USER GUIDE

# ProductRex Integration

# 1 ProductRex Integration Summary

**Subscription**
To use the ProductRex integration Dash Advice Marketplace, you need to have a subscription to ProductRex. You can go to www.productrex.com.au to create an account.

**What can the integration do?**
The integration allows you to:

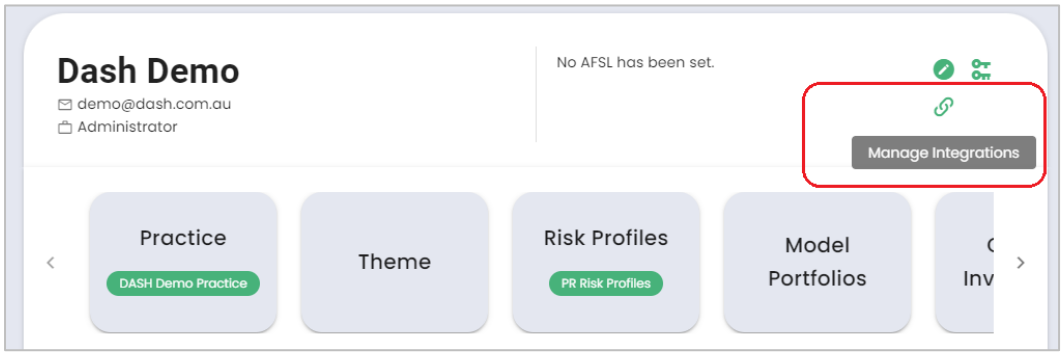
- Create ProductRex scenarios for a Contact from Dash,
- Import ProductRex scenarios into Dash for population into advice documents such as SOAs and ROAs,
- Import and save scenario reports into Dash File Notes,
- Scenario information will populate into your SOAs/ROAs generated in Dash.

# 2 Enable ProductRex Integration

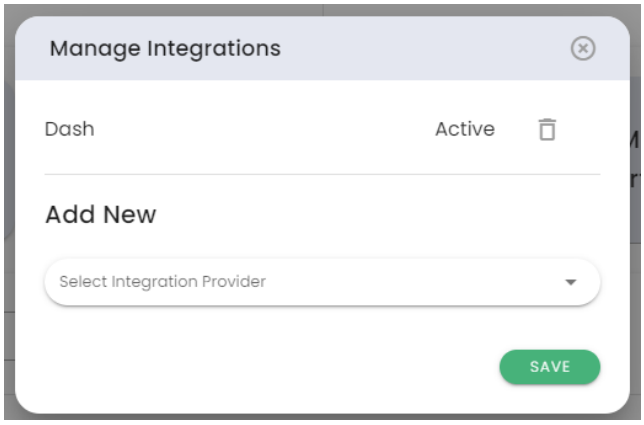
Before the integration can work, you need to enable the Dash integration in ProductRex.

