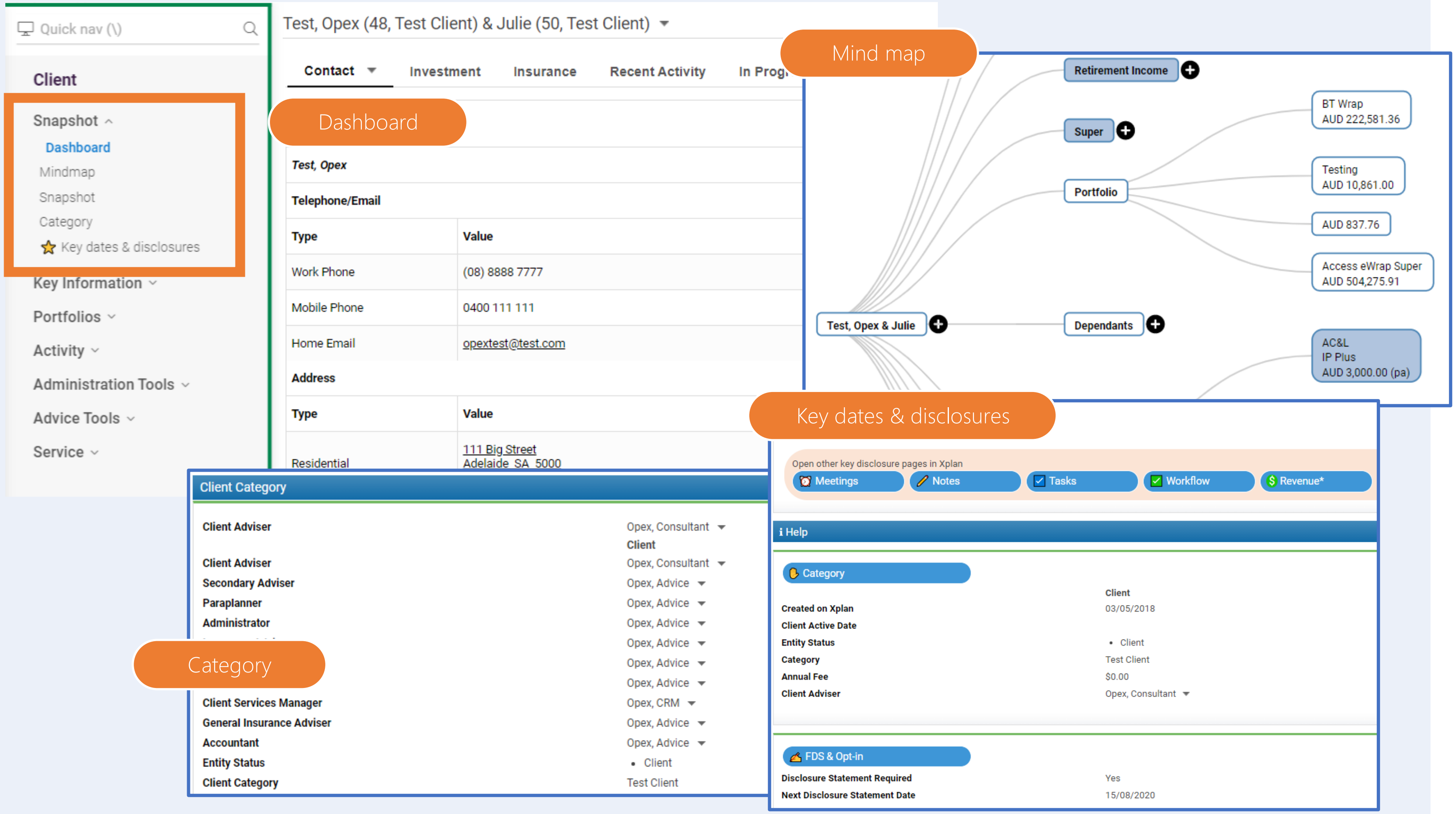
Your new Xplan interface

Your mud-map guide to the client navigation menu

