

The Console - Quick User Guide

Console Quick User Guide

This quick guide aims to provide you a step by step manual to your company Console.

This online Console is a software platform which enables you to view company related information and access documents digitally. This eliminates paperwork, physical files, emailing files and manual documentation, and it also gives you access from remote locations with your personalised password.

The quick guide is divided into several segments. Each segment will describe how to set up and utilise a certain function within the Console.

The following segments are included:

1. How to get started and access your company Console
2. How to complete the KYC process in your company Console
3. How to view information in your company Console
4. How to access and view document folders and files in your company Console

Quick Guide for your company Console

1. How to get started and access your company Console

To set up and access your company Console you will receive a welcome email from your company secretary with an invitation to activate your account:

You have been invited to activate your account and submit your information for KYC clearance.

In our user-friendly console, you can manage and view information and documents.

[Activate](#)

- Select **ACTIVATE**

Please set up a private and secure password for your account:

Welcome to BlueMeg Console

Please set up a private and secure password for your account.

Password *

Confirm Password *

[Set Password](#)

- Type on your new password in the designated text bar,. Please be aware of the password criteria required for your password.

ⓘ Your password should be at least 8 characters long and use at least 1 capital letter, 1 number, and 1 special character.

- Repeat your password below in the designated text bar
- Select **SET PASSWORD**

Welcome to your company Console!

1.1 How to reset Password & resend activation email

Go to the homepage of the Console and select the designated button:

- Select **I FORGOT MY PASSWORD** or Select **RESEND MY ACTIVATION EMAIL**

Login to Your Account

E-mail Address

Password

[↩ Login](#)

[I forgot my password](#) or [Resend my activation email](#)

[🛒 Order your company online](#)

Next steps:

-> How to complete the KYC process.

Quick Guide for your company Console

2. How to complete a KYC process on your company Console

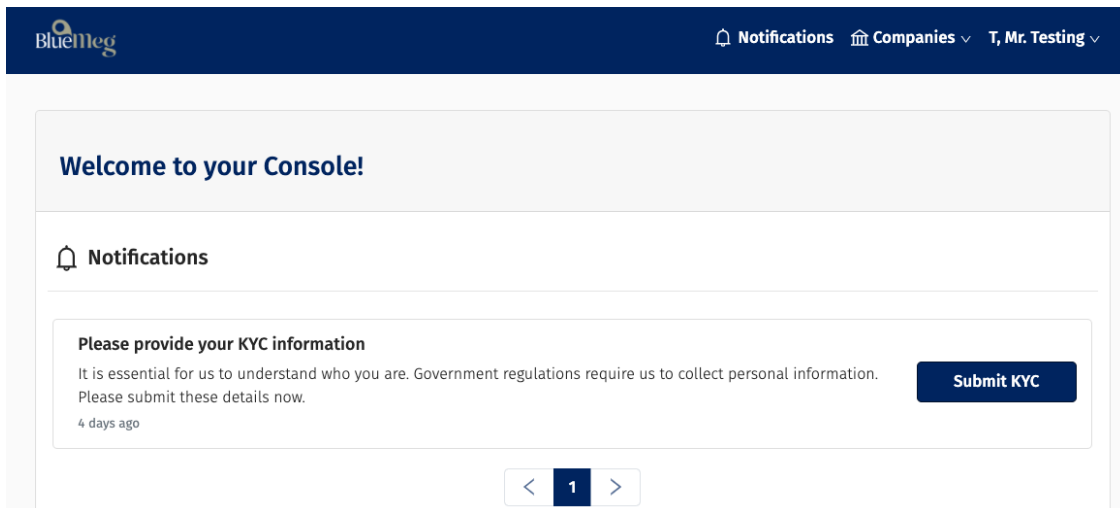
As very sensitive data will be uploaded onto the Console each person who gains access has to undergo a security background check which is common practice in finance related industries and includes passport, proof of residence, and criminal record checks. This security process is commonly known as KYC (Know Your Customer).

Follow the steps to complete a KYC check on your company Console:

