INTEGRATION USER GUIDE

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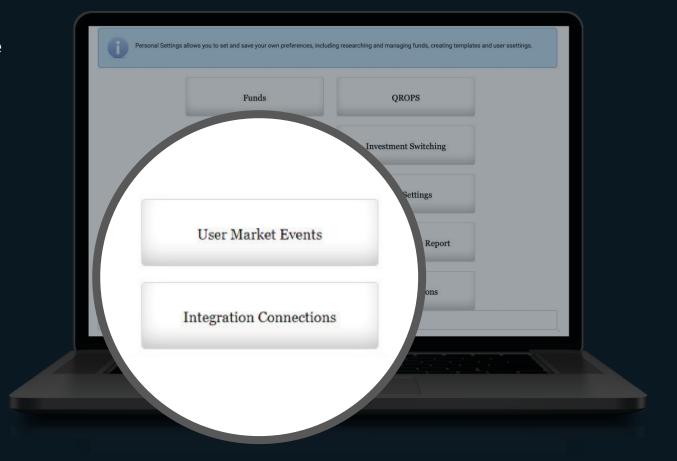
You are able to create the integration between your Selectapension licence and the **XPLAN back office** via the [**Personal Settings**] area in Selectapension.

Navigate to [User Settings] where you will see a list of options.

Bespoke Plans Investment Switching Defined Benefit Transfer Templates Users Settings With Profit Reports Company Profile Report	Funds	QROPS
	Bespoke Plans	Investment Switching
With Profit Reports Company Profile Report	Defined Benefit Transfer Templates	Users Settings
	With Profit Reports	Company Profile Report
User Market Events User Tax Regions	User Market Events	User Tax Regions

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Click the [Integration Connections] button which is immediately below the [User Market Event] button.



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

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Clicking [Connect to Xplan] will redirect you to the Xplan login page, The same credentials are entered which you use to log into XPLAN directly.

To sign up to the Assureweb portal click here Assureweb Username david rhodes@selectapension.com Assureweb Password Image: Comment of the Assureweb Password	To alon up to the Ass	aurawah partal aliak bara	
Assureweb Password		Sureweb portal <u>Click Here</u>	
POWERED BY An IPipeline Product Powered by iPipeline	Assureweb Username	david.rhodes@selectapension.com	
An Pipeline Product Powered by iPipeline	Assureweb Password		
Connect to Xplan		Instanting in the	
		assureweb) Po	wered by iPipeline
		An iPipeline Product	wered by iPipeline



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

An application would like to connect to your XPLAN account
Allow Selectapension Access?
Allow Deny

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Once clicked, you 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]

Integration Connections	Import Xplan Clients



Clicking on this button will open the following page:

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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 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 Seletapension client with a matching forename, surname and date of birth exists. Again, you have the option to merge client details.

Filter by Fo		client forename	_	Sumame:	-		Search	Gients	per page: 10	~		
Client Ref	Forename	Middle Name	Surname	Gender	DoB	Select All			Client pre	viously imported fr	om Xplan	
298	Matt		Murdoch	Male	07/08/1968		Merge Client D	Details		usly imported but		me
377	Sarah		Murdoch	Female	07/08/1969	0			and date	of birth match an e	xisting client	
102349	Andrew		Taylor	Male	07/02/1954							
102385	Diet		Pepper	Male								
102436	Anne		Burns	Female								
102464	Smith		John	Male			Merge Client D	Details				
102473	s		s	Female								
102512	Andrew		Buttermilk	Male	12/01/1990							
102554	Apple		Smith	Female	17/08/1989							
102982	Aaron		Carlton		02/01/1980							
	<i>.</i>		21 22	1-10 of 24 23 24 25 plan Clien	5 Next > L	ast >>						

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Clicking [Merge Client Details] will open the following page that allows you to compare XPLAN and Selectapension client details:

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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 Setectapension 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.

Title Mr Other title Mr Other title Bob Forename Bob Middle name Mr Surname Ajob Gender Male DoB Ody10/1975 Partner forename Karen
Forename Bob Middle name Mr Surname Ajob Gender Male DoB 05/10/1975 Partner forename Karen
Forename Bob Middle name Mr Surname Ajob Gender Male DoB 05/10/1975 Partner forename Karen
Surname Ajob Gender Male Male DoB 05/10/1975 05/10/1975 Partner forename Karen Karen
Gender Male DoB 05/10/1975 Partner forename Karen
DoB 05/10/1975 05/10/1975 Partner forename Karen Karen
Partner forename Karen Karen
Partner surname Collins Collins
Partner gender Female Female
Partner Do8 07/07/1985 07/07/1985

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- 10 When opening client pages, a number of XPLAN related buttons are displayed:
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- 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:

Link client from Xplan	Update client from Xplan	Unlink client from Xplan	Create client
Hlack	Ve	w Stored Analyses	Croate New Analysis

ihow		entries	Search:			
Ref 🔺	Sumame	Forename	© DOB	o Gender o		
2861	Pan	Dan	01/11/1974	Male		
12863	Time	Timmy	01/11/1974	Male		
12865	Backwards	Eilene	07/07/1982	Male		
12067	Peabody	Patricia	01/09/19/4	i emale		
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	Duilder	Matilda	07/07/1984	Male		



When creating / editing cases the appropriate buttons will be displayed allowing selection of XPLAN client pension plans etc.:

<< Back		Link plan from Xplan						
Map Integration	Plan			l				
Ref -	Name 0	Plan Type	0 Transfer Value 0	Valuation Date 0				
1962	(AJ Boll)	Defined Benefits (Final Salary)	75,000.00	03-00-2021				
				Previous 1 Next				

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The option to upload reports to the XPLAN system will now be available.

Print Options				
Select All				
Report				
Report Date Label	Report Print Date 👻			
Upload Report to Xplan				







For further support please contact:

T: 01892 669495 | E: support@selectapension.com