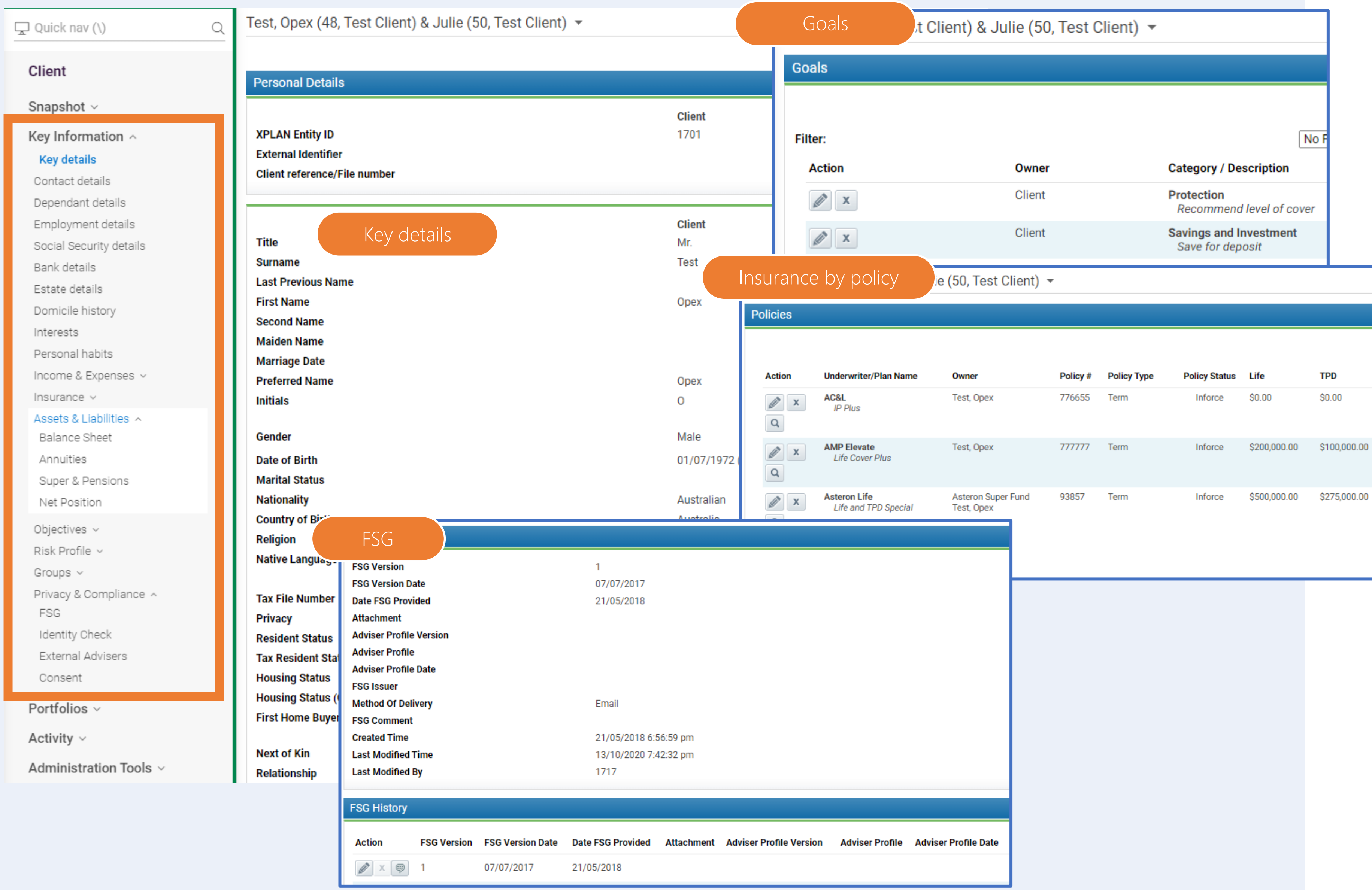
Snapshot

Quick access to your key client information & current activity...