- log onto your company Console

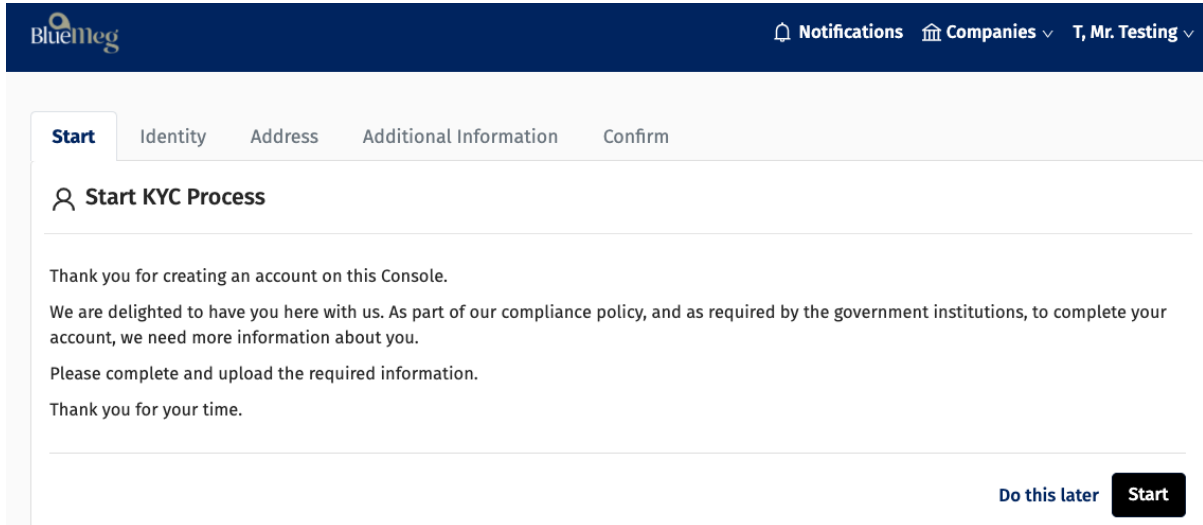
Under NOTIFICATIONS on the welcome page:

- Select **SUBMIT KYC**



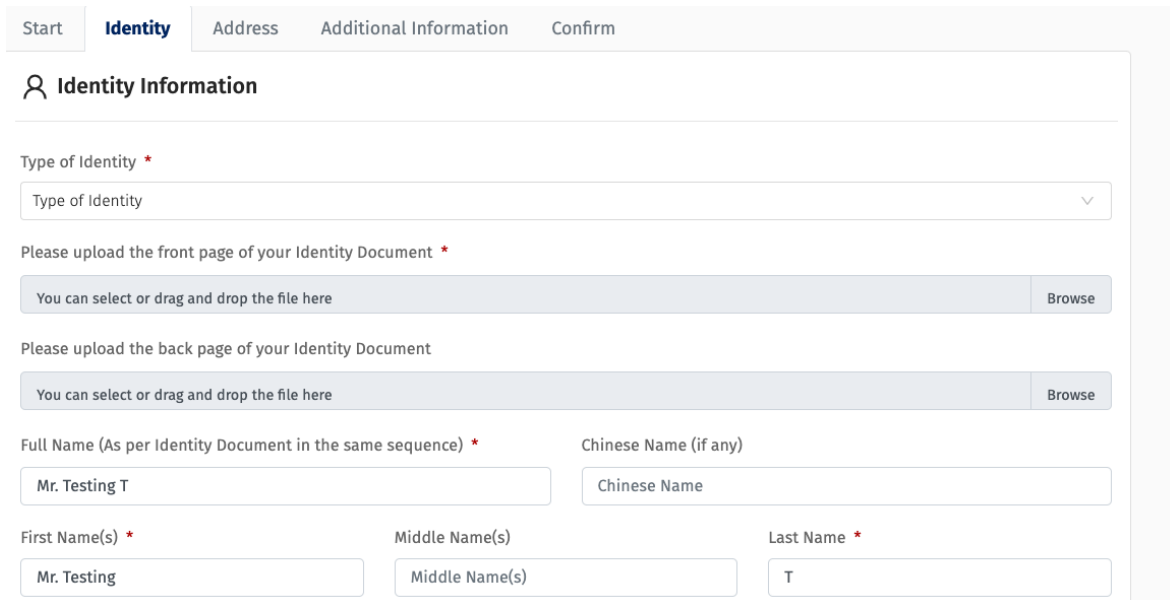
The screenshot shows the top navigation bar with the BlueMeg logo on the left and 'Notifications', 'Companies', and 'T, Mr. Testing' on the right. Below the navigation bar is a 'Welcome to your Console!' message. Underneath, there is a 'Notifications' section with a bell icon. A notification card is displayed with the title 'Please provide your KYC information', a message stating 'It is essential for us to understand who you are. Government regulations require us to collect personal information. Please submit these details now.', and a 'Submit KYC' button. The notification is dated '4 days ago'. At the bottom of the notification area, there are navigation arrows and the number '1'.

