

The future of Iress & what that means for you!



Iress Platform & Xplan Integration



- Connecting Xplan IPS (Portfolios) to Iress Platform (prev OneVue)
 - Onboarding new clients
 - Managing existing clients
- Pilot commences soon – lots of work to do!
- Madison Practices invited as early adopters/pilot group – small group on purpose.
- Data is the new oil!



Video



[Digital Strategy - the optimal digital model](#) - 5 minute watch

This video is too large to link here but we will make it available via other means shortly

Xplan Components in the video



- Opportunities – newer functionality
- eApplications – well established and always improving
- Client Portal – newish and will in time replace the existing Touch and Client Online

Video also focused on Fact Find and Digital signatures but there is more to Portal – lets take a look.

Video



Client Portal - show me what it does video - 5 minute watch

Post session Resources – Iress Community Links



Opportunities Webinar – 1 hour watch

Client Portal Webinar sessions - Iress Learning Centre - 5 minute watch

Check which eApplications are available for you to use now - 2 minute read