



XPlan Integration

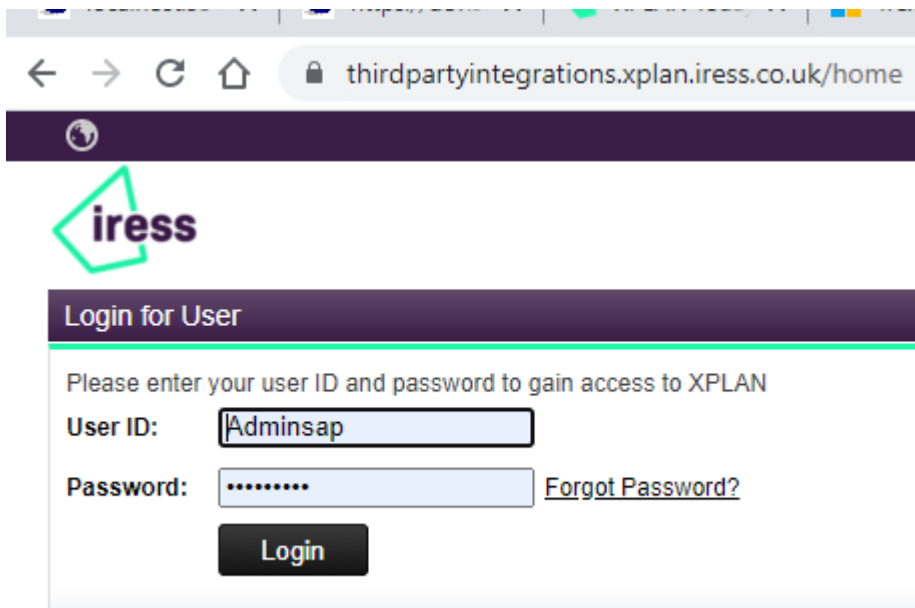
Quick Guide

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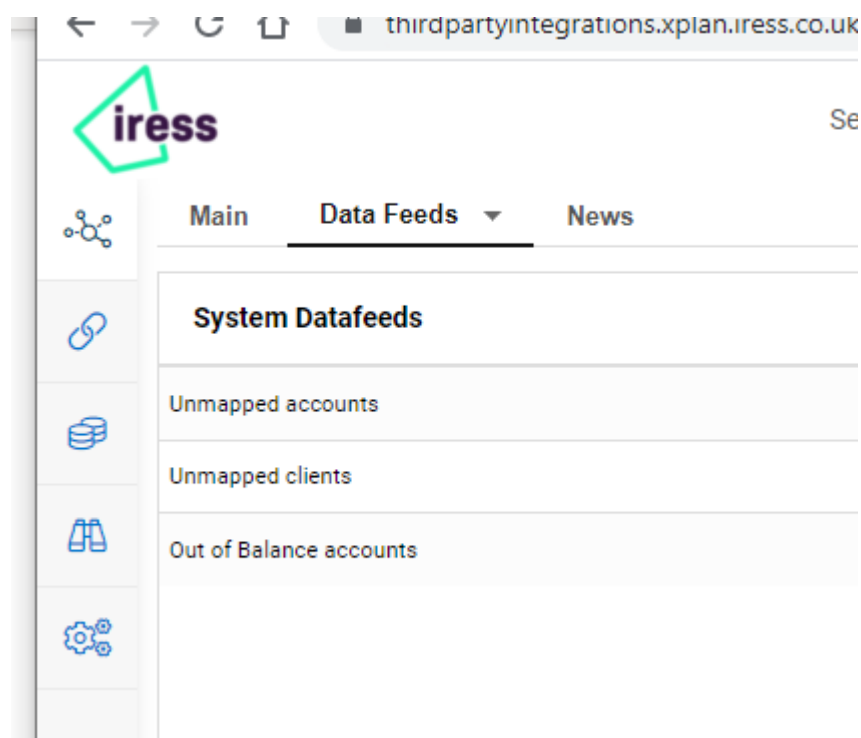
Accessing the XPlan system to create clients and plans

Log in to the XPlan system at <https://thirdpartyintegrations.xplan.iress.co.uk/>

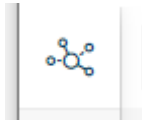


A screenshot of a web browser showing the login page for the XPlan system. The browser's address bar displays the URL `thirdpartyintegrations.xplan.iress.co.uk/home`. The page features the iress logo at the top left. Below the logo is a section titled "Login for User". Inside this section, there is a prompt: "Please enter your user ID and password to gain access to XPLAN". There are two input fields: "User ID:" with the text "Adminsap" entered, and "Password:" with masked characters ".....". To the right of the password field is a link that says "Forgot Password?". Below the input fields is a black button labeled "Login".