Key Information

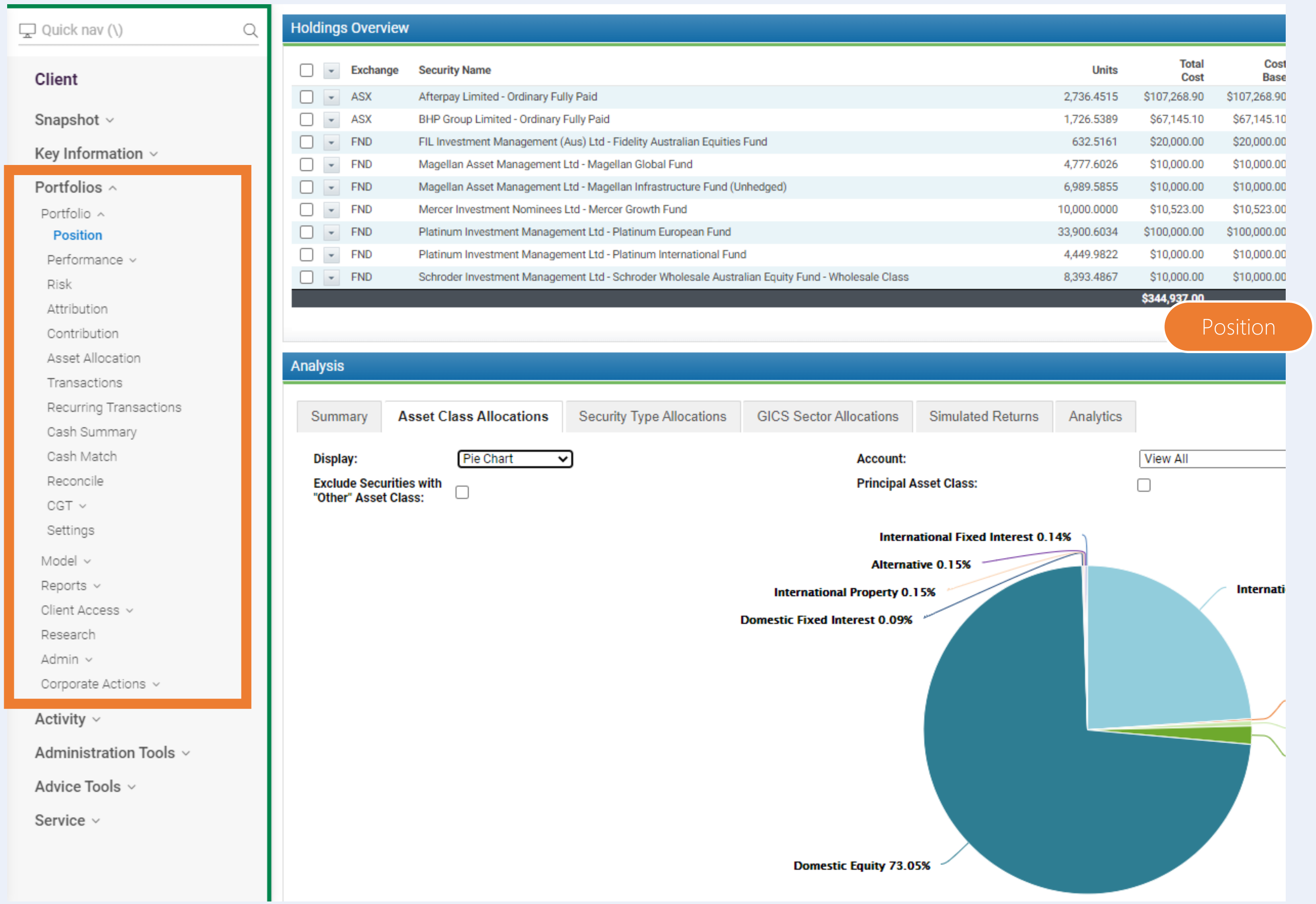
Your client's fact-find style data lives here!