On the START KYC PROCESS page:



- Select **START**

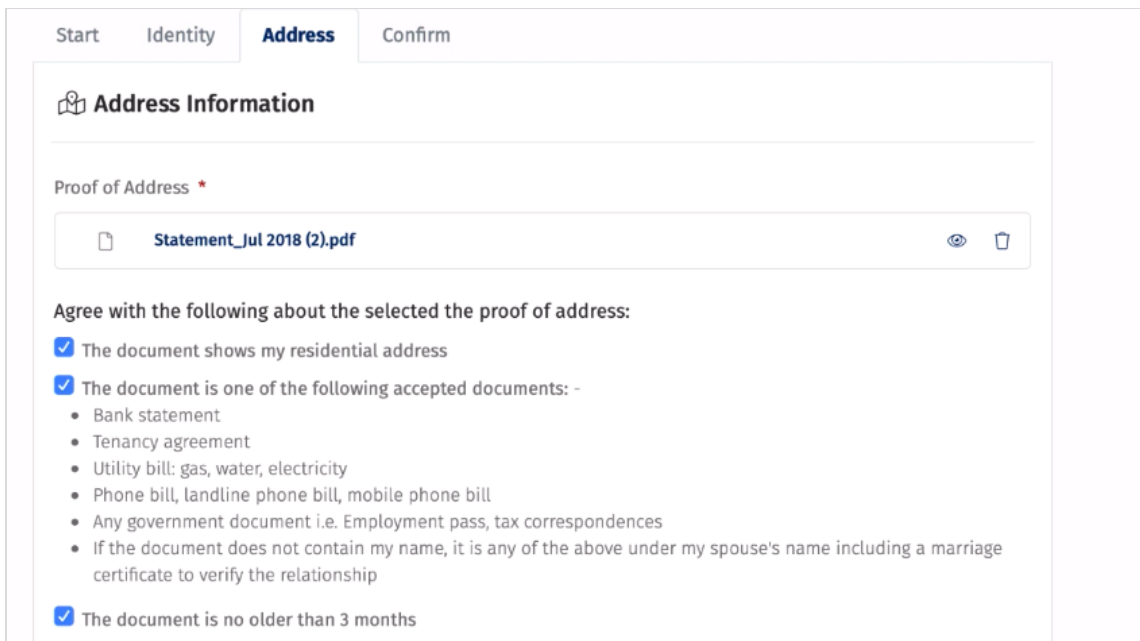
For the IDENTITY INFORMATION select **BROWSE** at the end of the designated text bar to upload your proof of identity document:



- Fill in all required **IDENTITY INFORMATION** in the designated text bars
- Select **SAVE & NEXT**

For the ADDRESS INFORMATION select **BROWSE** at the end of the designated text bar and upload your chosen proof-of-residence document (copy of utility bill, bank statement, etc)

Then make sure you agree and comply with all the requirements by ticking the designated boxes.



Start Identity **Address** Confirm

Address Information

Proof of Address *

Statement_Jul 2018 (2).pdf

Agree with the following about the selected the proof of address:

- The document shows my residential address
- The document is one of the following accepted documents: -
 - Bank statement
 - Tenancy agreement
 - Utility bill: gas, water, electricity
 - Phone bill, landline phone bill, mobile phone bill
 - Any government document i.e. Employment pass, tax correspondences
 - If the document does not contain my name, it is any of the above under my spouse's name including a marriage certificate to verify the relationship
- The document is no older than 3 months

- Fill in all the required ADDRESS INFORMATION in the designated text bars
- Select **SAVE & NEXT**
- CONFIRM: please review all your personal details
- Select **SUBMIT**

Next steps:

- > How to view information on your company Console
- > How to access and manage your documents

Quick Guide for your company Console

3. How to view information on your company Console

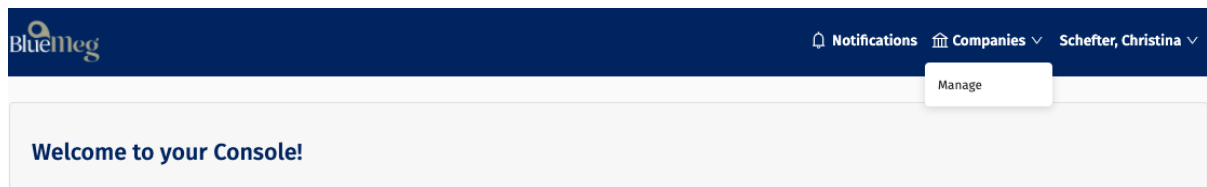
The dash board within your company Console guides you to various sources of information: the company information, the important dates, the document library and the positions held in your company.

Please follow the steps to access the dashboard:

- log onto the Console

Select the following step options:

- Go to **COMPANIES**
- Select **MANAGE**



The name of all the companies you are a stakeholder in, will appear.

