Moneysoft CRM Data Feed Integration Process – iress Xplan CRM and Moneysoft Fact Find Modules

Summary

When integrated, Moneysoft and Xplan deliver a powerful combination. The following guide runs through the set-up process in five short, easy to follow steps.

Ensure your Xplan version has the CRM and Fact Find module activated as this is where the data is integrated to. All Xplan sites upgraded to the December 2019 major release (19.12.98) will have the System Settings page as described enabled.

Note: You must ensure that the Moneysoft CRM Fact Find integration is enabled. If you are unsure please verify with your Xplan site administrator and confirm they have activated the Moneysoft CRM Fact Find integration.

If you have any questions or need any help with your own set-up, please email us at support@moneysoft.com.au or call us on 1300 850 878.

Steps

1. Confirm you have an operational Moneysoft Professional or Partner account with active clients

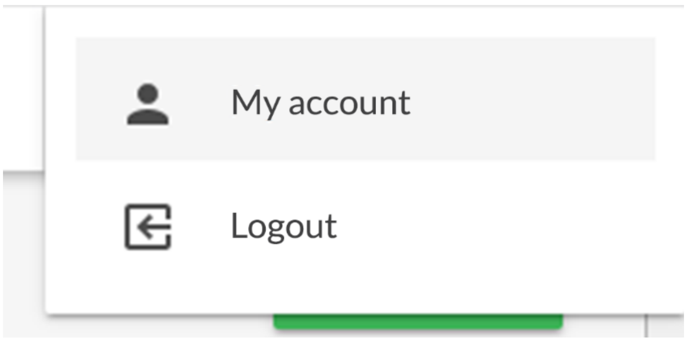
- If you do not have an active account, register here and invite your clients.

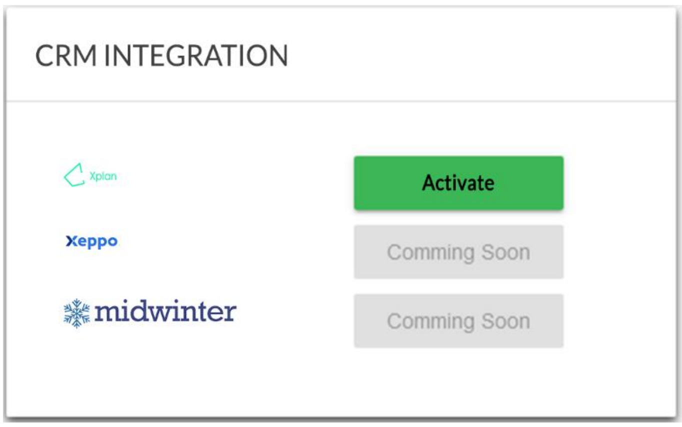
2. Confirm the Moneysoft CRM Fact Find Integration is Available

- Confirm that the Moneysoft CRM Fact Find integration is available within your site. If you are an administrator of your Xplan site and are unsure, click here to learn how to complete the activation.

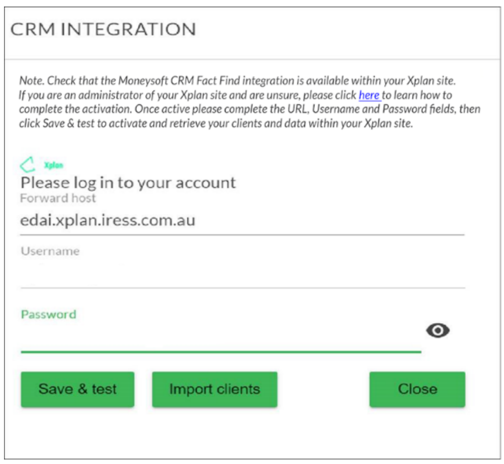
3. Authenticate the Moneysoft and Xplan Site Connection

- Log into your Moneysoft Professional or Partner account to activate your Xplan synchronisation and sync your clients.
- Once logged in, navigate to your My Account page, scroll down to the CRM Integration module and click the Activate button beside the Xplan logo.