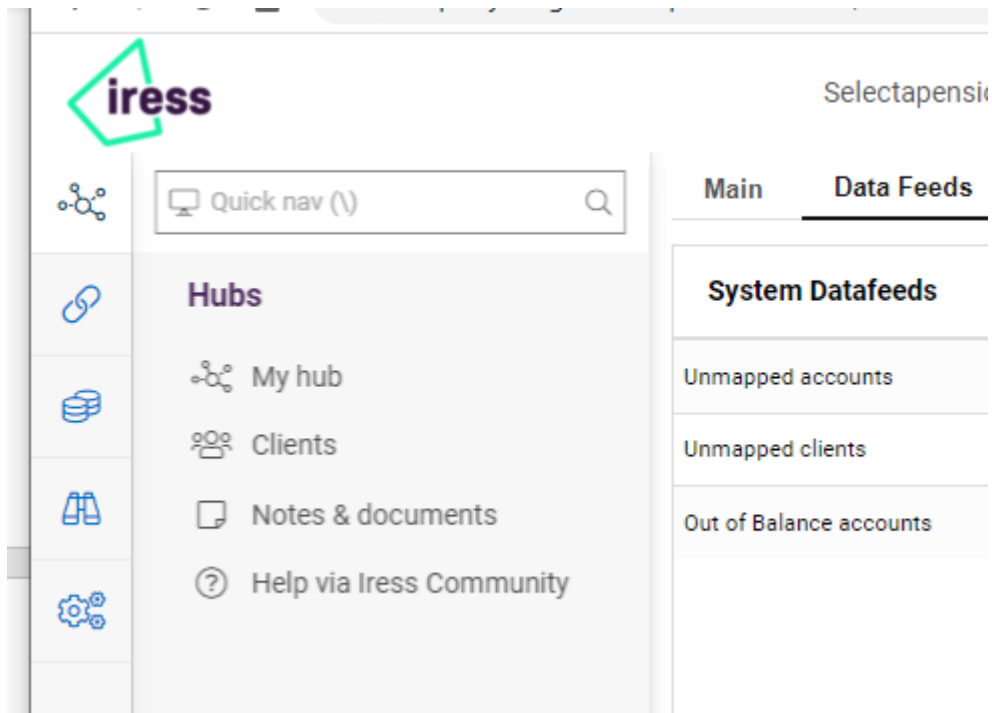
Client details can be accessed from the following screen:



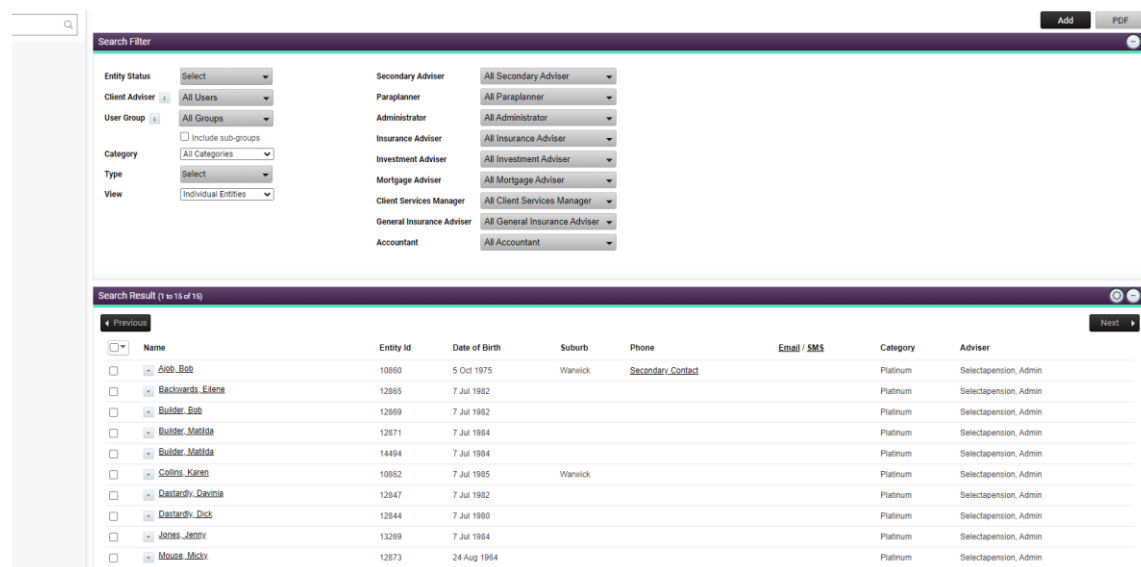
Click the hubs icon:



The following should be displayed:



Click on Clients to display the following:



Click on a client name to display the following:

The screenshot shows the iress client dashboard for Dastardly, Davinia (7 Jul 1982,). The interface includes a left-hand navigation menu with the following categories: Client, At a Glance (with sub-items: Client Dashboard, Net Position, Quick Reference, Client Activity, Leads & Campaigns), Key Information, Advice Process, Financial and Protection, Portfolios, Open Integrations, O&M, Servicing and Administration, Risk Profiling, and eApplications. The main content area displays the client's name, a dropdown menu for 'Portfolio', and sections for 'Top 10 Holdings' and 'Portfolio Market Map'.

From this page, new plans can be added. For example, to add a new pension plan, in the left-hand column click

- Financial and Protection
- Retirement
- Pensions

The screenshot shows the iress client dashboard with the 'Financial and Protection' menu expanded. The menu items are: Budget, Cashflow, Assets, Liabilities, Retirement, Pensions (highlighted in blue), and Annuities.

