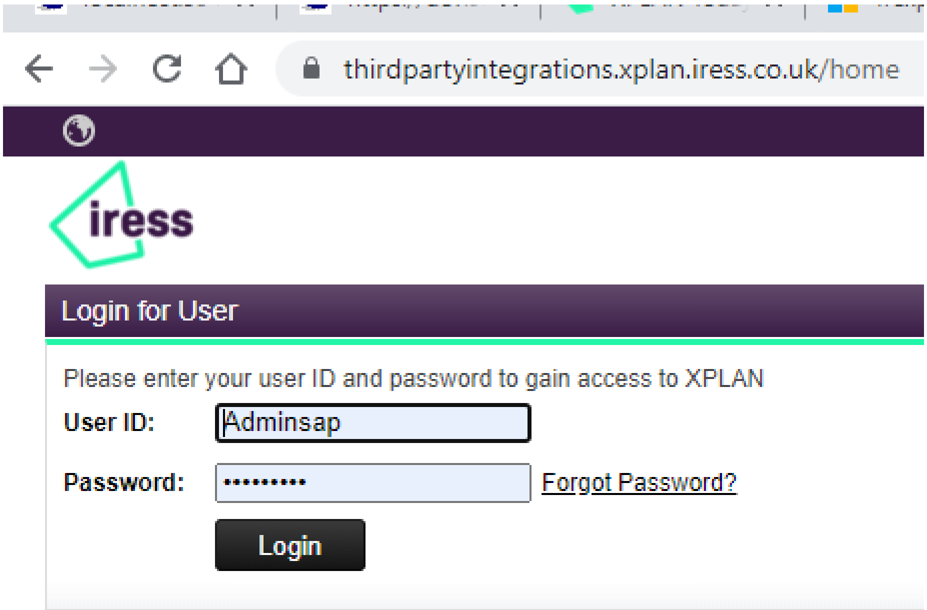
XPlan Integration

Quick Guide

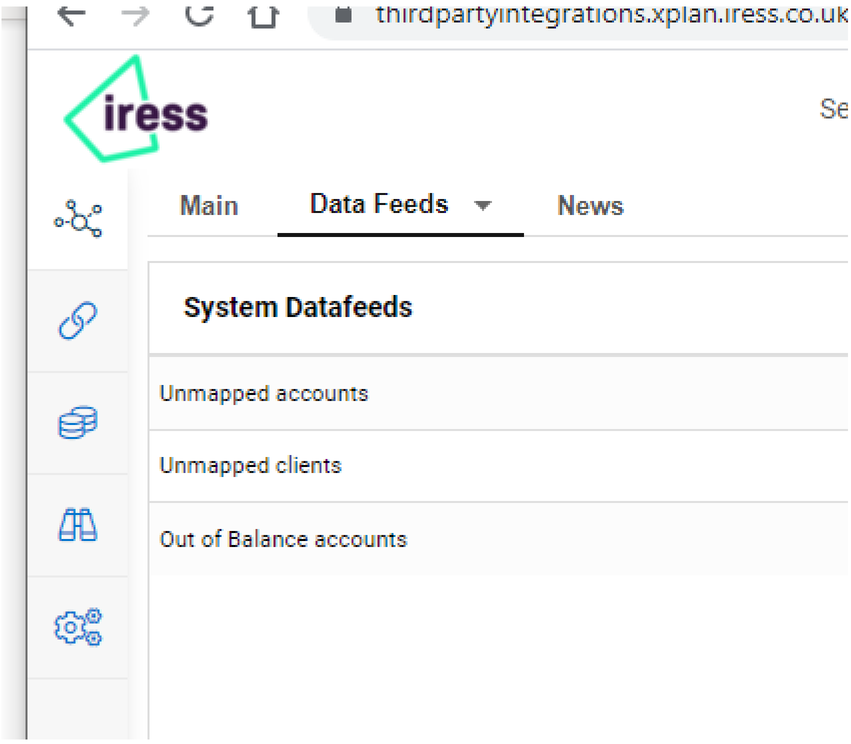
Contents

Accessing the XPlan system to create clients and plans

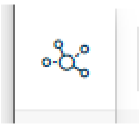
Log in to the XPlan system at https://thirdpartyintegrations.xplan.iress.co.uk/



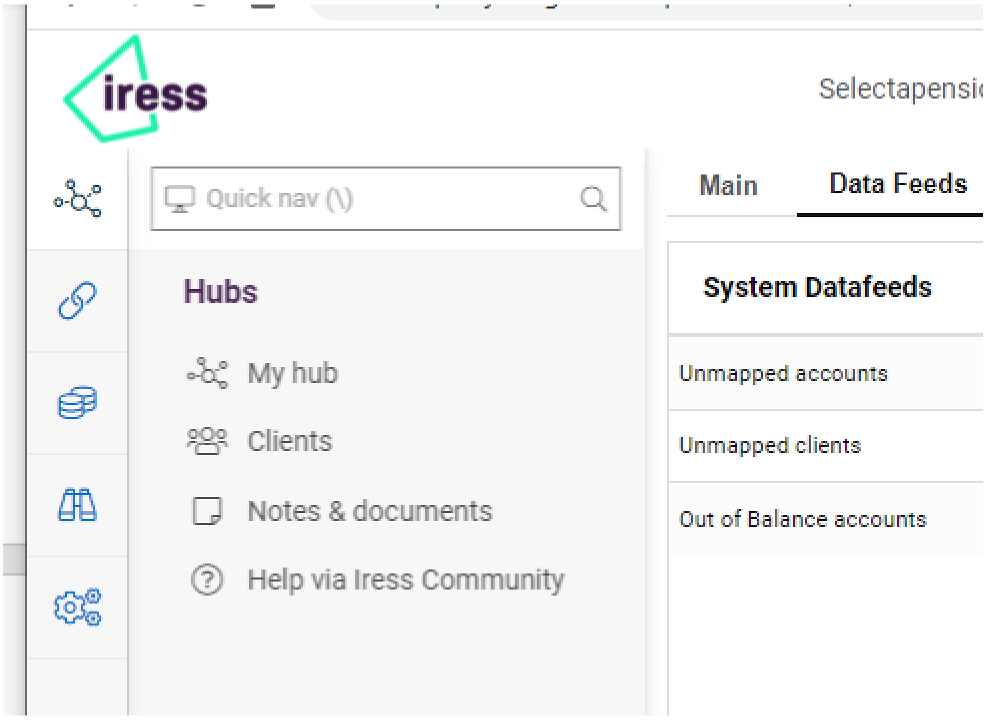
Client details can be accessed from the following screen:



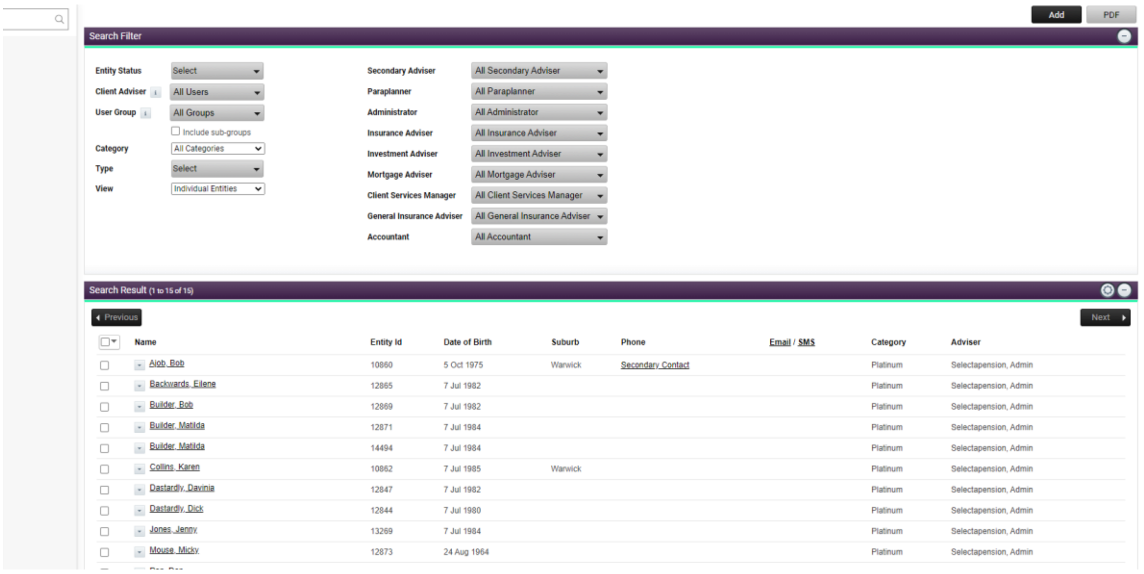
Click the hubs icon:



