

XPLAN- HOW TO ADD YOUR CLIENTS TO THE DBA CSO USER GROUP



How

To add a client to the CSO User Group (DBA), please follow the below steps:

1. Under the client's record, click on **Tasks** > Click on **Add** on the right-hand side under the **Tasks** heading to select the Task template.

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ප	Quick nav (\)	Rubble, Barney (56803) & Betty (56806) 👻	
ిరిం	Client		
0	Dashboard	Search	
Or.	General Info ~		Search
ጜ	Key Information \sim	Entities Client V Campaign Select Some Options	
a	Opportunities	Filter tasks by All Type All Subtype Priority Select Some Options	
	Notes	Range Completed Last 7 Days V Any days Subject	
<i>8</i> 6	Tasks	Status Select Some Options	
I	Threads	Keyword(s)	
~~	Goals & Objectives ${\scriptstyle \lor}$	Contain File(s): Hint: Use comma to separa	ite filename partial matches.
19 8	Financial Info ~	Categories All	
	Entity Info ~	Case / Thread Template All Thread Templates	
	Estate Planning		
	Insurance ~	r Tasks	
	WealthSolver ~		Transfer Tasks Add
	Risk Tolerance ${}^{\scriptstyle \vee}$	Action Due Date Type Subject Status Priority Group Assignee Basedate Basedate2 Activ	vated Date Thread Name Complete Date
	FPW Process Wizards $ \smallsetminus $		
	Process Wizards (OLD) $ \smallsetminus $		

2. Within the Templates area, click on the dropdown option to select the relevant task template. e.g.

Add this client to (Practice name) (CSO – DBA)

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۰ ^م ،	Edit Task					
S	Task	-	_	_		Sav
ᢡ	Templates	: 4	ll Types		~	
ŧ	Subject					1.FPW- Add client to PP User Group - for eg: Padua/DBA/Tanngo Add a DD Payment paid by Bank Account Add a DD Payment paid by Credit Card
Æ	Descriptio	n			(Add client to DBA Paraplanning group - Heather Add client to DBA Paraplanning group - Pario Add this client to AMR (CSO - DBA) Add this client to Chronos (CSO-DBA)
ISI						Add this client to Fitzpatricks Advice Partners (CSO-DBA) Add this client to Fitzpatricks Advisory Partners (CSO-DBA) Add this client to Fitzpatricks Insurance Advisers Pty Ltd (Sam B - CSO-DBA) Add this client to Fitzpatricks Private Wealth Gold Coast - (CSO-DBA)
¢¢°		L				Add this client to FPW Gold Coast - BW (CSO-DBA) Add this client to FPW Gold Coast Py Ltd- BW Add this client to FPW Gold Coast Py Ltd- BW Add this client to GCDA Enancial Services (CSO-DBA)
	Details	Supplemen	tary Comments	Attachments	Outco	Add this client to Padua PP User Group - Fitz Aust Add this client to Padua PP User Group - Fitz HV
	ld Assigned	i By		Not yet assigned Mehta, Siva		Add this client to Padua PP User Group - (FPW Perth Pty Ltd) Add this client to Padu User Group - Rothgard Add this client to PP Group- DBA (AMR)
	Status					

- 2. Once the template is selected, you can click **Save**.
- 3. You will see the task item in the list of your Incomplete Tasks list saved as an **Unactioned** item as shown below.



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154	Tasks	Status	Select Some Options			Konsword(c)	Exact match			
©2	Threads							_		
	Goals & Objectives ~					Contain File(s):	Hint: Use comma to separate fi	ilename partial matches.		
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	Insurance ~	▼ TaSKS (1 to 50 of 130)				_	_			
	WealthSolver ~	Previous								
	Risk Tolerance ~	Action Due D	ate Type	Subject	Status	s Priority (Group Assignee Bi	asedate Basedate2	Activated Date	 Three
	FPW Process Wizards ~	1/03/2	2022 jii Miscellaneous	1.FPW- Add client to PP User Group -	for Unac	tioned 🗸 Normal	a 👻 Mehta, Siva		22/02/2022	

For the client to be automatically added to the CSO User Group, you will need to complete this task.

Tasks (1 to 1 of	:1)							
Previous	- 1)							
Action	Due Date	Туре	Subject	Status	Priority	Group	Assignee	▲ Ba
	1/03/2022	Miscellaneous	1.FPW- Add client to PP User Group - for	Complete 🗸	Normal		 Mehta, Siva 	

You will see that the client has now been added to the CSO User Group.

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<u>مې</u>	WealthSolver ~	Related Entities						
	Risk Tolerance $^{\vee}$	Search Filter						
S	FPW Process Wizards $ \smallsetminus $	Parent Group						
Q0	Process Wizards (OLD) ${\scriptstyle \lor}$	Include sub-groups						
Ъ	Rothgard \vee	Only display Groups which are ticked						
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88	Merge Report	Search Result (110 50)						
40	Service ~	Previous						
ISI	Admin ^	M i I i Name	Description					
	Client Group							
£С,	User Group							
	Personal Vault	✓ O0 Headspace ▼						
	Snapshot	AMR Financial Services (CSO - DBA) 🔻						
	Audit Trail							
	Account Mappings							
	Campaigns							
	Alerts							
	Invoices							

4. Once the work has been completed on your client, you will need to remove the client from the relevant CSO user group

To do this, within the client record, click on Admin > User Group. The **untick** the box next to the CSO user Group.



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	Merge Report	Search Result (116 50)		
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	Snapshot	□ AMR Financial Services (CSO - DBA) ▼		Branch
	Audit Trail			
	Account Mappings			
	Campaigns			
	Alerts			
	Invoices			
	Bank Details			
	Consent			
	Import Information	· •		
	Complaints			
	Adviser Fees 🗸			
"	Planwealth Migration			

For further assistance please contact Siva Mehta:

Email - siva.mehta@ftz.com.au

Phone - (02) 9248 8093