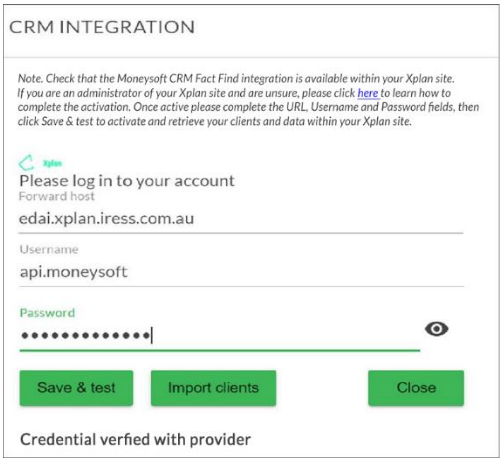




- Enter your Xplan site URL (forward host), Username and Password in the respective fields then click Save & Test.
    - Do not enter the https:// section of your Xplan site URL into the Forward host field.



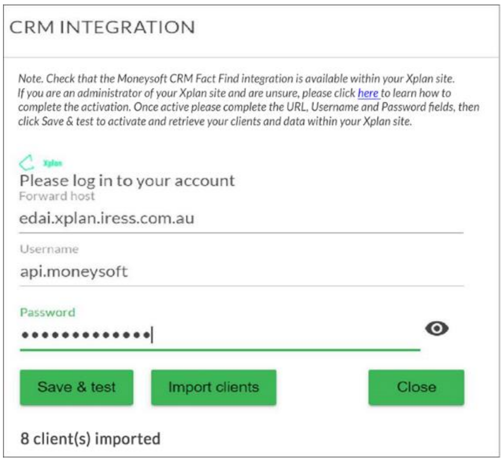
- A credentials verified message will be displayed if the log in is successful.



4. Import clients

- Click Import Clients to retrieve your clients
- A confirmation message is displayed detailing the number of clients retrieved.

  Note: This step will need to be performed each time you have a new client in Xplan which is not yet listed in your Moneysoft clients list.
- You can now link and match clients in Moneysoft to clients in Xplan.



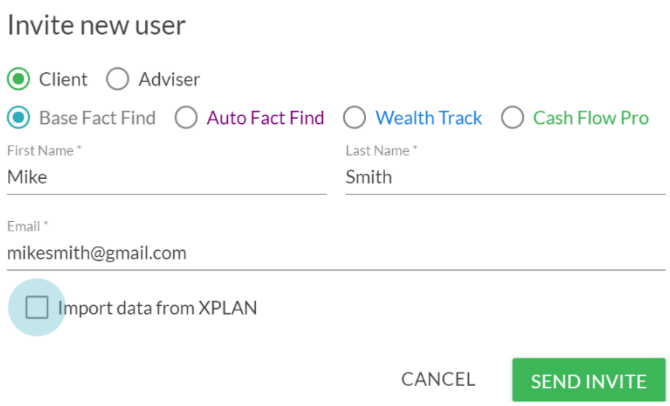
5. Link Clients Between Moneysoft and Xplan

- There are two ways clients can linked between Moneysoft and Xplan
  - Link a new client from the invitation menu where client data exists in Xplan but not in Moneysoft – See Step 6
  - Link an existing client from the client menu where client data exists in Xplan and in Moneysoft – See Step 7