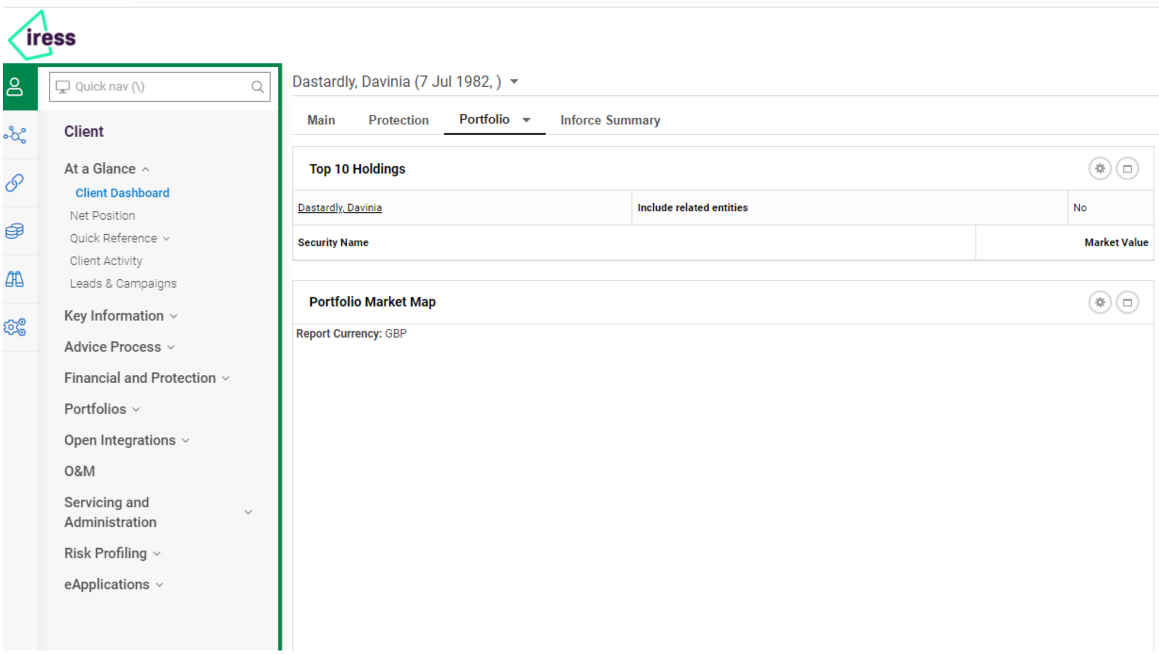
The following should be displayed:



Click on Clients to display the following:

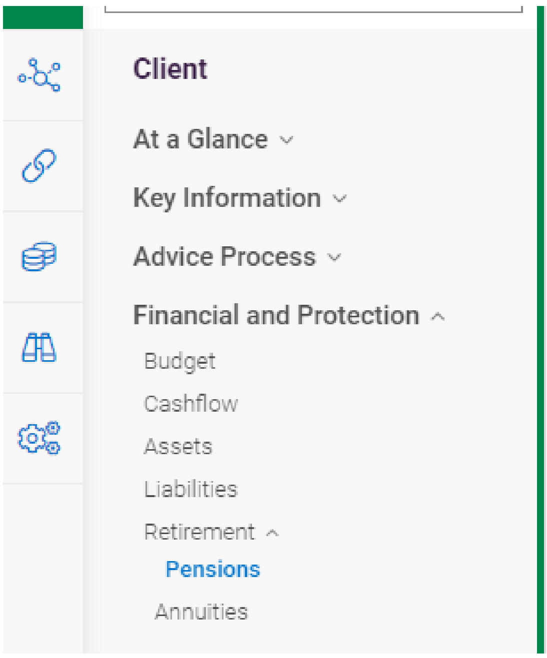


Click on a client name to display the following:

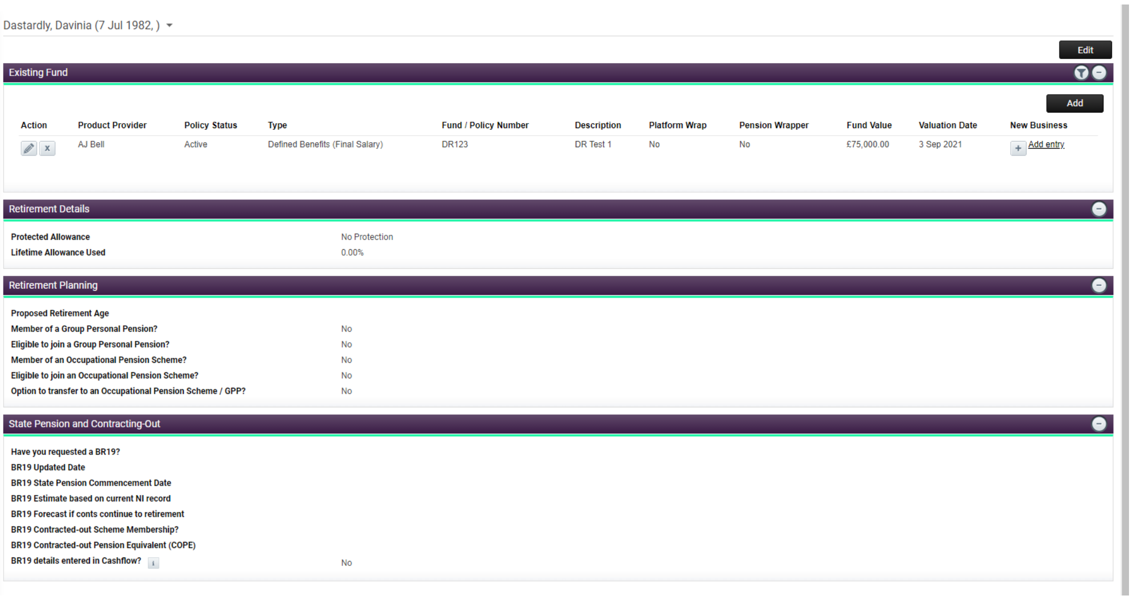


From this page, new plans can be added. For example, to add a new pension plan, in the left-hand column click

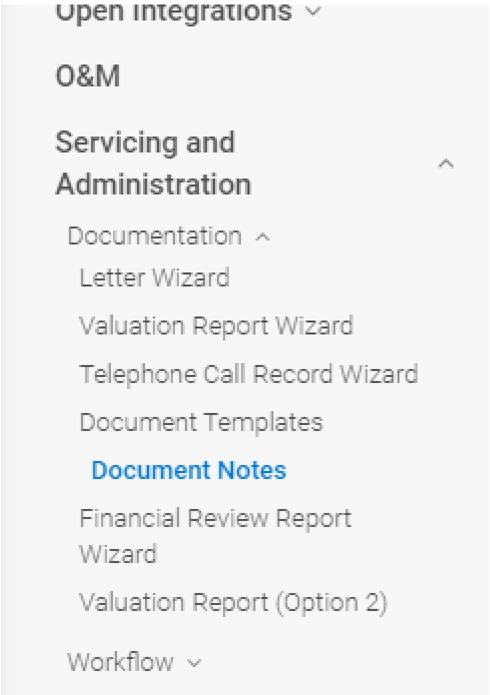
- Financial and Protection
- Retirement
- Pensions



