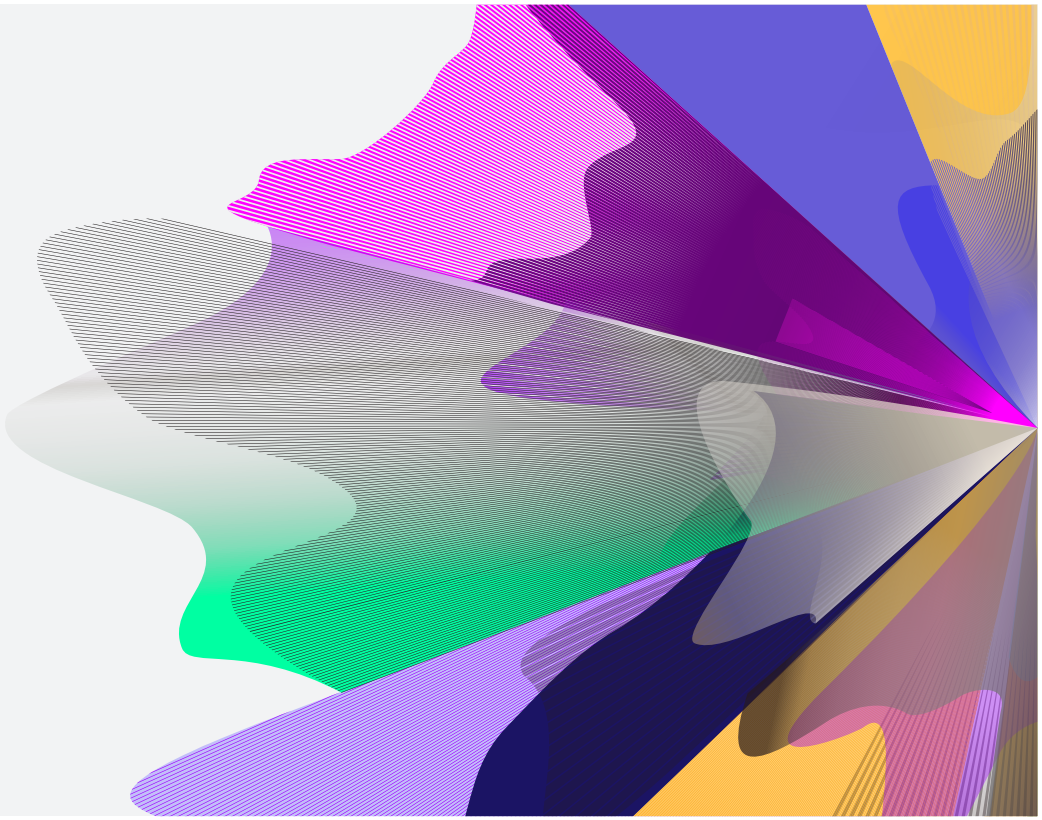
EXPAND



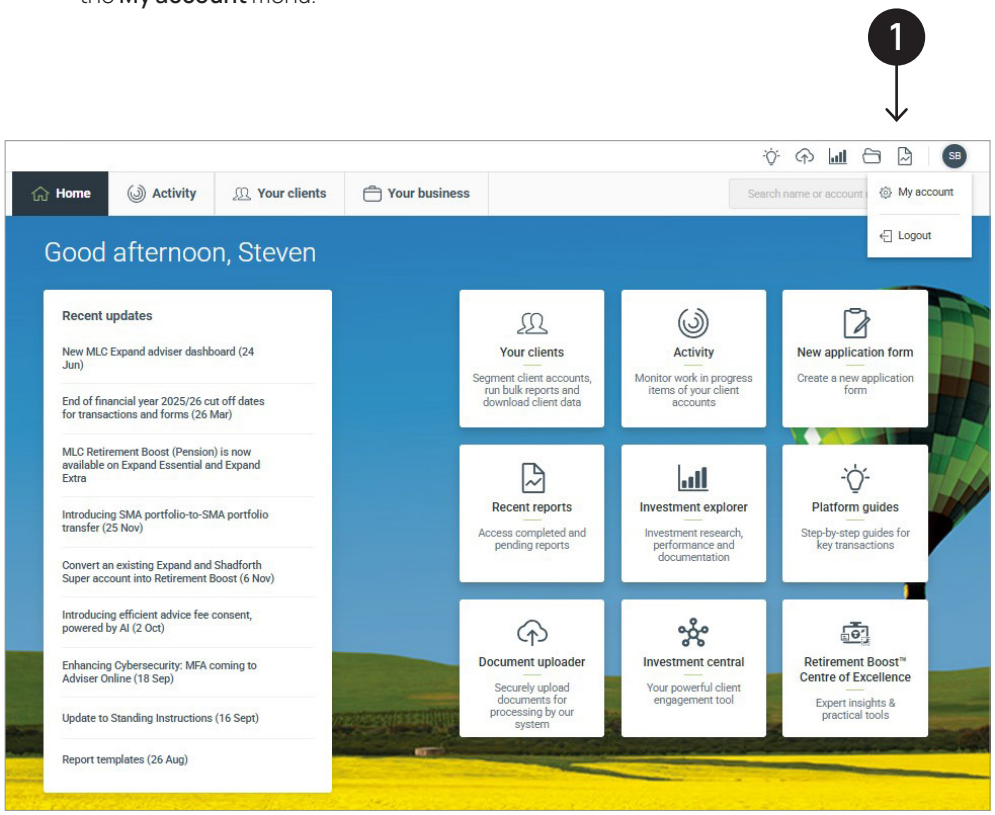
Setting up and managing data feeds

October 2026
myexpand.com.au

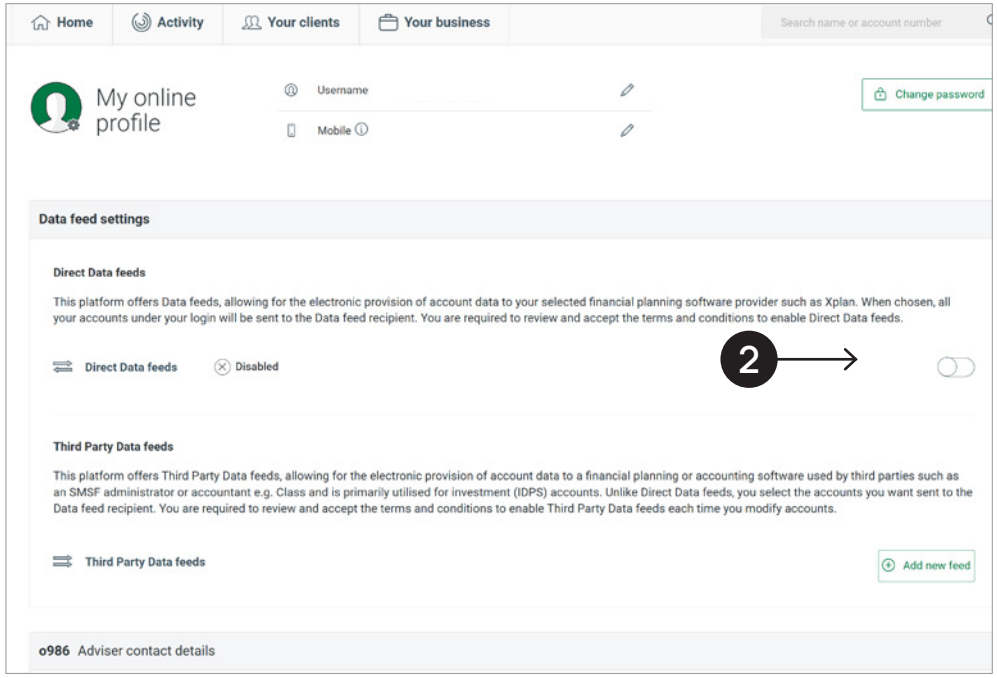