The following should be displayed allowing the editing of an existing plan or the addition of a new one:

Dastardly, Davinia (7 Jul 1982,) ▾

Edit

Existing Fund

Add

Action	Product Provider	Policy Status	Type	Fund / Policy Number	Description	Platform Wrap	Pension Wrapper	Fund Value	Valuation Date	New Business
	AJ Bell	Active	Defined Benefits (Final Salary)	DR123	DR Test 1	No	No	£75,000.00	3 Sep 2021	Add entry

Retirement Details

Protected Allowance

No Protection

Lifetime Allowance Used

0.00%

Retirement Planning

Proposed Retirement Age

Member of a Group Personal Pension?

No

Eligible to join a Group Personal Pension?

No

Member of an Occupational Pension Scheme?

No

Eligible to join an Occupational Pension Scheme?

No

Option to transfer to an Occupational Pension Scheme / GPP?

No

State Pension and Contracting-Out

Have you requested a BR19?

BR19 Updated Date

BR19 State Pension Commencement Date

BR19 Estimate based on current NI record

BR19 Forecast if conts continue to retirement

BR19 Contracted-out Scheme Membership?

BR19 Contracted-out Pension Equivalent (COPE)

BR19 details entered in Cashflow?

No

When testing the integration functionality, to check for uploaded documents, click the Servicing and Administration | Documentation | Document Notes link in the left-hand column:

Open Integrations ▾

O&M

Servicing and Administration ▴

Documentation ▴

Letter Wizard

Valuation Report Wizard

Telephone Call Record Wizard

Document Templates

Document Notes

Financial Review Report Wizard

Valuation Report (Option 2)

Workflow ▾

The following should then be displayed:

Document Filters

Filter Notes: Type Subtype

Date Range: Not Selected is within Date Criteria

Client Access: Dont filter

Contain File(s):

Subject: Keyword(s): Associated Category: Select Some Options Owner: <Not Selected> Last Modifier: <Not Selected> Portfolio Account: <Not Selected>

Search Reset

Document List (1 to 7 of 7)

Notify Me: Dont notify

Previous

	Action	Type	Subtype	Subject	Related Entities	Date	Modified By	Date Modified	Locked
<input type="checkbox"/>		General	General	Selectapension Report for Plan Ref 1962	Dastardly Davinia (Client)	10 Sep. 2021	Selectapension, Admin	10 Sep. 2021 09:54	No
<input type="checkbox"/>		General	General	Selectapension Report	Dastardly Davinia (Client)	03 Sep. 2021	Selectapension, Admin	03 Sep. 2021 16:26	No
<input type="checkbox"/>		General	General	Selectapension Report	Dastardly Davinia (Client)	03 Sep. 2021	Selectapension, Admin	03 Sep. 2021 12:10	No
<input type="checkbox"/>		General	General	Selectapension Report	Dastardly Davinia (Client)	01 Sep. 2021	Selectapension, Admin	03 Sep. 2021 11:24	No

AddNext

To view a document, click the right-hand icon in the Action column:

Previous

Action

Type

General

General

General

General

The following should then be displayed from where the document can be viewed by clicking on their file name:

Document Summary

Subject Selectapension Report

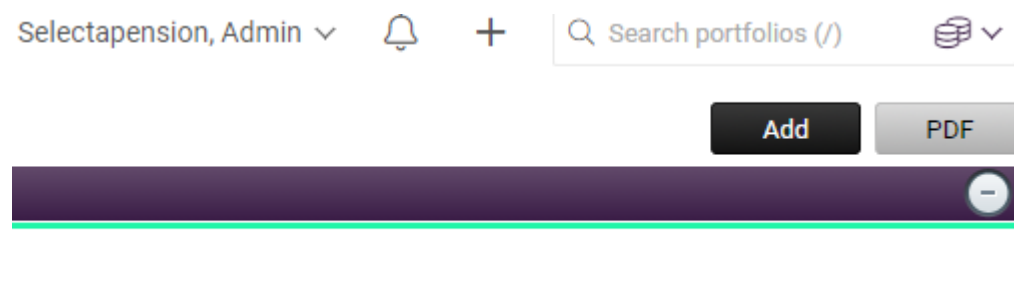
Description Selectapension report for Client Ref 10860, Plan Ref 1236

Attachments

Filename DR-Test-1.pdf

Adding New Clients to Xplan

Click the Add Button at the top right of the client listing page:



The following will then be displayed:

A screenshot of the 'New Client' form. The form has a title 'New Client' and a subtitle 'Add a New Client'. Below the subtitle, there is a welcome message: 'Welcome to the step-by-step interface to add a new client into Xplan. Click on "Next" after you have entered the details. If you wish to use the classic interface of "Add a New Client", click on the Classic Interface button.' Below the welcome message, there is a section titled 'Client Type' with four radio button options: 'Individual' (selected), 'Company', 'Trust', and 'Partnership'. Below the 'Client Type' section, there is a section titled 'vCard' with a 'Choose file' button and the text 'No file chosen'.