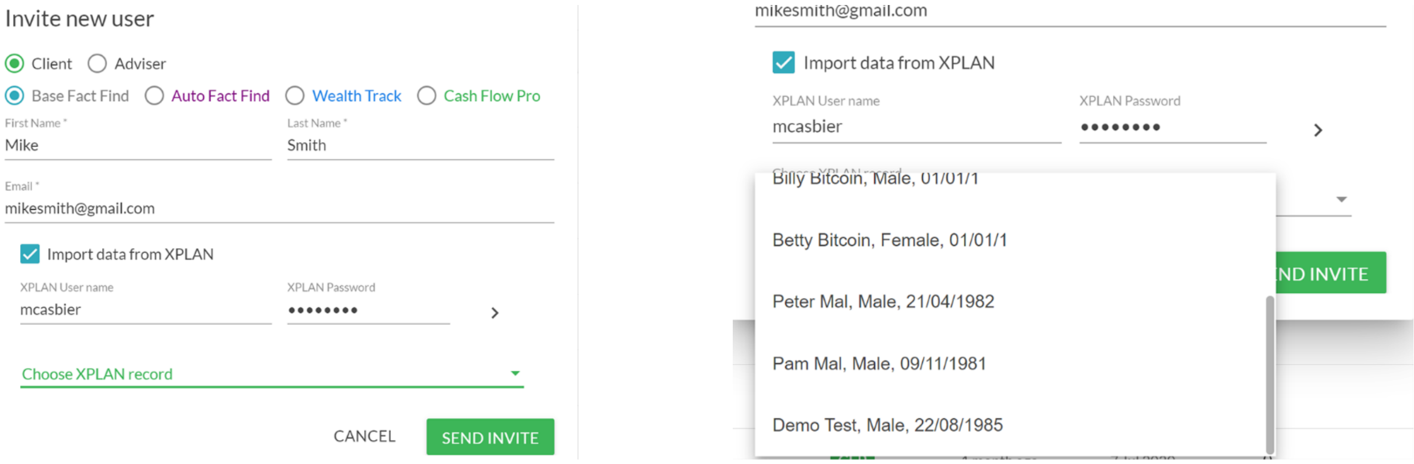
6. Link a New Client from the Invitation Menu where Client Data Exists in Xplan but not in Moneysoft

Once you have retrieved the Xplan client list, from the client invitation module in Moneysoft you can Import client data at the time of inviting the related client.

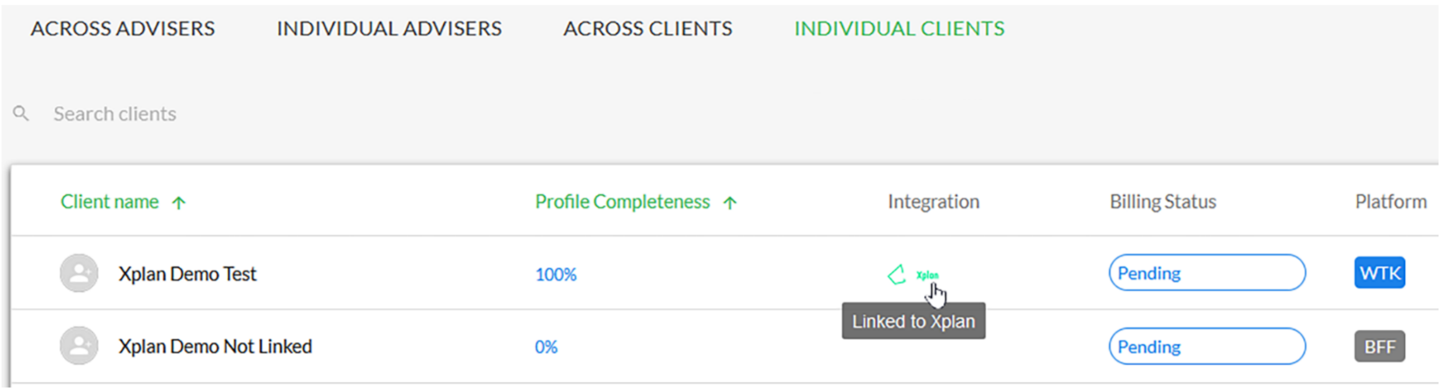
- Enter the client name and email address.
- Check Import data from Xplan.



- From the Choose Xplan Record drop down list, select the client whose Xplan data is to be linked.