For adviser use only

Adviser data feeds

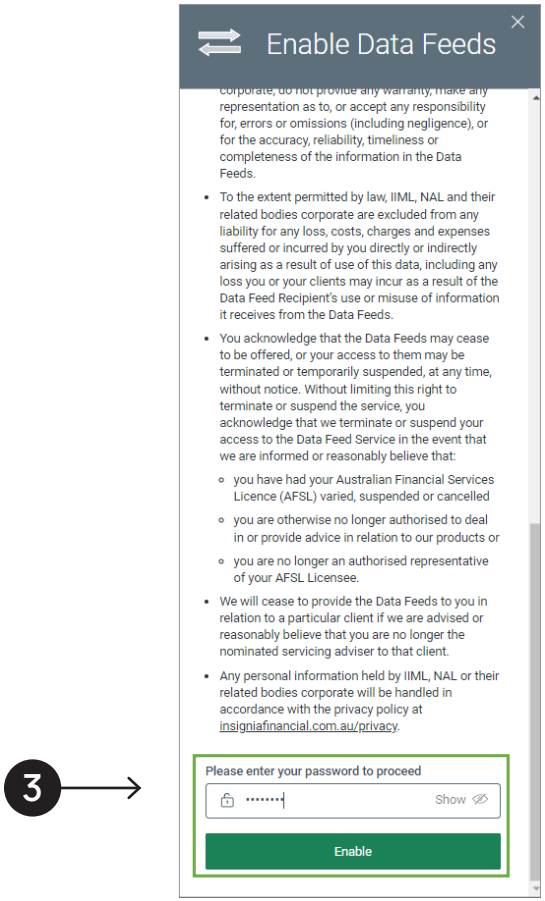
1 On the top right-hand corner, select the icon with your adviser initials to access the **My account** menu.



