

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

What's changing?



Compass Interface | Navigation & Interface

Compass

COMPASS Add Quicklin

- Labs
- Account
- Client Focus
- Diary
- Document Note
- Email
- General
- Lending
- My Details
- Portfolio
- Tasks
- User Interface
- XPLANTouch
- Invoicing

Compass

Quick nav (\)

Labs

New Xplan navigation

The new Xplan navigation has been introduced. To start off, we've introduced a new client navigation experience, also introduced 'quick navigation' to allow you to navigate more efficiently. Use the preference setting here to choose your preferred navigation experience.

Yes No

You can also watch this [short video](#) to see the new navigation experience in action.

We are constantly looking for feedback from our users to help us improve the user experience.

Hubs

- My hub
- Diaries
- Tasks
- Clients
- Leads
- Cases
- Notes & documents
- Campaigns
- Applications
- Signatures
- Help via Iress Community

Compass

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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!

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

Visit our **Technology Solutions Hub** for guides and videos on all things AB9.

Useful information you'll find on the website:

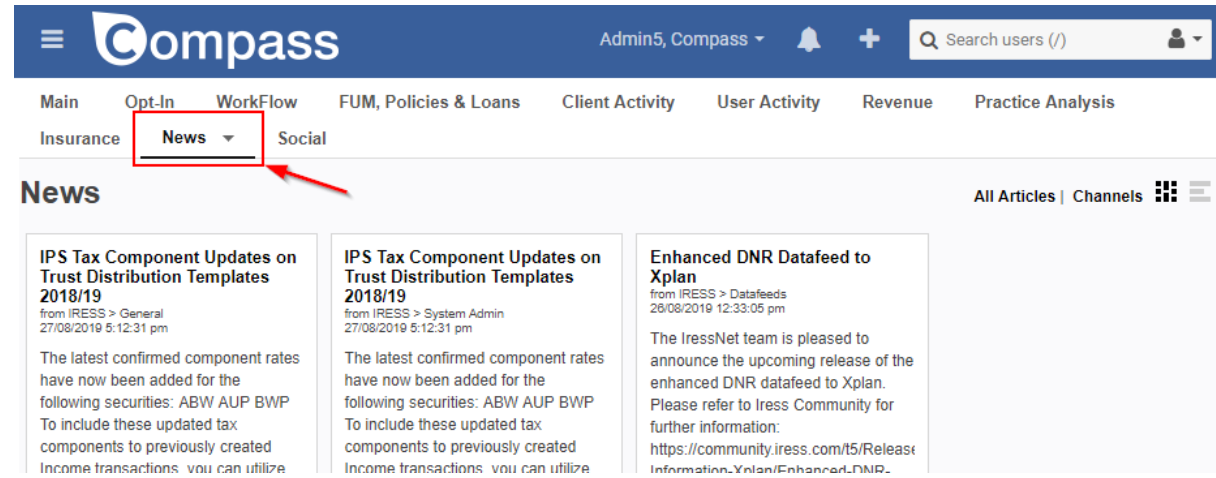
- Compass Resources
- Announcements (defects, enhancements)
- Compass Development Roadmap

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

Compass News

Visit our **Compass News tab** on the Dashboard:

- Announcements
- Site Issues
- Down Time
- Major Issues
- Enhancements



The screenshot shows the Compass dashboard interface. At the top, there is a navigation bar with the Compass logo, user information (Admin5, Compass), and a search bar. Below the navigation bar, there are several tabs: Main, Opt-In, WorkFlow, FUM, Policies & Loans, Client Activity, User Activity, Revenue, and Practice Analysis. The 'News' tab is highlighted with a red box and a red arrow pointing to it. Below the tabs, the 'News' section is displayed, featuring three articles. The first two articles are titled 'IPS Tax Component Updates on Trust Distribution Templates 2018/19' and the third is 'Enhanced DNR Datafeed to Xplan'. The first two articles have a sub-headline 'The latest confirmed component rates have now been added for the following securities: ABW AUP BWP' and a sub-text 'To include these updated tax components to previously created Income transactions, you can utilize'. The third article has a sub-headline 'The IressNet team is pleased to announce the upcoming release of the enhanced DNR datafeed to Xplan. Please refer to Iress Community for further information: https://community.iress.com/t5/Release-Information/Xplan/Enhanced-DNR-'. The top right of the news section has links for 'All Articles' and 'Channels'.

Compass Helpdesk Contact



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P: 1300 584 276

8:30am – 5pm AEDT

Q & A Session