For test purposes, only the fields that are mandatory in the Selectapension application need to be completed. If the partner details are required, tick Has partner information, which will allow details to be entered.

New Client

Basic Information

Please fill out this basic information for the new individual client. Some of the fields might be required.

	Client	Partner
Title:	<input type="text" value="Mr"/>	<input type="text"/>
Surname:	<input type="text" value="Gary"/>	<input type="text"/>
First Name:	<input type="text" value="Green"/>	<input type="text"/>
Gender:	<input type="text" value="Male"/>	<input type="text" value="Female"/>
	<input checked="" type="checkbox"/> Has partner information.	
Category:	<input type="text"/>	
Entity Status:	<input checked="" type="checkbox"/> Client <input type="checkbox"/> Archived <input type="checkbox"/> Contact <input type="checkbox"/> Deceased <input type="checkbox"/> Group Plan Members <input type="checkbox"/> Prospect	
Is your client vulnerable	<input type="text"/>	<input type="text"/>
Client Adviser	<input type="text" value="Selectapension, Admin"/>	

◀ Prev

For other values, the defaults can be accepted (the address details, for example, are not mandatory) until arriving at the following page:

New Client

Client "Bob, Blob" Has Been Created

The new individual client has been created. Here's the details:

Surname: Bob

First Name: Blob

The new client name should be displayed when returning to the client listing. At this stage, only basic personal information will have been entered. To enter more detailed information, that will be required by the Selectapension application, navigate to the client listing page and click on the small arrow on the left of the client name.

- ☐
- ☐
- ☐

Clicking this arrow then hovering over Key Information will display the following:

<input type="checkbox"/>	<input type="checkbox"/>	<u>Backwards, Eilene</u>	12865	7 J
<input type="checkbox"/>	<input type="checkbox"/>	Add Note to All	14947	
<input type="checkbox"/>	<input type="checkbox"/>	Add Task to All	12869	7 J
<input type="checkbox"/>	<input type="checkbox"/>	Add Thread to All	14494	7 J
<input type="checkbox"/>	<input type="checkbox"/>	Add Campaign to All	12871	7 J
<input type="checkbox"/>	<input type="checkbox"/>	Add Invoice to All	14897	24
<input type="checkbox"/>	<input type="checkbox"/>	Add Recurring Invoice to All	14944	
<input type="checkbox"/>	<input type="checkbox"/>	Email as Attached Clients	14942	
<input type="checkbox"/>	<input type="checkbox"/>	Show Summary	14919	
<input type="checkbox"/>	<input type="checkbox"/>	Download VCard		
<input type="checkbox"/>	<input type="checkbox"/>	Start Time Ticker		
<input type="checkbox"/>	<input type="checkbox"/>	Add...		
<input type="checkbox"/>	<input type="checkbox"/>	Email...		
<input type="checkbox"/>	<input type="checkbox"/>	Quick Merge		
<input type="checkbox"/>	<input type="checkbox"/>	Quick IPS Reports		
<input type="checkbox"/>	<input type="checkbox"/>	At a Glance		
<input type="checkbox"/>	<input type="checkbox"/>	Key Information		
<input type="checkbox"/>	<input type="checkbox"/>	Advice Process		
<input type="checkbox"/>	<input type="checkbox"/>	Financial and Protection		
<input type="checkbox"/>	<input type="checkbox"/>	Portfolios		
<input type="checkbox"/>	<input type="checkbox"/>	Open Integrations		
<input type="checkbox"/>	<input type="checkbox"/>	O&M		
<input type="checkbox"/>	<input type="checkbox"/>	Servicing and Administration		
<input type="checkbox"/>	<input type="checkbox"/>	Risk Profiling		
<input type="checkbox"/>	<input type="checkbox"/>	eApplications		
<input type="checkbox"/>	<input type="checkbox"/>	<u>Time, Timmy</u>	12863	1 J

Clicking on Main and then Edit button at the top right of the new page will allow further client details to be added:

Jones, Jenny (7 Jul 1984,)

Saves

Cancel

Photograph

Photo

Upload Image

Delete Image

Personal Details

Review Status

Entity Id

13269

Year&Id

202113269

Client reference/File number

Title

Mrs

Surname

Jones

Forename

Jenny

Middle Name

Jane

Maiden Name

Preferred Name

Initials

Salutation

Jenny

☐ Use master entity details

Gender

Male

Date of Birth

7/07/1984

(37 years old)

Proposed Retirement Age

Selected Retirement Date

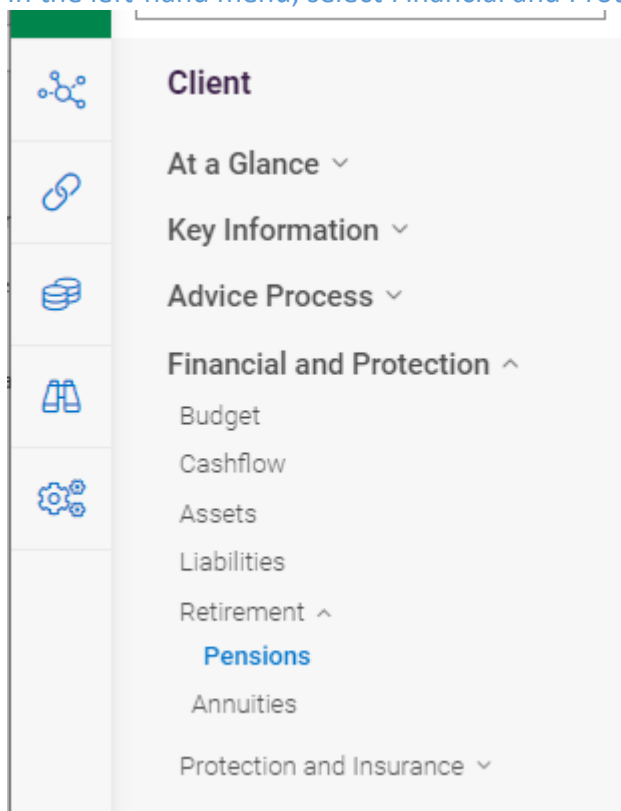
Marital Status

Marriage Date

Adding XPlan Client Pension Plans

Select a client from the client list.

In the left-hand menu, select Financial and Protection | Retirement | Pensions:



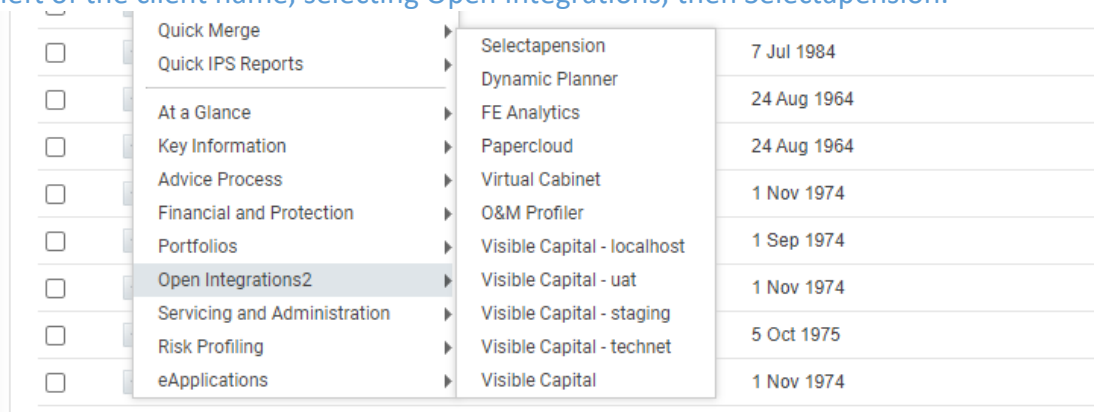
On the following page, click the Add button in the top right-hand corner. Pension details can then be completed and saved:

Type	Defined Benefits (Final Salary) ▼	
Pension Type	▼	
Contribution / Benefit Type	Defined Contribution ▼	
Fund / Policy Number		
Policy Status	Active ▼	
Description		
Fund Value		
Recommended Value		
Valuation Date ⓘ		31
Last Valuation ⓘ		
Crystallised Fund		
Uncrystallised Fund		
Value Last Updated ⓘ		31
Platform Wrap	No	
Fund Value In Plan Currency		

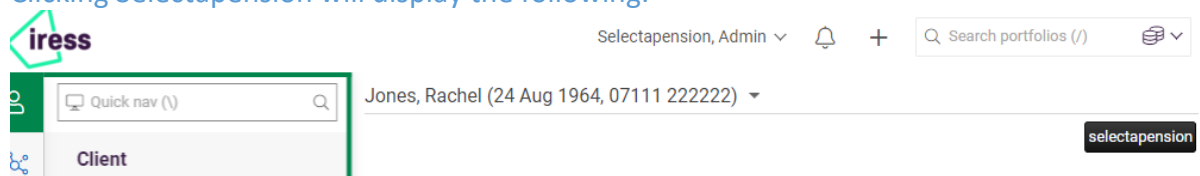
Details	Secondary	Funds	Beneficiaries	Contributions	Risk	Withdrawals	Tracking	Crystallisation	Comments	Claim Histor
Product Provider	▼									
Supplier	[Searchsuppliername] 🔍									
Panel Product Description										
Inception Date		31								
Scheme Retirement Age										
Normal Retirement Date		31 Normal Retirement Age								
Leaving Date/ Date Paid Up		31								
Scheme/Plan Owner										