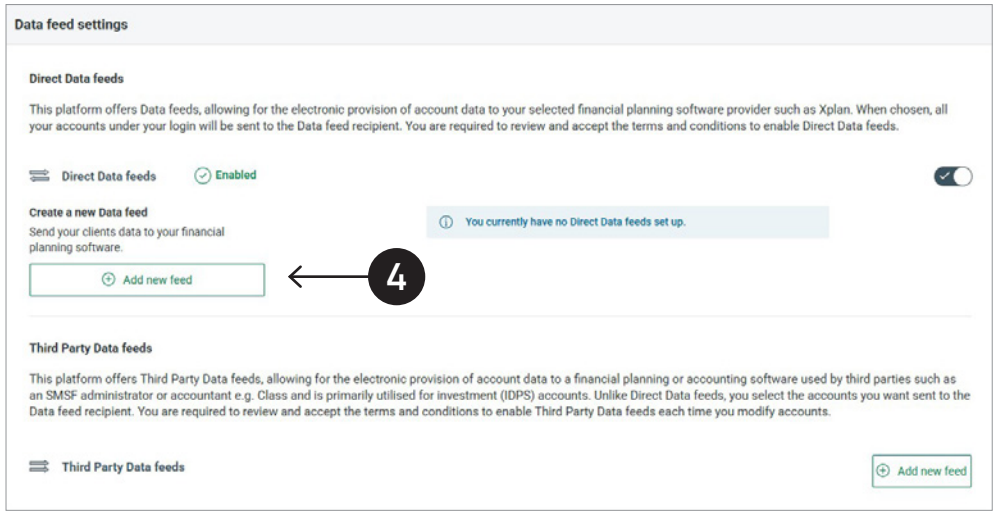
2 Under Data Feed Settings, select the toggle to display the tick ✓ to enable the feed.



3 You will be asked to review and accept the Terms and Conditions. If you accept, input your password to proceed and select **Enable**.



4 Within Direct Data feeds, select **Add new feed.**

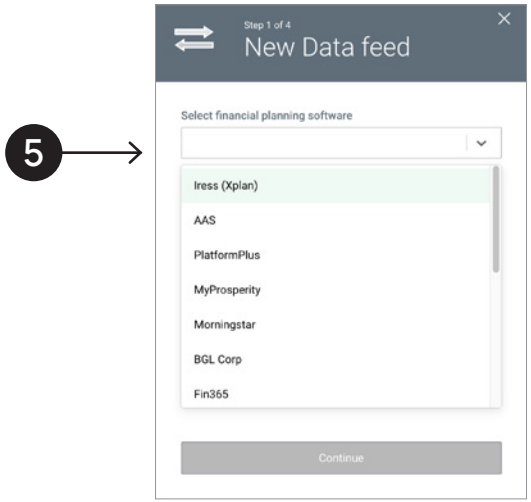


Setting up data feeds with your advice software provider

You will also need to set up data feeds with your advice software provider. Please contact your advice software provider for set up support.

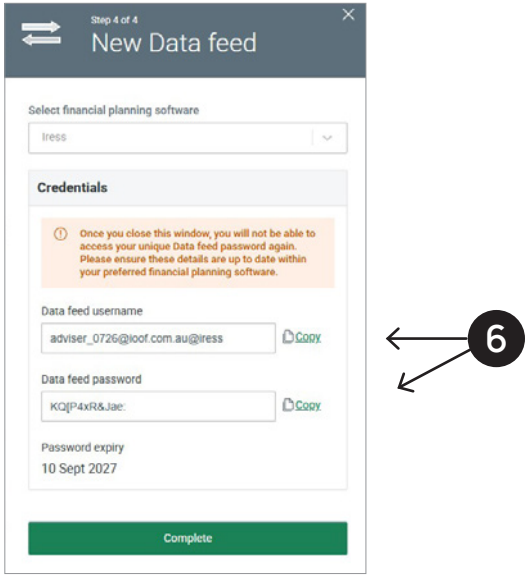
5

- Select your Data feed provider.
- Multi-factor authentication is then required to proceed to **Step 6.**



