



# XPLAN

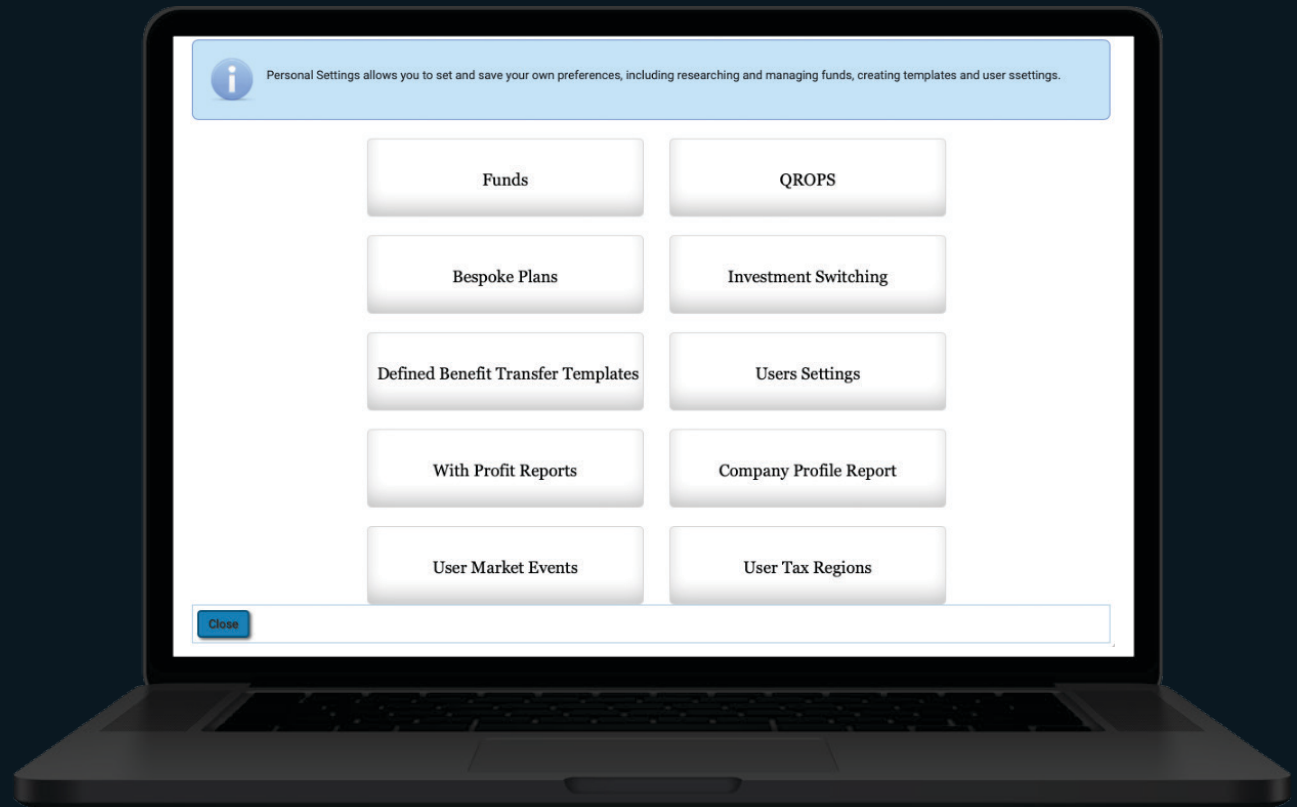
INTEGRATION USER GUIDE



# Accessing Xplan data from Selectapension

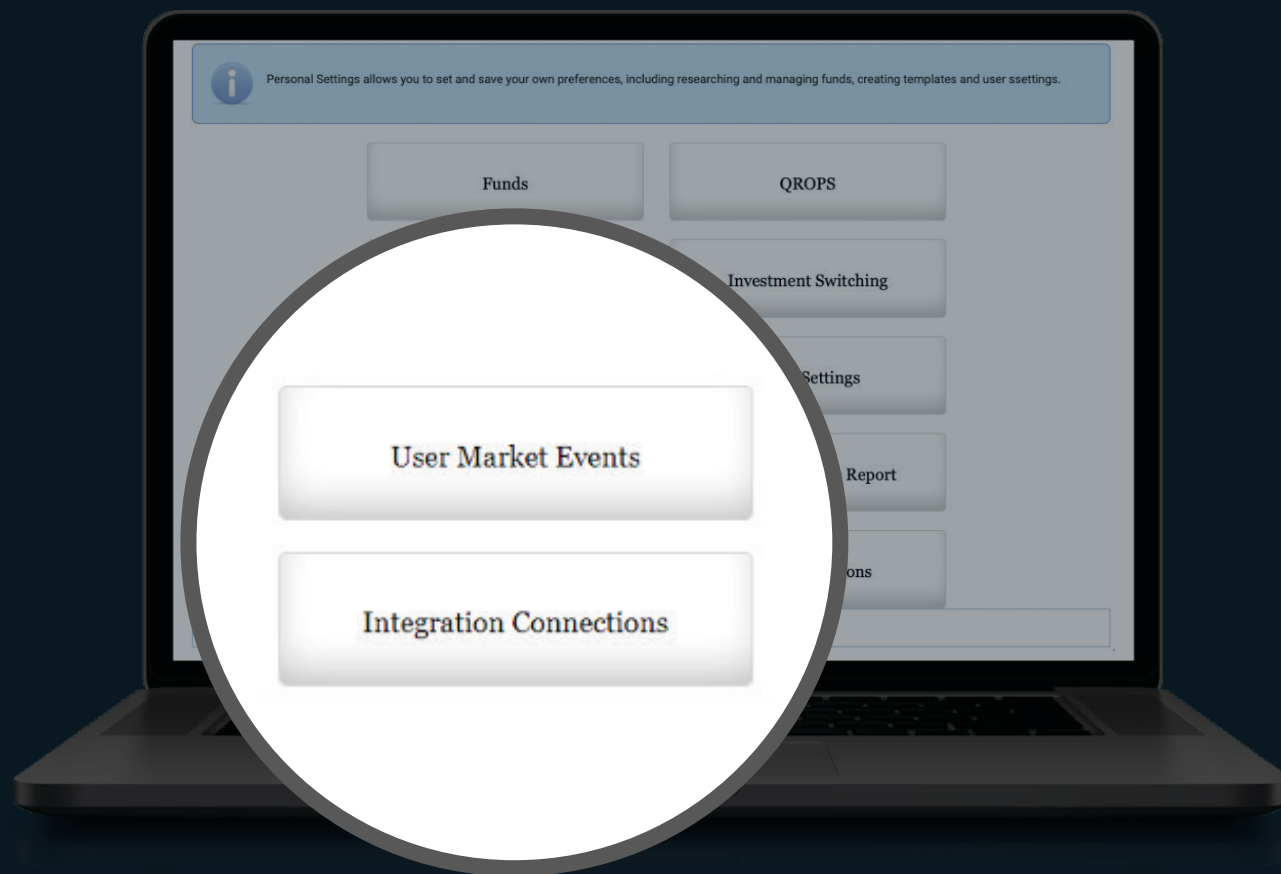
You are able to create the integration between your Selectapension licence and the **XPLAN back office** via the **[ Personal Settings ]** area in Selectapension.