Opening Imported Selectapension Clients from XPlan

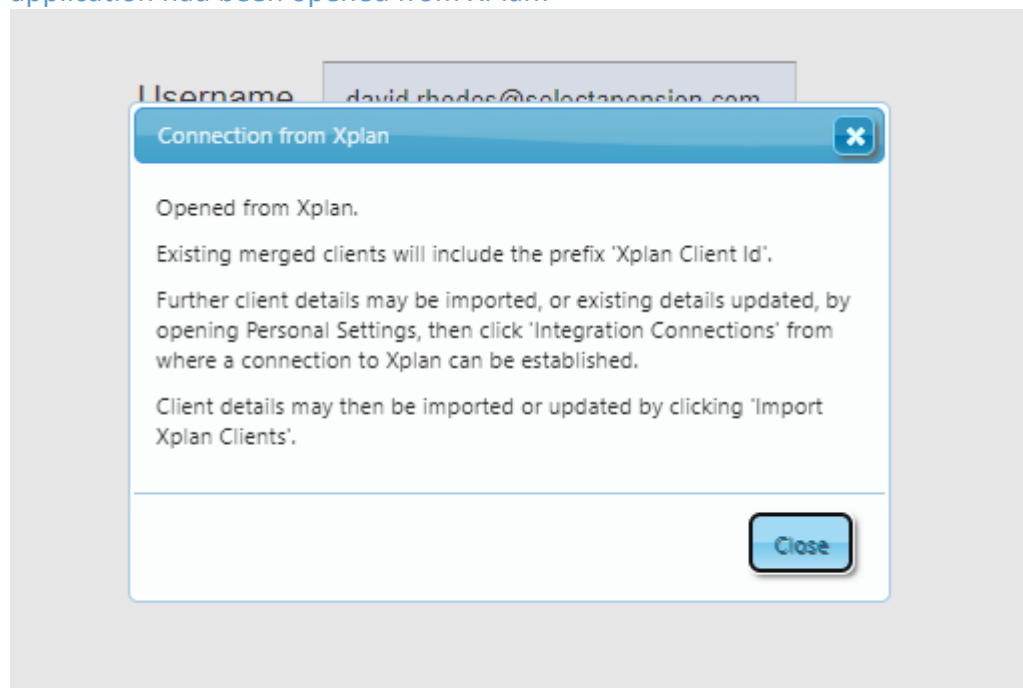
A button is available in the XPlan application allowing users to open the Selectapension application directly, linking directly to a client record if the client has been imported into Selectapension. This can be accessed by, in the client listing, clicking the small arrow to the left of the client name, selecting Open Integrations, then Selectapension.



Clicking Selectapension will display the following:



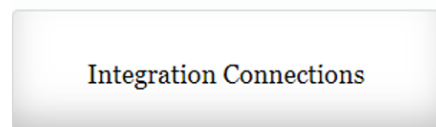
The Selectapension button URL is administered by Iress and points to a predefined URL. When clicked, Selectapension will open, displaying a message informing the user that the application had been opened from XPlan:



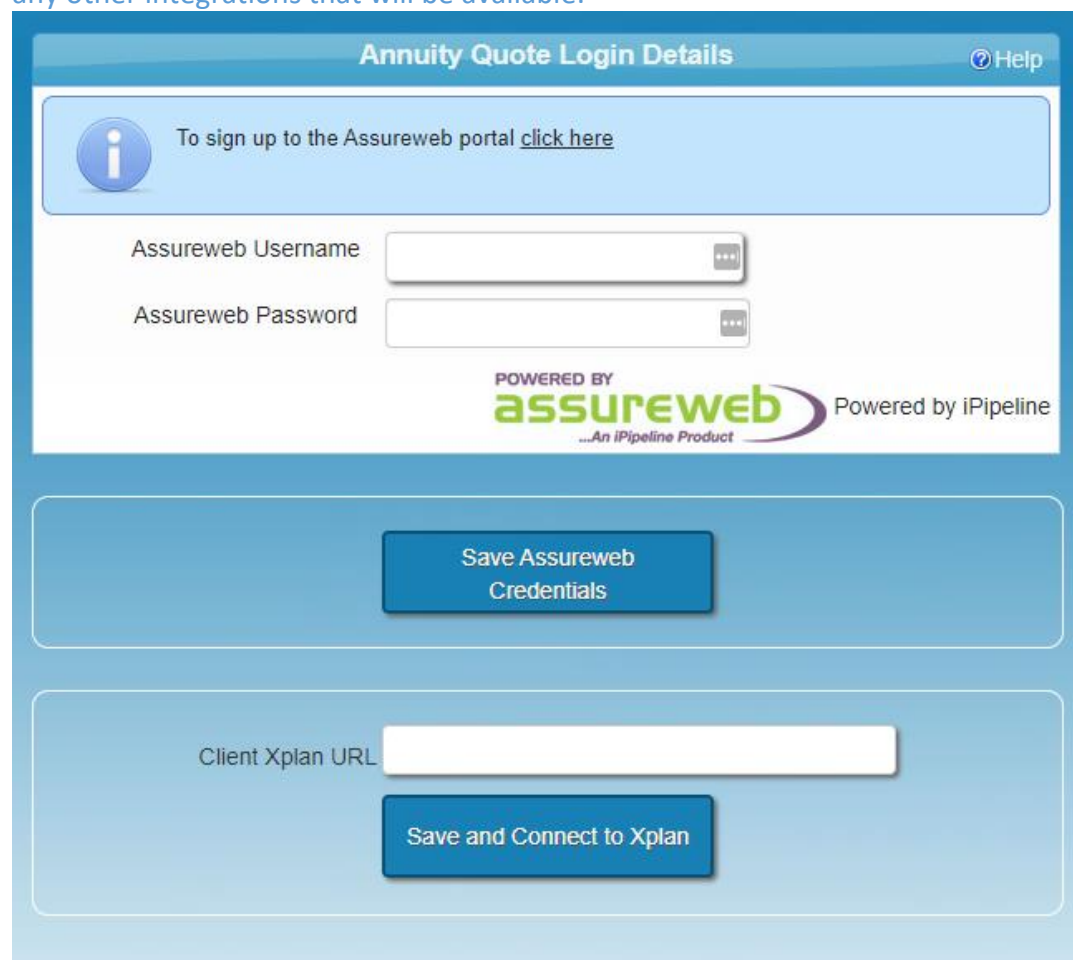
If the XPlan client record has been previously imported, the client record will open automatically or, if the user is not logged in to Selectapension, following a successful login.