6

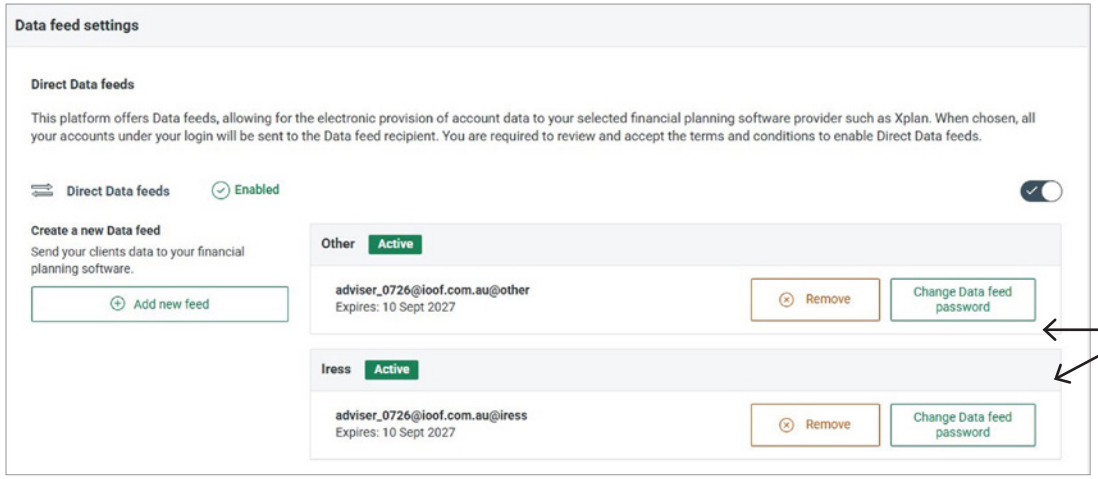
- Your unique Data feed credentials will now appear.
- Please copy your Data feed username and password and immediately enter into your external software provider.
- Make sure you copy and store the password before leaving this screen. If you don't, you will need to generate a new password.



7 You will be required to reset your Direct Data feed password every 12 months. Email reminders will be sent to you prior to expiry.

How to reset your Data feed password*

- The current status of the Data feed will show as either Active, Expiring or Expired. Expiring and Expired Data feeds will require a password update.
- A Data feed will appear as Locked if you enter an incorrect password three times in a row in your external software provider. To unlock a Data feed you will need to change your Data feed password.
- To change your password click on **Change Data feed password.**
- Then follow **steps 4, 5 and 6** from the previous section to update your password.
- If you wish to **remove** a Data feed, click Remove.
- If you want to disable all Data feeds, switch the toggle button off.



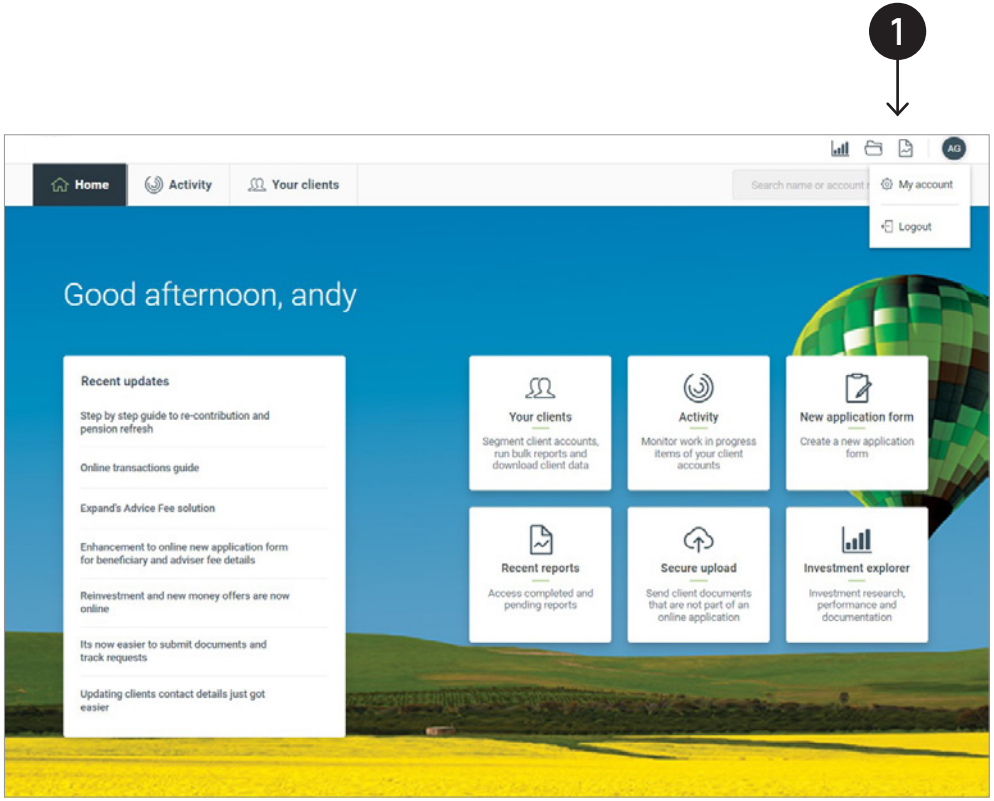
*Important

Before resetting your password, make sure no Data feed processes are running (these can often occur during the evening). If a process is still running, your software provider may continue using your old password, which can cause the Data feed to be locked.

