USER GUIDE

Xplan CONNECTOR – PART 1 (Initial Setup)

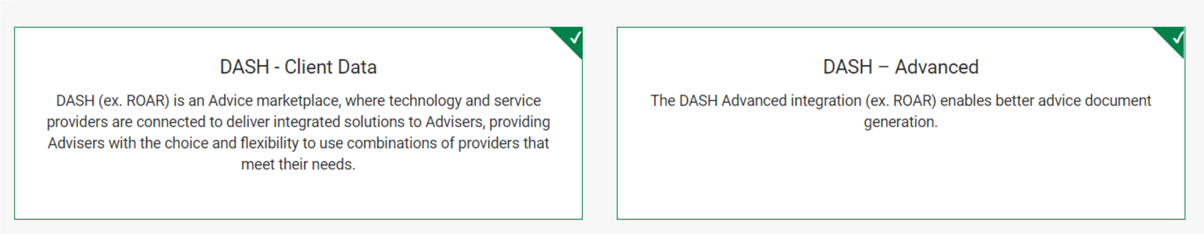
Contents

1 Xplan Connector Initial Setup

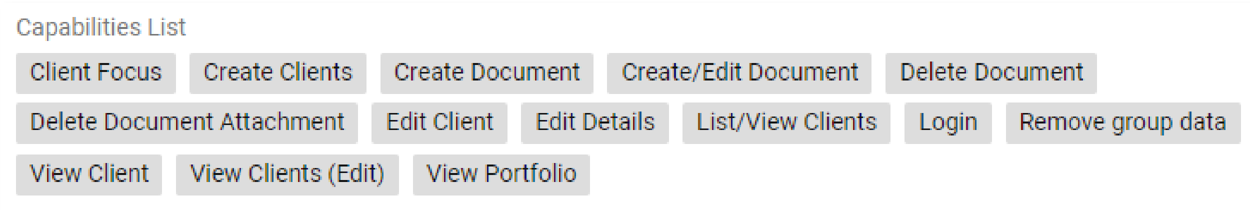
The Xplan Connector App is used to sync data between DASH and Xplan.

Before using Xplan Connector App, you will need to enable the Xplan **connection to DASH** in IRESS Open. You will need Xplan Admin rights to complete this step:

1. In Xplan, navigate to IRESS Open page (Admin -> Site -> System Settings -> IRESS Open)
2. Once in IRESS Open, select both DASH tiles:
    a. **DASH – Client Data** is to enable transfer of Client Focus data between Xplan and DASH
    b. **DASH – Advanced** is to enable transfer of Scenarios from WealthSolver, Risk Researcher and XTools+ into DASH for SOA Generation.



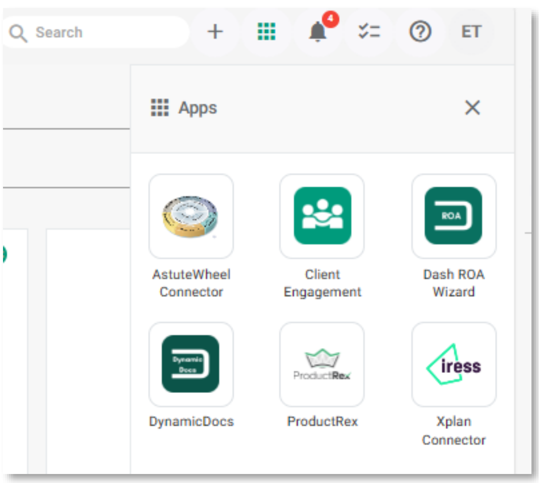
3. After reading the Terms of Service, select **Activate.**
4. Ensure your Xplan login has the below Xplan capabilities for the integration to work.



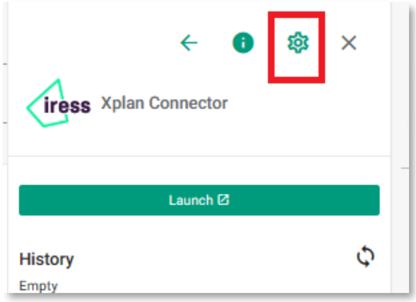
Once the connection is **enabled**

5. In DASH, visit the Store and subscribe to **Xplan Connector** app.

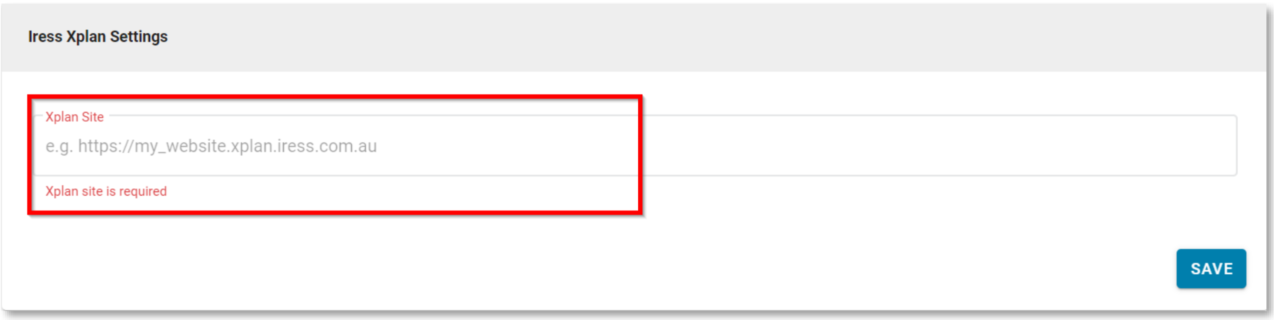
6. Select the Apps panel and choose the Xplan Connector app