Accessing XPlan Data from Selectapension

Click the Integration Connections button which is immediately below the Bulk Upload button.



When clicked, the following page will be displayed which allows connection to XPlan and any other integrations that will be available:

The form is titled "Annuity Quote Login Details" in a blue header bar with a "Help" icon on the right. Below the header is a light blue box containing an information icon and the text "To sign up to the Assureweb portal [click here](#)". The main form area has two input fields: "Assureweb Username" and "Assureweb Password", each with a small "x" icon to its right. Below these fields is a logo for "assureweb" with the text "POWERED BY" above it and "...An iPipeline Product" below it. To the right of the logo is the text "Powered by iPipeline". At the bottom of the form is a large blue button labeled "Save Assureweb Credentials". Below this is another section with a "Client Xplan URL" input field and a blue button labeled "Save and Connect to Xplan".

Clicking Connect to XPlan will redirect the user to the XPlan login page.

Following submission of credentials, the following should be displayed. Click Allow.

An application would like to connect to your XPLAN account

Allow selectapension TEST Access?

Allow

Deny

Once clicked, the user will be redirected back to the user area page where a previously hidden button allowing all XPlan clients to be viewed will be displayed:

Import Xplan Clients

Clicking on this button will open the following page:

Xplan Clients

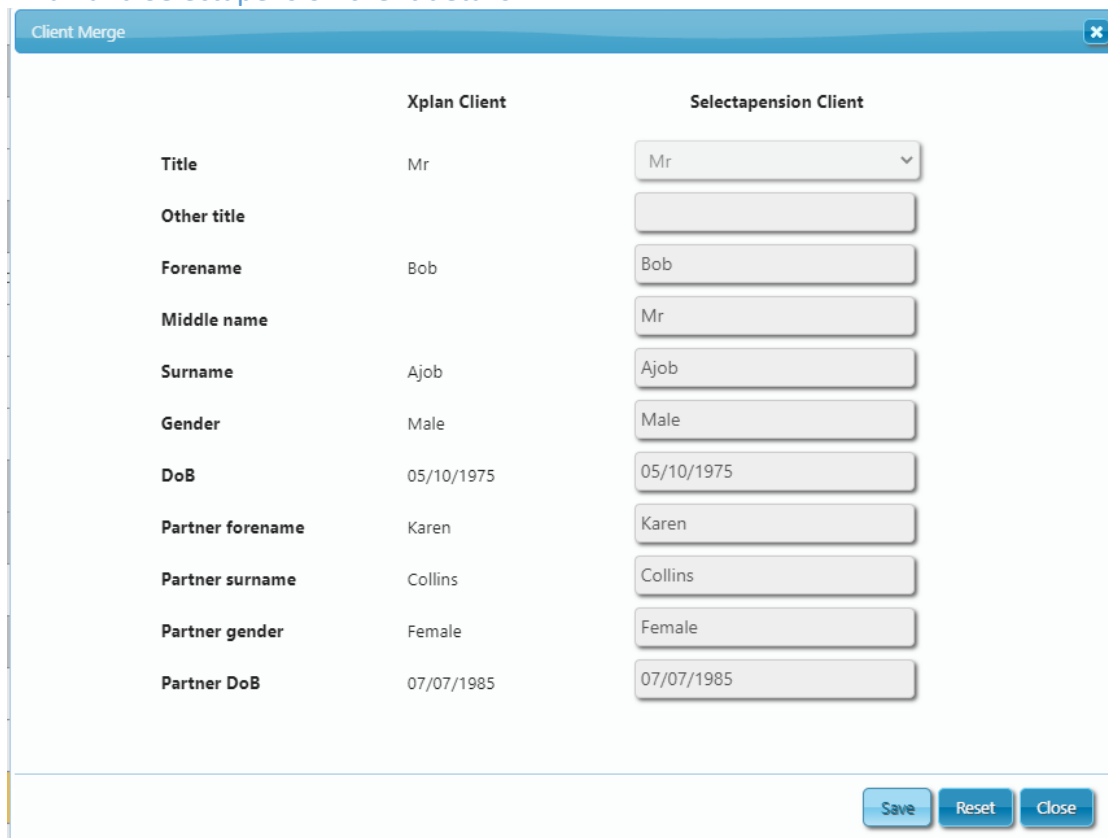
Xplan Client ID	Title	Middle Name	Surname	Gender	DoB	Select All	
10860	Bob		Ajob	Male	05/10/1975	<input type="checkbox"/>	Merge Client Details
10862	Karen		Collins	Female	07/07/1985	<input type="checkbox"/>	
12844	Dick		Dastardly	Male	07/07/1980	<input type="checkbox"/>	
12847	Davinia		Dastardly	Male	07/07/1982	<input type="checkbox"/>	Merge Client Details
12850	Spongebob		Squarepants	Male	05/10/1975	<input type="checkbox"/>	
12858	Bobby	Harry	Smith	Male	01/11/1974	<input type="checkbox"/>	
12861	Dan		Pan	Male	01/11/1974	<input type="checkbox"/>	
12863	Timmy	T	Time	Male	01/11/1974	<input type="checkbox"/>	
12865	Eilene		Backwards	Male	07/07/1982	<input type="checkbox"/>	Merge Client Details
12867	Patricia	Rose	Peabody	Female	01/09/1974	<input type="checkbox"/>	Merge Client Details
12869	Bob	The	Builder	Male	07/07/1982	<input type="checkbox"/>	
12871	Matilda	The	Builder	Male	07/07/1984	<input type="checkbox"/>	Merge Client Details
12873	Micky	M	Mouse	Male	24/08/1964	<input type="checkbox"/>	
13269	Jenny	Jane	Jones	Male	07/07/1984	<input type="checkbox"/>	
14494	Matilda	The	Builder	Male	07/07/1984	<input type="checkbox"/>	Merge Client Details