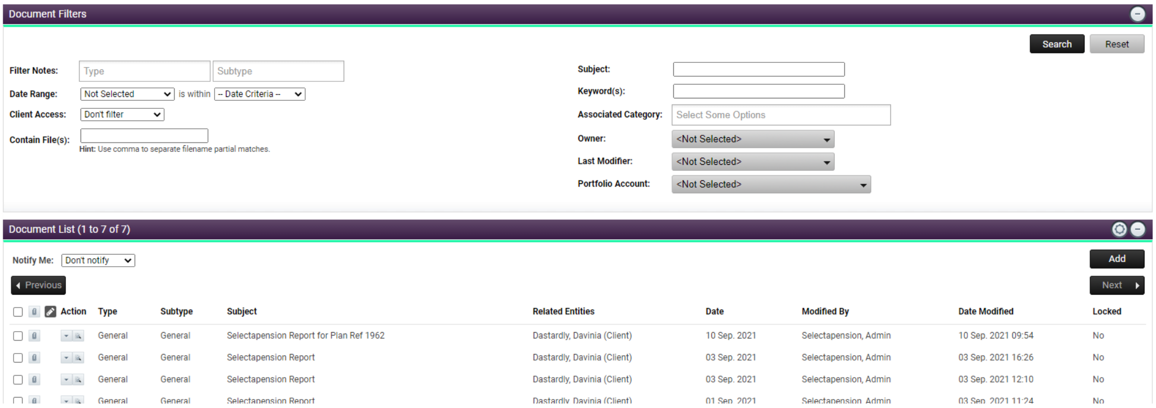
The following should be displayed allowing the editing of an existing plan or the addition of a new one:



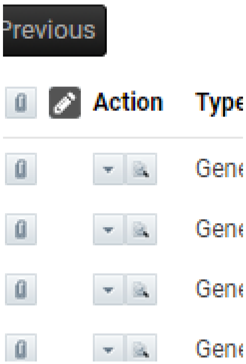
When testing the integration functionality, to check for uploaded documents, click the Servicing and Administration | Documentation | Document Notes link in the left-hand column:



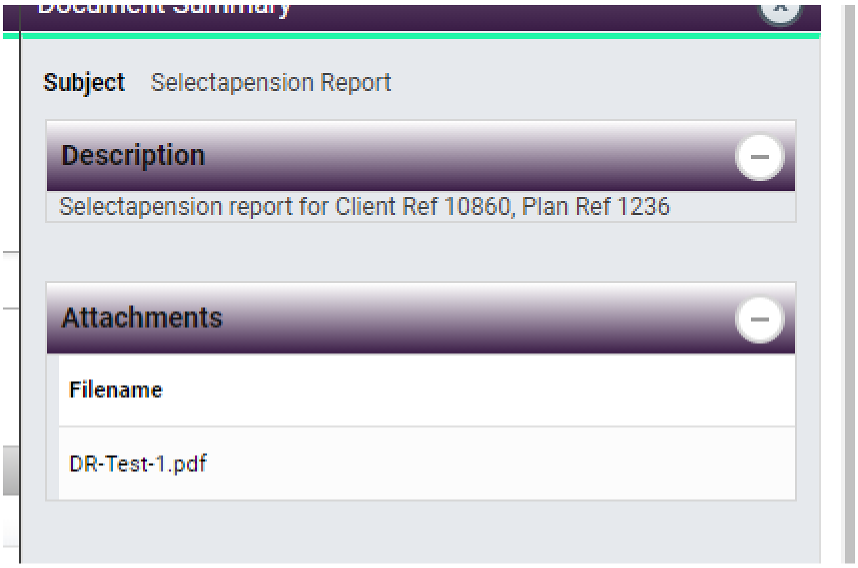
The following should then be displayed:



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

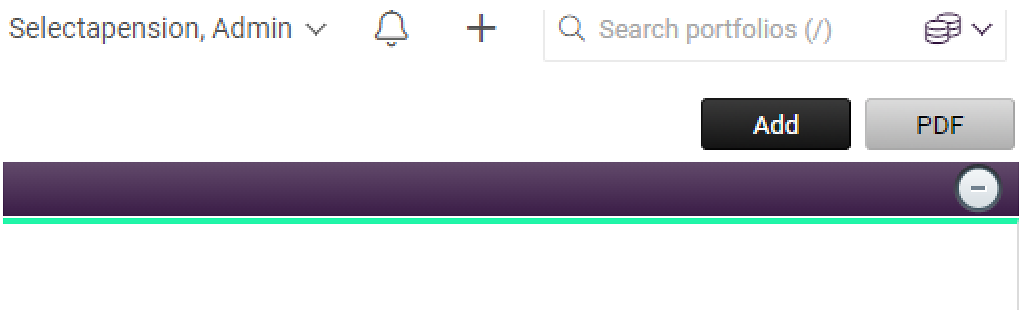


The following should then be displayed from where the document can be viewed by clicking on their file name:

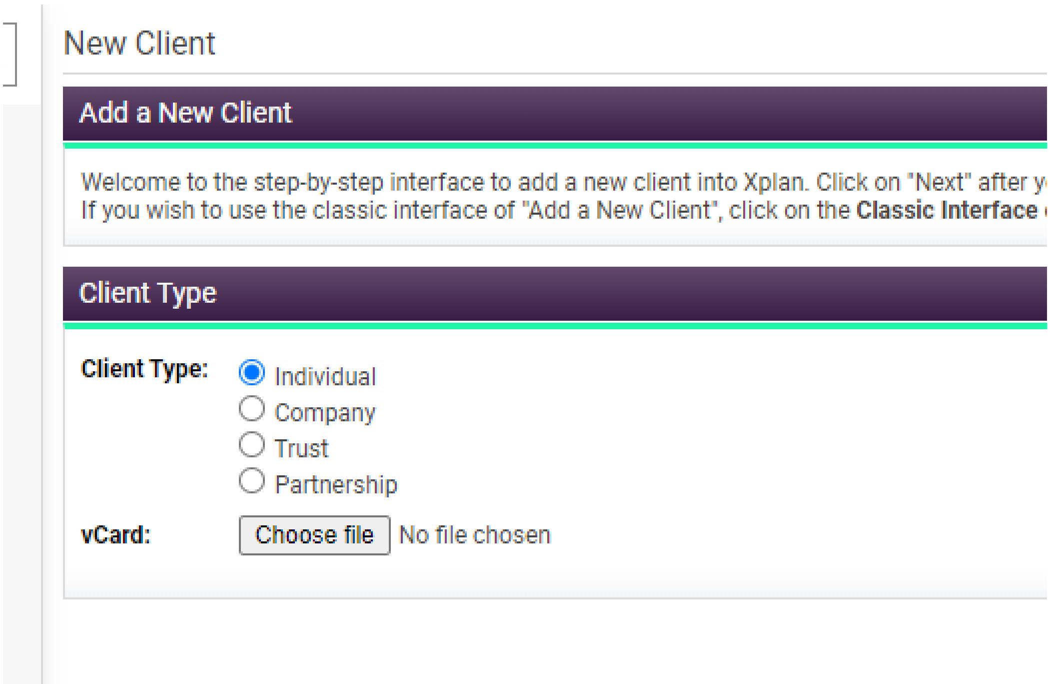


Adding New Clients to Xplan

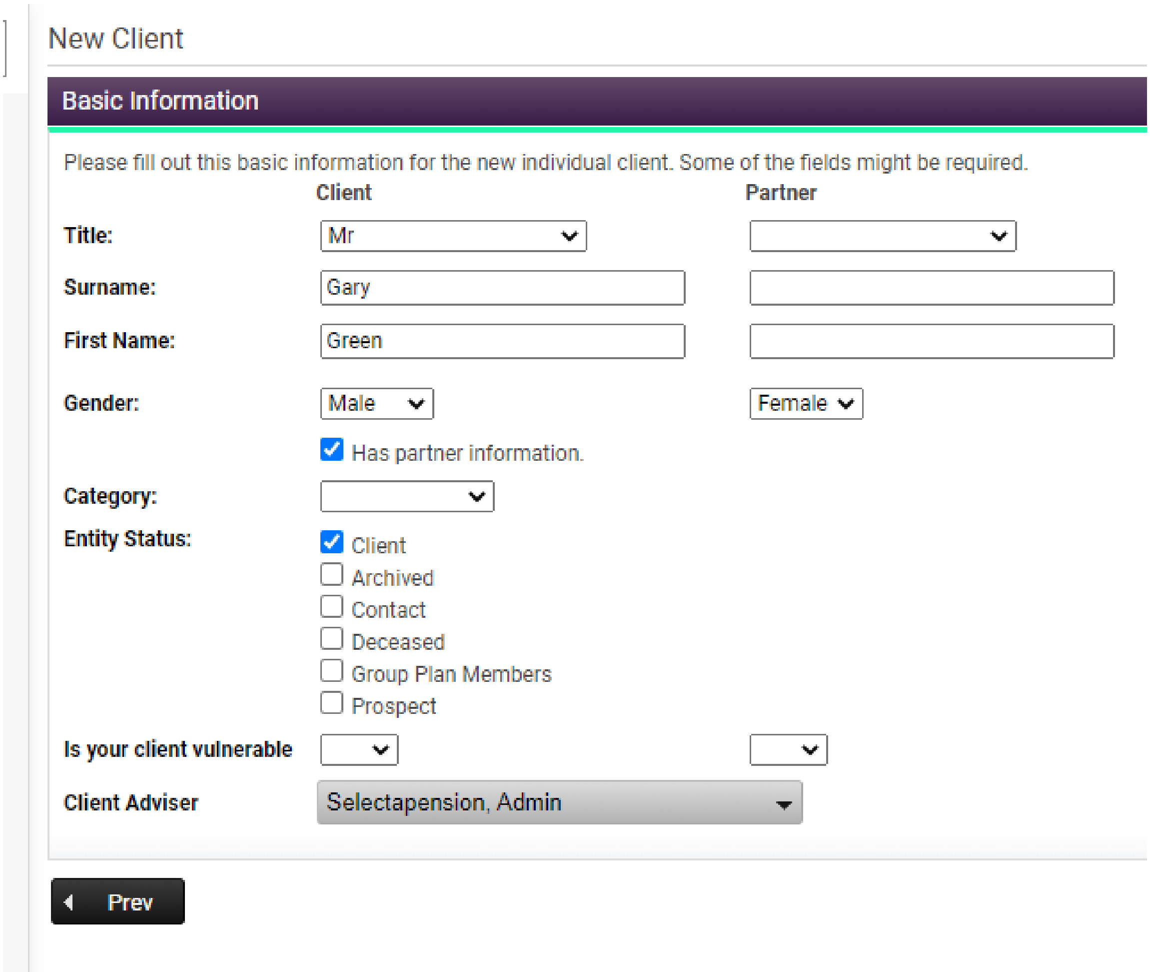
Click the Add Button at the top right of the client listing page:



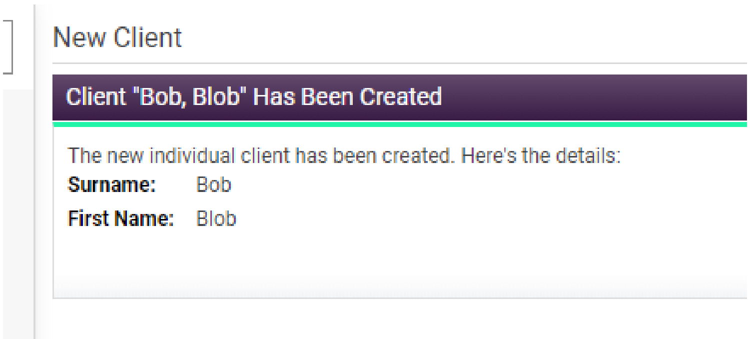
The following will then be displayed:



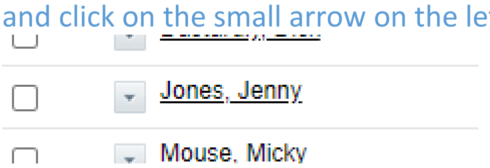
For test purposes, only the fields that are mandatory in the Selectapension application need to be completed. If the partner details are required, tick Has partner information, which will allow details to be entered.



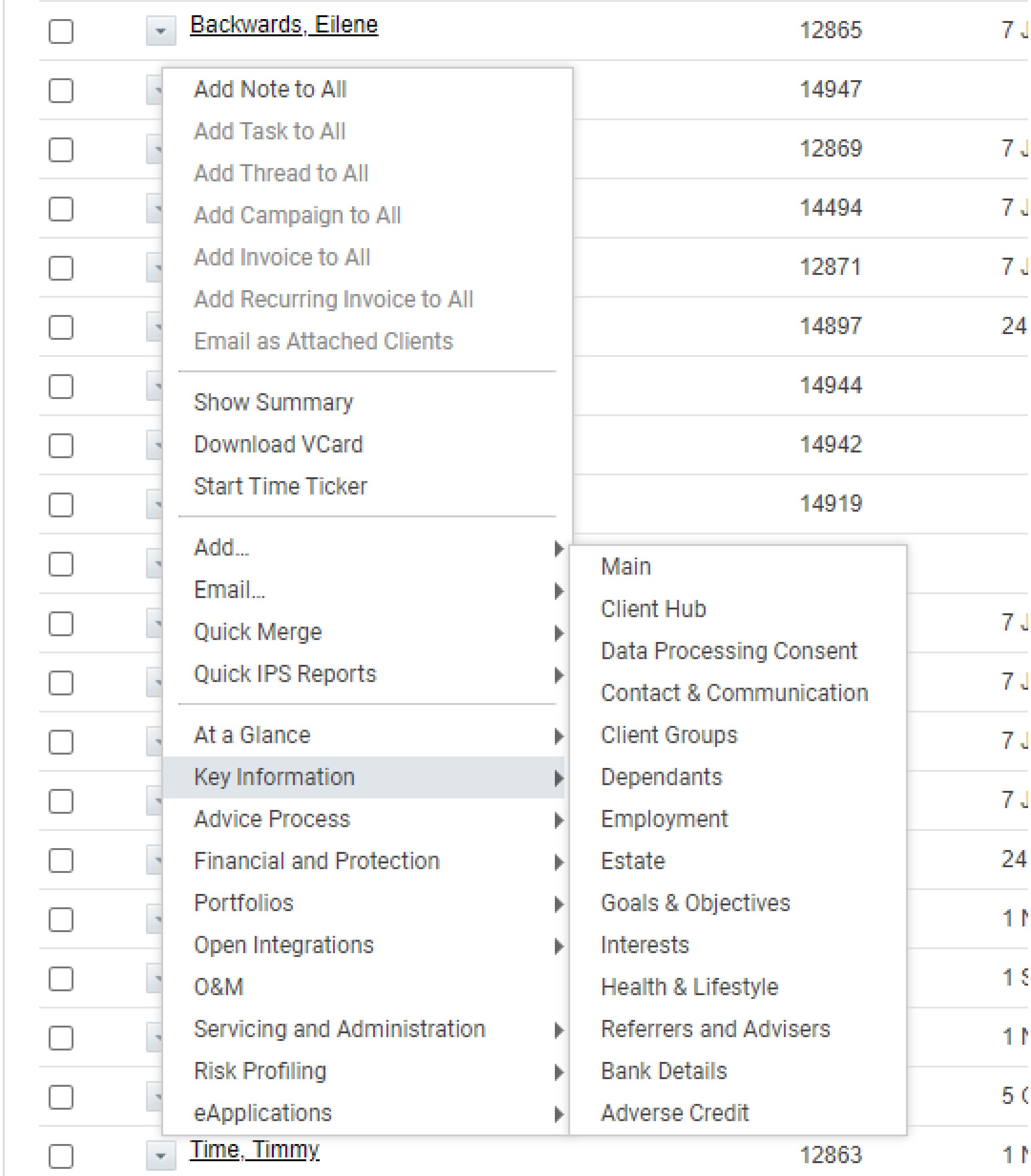
For other values, the defaults can be accepted (the address details, for example, are not mandatory) until arriving at the following page:



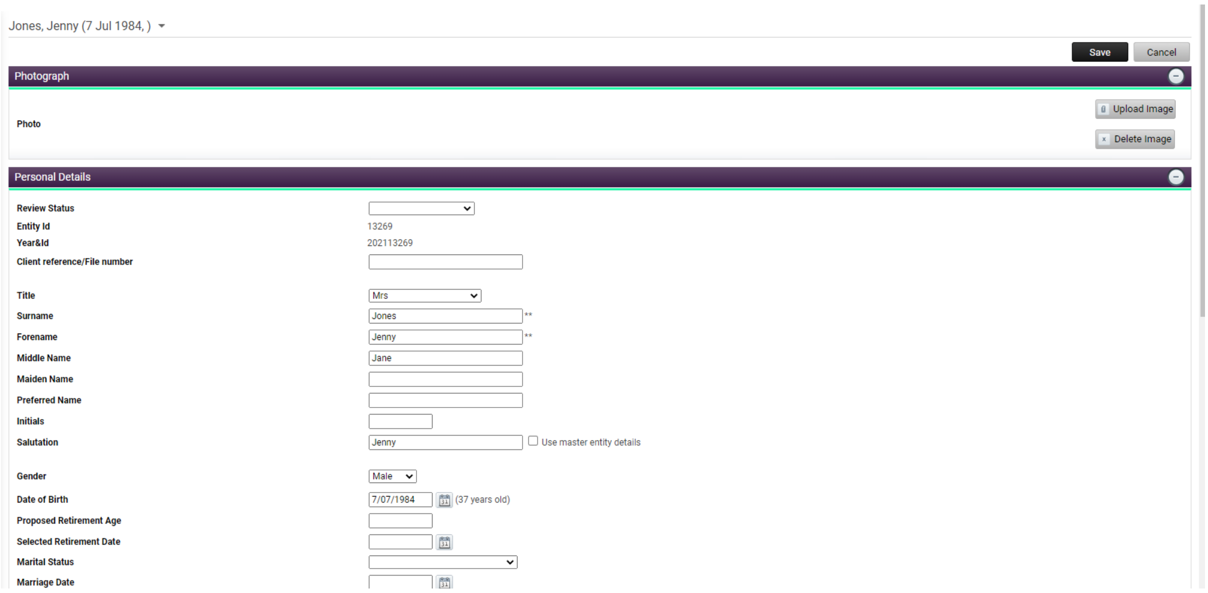
The new client name should be displayed when returning to the client listing. At this stage, only basic personal information will have been entered. To enter more detailed information, that will be required by the Selectapension application, navigate to the client listing page and click on the small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



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

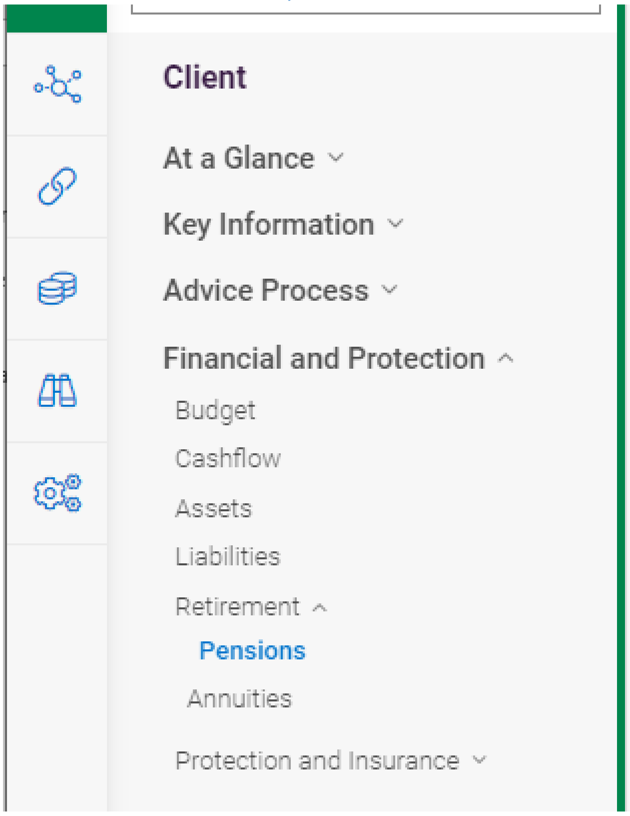


Clicking on Main and then Edit button at the top right of the new page will allow further client details to be added:

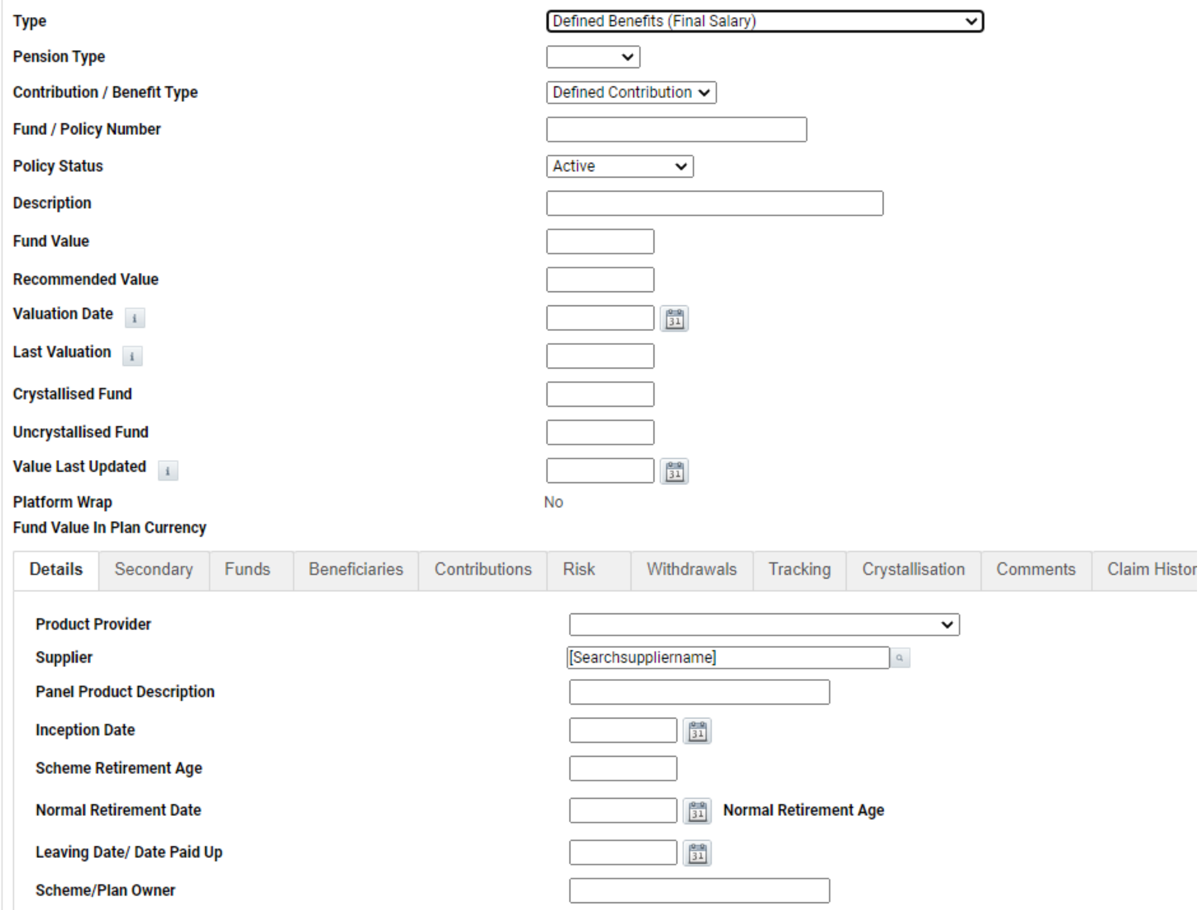


Adding XPlan Client Pension Plans

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:



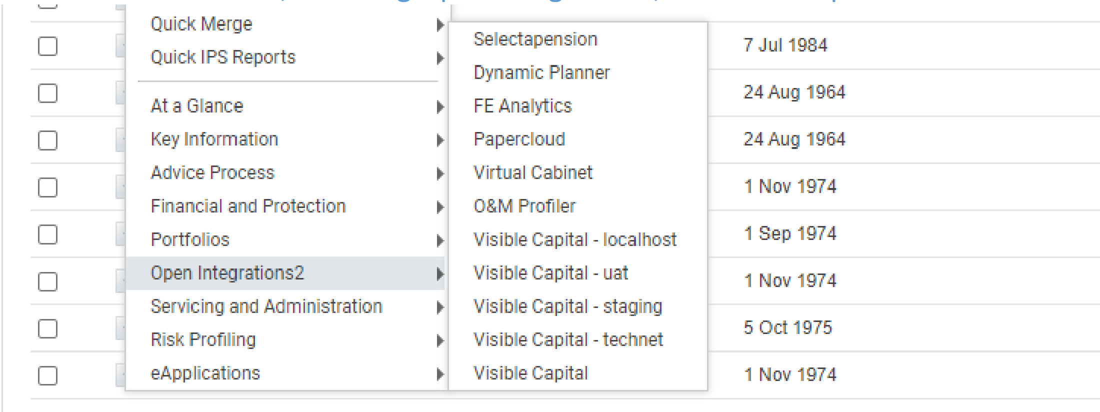
Type	Defined Benefits (Final Salary)
Pension Type	
Contribution / Benefit Type	Defined Contribution
Fund / Policy Number	
Policy Status	Active
Description	
Fund Value	
Recommended Value	
Valuation Date	
Last Valuation	
Crystallised Fund	
Uncrystallised Fund	
Value Last Updated	
Platform Wrap	No
Fund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

Details | Secondary | Funds | Beneficiaries | Contributions | Risk | Withdrawals | Tracking | Crystallisation | Comments | Claim Histor

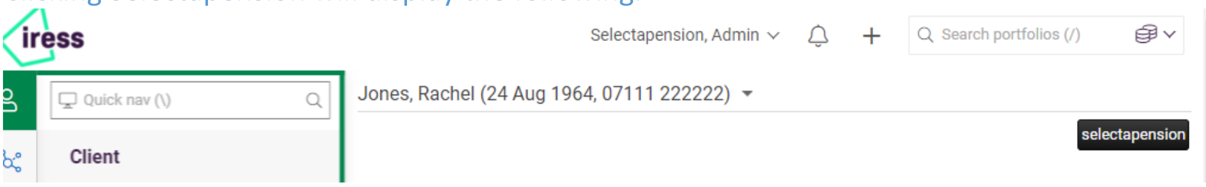
Product Provider	
Supplier	[Searchsuppliername]
Panel Product Description	
Inception Date	
Scheme Retirement Age	
Normal Retirement Date	Normal Retirement Age
Leaving Date/ Date Paid Up	
Scheme/Plan Owner	

Opening Imported Selectapension Clients from XPlan

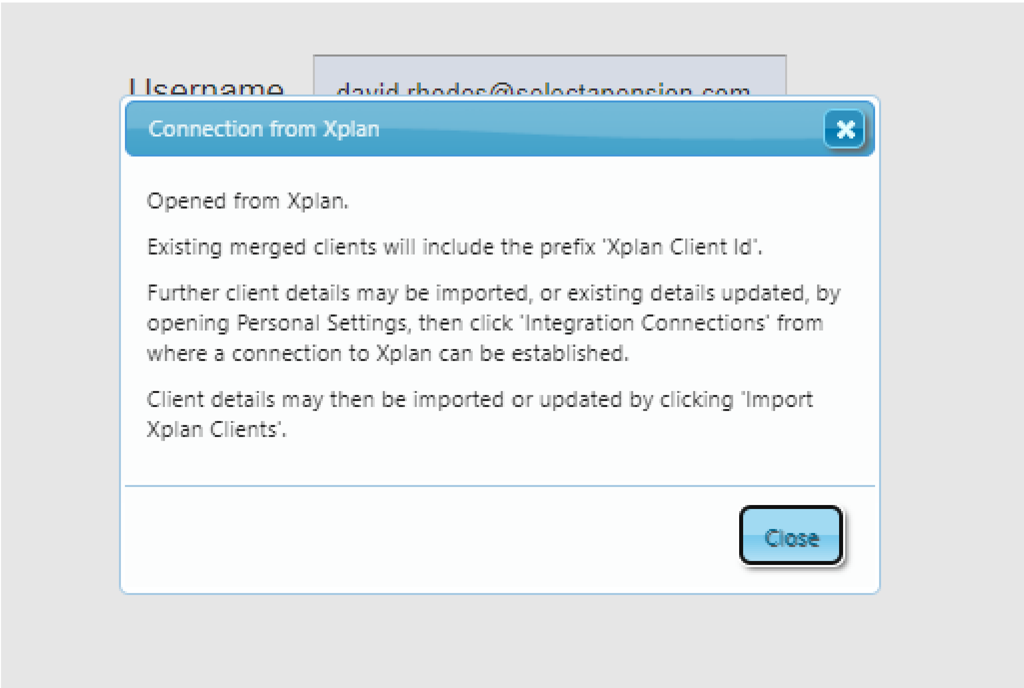
A button is available in the XPlan application allowing users to open the Selectapension application directly, linking directly to a client record if the client has been imported into Selectapension. This can be accessed by, in the client listing, clicking the small arrow to the left of the client name,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



Clicking Selectapension will display the following:



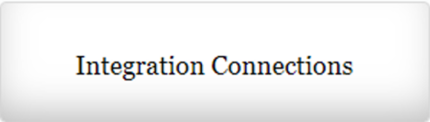
The Selectapension button URL is administered by Iress and points to a predefined URL. When clicked, Selectapension will open, displaying a message informing the user that the application had been opened from XPlan:



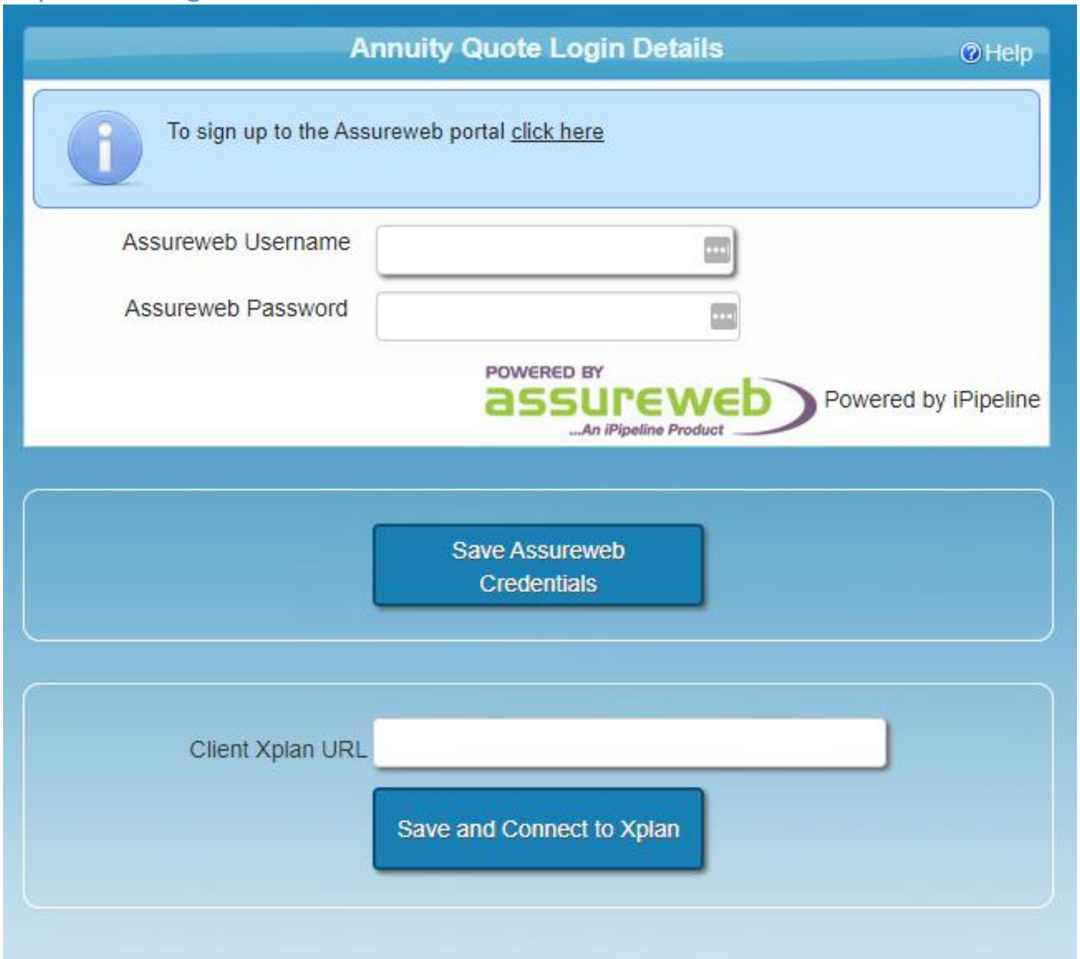
If the XPlan client record has been previously imported, the client record will open automatically or, if the user is not logged in to Selectapension, following a successful login.