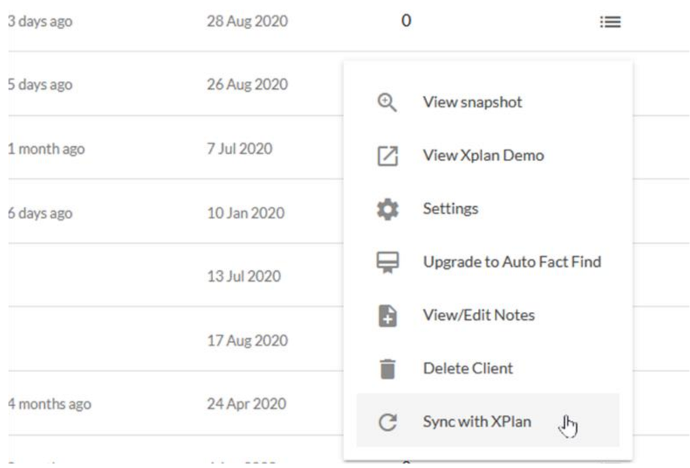
- Once a client is linked the Xplan integration icon will be displayed against the client on the Individual Clients page as shown below.
  - Hovering over the Xplan integration icon which will display Linked to Xplan
  - A client not linked to Xplan will have no integration icon
- Client data available in Xplan will be retrieved and pre-populated into the client Profile section in Moneysoft, i.e. relevant data points within the client's Fact Find modules will be updated when the client logs in.



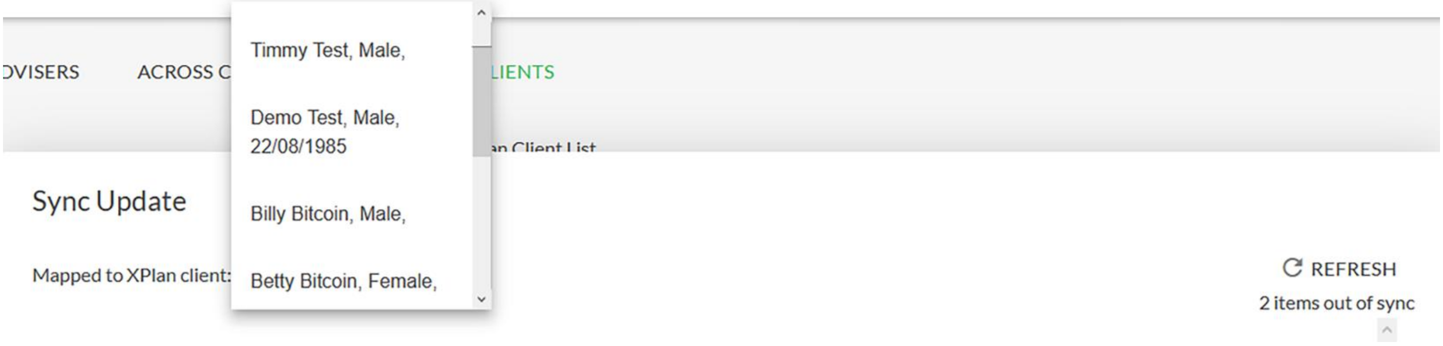
7. Linking an Existing Client from the Client Menu where Client Data Exists in Xplan and in Moneysoft

This option is used where the client already exists in Moneysoft and in Xplan to link or sync the client between the both systems, i.e. the client already has an active account in Moneysoft.

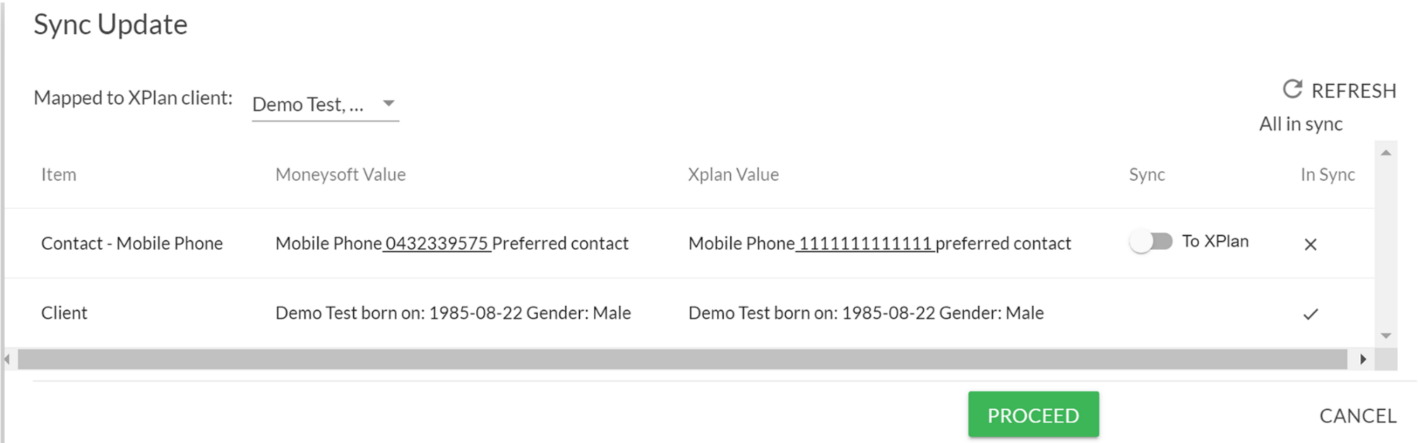
- Click on the three dot / three dash options menu for the selected client and select Sync with Xplan to open the Sync Update pop up window