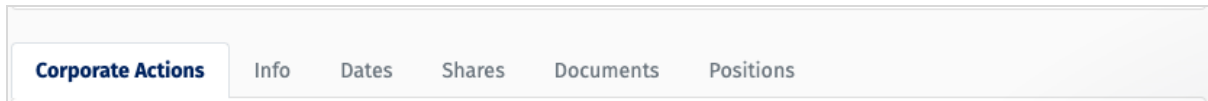
To view a Company:

- Select the company in the company list or
- Type in the name of the company in the **SEARCH** text bar next to **COMPANIES** in the top right text box of the screen



- Select *your company*

You will find the information dashboard of your company:



1. **Corporate Actions:** You can view any ongoing corporate actions initiated by your company administrator.
2. **Info:** You can view all your company information in one overview.
3. **Dates:** You can view all the important dates for the governance of your company.
4. **Shares:** You can see an overview of the shareholding structure of your company.
5. **Documents:** You can view and download all your company related document files.
6. **Positions:** You can view all the different stakeholders in your company.

Next step:

->How to access and manage your documents

Quick Guide for your company Console

4. How to access your documents on your company Console when permission is granted

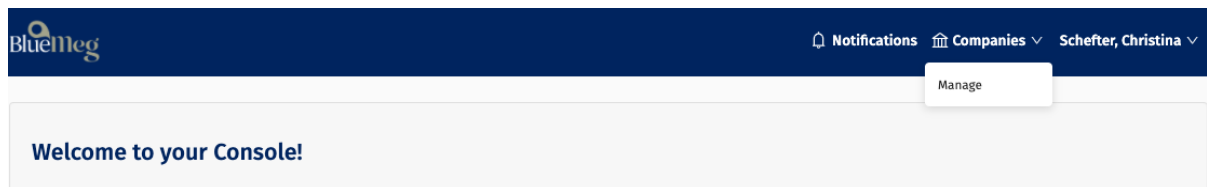
All the relevant documents and files of your company are uploaded, filed and stored within the DOCUMENT library of your company on the Console from your company administrator. The administrator can give you permission to access relevant documents.

Follow the steps to access your documents in your company Console once you have been granted permission:

- log onto the Console

Select the following step options:

- Select **COMPANIES** in the drop down menu on the top
- Select **MANAGE**

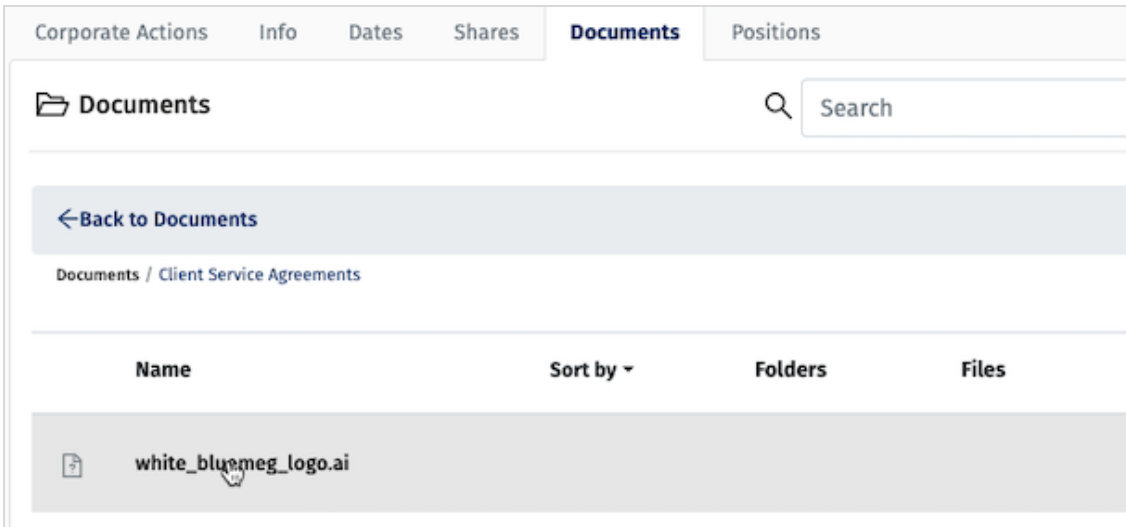



- Select your **COMPANY** under Name

Companies		Search
Name	Jurisdiction	
Discover our Console Limited	Hong Kong	
Less Is More Ltd	Hong Kong	

On the menu bar under your company name select the following option steps:

- Select **DOCUMENTS**



Corporate Actions	Info	Dates	Shares	Documents	Positions
Documents					
← Back to Documents					
Documents / Client Service Agreements					
Name	Sort by	Folders	Files		
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- Select the **FOLDER NAME** you wish to access
- Select the **FILE NAME** (inside the folder) which you wish to access

To download the files inside a folder:

- Select the **FILE NAME** you want to download. The file will open in your browser.

For downloading the file, follow the download instructions of your operating system.