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



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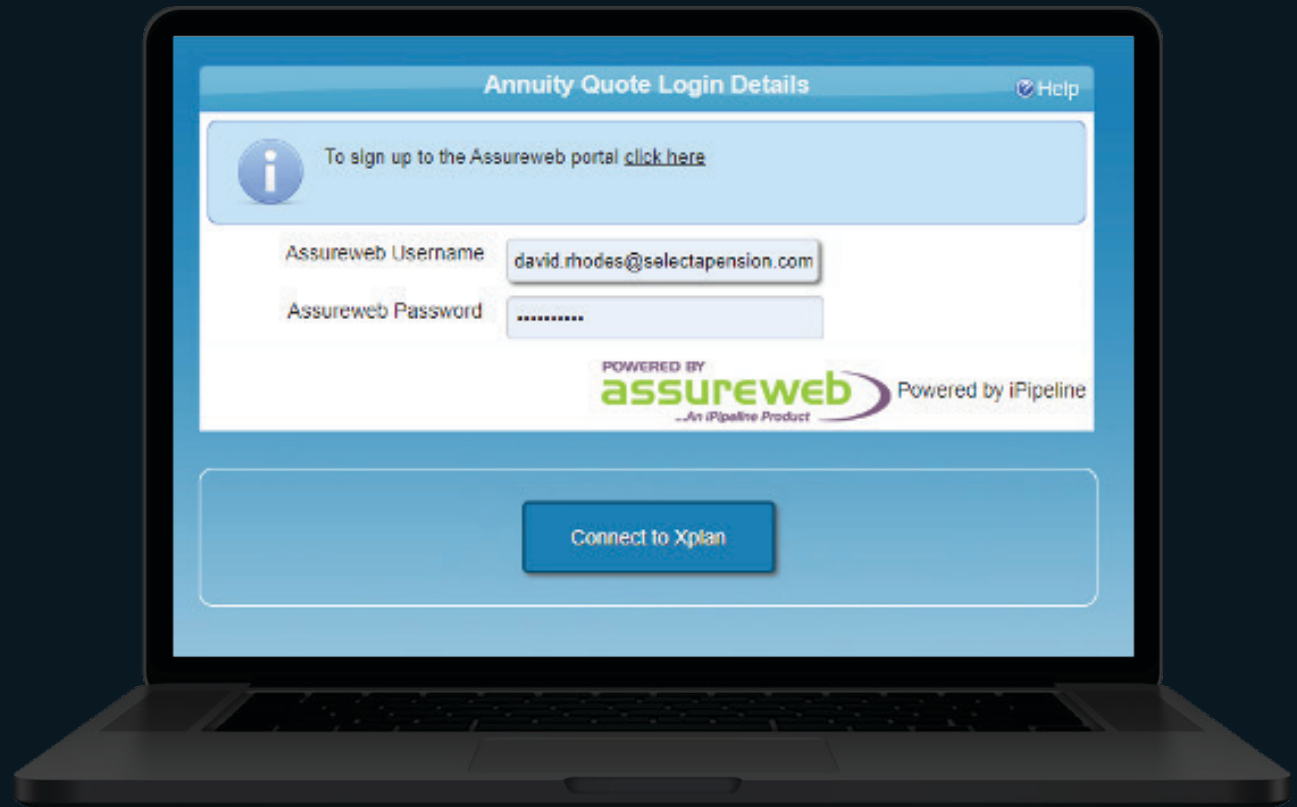
- 1 Click the [ **Integration Connections** ] button which is immediately below the [ **User Market Event** ] button.



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

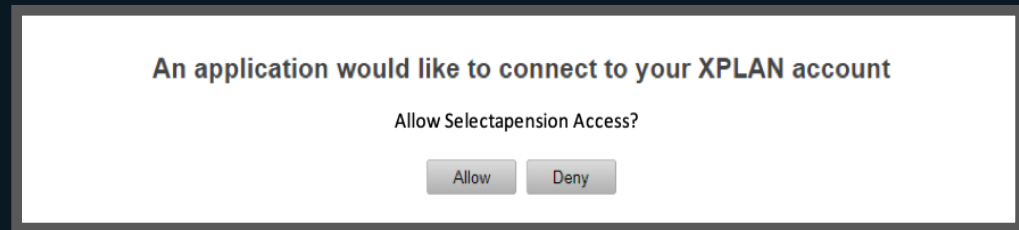
3 Clicking [ **Connect to Xplan** ] will redirect you to the Xplan login page, The same credentials are entered which you use to log into XPLAN directly.