☐ Client previously imported from Xplan
☐ Not previously imported but forename, surname and date of birth match an existing client

Import Xplan Clients

All or a selection of XPlan clients may be imported by ticking the appropriate checkboxes and clicking Import XPlan Clients. The coloured row backgrounds indicate the status of the XPlan clients. A grey background indicates that the client has already been imported and exists in the Selectapension client data. However, to check that the details are up to date, the Merge Client Details button can be clicked. The yellow background indicates that, although the client has not yet been imported, a client with a matching forename, surname and date of birth exists. Again, the user has the option to merge client details.

Clicking Merge Client Details will open the following page that allows the user to compare XPlan and Selectapension client details:



The screenshot shows a 'Client Merge' window with a table comparing Xplan Client and Selectapension Client details. The Xplan Client details are on the left, and the Selectapension Client details are on the right. The Selectapension Client details are in input fields, some of which are pre-filled with the Xplan Client values. At the bottom right, there are 'Save', 'Reset', and 'Close' buttons.

	Xplan Client	Selectapension Client
Title	Mr	Mr
Other title		
Forename	Bob	Bob
Middle name		Mr
Surname	Ajob	Ajob
Gender	Male	Male
DoB	05/10/1975	05/10/1975
Partner forename	Karen	Karen
Partner surname	Collins	Collins
Partner gender	Female	Female
Partner DoB	07/07/1985	07/07/1985

To update the Selectapension client with XPlan details, simply drag the XPlan value into the Selectapension field and drop. Please note that there is no check that the two field names match, e.g. the XPlan client forename could be dragged into the Selectapension client surname. Also, the value cannot be dragged out of the Selectapension field. However, clicking Reset will return the client details to their original state. The changes will not be saved until the Save button is clicked.

As with IO, when opening clients pages, a number of XPlan related buttons are displayed:

Link client from Xplan

Update client from Xplan

Unlink client from Xplan

Create client

◀Back

View Stored Analyses

Create New Analysis

Clicking on Link client from XPlan, for example, will display a list of previously unmapped XPlan clients from which a selection may be made to populate the client details:

Map Integration Client

Show entries

Search:

Ref	Surname	Forename	DOB	Gender
12861	Pan	Dan	01/11/1974	Male
12863	Time	Timmy	01/11/1974	Male
12865	Backwards	Eilene	07/07/1982	Male
12867	Peabody	Patricia	01/09/1974	Female
12869	Builder	Bob	07/07/1982	Male
12871	Builder	Matilda	07/07/1984	Male
12873	Mouse	Micky	24/08/1964	Male
13269	Jones	Jenny	07/07/1984	Male
14494	Builder	Matilda	07/07/1984	Male

Showing 1 to 9 of 9 entries

Previous

1

Next

When creating/editing cases, the appropriate buttons should be displayed allowing selection of XPlan client pension plans etc:

<< Back
Link plan from Xplan
Next >>

Map Integration Plan
✕

Ref	Name	Plan Type	Transfer Value	Valuation Date
1962	(AJ Bell)	Defined Benefits (Final Salary)	75,000.00	03-09-2021

Showing 1 to 1 of 1 entries

Previous

1

Next

The option to upload reports to the XPlan system should now be available. Instructions for checking that the document has been successfully uploaded are detailed in the Accessing the Xplan system section:

Print Options	
Select All	<input checked="" type="checkbox"/>
Report	<input checked="" type="checkbox"/>
Report Date Label	Report Print Date ▼
Upload Report to Xplan	<input checked="" type="checkbox"/>