Portfolios

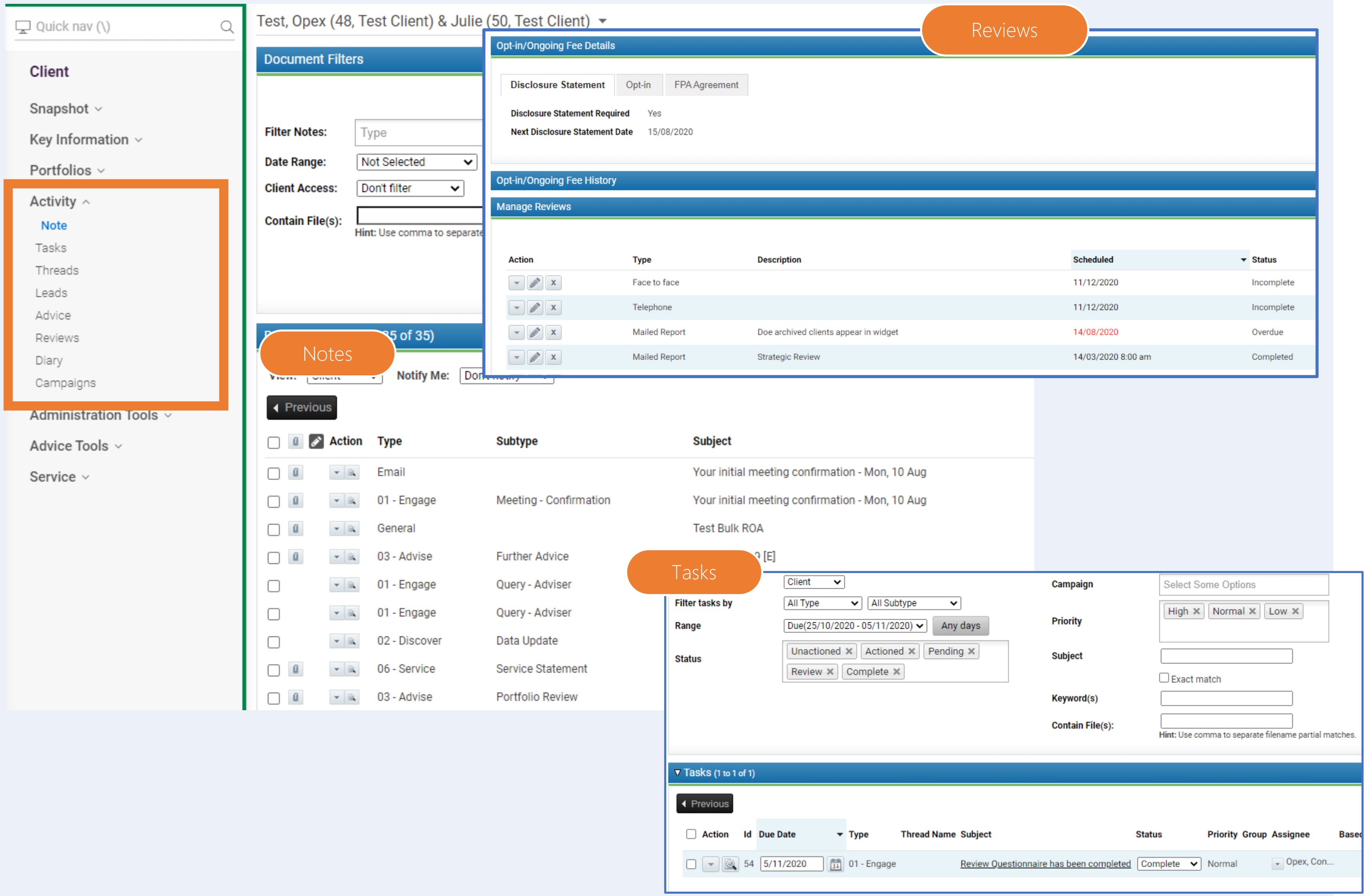
Your client's investment holdings (if you have IPS licence)...

Same as before - no change to this menu!