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



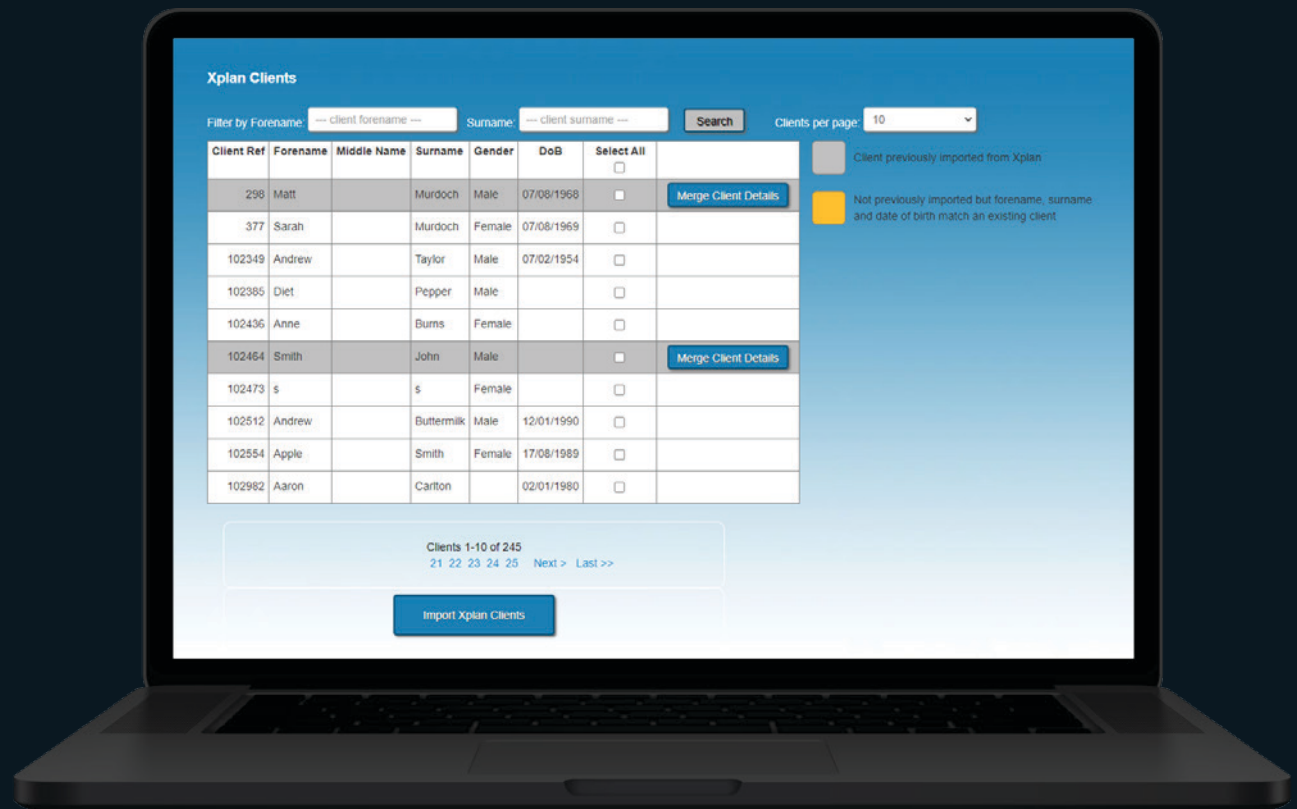
**5** Once clicked, you will be redirected back to the user area page where a previously hidden button allowing all XPLAN clients to be viewed will be displayed **[ Import XPLAN Clients ]**



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6 Clicking on this button will open the following page:

7 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.

