted section of the text and select **Add Note**
2. Enter your text into the **Add Note** window
3. Click **Add Note**. The new note will appear directly below the first note

To bulk delete all notes associated to a section of text, click on the highlighted section, and choose "Delete Note"