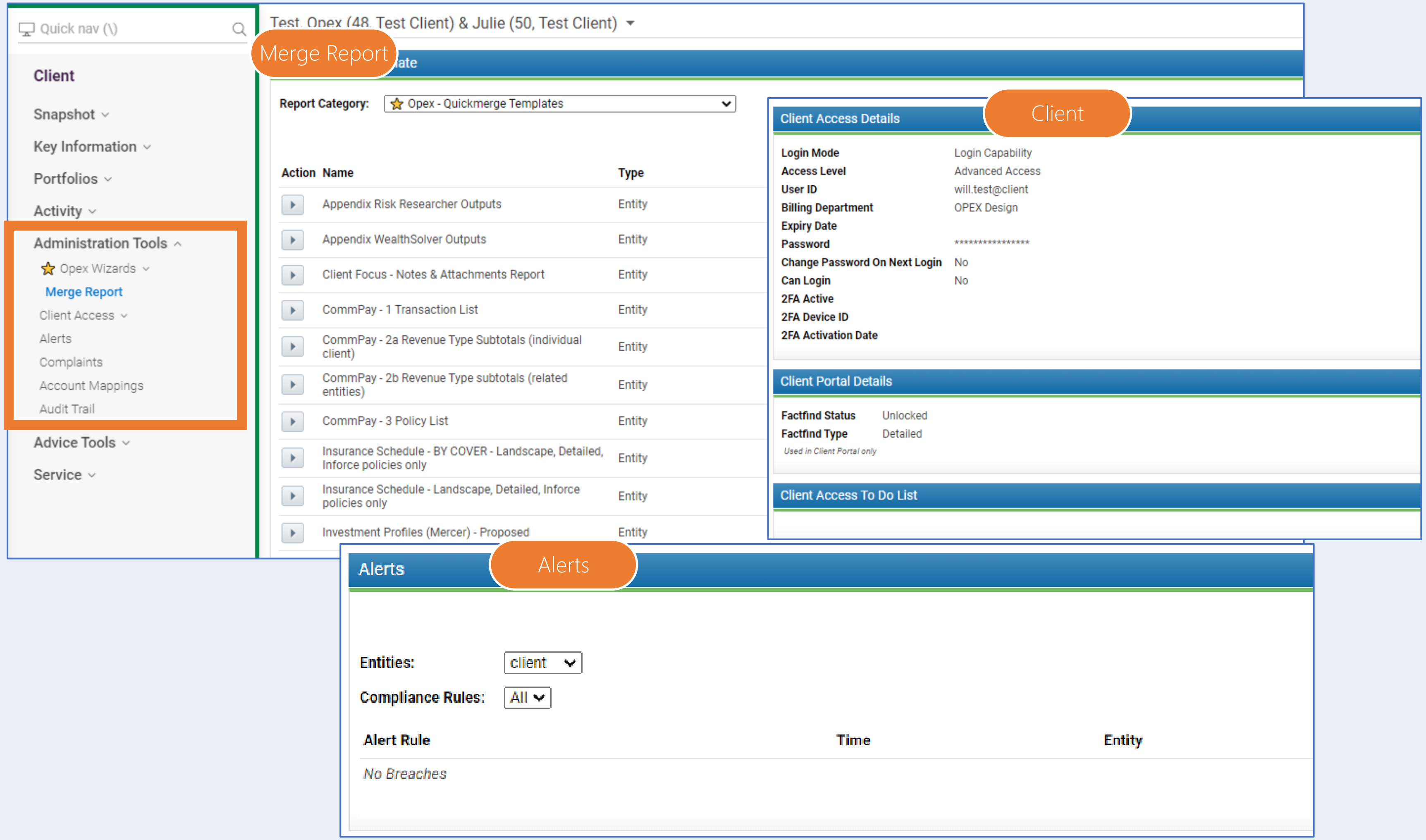
Activity

Manage the daily flurry of client activity - notes, tasks, workflow, meetings, reviews.



Administration Tools

Find your pure admin functions here including wizards, generate templates & other admin tools

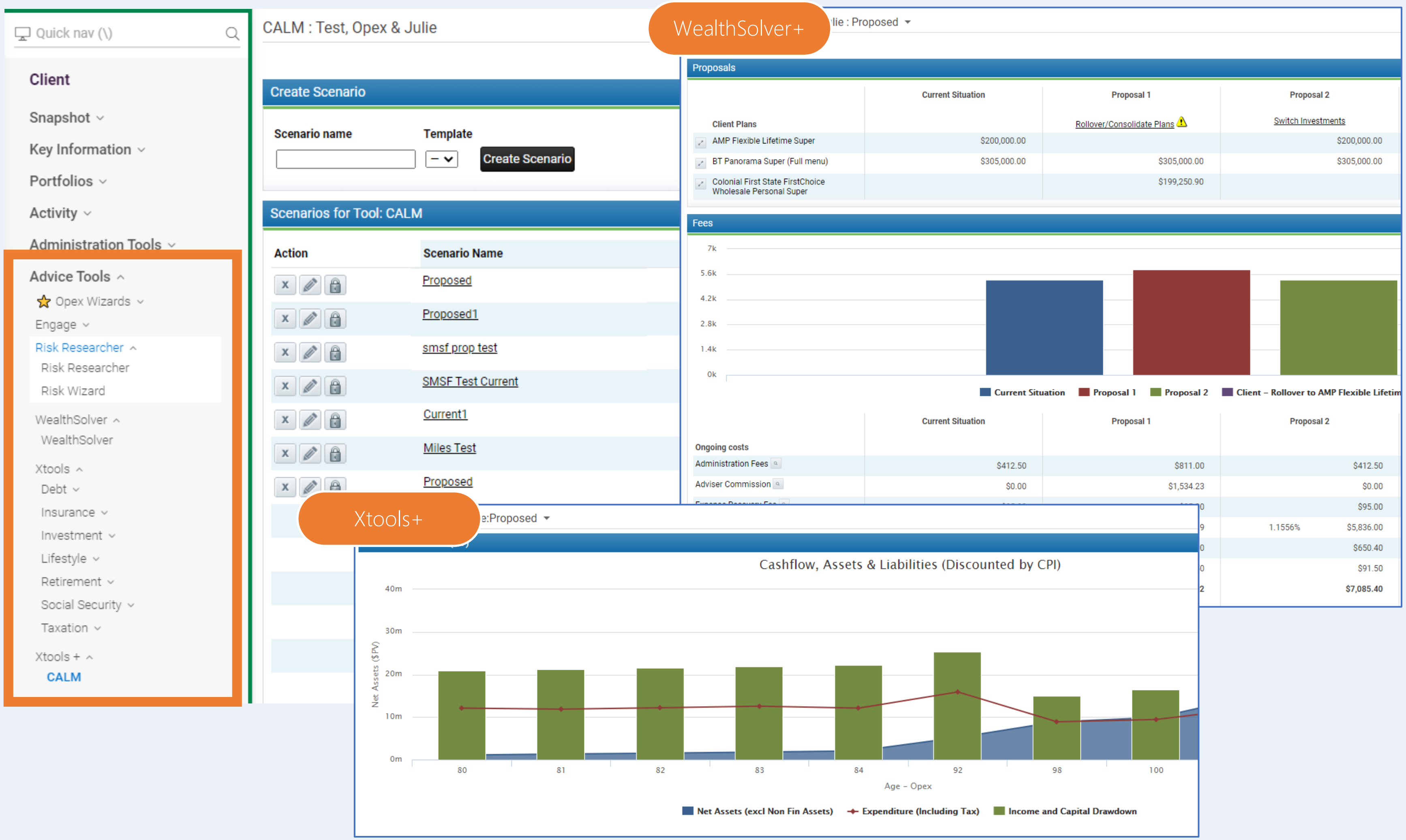


Advice Tools

Time to get technical?

This is where you'll find all the tools & wizards to model & generate your advice

(you'll only see the various modelling tools if you have the relevant Xplan licence)



Service

Manage the business-end of your client - marketing, revenue (CommPay), FDS & Opt-in, service levels & service delivery

(you'll only see the CommPay pages if you have the CommPay Xplan licence)