1. Log into ProductRex and go to Account Settings

2. Click on the link icon to Manage Integrations



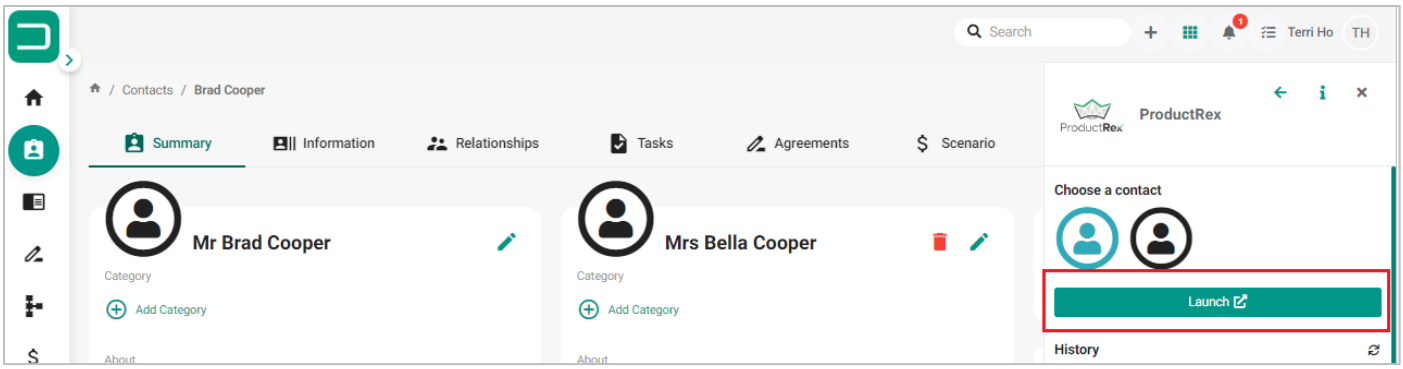

3. In Manage Integrations pop-up, click on “Select Integration Provider” and select “Dash”. Click Save.



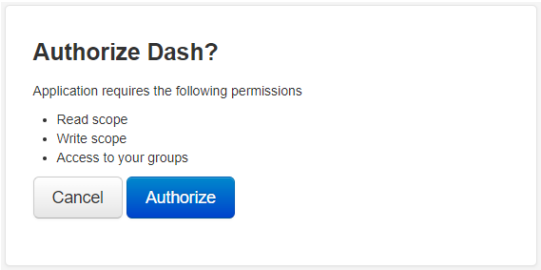
# 3 Launching & Using the Integration

### Select a Contact and Launch ProductRex from Dash

In Dash, go into a Contact and launch ProductRex.

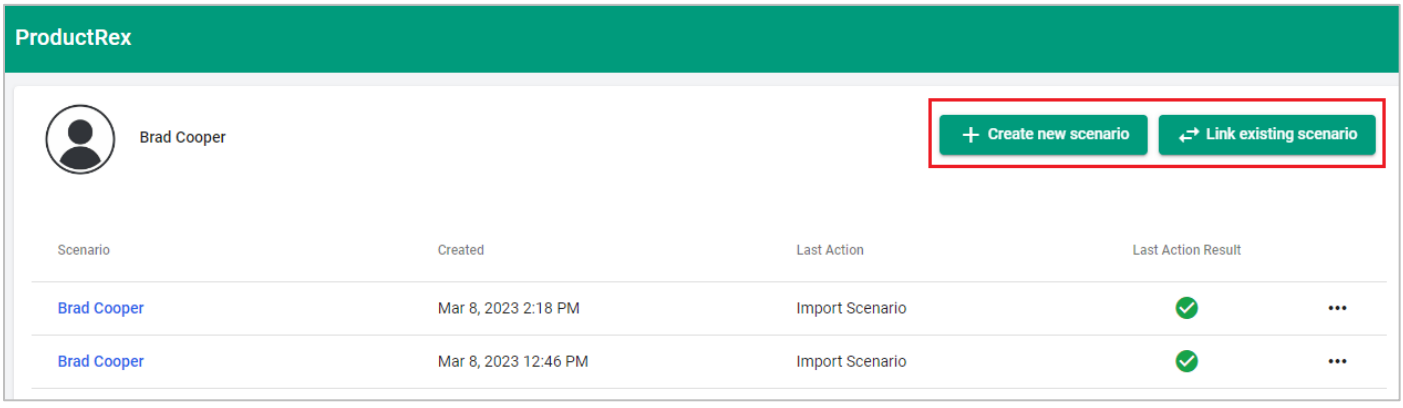



Click on **Authorize** to provide permissions in ProductRex.



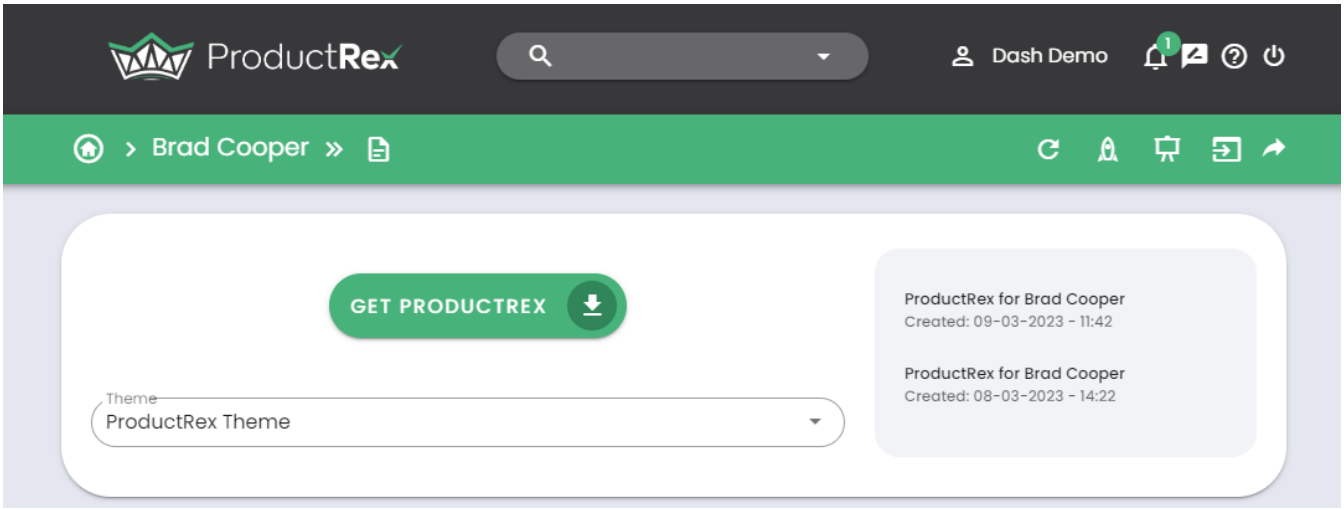

In the ProductRex Integration screen launched for the Contact, you can see options to:

- **Create new scenario:** this allows you to create a new ProductRex scenario.
- **Link existing scenario:** this allows you to link a scenario already created in ProductRex.




Select the appropriate option and complete your scenario in ProductRex.

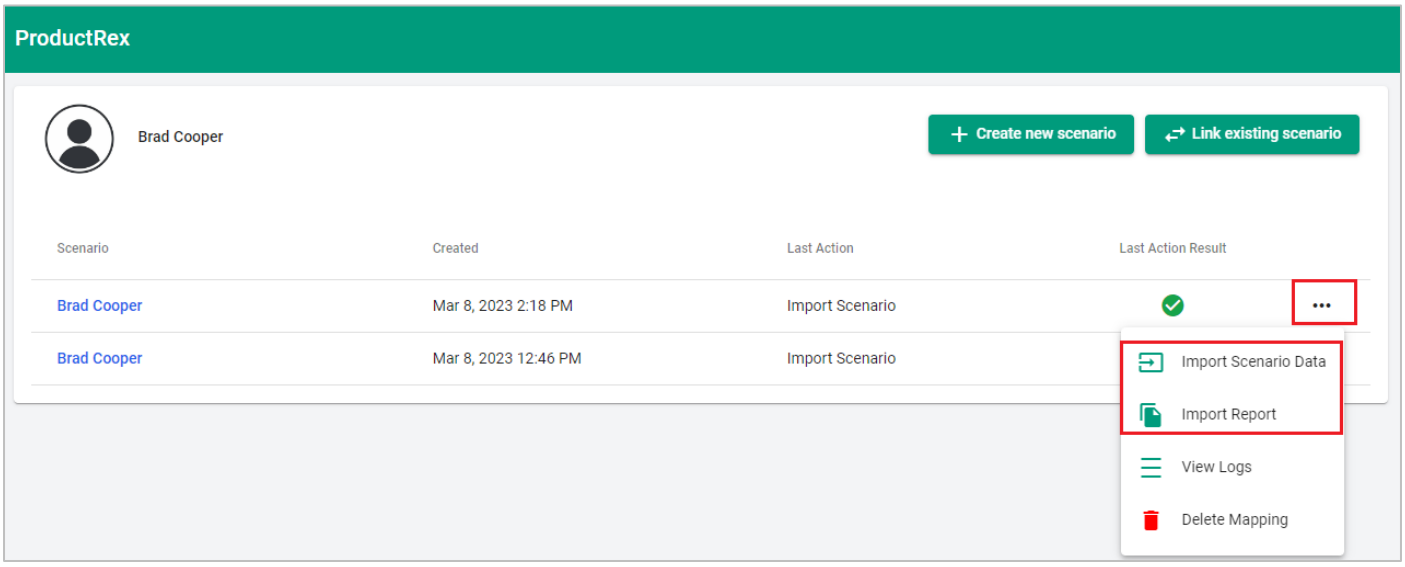
! **Remember to Generate the report in ProductRex in order to pass the scenario data into Dash.**