7. Select the **App Setting** cog icon.



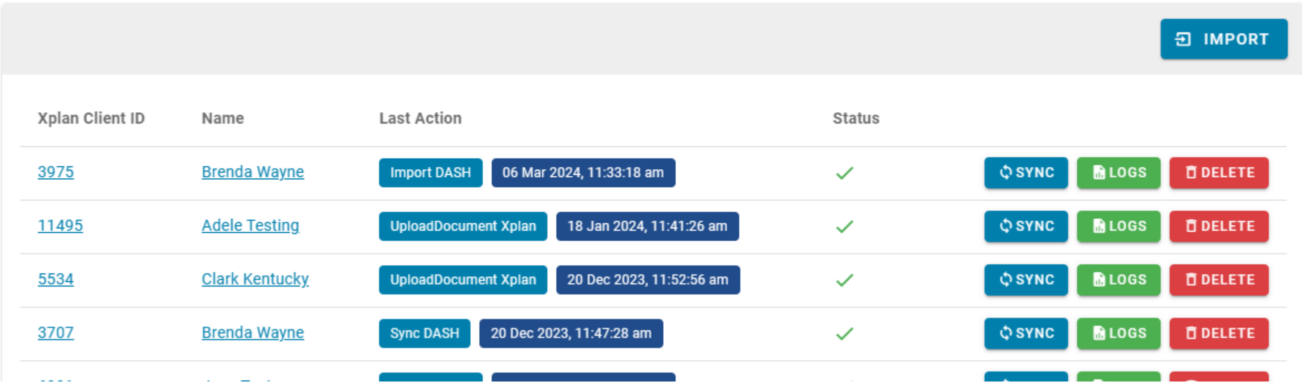
8. Enter your Xplan Site URL and select **Save**



2 Launching Xplan Connector

When launching the XPlan Connector app from the Dashboard, you will be taken to the **Contact Management Dashboard** screen. This view shows a list of all Contacts that have been mapped between DASH and Xplan. In this view, you can manage your mapping and sync client data without having to be in any particular Contact.

1. Launch the Xplan Connector app – select the Apps panel > Launch Xplan Connector
2. You will be taken to the Contact Management Screen



The **Last Action** Column shows the previous actions performed on the Contacts and the date and time of the action. This is helpful to see when the Sync was last completed.

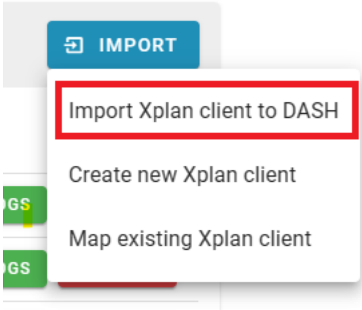
The **definitions** for the actions under **Last Action** column are:

- Sync DASH -> Syncing from Xplan to DASH
- Sync Xplan -> Syncing from DASH to Xplan
- Import DASH -> Importing a new Xplan Contact to DASH
- Export Xplan -> Export a newly created contact from DASH to Xplan
- Map -> Create mapping between DASH Contact and Xplan Contact. If the same client appears in both systems.

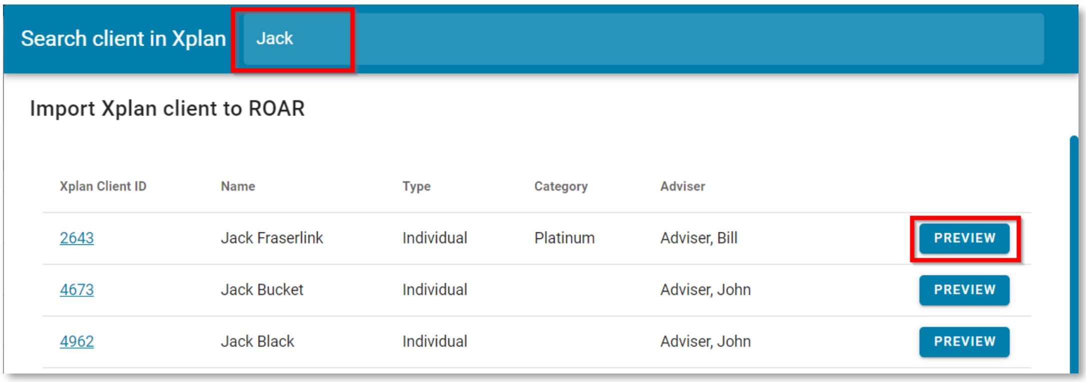
The **Status** Column shows whether the sync was successful or not. If it is successful, it will show a green tick. If it is not successful, it will show an error (exclamation mark) icon. You can read the error message by clicking at the “**Logs**” in green colour.

2.1 Import existing client from Xplan to DASH

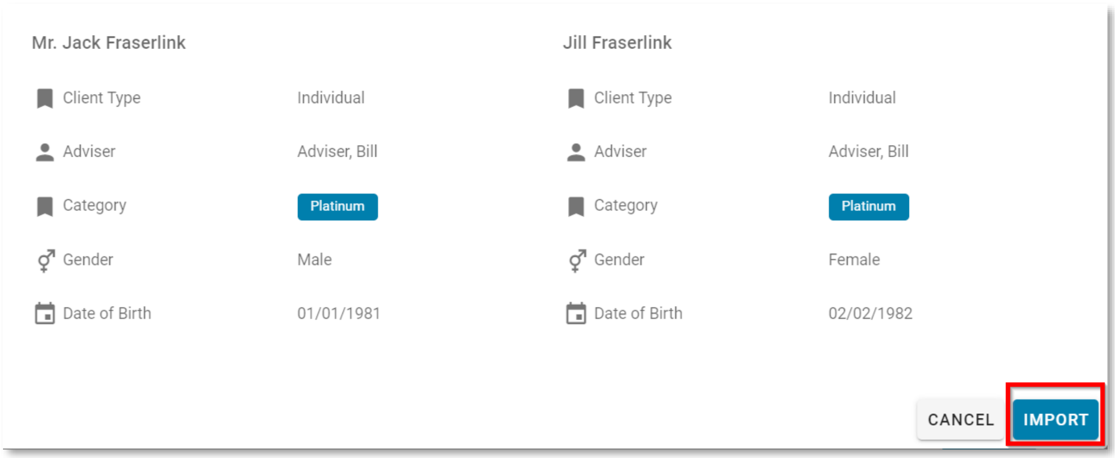
1. In the same **Contact Management Dashboard** screen, select **Import** and select **Import Xplan client to DASH**. This action will pass client data from Xplan into DASH.



