Compass Monthly Webinar | Xtools+ Basics & Compass Enhancements

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Topics covered

AGENDA
How to Set up an Xtools+ Scenario
How to Compare Multiple Xtools Scenario
How to Incorporate Xtools Modelling to your advice documents
New Compass Enhancements

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What's changing?

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Compass Interface | Navigation & Interface

Old

Current

Future

Compass Interface | Features

- ✓ **Simplified Menus – All menus found in one area**

- ✓ **Categorised Icons and Hubs section**

- ✓ **Improved entity search functions**

- ✓ **Quick Search replaced by universal search**

- ✓ **Quick Links replaced with My Links**

- ✓ **Favourite Pages**

Search IRESS Community:

"Xplan Navigation" for more information

Compass Resources | Pathway Learning

Email Functions

Email | Signature

Creating Email Signature on Compass can be quite confusing.

A few principals to help you create your email signature:

- Email Editor on Compass is coding based

- Images cannot be copied straight in

- Use Tables to help position and format

- Individual images need to be stored in document library

- Use links!

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Email | Template

Email Template will help you prepare your written communication and test it before sending it to your client/s

Principals on the use of Email Templates:

- Allows you to save frequently used emails or layout

- Helps you create draft emails so you can test before sending

- Add images, tables, attachments and Xmerge reports

Email | Bulk Email

Bulk Emails allows you to send mass emails to a list of your clients

Principals on the use of bulk email:

Compass Resources

Compass News

Visit our *Technology Solutions Hub* for guides and videos on all things *AB9*.
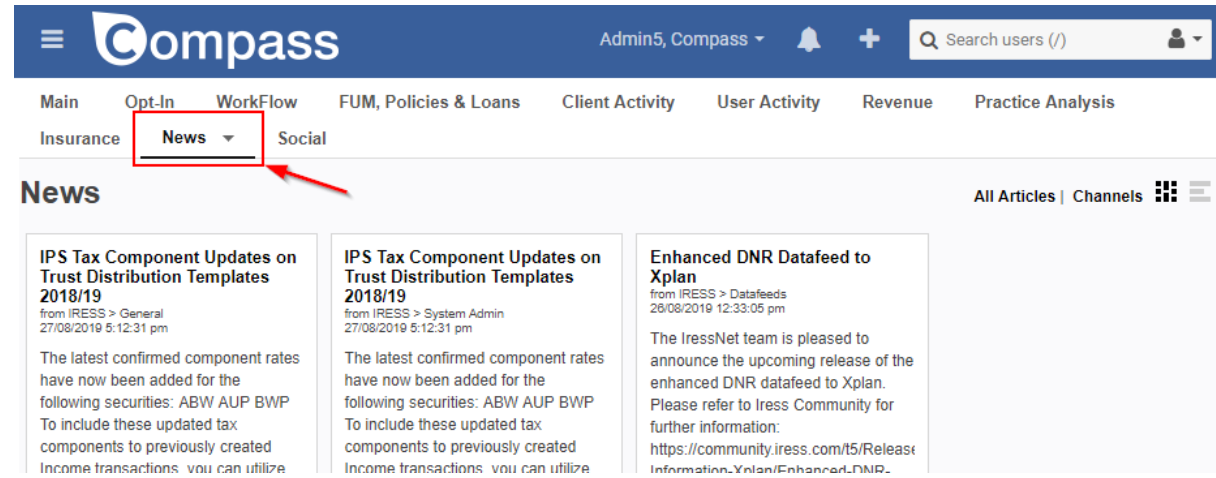
Useful information you'll find on the website:

- Compass Resources

- Announcements (defects, enhancements)

- Compass Development Roadmap

https://techsolutions.cpal.com.au/

Visit our *Compass News tab* on the Dashboard:

- Announcements

- Site Issues

- Down Time

- Major Issues

- Enhancements

Compass Helpdesk Contact

E: compass.support@cpal.com.au

P: 1300 584 276

8:30am – 5pm AEDT

Q & A Session