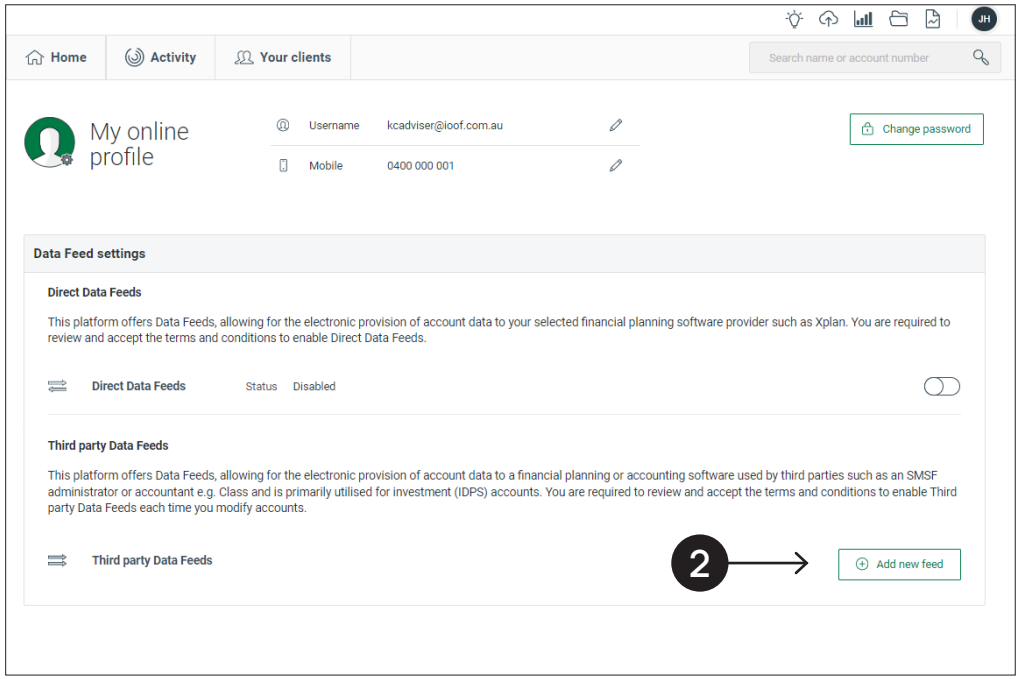
Third party data feeds (Class only)

Add third party data feeds

1 On the top right-hand corner, select the icon with your adviser initials to access the **My account** menu.



2 Under the Data Feed settings > Third party Data Feeds, click Add new feeds.



Select accounts to enable data feeds

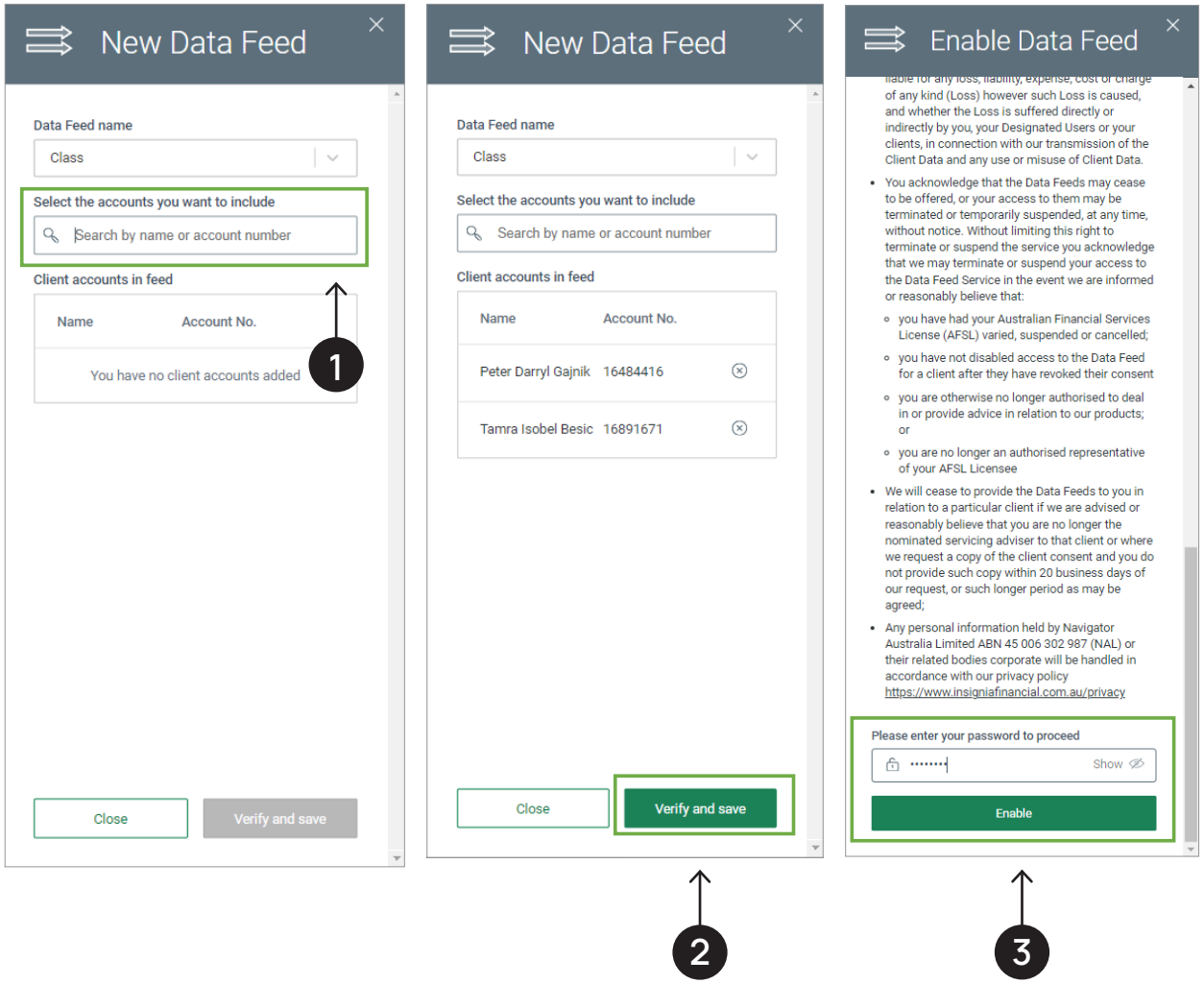
1. You can search for accounts to include in the data feed by typing in the account number or name. Once you have located the account select the **plus + sign** symbol. This will then be added to the **Client accounts in feed list**.