2. Search for your Xplan Client and click “**Preview**”.



3. Confirm the correct client has been selected and select **Import**.

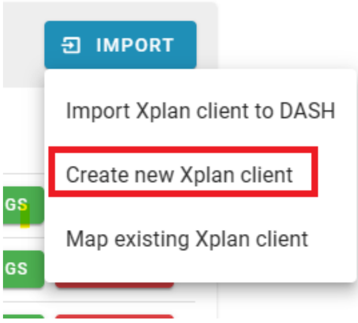


4. Once complete, view the Contact in DASH by searching within the Contacts section. You’ll notice a green tick next to the status.

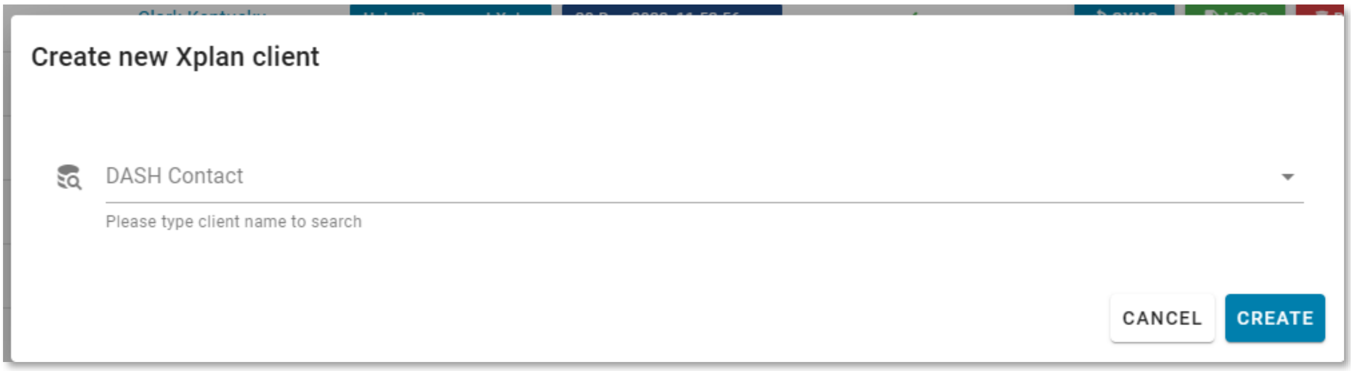
2.2 Import existing client from DASH to Xplan

If you have created a new contact in DASH, that is not in XPlan:

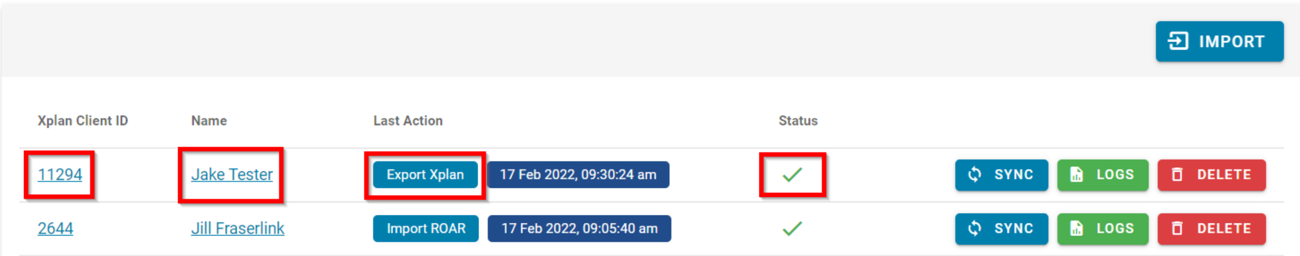
1. Select **Import > Create new Xplan client**.



2. Search DASH for the contact name from DASH, select **Create**



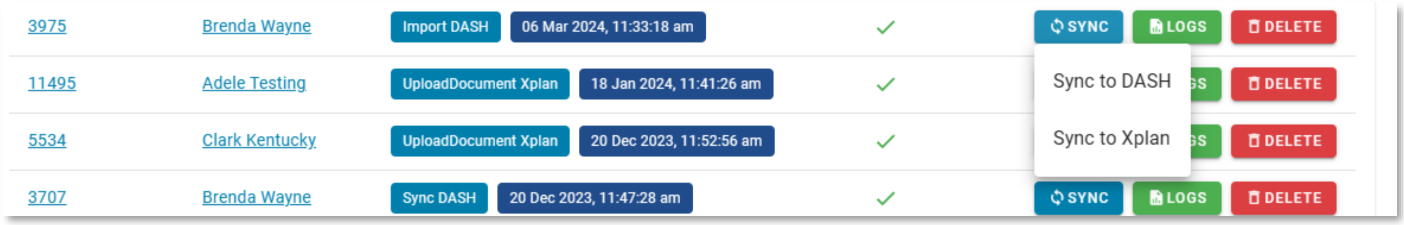
3. Once the export is finished, you can check the client by clicking the "**Xplan Client ID**" to see the client in **Xplan**.



2.3 Sync client data between DASH and Xplan

After exporting and importing the client, changes you make in DASH or Xplan can be synced interchangeably.

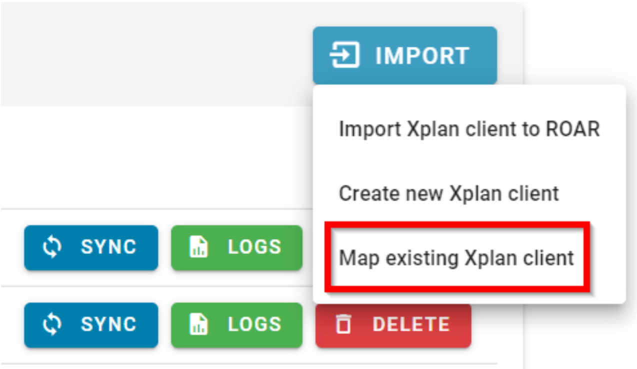
If you want to sync Xplan changes to DASH, click **Sync to DASH** or if you want to sync DASH changes to Xplan click **Sync to Xplan.**



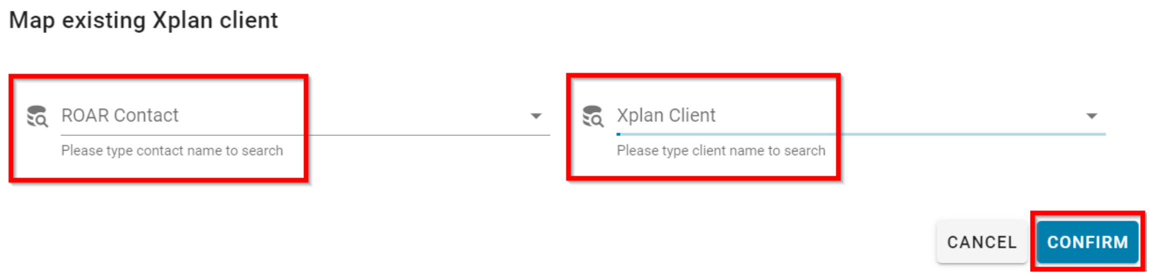
2.4 Map between DASH and Xplan clients

When you have a Contact which already exists in both DASH and Xplan, you should map or link these Contacts to create a connection between these two Contacts, and you will be able to sync data between Xplan and DASH.

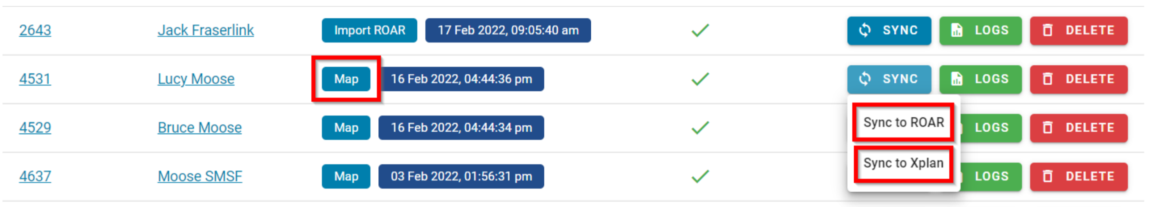
1. To create a mapping, click on the "**Import**" in Contact Management Dashboard and click "**Map Existing Xplan client**".



2. Find the Contact in both DASH and Xplan and click "**Confirm**".



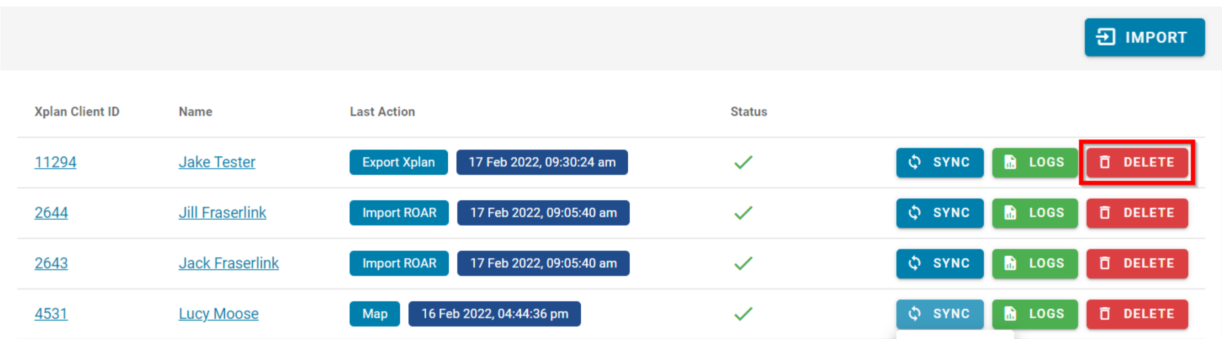
3. After the mapping is done, you will see that the Contacts are mapped, and you can either choose "**Sync to DASH**" or "**Sync to Xplan**".



2.5 Delete the mapping between DASH and Xplan clients

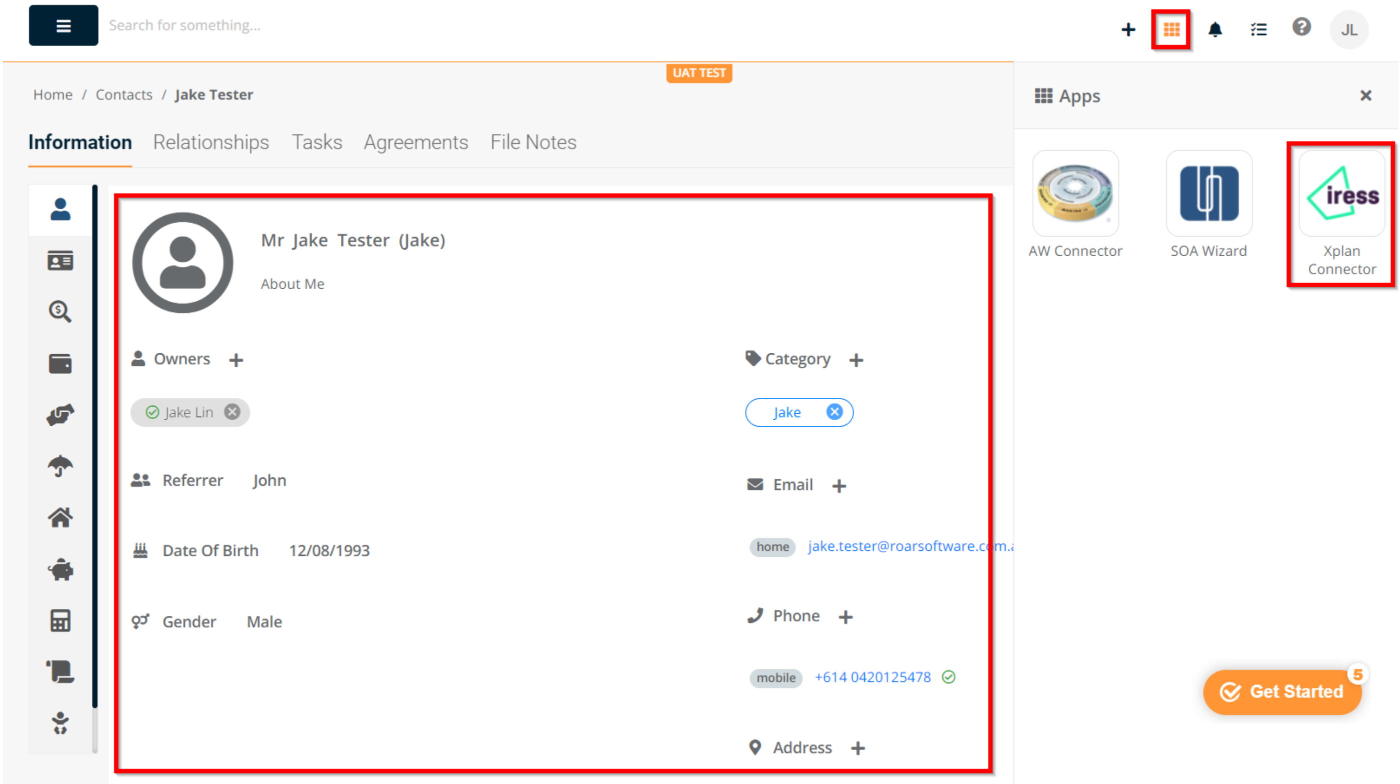
Mappings can be deleted, and they can be deleted by clicking the **"Delete"** button in the Client Management Dashboard.

Note: Deleting the mapping won't delete the Contacts in DASH or Xplan.

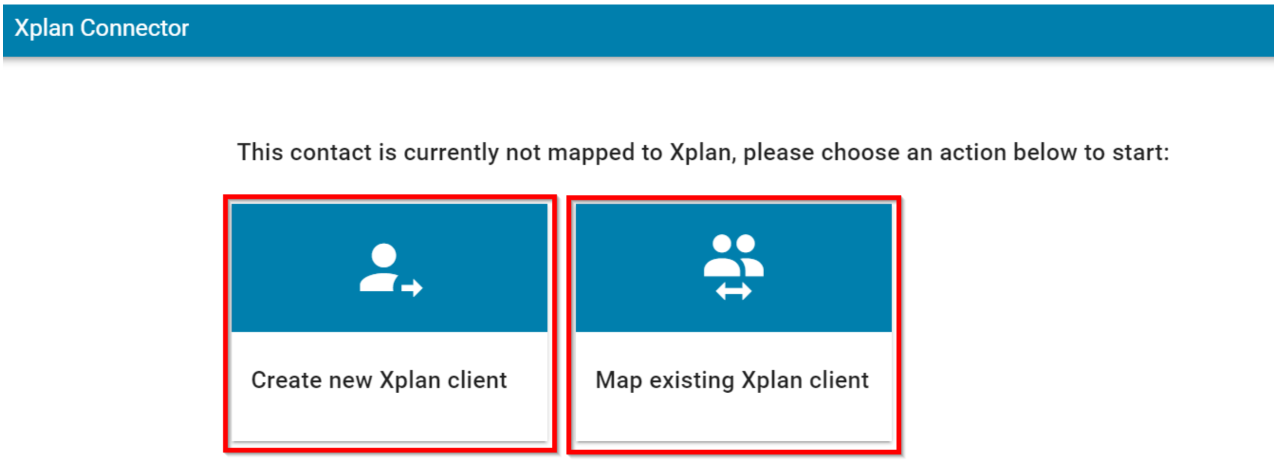


3 Launching Xplan Connector against a Contact

If you launch the Xplan Connector against a Contact, you will get one of the two dashboards depending on the Contact you choose.



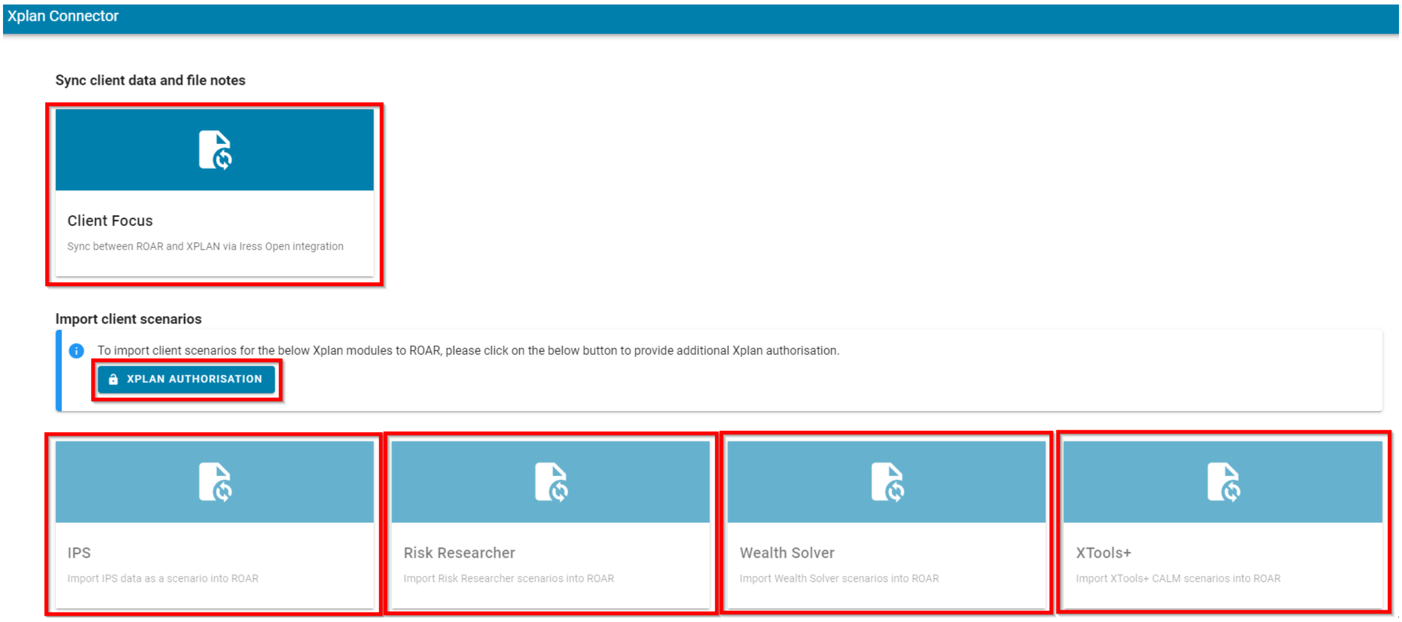
If you launch the Xplan Connector against a Contact that hasn't been mapped with Xplan before, you will see the dashboard with the options to "**Create new Xplan client**" or "**Map existing Xplan client**".



1. Choose "**Create new Xplan client**" if the client doesn't exist in Xplan. This will create a new Contact in Xplan.
2. Choose "**Map existing Xplan client**" if the client already exists in Xplan. This will create a connection between the Contact in DASH and Xplan.

If you launch the Xplan Connector against a Contact that is already mapped to Xplan, you will see the following dashboard with the options to:

1. Sync client data and file notes
2. Import IPS data as a Scenario into DASH
3. Import Risk Researcher Scenarios into DASH
4. Import Wealth Solver Scenarios into DASH
5. Import XTools+ CALM Scenarios into DASH

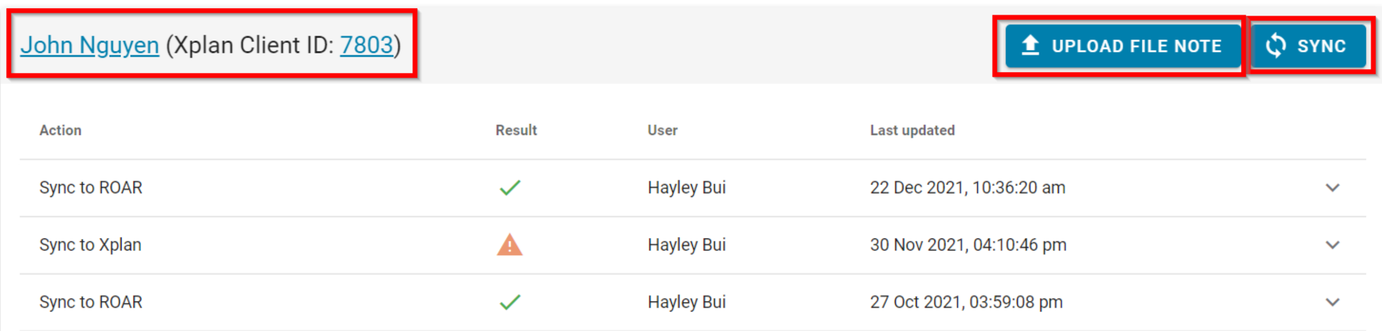


Note: To import Client Scenarios from Xplan to DASH, please click on the "**Xplan Authorisation**" button to provide additional Xplan authorisation.

3.1 Client Focus – Sync Client Data and File Notes

In the Client Engage option, this allows you to sync Client Fact Find data and File Notes in Xplan's **Client Dashboard**.

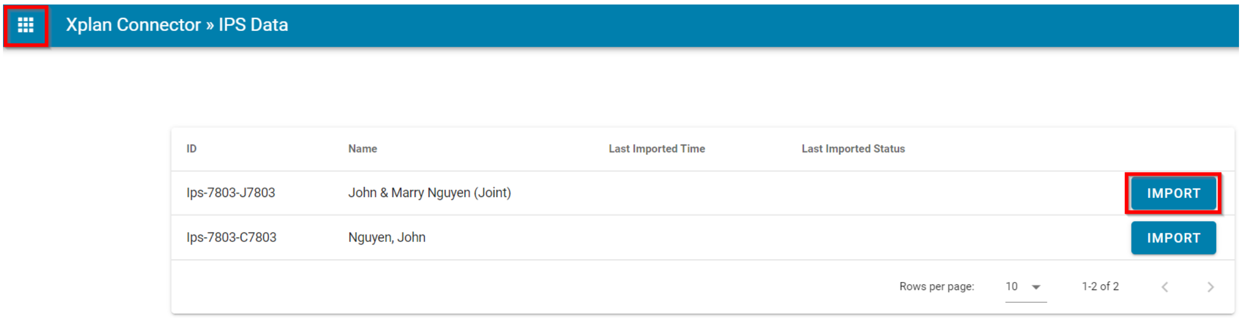
Note: Only File Notes from DASH can be uploaded to Xplan's File Notes. File note sync is one way - from DASH to Xplan only.



3.2 IPS – Import IPS data as a Scenario into DASH

You can import IRESS Portfolio System (IPS) data as a Scenario into DASH and use it to populate into your SOA documents.

To import the IPS Scenarios, please click the “**IPS tile**” on the main Dashboard and then click “**Import**”.

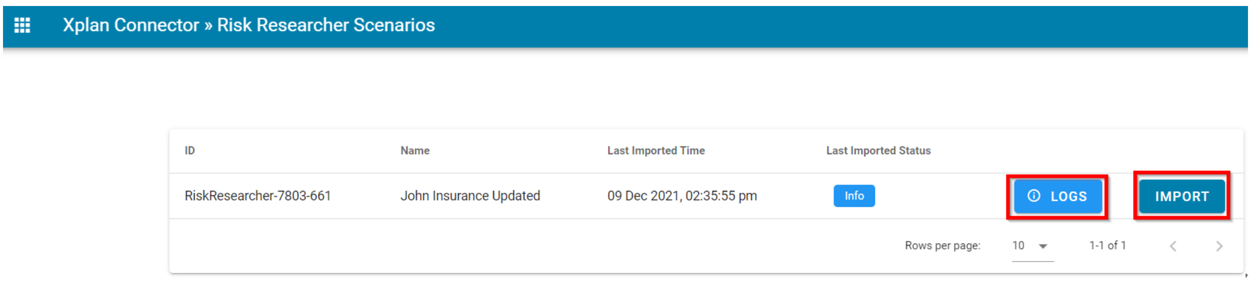


To navigate back to the main Dashboard, click on the “**nine-square**” icon at the top left corner.

3.3 Risk Researcher – Import Risk Researcher Scenarios into DASH

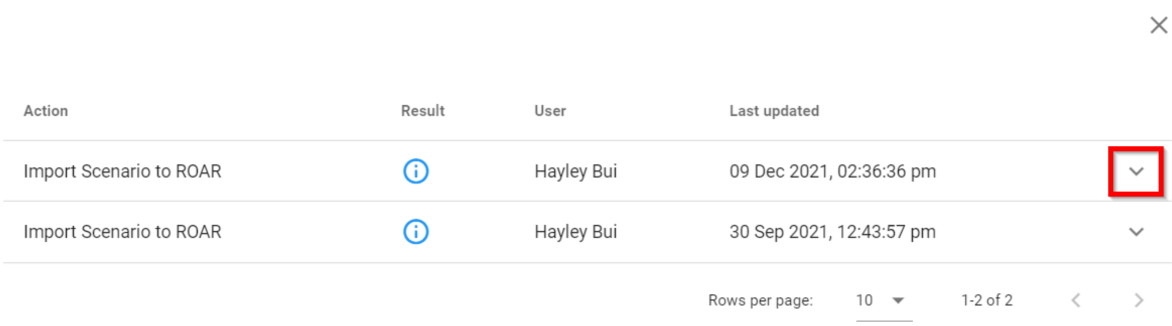
You can import Risk Researcher Scenarios into DASH and use it to populate into your SOA documents.

To import the Risk Researcher Scenarios, please click the “**Risk Researcher tile**” on the main Dashboard and then click “**Import**”.



You can view the “**Logs**” if the import gives you a warning message like above.

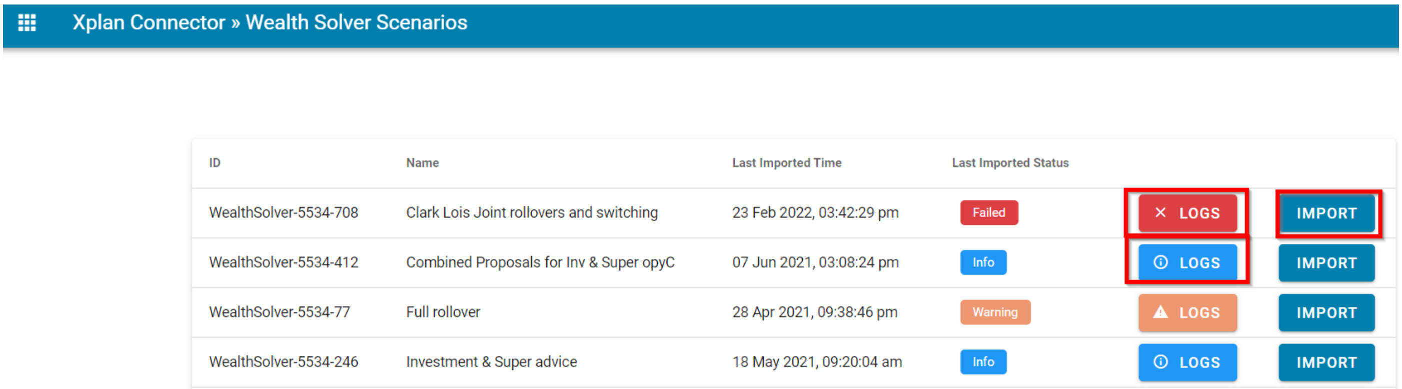
You can see the **detailed logs** by clicking on the dropdown icon circled below.



3.4 Import Wealth Solver Scenarios into DASH

You can import Wealth Solver Scenarios into DASH and use it to populate into your SOA documents.

To import the Wealth Solver Scenarios, please click the "**Wealth Solver tile**" on the main Dashboard and then click "**Import**".



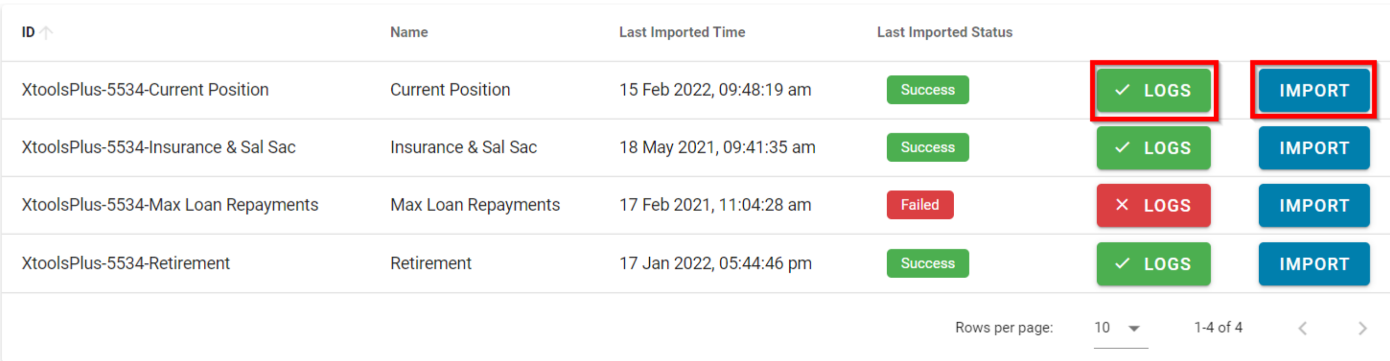
ID	Name	Last Imported Time	Last Imported Status		
WealthSolver-5534-708	Clark Lois Joint rollovers and switching	23 Feb 2022, 03:42:29 pm	Failed	LOGS	IMPORT
WealthSolver-5534-412	Combined Proposals for Inv & Super opyC	07 Jun 2021, 03:08:24 pm	Info	LOGS	IMPORT
WealthSolver-5534-77	Full rollover	28 Apr 2021, 09:38:46 pm	Warning	LOGS	IMPORT
WealthSolver-5534-246	Investment & Super advice	18 May 2021, 09:20:04 am	Info	LOGS	IMPORT

If the import failed, you would see the failed status and click on the "**Logs**" to see the error message.

3.2.5 Import XTools+ CALM Scenarios into DASH

You can import Xtools+ CALM Scenarios into DASH and use it to populate into your SOA documents.

To import the Xtools+ Scenarios, please click the "**Xtools+ tile**" on the main Dashboard and then click "**Import**".



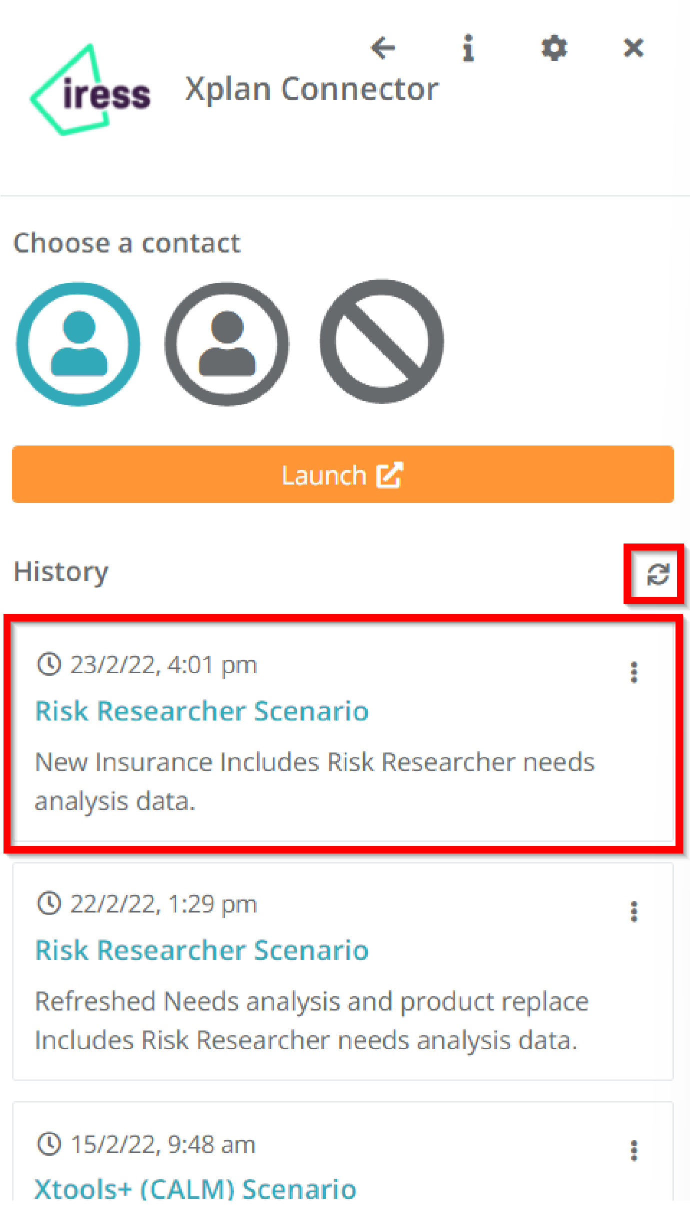
ID	Name	Last Imported Time	Last Imported Status		
XtoolsPlus-5534-Current Position	Current Position	15 Feb 2022, 09:48:19 am	Success	LOGS	IMPORT
XtoolsPlus-5534-Insurance & Sal Sac	Insurance & Sal Sac	18 May 2021, 09:41:35 am	Success	LOGS	IMPORT
XtoolsPlus-5534-Max Loan Repayments	Max Loan Repayments	17 Feb 2021, 11:04:28 am	Failed	LOGS	IMPORT
XtoolsPlus-5534-Retirement	Retirement	17 Jan 2022, 05:44:46 pm	Success	LOGS	IMPORT

If the import was successful, you will see the green tick with the status "**Success**".

3.2.6 Check imported Scenarios in DASH

Once you have imported Scenarios to DASH, you can check that these have successfully been imported.

To do this, go back into DASH, and under the History section of the Xplan Connector, you will see details of the imported Scenarios. These are now ready to be selected for SOA generation.



Note: Please click on the “refresh” button if your imported scenarios are not showing.