

# Legal Messages upload on fundinfo

Version 1.0.0

Initial version: 3<sup>rd</sup> December 2018  
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## 1. Summary

This document describes how to upload legally binding 'Legal Message' documents to fundinfo.

## 2. Registration

In case you are already a registered user on <https://core.fundinfo.com> with your corporate email address, skip this section and proceed with chapter 3 ('Request user rights') or chapter 4 ('Upload of Legal Messages').

Otherwise, please create a new user account:

- Go to <https://core.fundinfo.com>, select 'Register' tab.
- Complete the form and click 'Register'.
- A verification email will be sent from [no-reply@fundinfo.com](mailto:no-reply@fundinfo.com) (please check your spam folder in case it does not appear in your inbox).
- Activate your user account by clicking on the link in that email.

## 3. Request user rights

After completing the registration process, please notify [doc-team@fundinfo.com](mailto:doc-team@fundinfo.com) by email and request user rights by listing the required Fund Group name(s) and Publication Countries\*, e.g.:

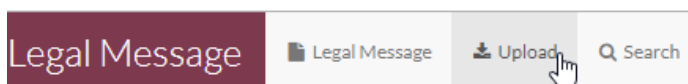
Fund Group	Publication Country *
ABC Funds International	CH

\* limited to countries where fundinfo.com is a recognized publication platform by the local authority.  
As of December 2018: Belgium (BE), Switzerland (CH), France (FR), Italy (IT)

Our doc-team@fundinfo.com will review your request and sets the user rights. As soon as you receive the confirmation email for the user rights, you are ready to go.

## 4. Upload of Legal Messages

Open <https://core.fundinfo.com/> in your web browser and login with your credentials. Make sure to navigate to 'Legal Messages' – 'Upload' in case you are not automatically directed to that section.



Then simply follow the instructions on the screen to start the process.

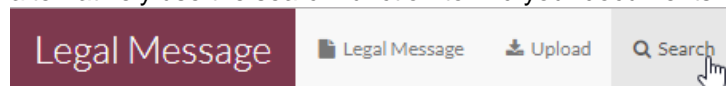
## 5. Confirmation Email

Once you completed the upload/modification process, you will receive an automatically created confirmation email from [doc-team@fundinfo.com](mailto:doc-team@fundinfo.com). We strongly recommend to store/save these emails, as they contain the document configuration details as well as hyperlinks to your document ([View](#)) and a direct link to [core.fundinfo.com](http://core.fundinfo.com) ([Edit](#)) which opens the document configuration dialog.

[View - Edit](#)

## 6. Search function

In case you need to modify a document configuration or want to de-activate the publication, you can alternatively use the search function to find your documents.




### 'Advanced' search

Please type a 'Task Name' and then select a Fund Group and Fund from the drop down as well as 'Language' and 'PublicationCountry' to start your search. PublicationState and RecordDate are optional criteria.

You can also use the search bar with the magnifier symbols by typing text to filter the fund view.



The  icon opens the 'Paste ISINs' dialog which is helpful to quickly find funds based on ISIN codes.

### Search 'By Checksum'

On the lower end of the Search screen you can paste document 'checksum' codes. The 'checksum' code is the fundinfo identifier provided in the above-mentioned Confirmation Emails.

**fundinfo Identifier**      736bff673c7a2f517155607f31d0847f - [View - Edit](#)

## 7. Edit / de-activate

The found documents are now listed in the table of the upper screen area. Each line represents one document with its configuration details. Click on a line to edit the details with the selection boxes on the lower end of the screen.

Use 'Shift' or 'Ctrl' to select multiple documents. Then right-click a selected line to open the context menu, which presents various options to modify configuration details.

On the top of the context menu the 'publish / save' functions allow to 'activate' or 'de-activate' documents for publication. The 'publish / save' functions will trigger a new Confirmation Email (see above).

## 8. Revision History

Version	Date	Author	Description
1.0.0	03.12.2018	<a href="mailto:rene.fuhrer@fundinfo.com">rene.fuhrer@fundinfo.com</a>	Initial version

## 9. Contact information

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