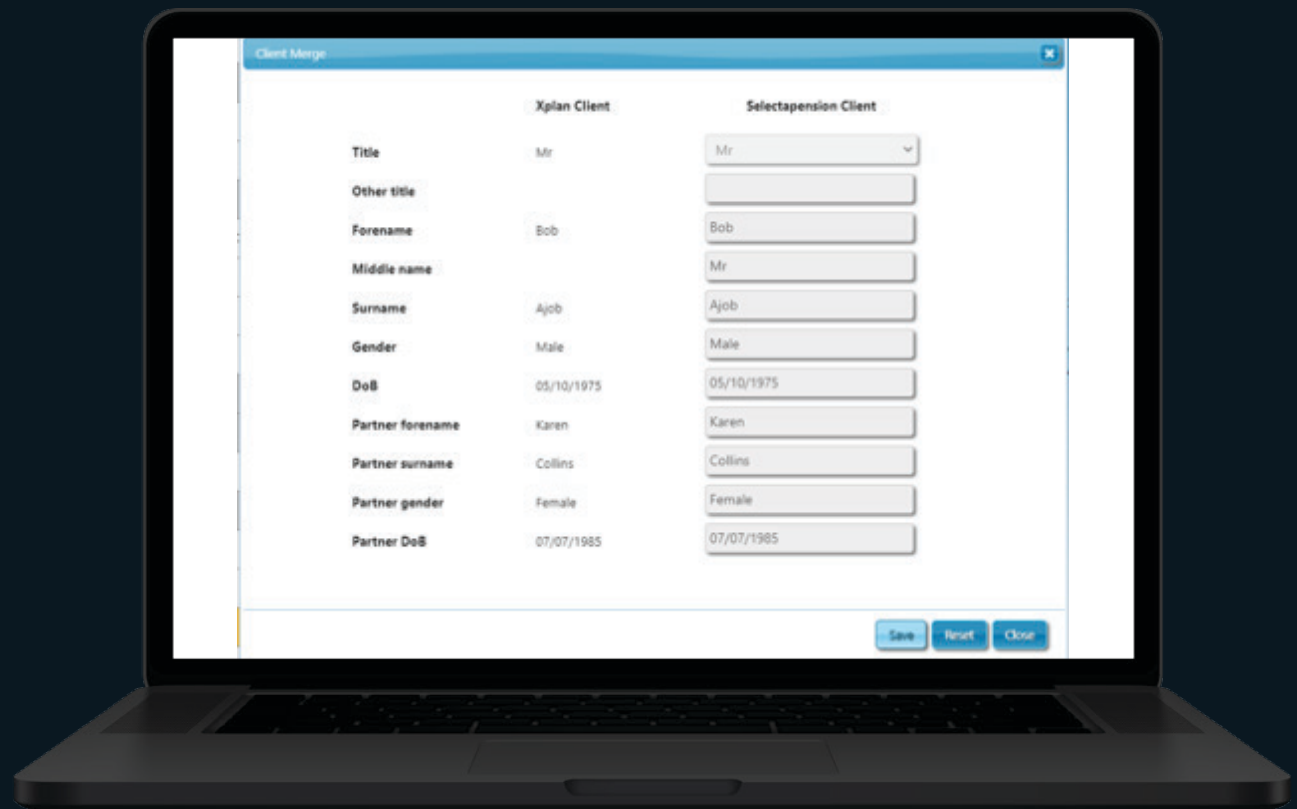




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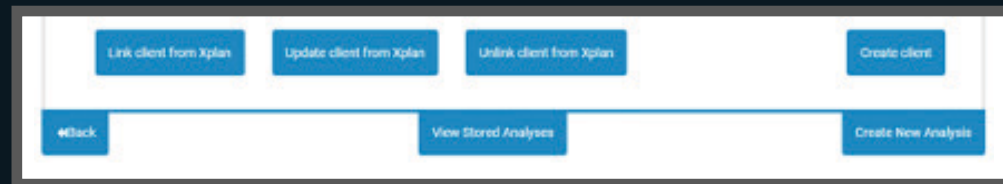
8 Clicking **[ Merge Client Details ]** will open the following page that allows you to compare XPLAN and Selectapension client details:

9 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.