2. Once you have added your accounts, select **Verify and Save**.

3. You will be asked to review and accept the Terms and Conditions. If you accept, input your password to proceed and select **Enable**.

Enabling data feeds with client consent

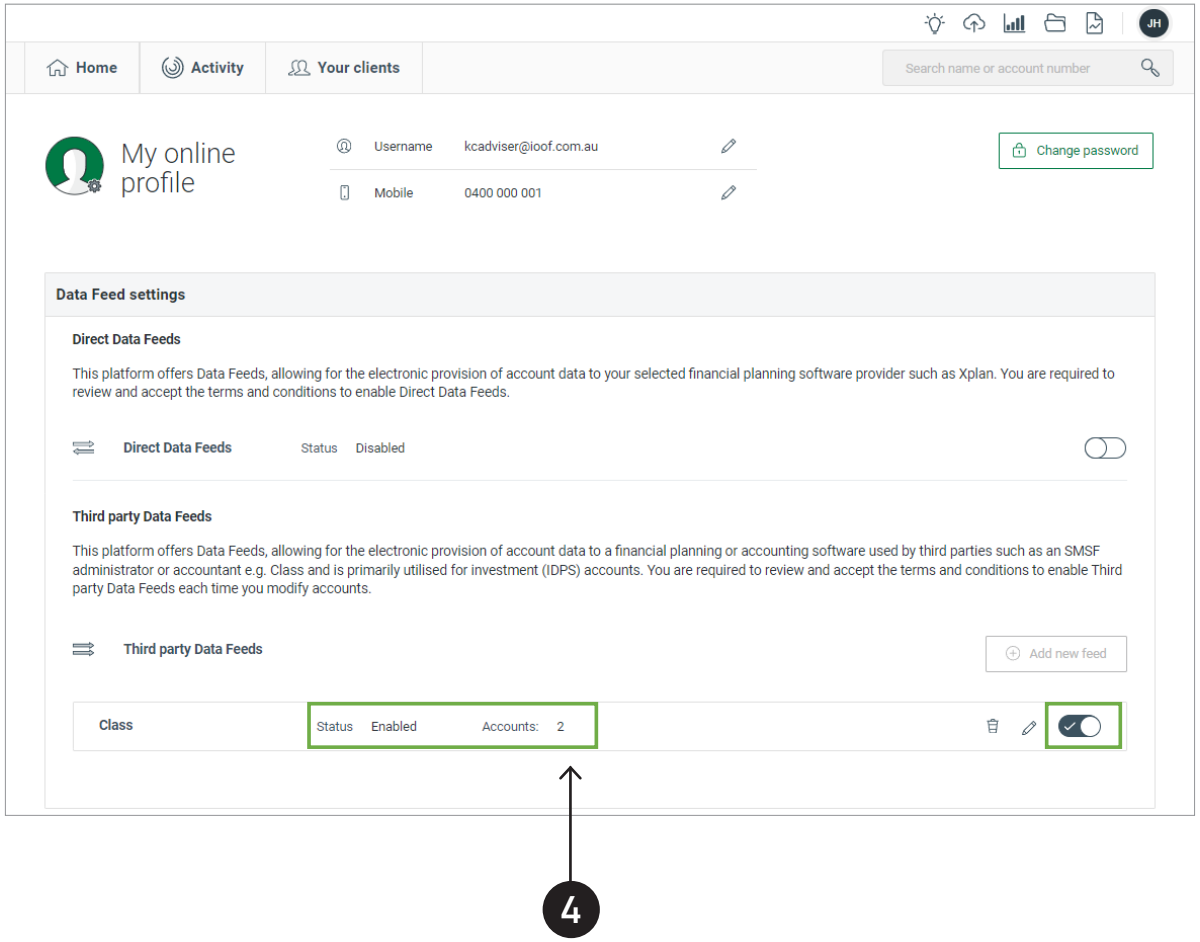
You must only enable data feeds for clients who have given you their consent to do so.