Accessing XPlan Data from Selectapension

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

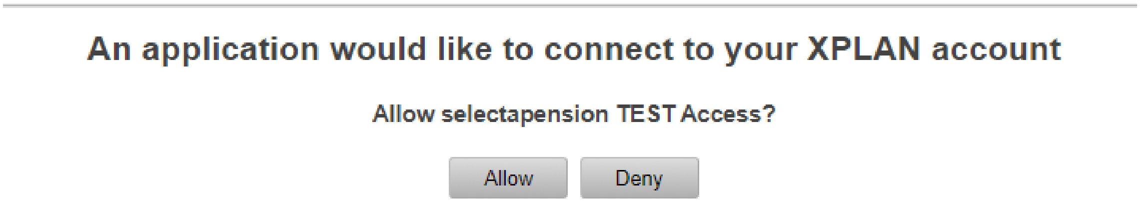


When clicked, the following page will be displayed which allows connection to XPlan and any other integrations that will be available:



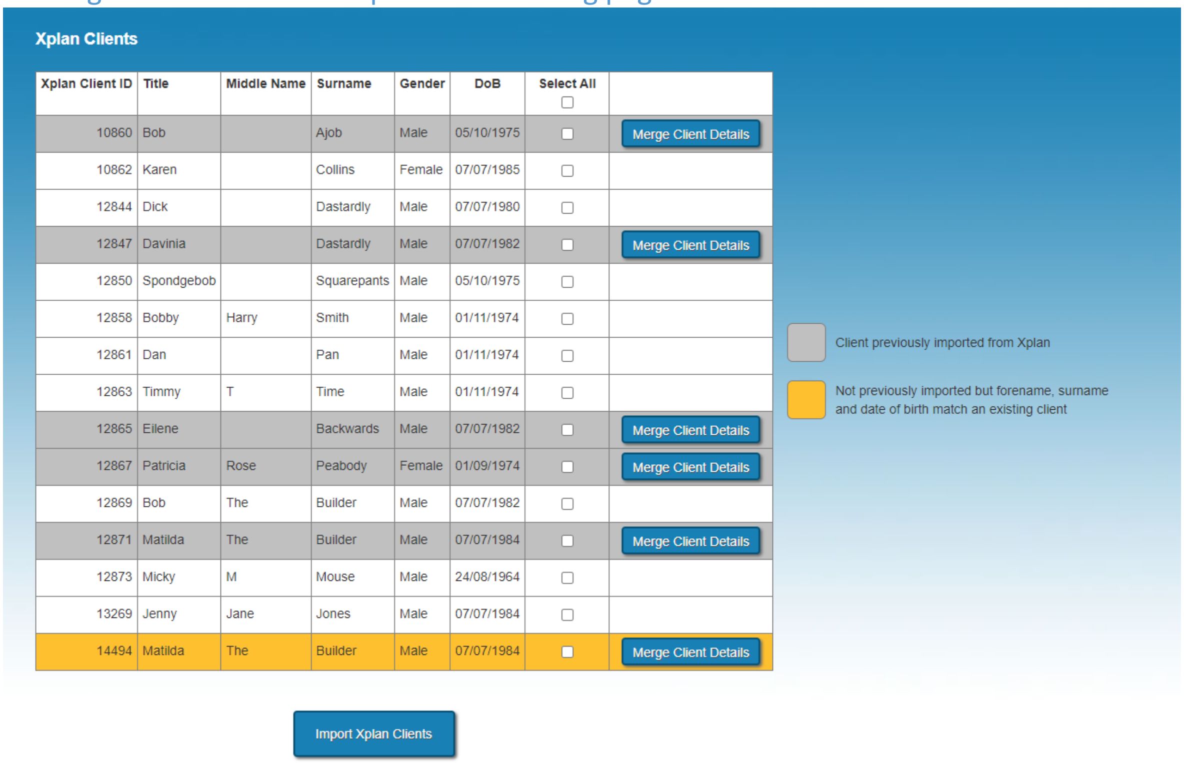
Clicking Connect to XPlan will redirect the user to the XPlan login page.

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



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:

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	☐	Merge Client Details
10862	Karen		Collins	Female	07/07/1985	☐	
12844	Dick		Dastardly	Male	07/07/1980	☐	
12847	Davinia		Dastardly	Male	07/07/1982	☐	Merge Client Details
12850	Spondgebob		Squarepants	Male	05/10/1975	☐	
12858	Bobby	Harry	Smith	Male	01/11/1974	☐	
12861	Dan		Pan	Male	01/11/1974	☐	
12863	Timmy	T	Time	Male	01/11/1974	☐	
12865	Eilene		Backwards	Male	07/07/1982	☐	Merge Client Details
12867	Patricia	Rose	Peabody	Female	01/09/1974	☐	Merge Client Details
12869	Bob	The	Builder	Male	07/07/1982	☐	
12871	Matilda	The	Builder	Male	07/07/1984	☐	Merge Client Details
12873	Micky	M	Mouse	Male	24/08/1964	☐	
13269	Jenny	Jane	Jones	Male	07/07/1984	☐	
14494	Matilda	The	Builder	Male	07/07/1984	☐	Merge Client Details