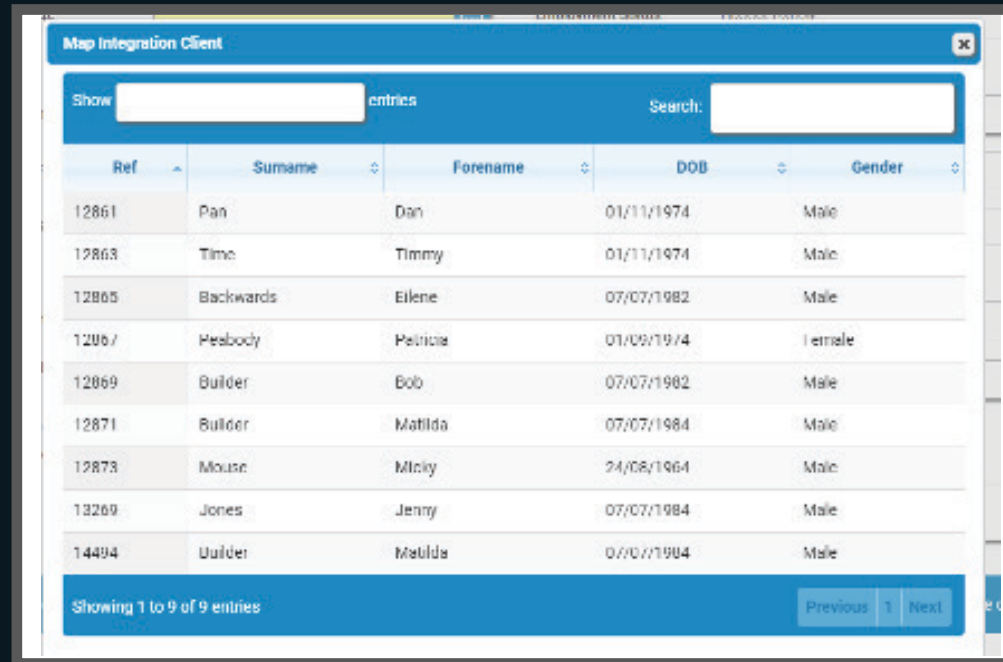


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10 When opening client pages, a number of XPLAN related buttons are displayed:



11 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:



A screenshot of a 'Map Integration Client' dialog box. It has a search bar and a table of client entries. The table has columns for Ref, Surname, Forename, DOB, and Gender. There are 9 entries listed.

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	Peelbody	Patricia	01/09/1974	Female
12869	Builder	Bob	07/07/1982	Male
12871	Builder	Matilda	07/07/1984	Male
12873	Mouse	Mindy	24/08/1964	Male
13269	Jones	Jenny	07/07/1984	Male
14494	Builder	Matilda	07/07/1984	Male

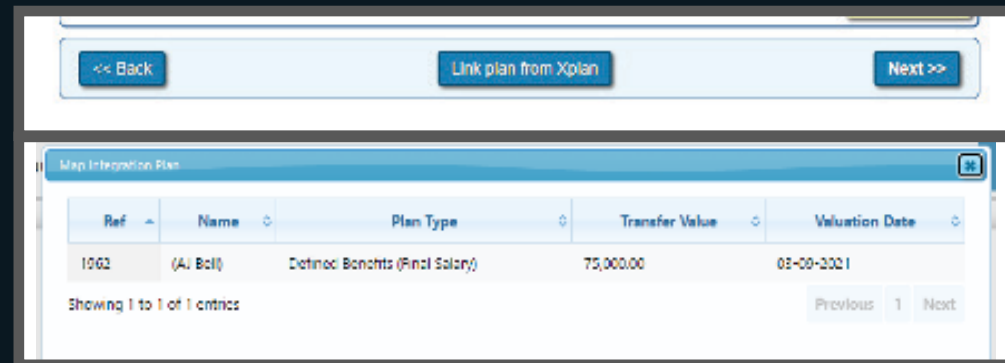
Showing 1 to 9 of 9 entries



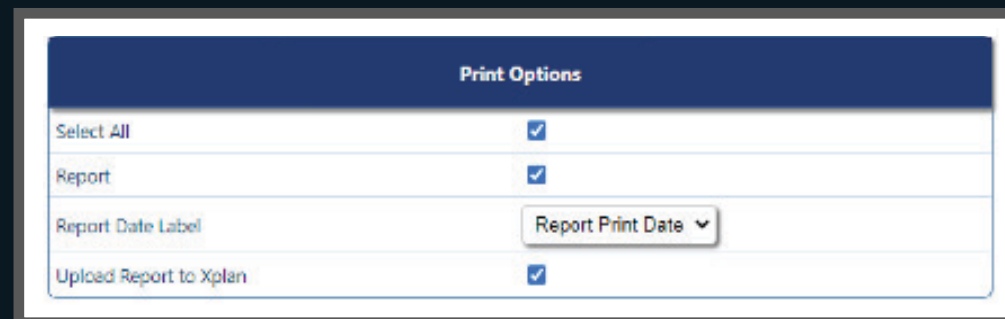


# Accessing Xplan data from Selectapension

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



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





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For further support please contact:

T: 01892 669495 | E: [support@selectapension.com](mailto:support@selectapension.com)