4 You will be directed back the My online profile page where you will be able to confirm the status and number of accounts in the data feed.

Add your data feed to Class

Once you have enabled third party data feeds on Expand Online, you will need to also set up the data feed with Class. For more information please click here or contact support@class.com.au for support.

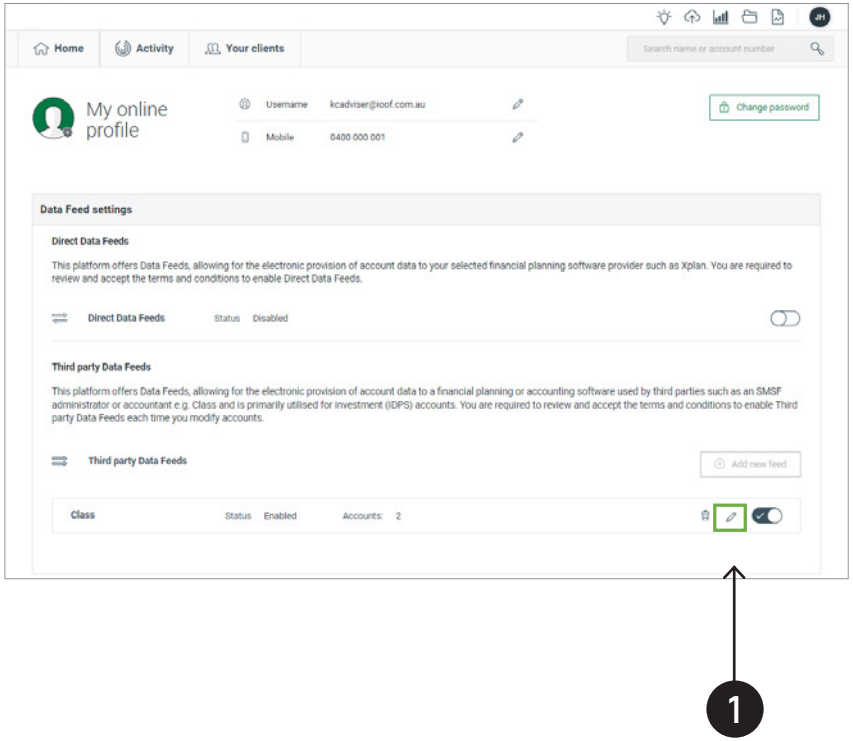


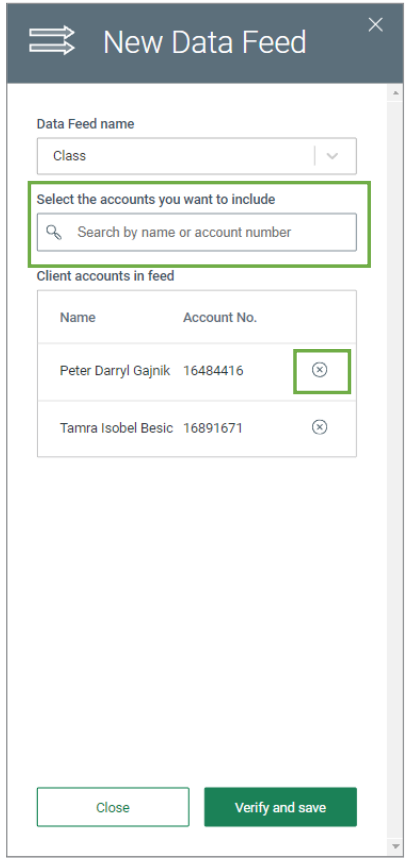
Edit a third party data feed

1. If you need to edit the data feed, select the **pencil** icon. Here you can add new accounts using the search bar or delete accounts by selecting the cross against the listed account. Once updated, select **Verify and save**.

2. You will be asked to review and accept the Terms and Conditions. If you accept, input your password to proceed and select **Enable**.

> **Advisers are responsible for the accounts registered**
>
> You are responsible for ensuring that clients and their associated accounts are enabled under the third party data feed continue to consent to their information being made available to Class.





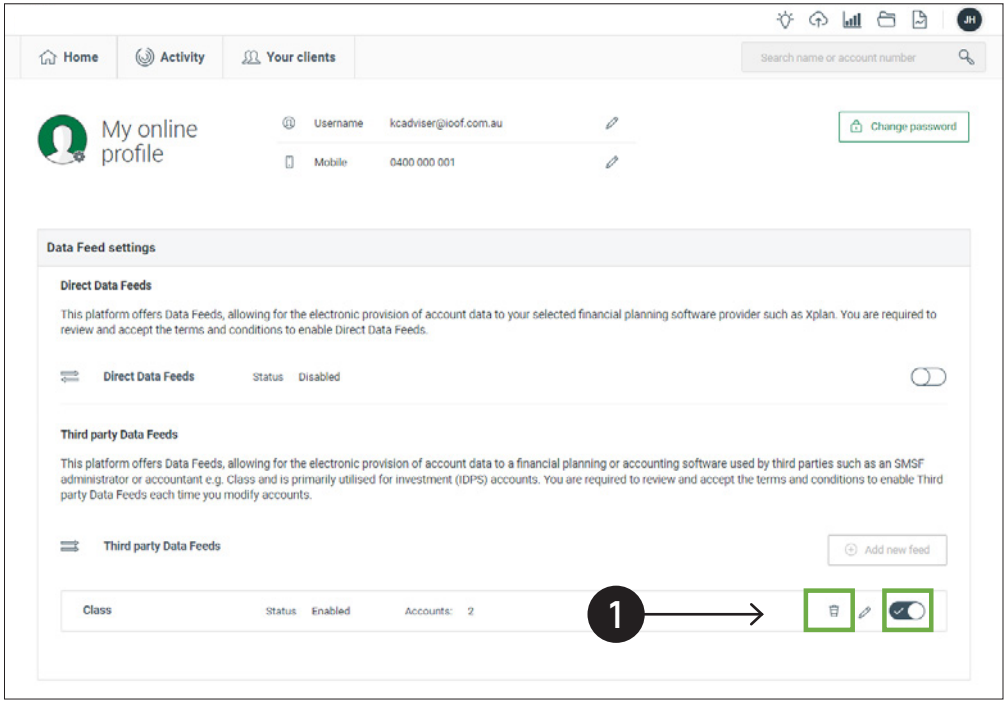
Delete and disable data feed

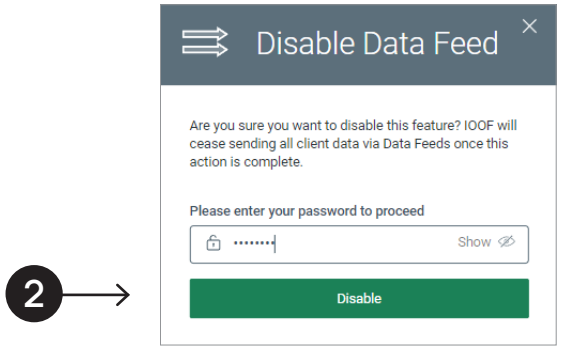
1. You can also delete or disable the data feeds.
2. To disable the feed, select the toggle with the tick ✓ icon. You will be directed to confirm your selection. Input your password to proceed and select **Disable**.
3. To delete the data feed, select the bin icon. You will be directed to confirm your selection. Input your password to proceed and select **Delete**.

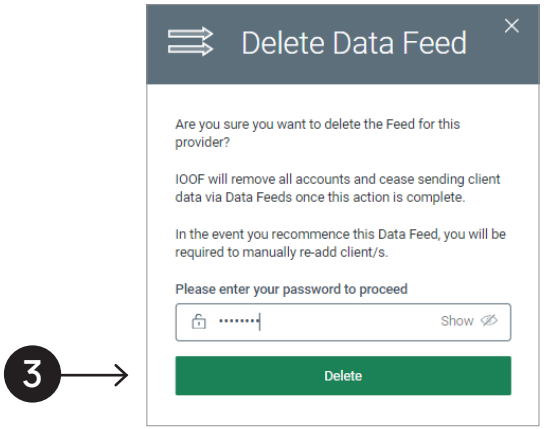
Disabling or deleting a third party data feed

If you disable a data feed, we will cease sending any account data. You can re-enable the data feed at any time and your previous client list will be retained.

If you delete the data feed, we will cease sending any account data and **all accounts will be removed** and will need to be readded.







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