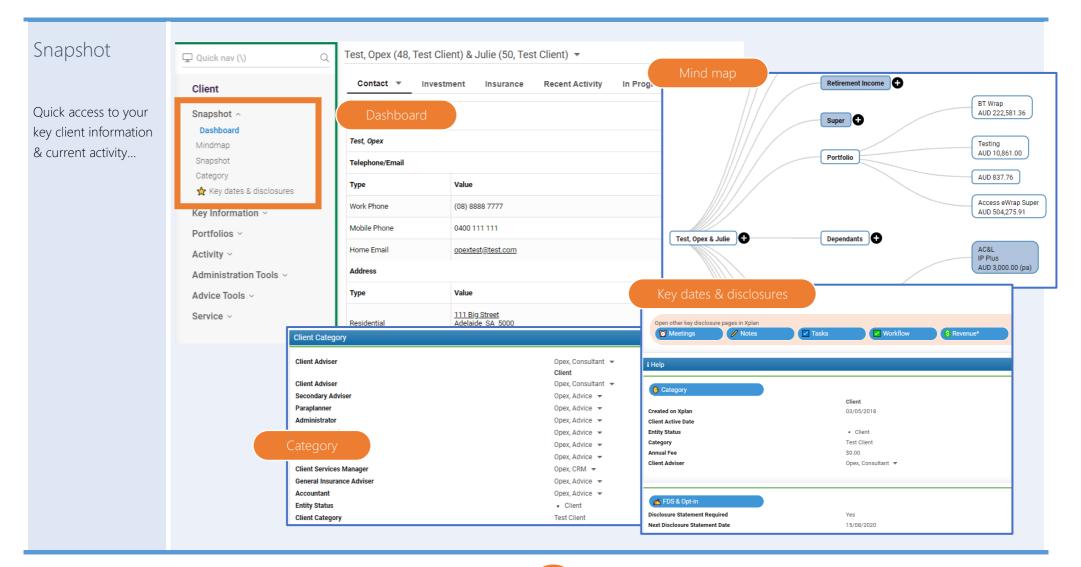
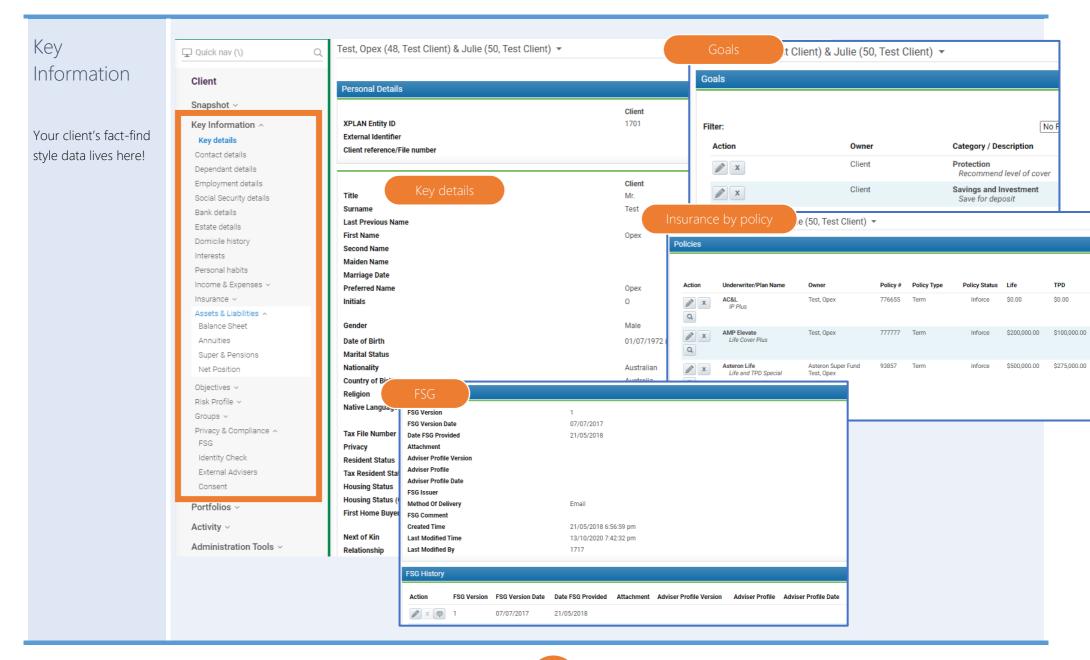
Your new Xplan interface

Your mud-map guide to the client navigation menu



1 Mud-map guide to the interface

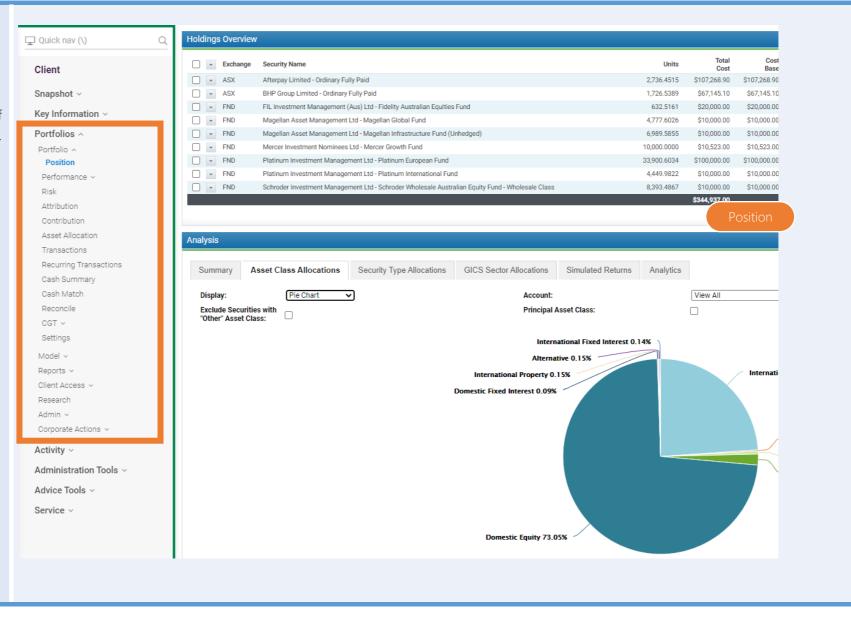


2 Mud-map guide to the interface

Portfolios

Your client's investment holdings (if you have IPS licence)...

Same as before - no change to this menu!



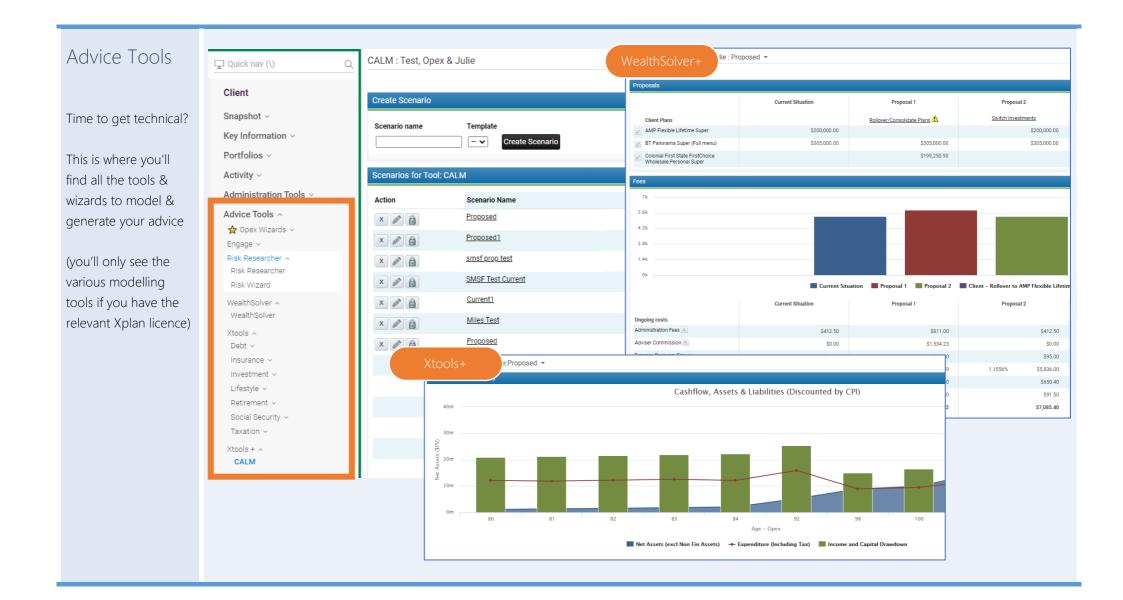
3 mud-map guide to the interface

Activity Test, Opex (48, Test Client) & Julie (50, Test Client) 🔻 Quick nav (\) Q Opt-in/Ongoing Fee Details **Document Filters** Client Disclosure Statement Opt-in FPA Agreement Manage the daily Snapshot ~ Disclosure Statement Required Yes Filter Notes: Next Disclosure Statement Date 15/08/2020 Туре flurry of client activity -Key Information \sim Date Range: Not Selected ~ notes, tasks, workflow, Portfolios ~ Opt-in/Ongoing Fee History Don't filter Client Access: ~ meetings, reviews. Activity ~ Manage Reviews Contain File(s): Note Hint: Use comma to separat Tasks Action Туре Descriptio Scheduled - Status Threads Face to face - 🖉 X 11/12/2020 Incomplete Leads - 🖉 X 11/12/2020 Telephone Incomplete Advice - 🖉 X Mailed Report Doe archived clients appear in widget 14/08/2020 Overdue (5 of 35) Reviews - 🖉 X Mailed Report Strategic Review 14/03/2020 8:00 am Completed Diary Notify Me: Don Campaigns Previous Administration Tools Subject 🗌 👔 🔗 Action Type Subtype Advice Tools ~ 0 Email Your initial meeting confirmation - Mon, 10 Aug - 🔍 Service ~ 01 - Engage Meeting - Confirmation 0 - 🔍 Your initial meeting confirmation - Mon, 10 Aug General Test Bulk ROA + 🗟 * 🗟 03 - Advise Further Advice Client 🗸 01 - Engage Query - Adviser Campaign Select Some Options - 🔍 All Type 🖌 All Subtype Filter tasks by ~ - 🗟 01 - Engage Query - Adviser High × Normal × Low × Priority Range Due(25/10/2020 - 05/11/2020) Any days 02 - Discover Data Update - 🔍 Unactioned × Actioned × Pending × Subject Status 06 - Service Service Statement 0 - 🔍 Review × Complete × Exact match 0 👻 🔍 03 - Advise Portfolio Review Keyword(s) Contain File(s): Hint: Use comma to separate filename partial matches. Tasks (1 to 1 of 1) Previous Action Id Due Date 🔻 Туре Thread Name Subject Base Status Priority Group Assignee Opex, Con... 🗌 👻 📴 54 5/11/2020 🛐 01 - Engage Review Questionnaire has been completed Complete V Normal

4 mud-map guide to the interface

| Administration | Quick nav (\) | Test_Opex (48. Test Client) & Julie (50, Test Clien | t) 🖛 | | | |
|---|--|---|--------|---|---|--|
| Tools | Client | Merge Report | | | | |
| | Snapshot ~ | Report Category: 😭 Opex - Quickmerge Templates | ~ | Client Access Details | Client | |
| Find your pure admin functions here including wizards, generate templates & other admin tools | Key Information ∨ Portfolios ∨ Activity ∨ Administration Tools ∧ | Action Name | Туре | Access Level | Login Capability Advanced Access will.test@client | |
| | | Appendix Risk Researcher Outputs | Entity | Billing Department OPEX Design Expiry Date Password Password ************************************ | | |
| | | Appendix WealthSolver Outputs | Entity | | | |
| | | Client Focus - Notes & Attachments Report CommPay - 1 Transaction List | Entity | | | |
| | | CommPay - 2a Revenue Type Subtotals (individual client) | Entity | | | |
| | | CommPay - 2b Revenue Type subtotals (related entities) | Entity | | | |
| | | CommPay - 3 Policy List Entity | Entity | | | |
| | | Insurance Schedule - BY COVER - Landscape, Detailed, Inforce policies only | Entity | Used in Client Portal only | | |
| | | Insurance Schedule - Landscape, Detailed, Inforce policies only | Entity | Client Access To Do List | | |
| | | Investment Profiles (Mercer) - Proposed Alerts Alerts | Entity | | | |
| | | Entities: client V Compliance Rules: All V | | | | |
| | | Alert Rule | | Time | Entity | |
| | | No Breaches | | | | |
| | | | | | | |

5 mud-map guide to the interface



6 Mud-map guide to the interface

| Service | Quick nav (\) Q Client | Test, Opex (48, Test Client) & Julie (50, Test Client) Marketing Subscription Invoices Filter Invoices Client No Contact No |
|--|--|---|
| Manage the business- end of your client - marketing, revenue (CommPay), FDS & Opt-in, service levels & service delivery (you'll only see the CommPay pages if you have the | Snapshot ∨ Key Information ∨ Portfolios ∨ Activity ∨ Administration Tools ∨ Advice Tools ∨ Service ∧ ☆ Opex Wizards ∨ Revenue ∧ Fee for Service | Invoice No. Invoice Status All Status ✓ Invoice Paid Type All Date Type Invoice Date ✓ Date Range 22/10/2020 22/10/2020 29/10/2020 29/10/2020 29/10/2020 Invoices Results Mr Opex Test and Mrs Julie Test Action Invoice No. User Joint Invoice Street Street Street 111 Big Street Suburb State State SA |
| CommPay Xplan licence) | Invoices CommPay Service ^ Category Reviews Service Packages Marketing ^ Subscription Referral | Payments Filter Postcode 500 Preferred Email opextest@test.com Invoice No. Type All Status All Status Obta Range Last 7 Days Payments Results Perev Action Id User Joint Payment Status Type Action Id User Status Type Action Id User Joint Payment Status Type Mailing Type Mailing Method Client Mailing Method Action Id User Joint Payment Status Type Mailing Method Action Id User Joint Payment Status Type Mailing Method Joint Payment Status Type Mailing Method Mailing Method Joint Payment Status Just Just Just Just Just Just Just Ju |