- In the Sync Update pop up window select the Xplan client to map to the Moneysoft client from the Mapped to Xplan Client drop down list.



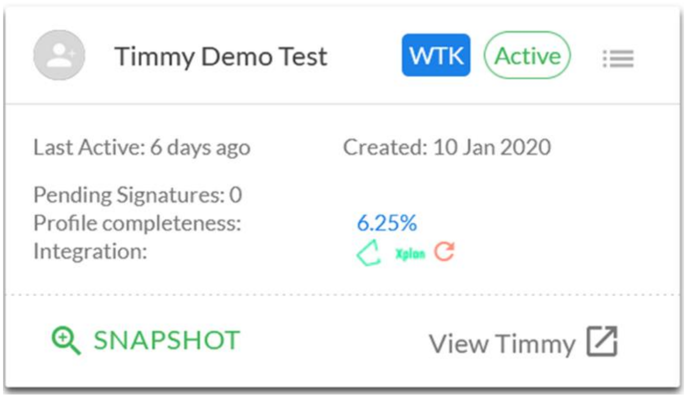
- Once the client is selected a list of data will appear with the respective fields. Click refresh to display any other fields that may have new data.



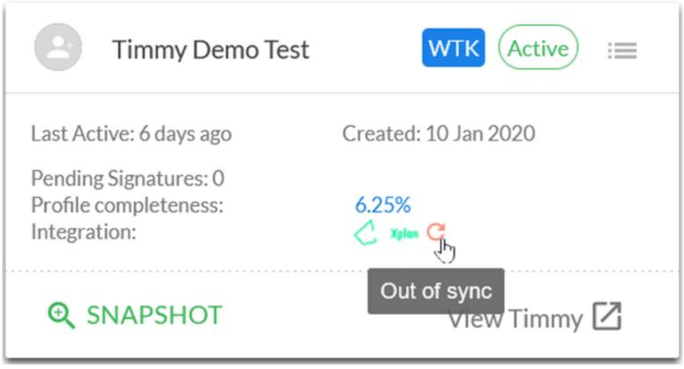
- Defining the Sync Update terminology:
  - Item – The respective data fields, e.g. name, date of birth, contact numbers and all the fields that are available to sync between the two systems will be listed
  - Moneysoft Value – This is data that has been entered into Moneysoft or available in Moneysoft
  - Xplan Value – This is the data that is available in Xplan or that has been entered in Xplan
  - Sync – The direction of the sync data. The slider displays the direction the data is to be synced, i.e. To Xplan means from Moneysoft to Xplan and From Xplan means from Xplan to Moneysoft
  - In Sync – A ✓ icon indicates the data is in sync between the two systems, i.e. the data matches. An x indicates the data is not in sync between the two systems, i.e. the data does not match.
- For any data points marked with an x, select the direction of sync then click Proceed to sync the data in the direction selected.

8. New Data Syncing

- When there is new data in either system that is not in sync, a red Out of Sync circular arrow icon will appear next to the Xplan icon for the relevant client.



- To sync the data, click on the Out of Sync icon



- In the Sync Update pop up window, a list of new data points will be listed that can be synced between Moneysoft and Xplan.