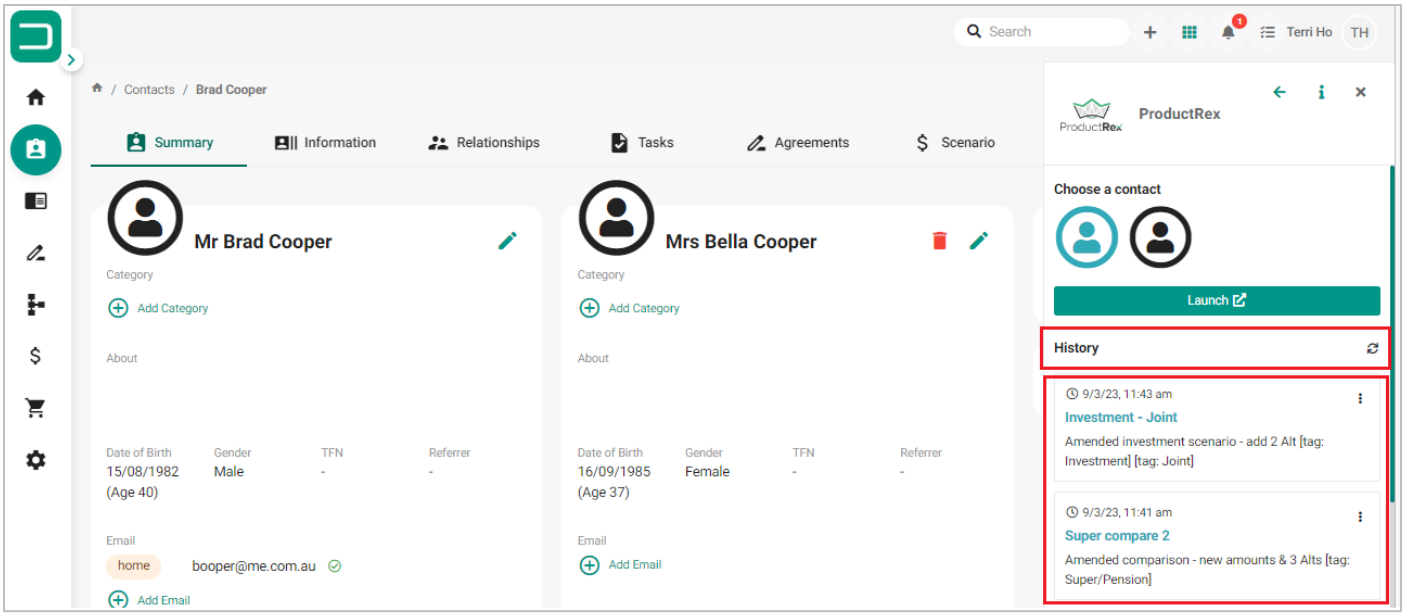

**Importing ProductRex scenario to Dash**

Once your ProductRex report has been generated, you can:

- **Import Scenario Data:** select this option if you would like the information from your ProductRex scenario to populate into SOAs and ROAs.
- **Import Report:** select this option if you would like to save the generated report from ProductRex into File Notes in Dash.
- You can select both options, one at a time.
- You can also click into the Contact's name (highlighted in Blue) to take you to that Contact's ProductRex scenario directly.




If you have selected to Import Scenario Data, and once this is done, you can go back into Dash, click on Refresh next to History, and you can then see the scenario imported. This scenario imported is now ready to merge into your SOA or ROA.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Summary
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Relationships
Tasks
Agreements
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Category
Add Category
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Investment - Joint
Amended investment scenario - add 2 Alt [tag: Investment] [tag: Joint]
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Super compare 2
Amended comparison - new amounts & 3 Alts [tag: Super/Pension]