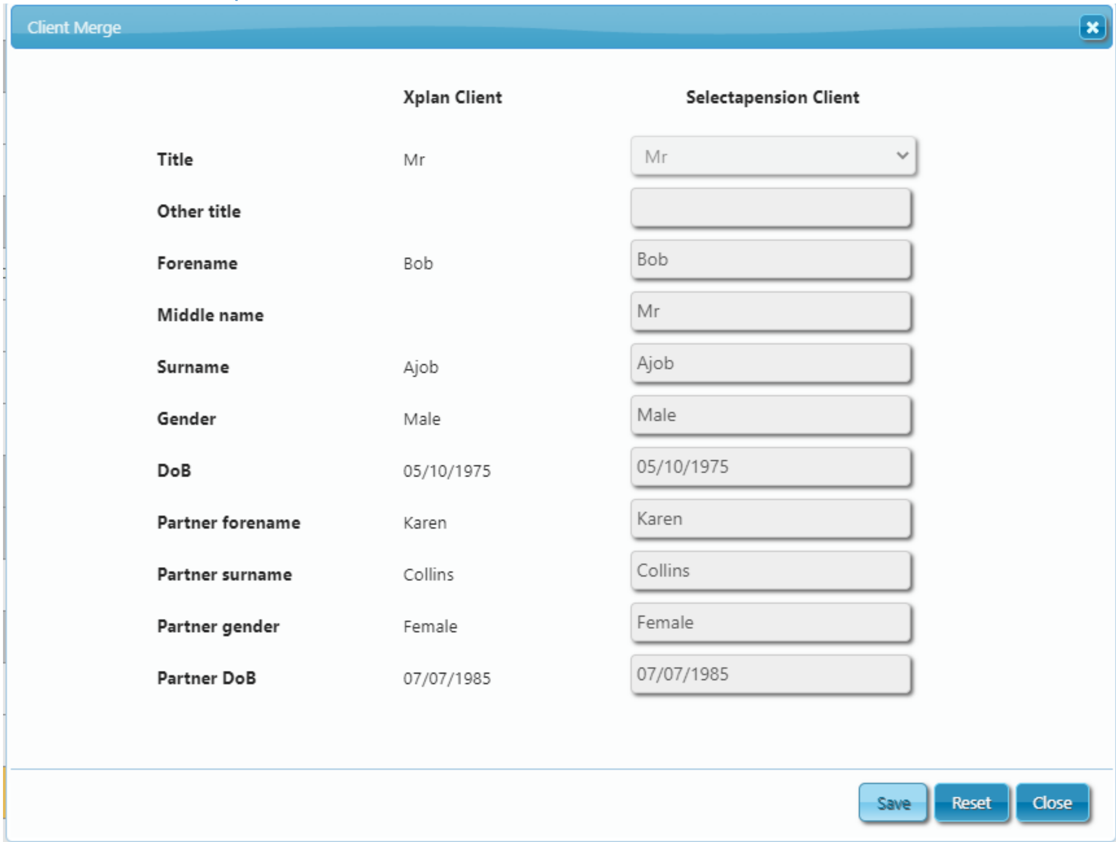
Client previously imported from Xplan

Not previously imported but forename, surname and date of birth match an existing client

Import Xplan Clients

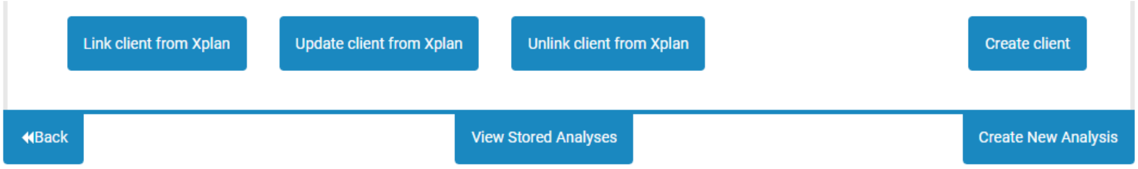
All or a selection of XPlan clients may be imported by ticking the appropriate checkboxes and clicking Import XPlan Clients. The coloured row backgrounds indicate the status of the XPlan clients. A grey background indicates that the client has already been imported and exists in the Selectapension client 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:

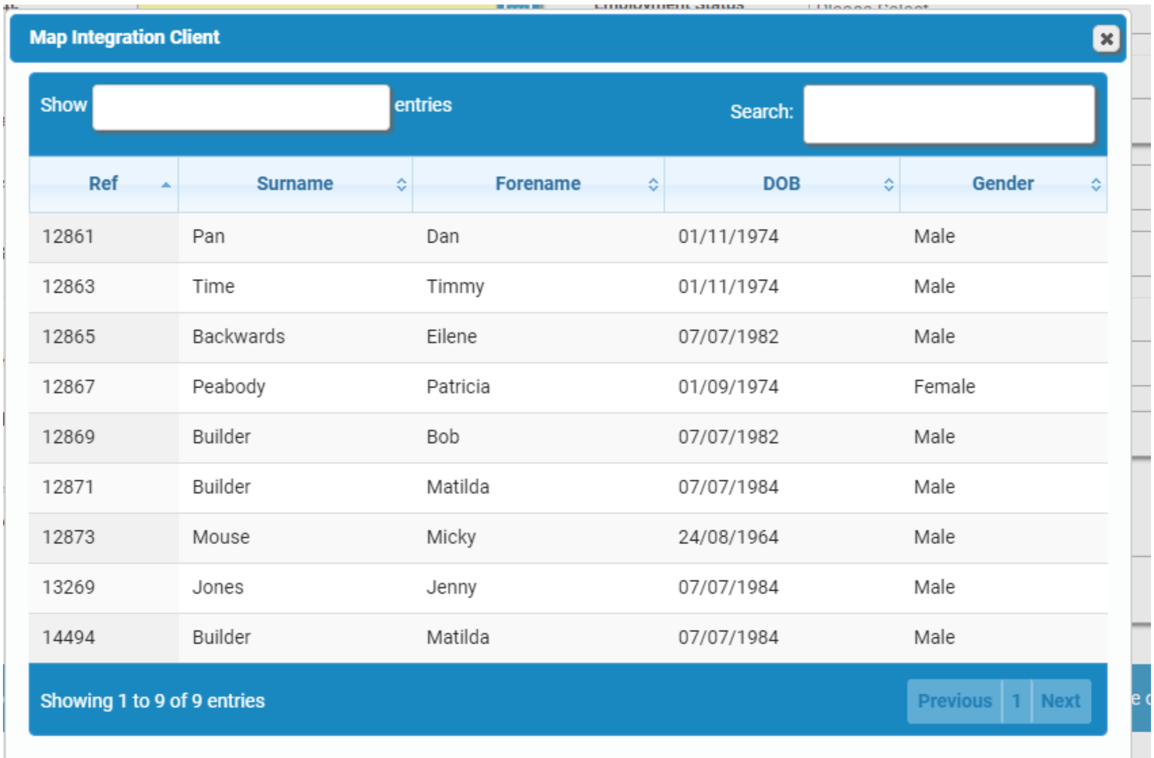


To update the Selectapension client with XPlan details, simply drag the XPlan value into the Selectapension field and drop. Please note that there is no check that the two field names match, e.g. the XPlan client forename could be dragged into the Selectapension client surname. Also, the value cannot 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:



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:

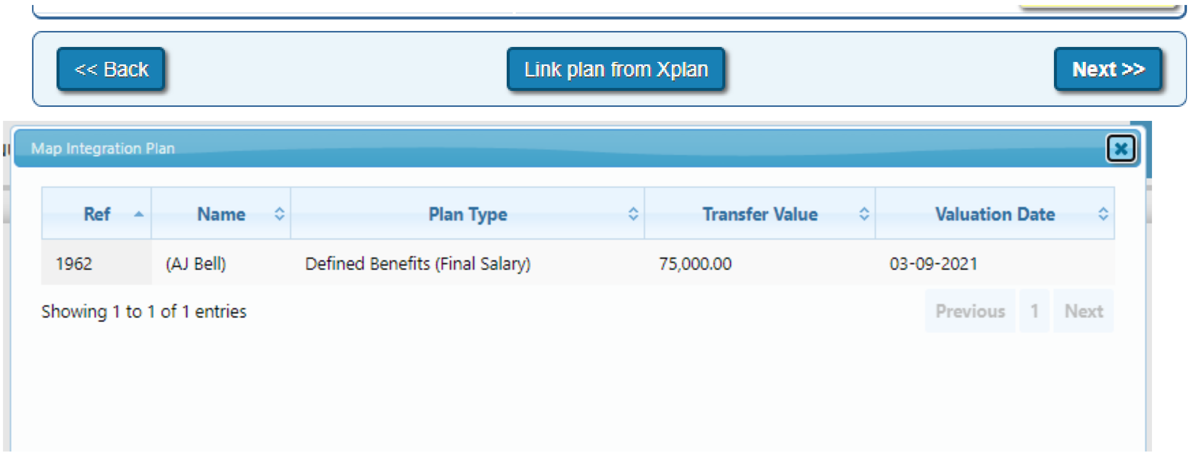

Map Integration Client

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:



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: