Xeppo

KNOW › RUN › GROW

Agenda for Product Update

Q1 Xeppo Core
Reviewing deliverables in the first quarter

Q1 App & 3rd Party App
Activity App Enhancement
Introducing the AFSL App

Q2 New Features
Updates on Xeppo's new features in progress

Q2 Educational Series
What to expect

Q1 Xeppo Core

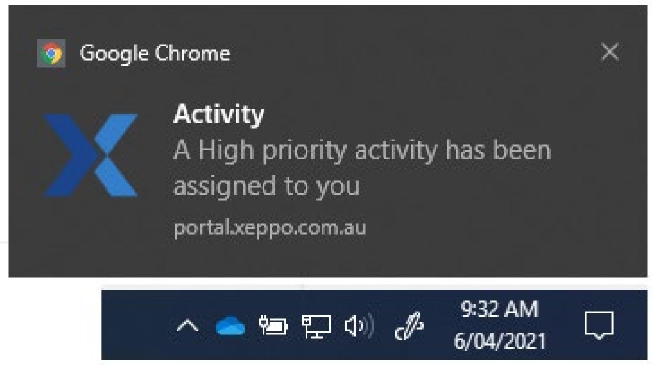
Browser Notifications

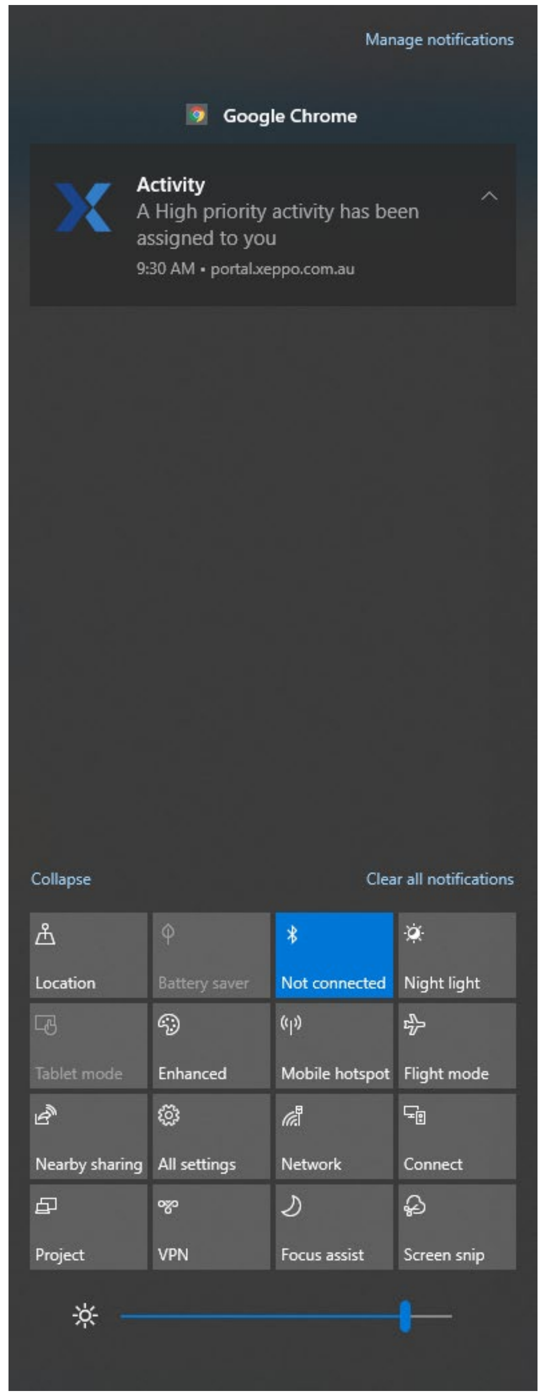
Key Firm Contacts

Compliance Fields

Xeppo Insights PowerBI Report

Browser Notifications

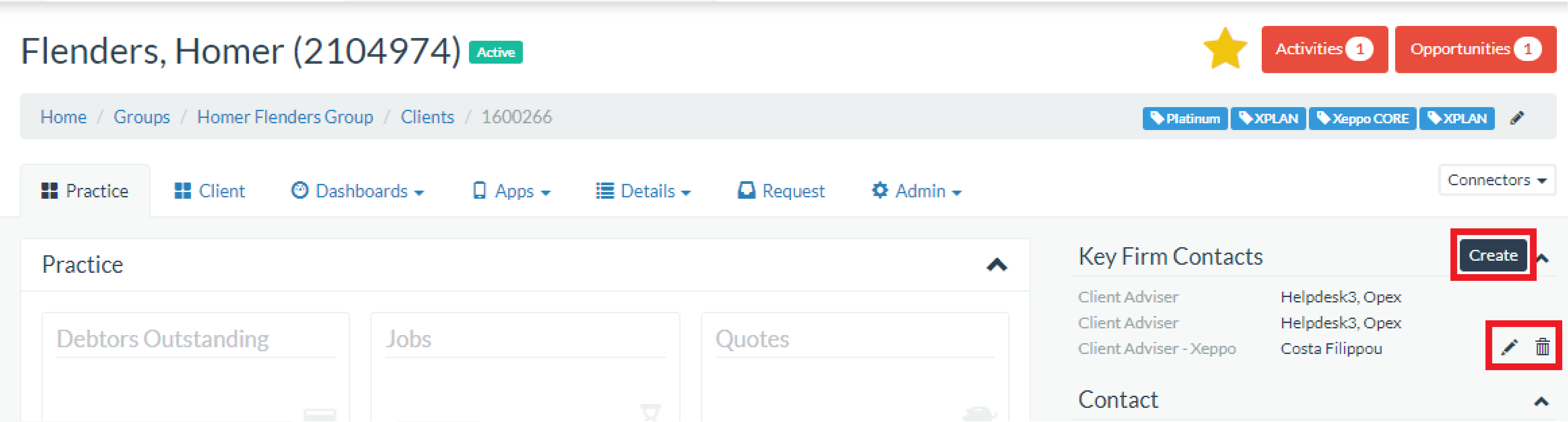


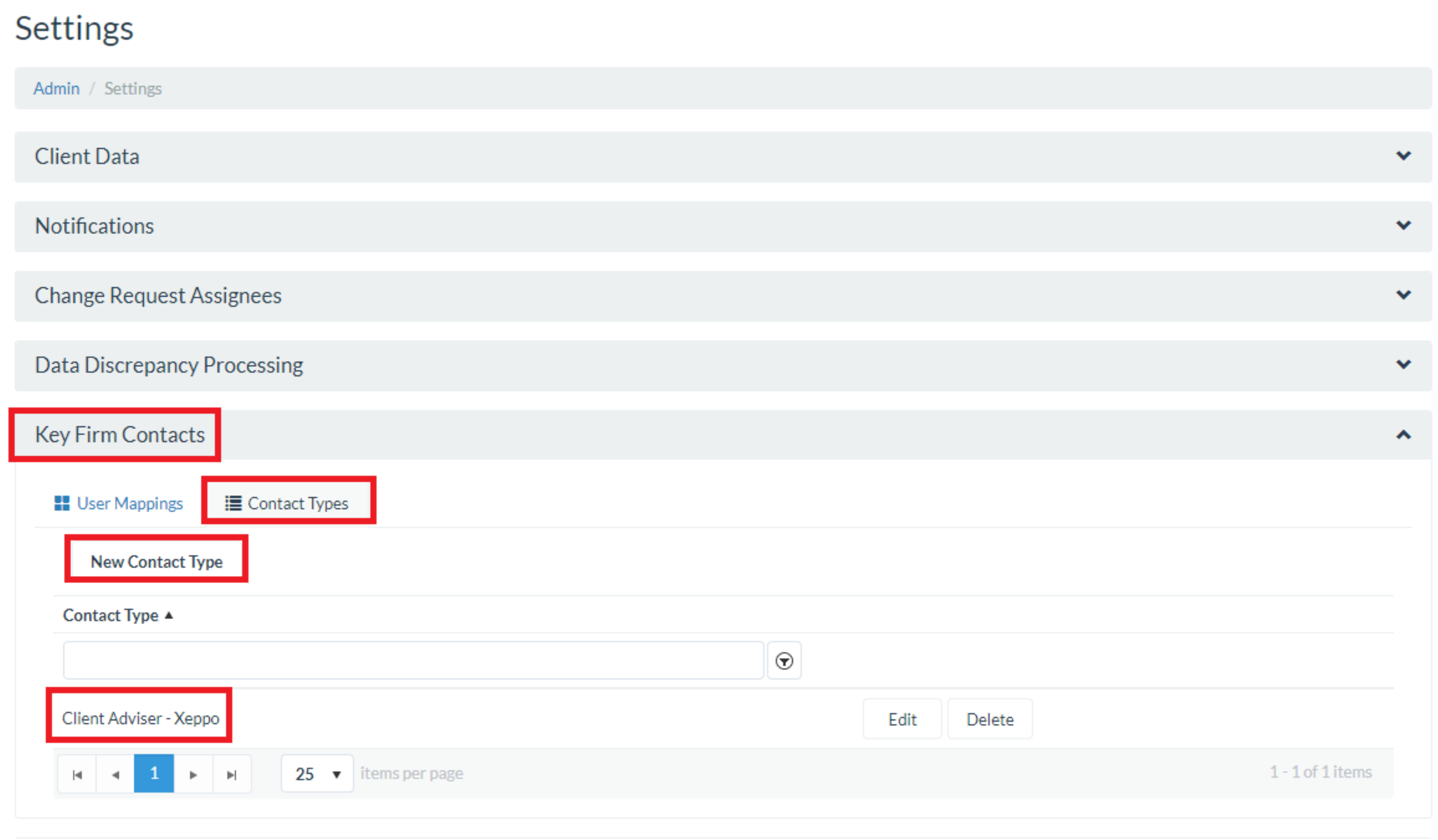


- Ability to receive on demand notifications from Xeppo through Windows Notification Centre or Android Device
- Remove death by email
- Some Common types of notifications:
  - Activity and Project Assignment
  - Lead and Opportunity Assignment
- Click through straight to Xeppo
- Find information on this feature you can search *Push Notifications* within our Support Portal

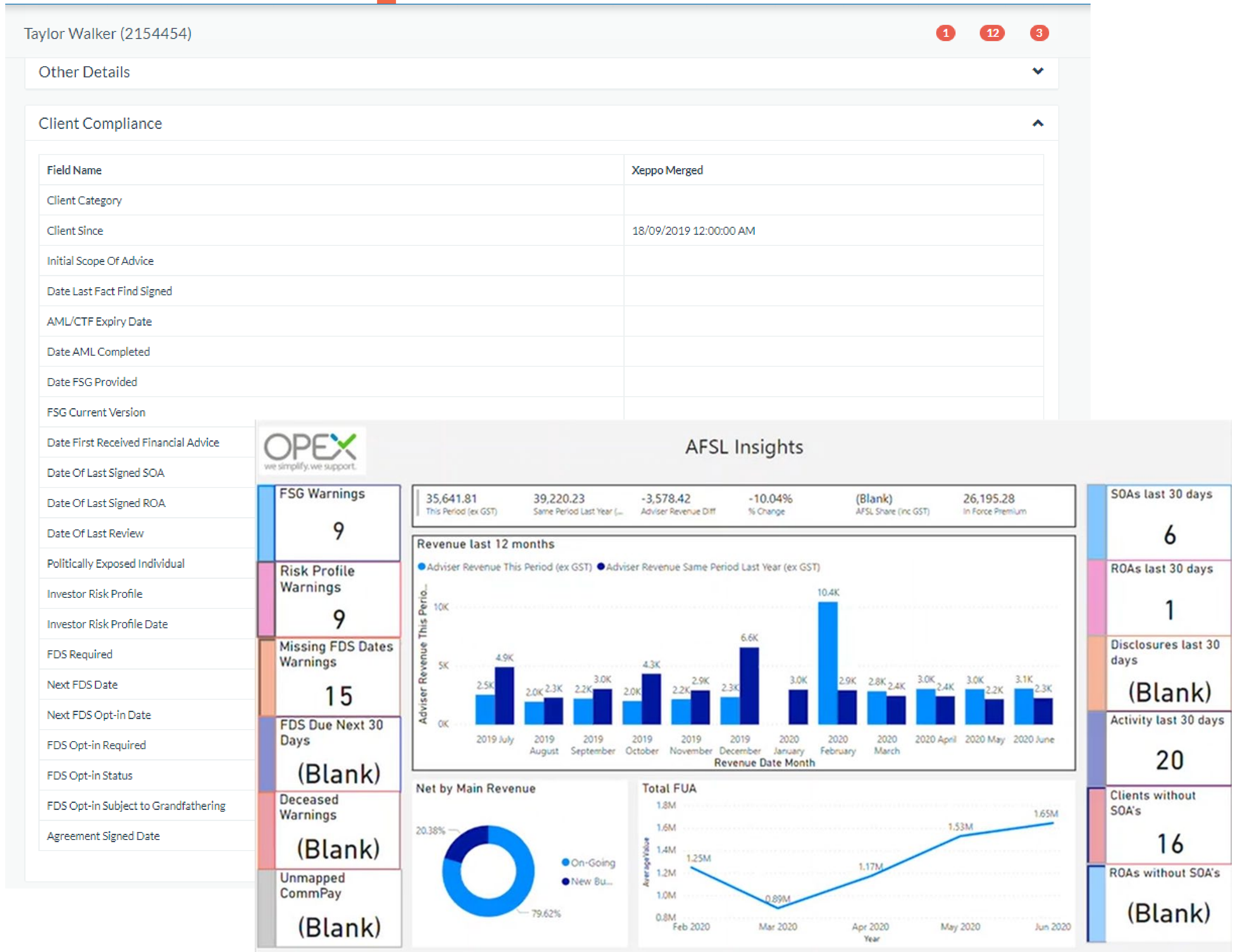
Key Firm Contacts

- Ability to create Key Firm Contacts in Xeppo directly
- Apply to clients where your source system does not cater for Key Firm Contacts within your business
- Only Key Firm Contacts created in Xeppo can be edited and deleted
- Further enhancements to adding Key Firm Contacts into Xeppo will be coming in Quarter 2





Compliance Fields



- Added additional Financial Planning Compliance fields such as:
  - SOA Date
  - ROA Date
  - Date Last Fact Find Signed…
- Currently mapped from Xplan and only visible in Xeppo currently, however will be editable in the future
- Fields can be used to view against the client record and also available through filters in Xeppo and through our API
- Used in AFSL insights PowerBI report managed by Opex

Xeppo Insights PowerBI Report

- New Xeppo insights report leveraging data from source systems whilst also leveraging data based on App usage in Xeppo

- Available via PowerBI's App store

- Some key aspects of the report are:
  - Revenue Analytics for Client Groups
  - New Client and New Business Revenue insights from our Sales App
  - Activity and Workflow insights from our Activities App

- Find information on how you can install this report you can search *Xeppo Insights Template App Installation and Configuration* within our Support Portal

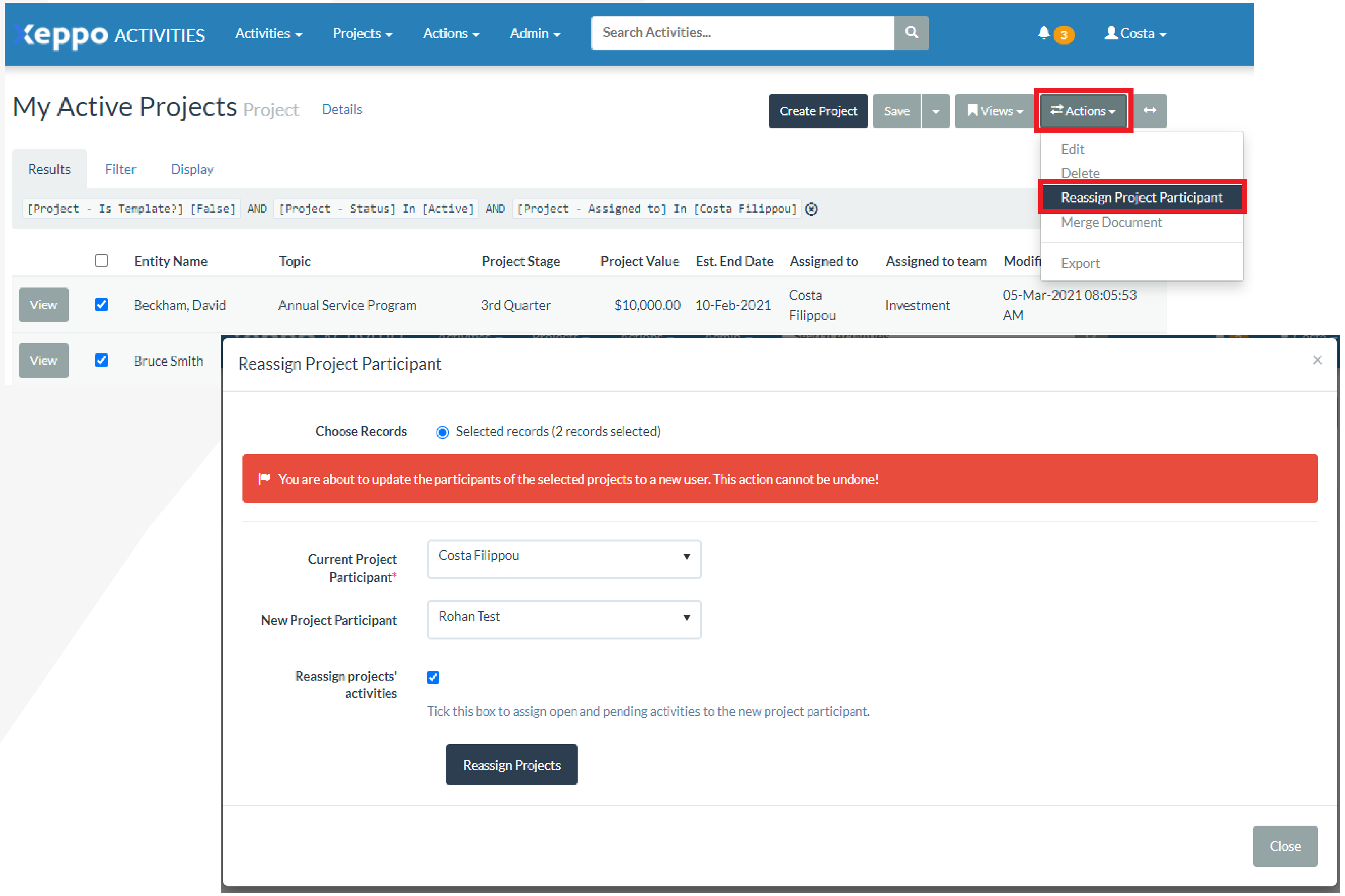
Q1 Xeppo
&
3rd Party Apps

Re-Assign Project Participants (Activities App)

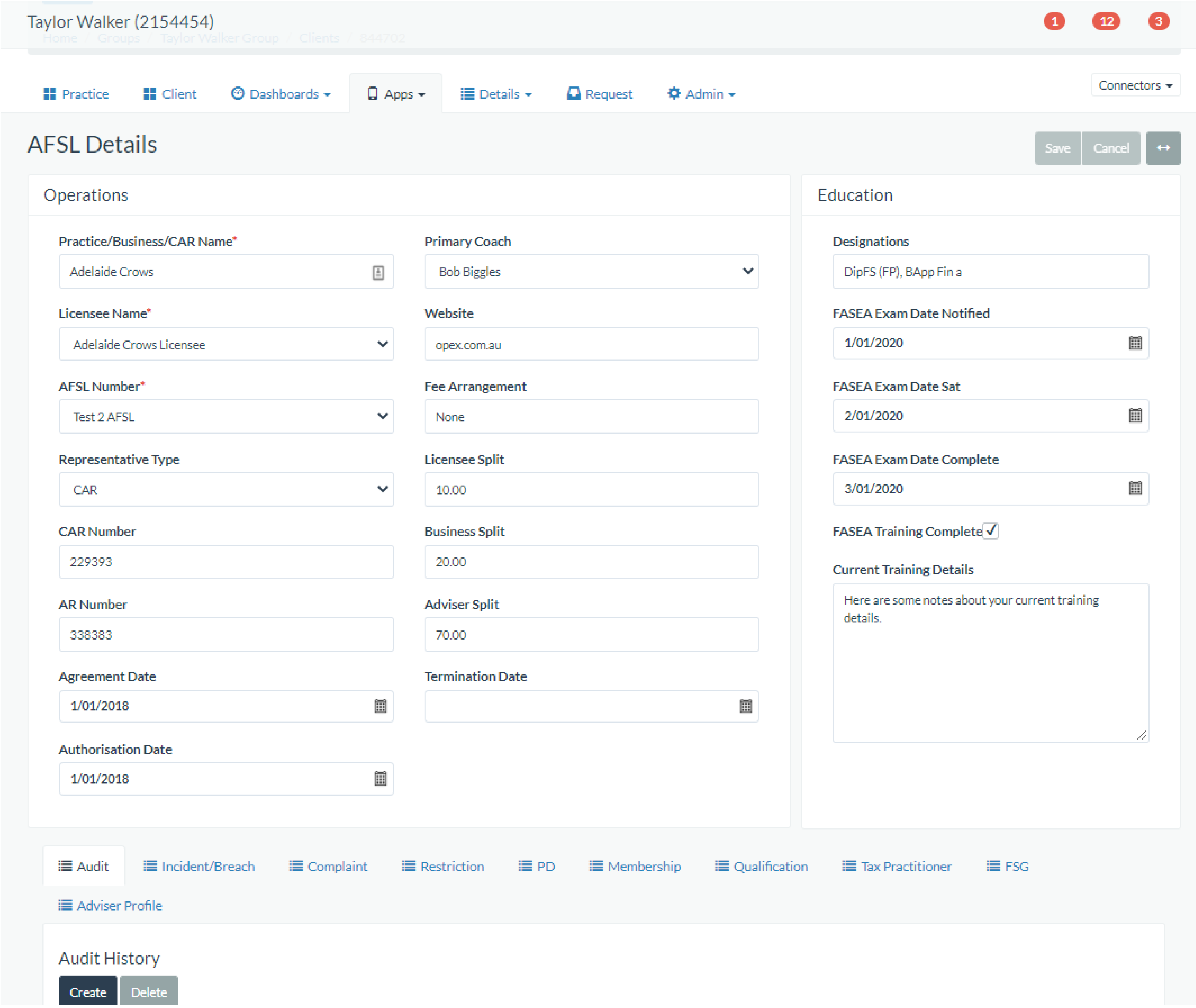
AFSL App (Opex App)

Re-Assigning Project Participants

- Users now have the ability to re-assign project participants from one user to another
- This can be used if staff leave a business or staff roles change
- Will update all roles for all selected projects from the Current to the New project participant
- Unactioned activities part of selected projects can also be re-assigned
- You can find more information about this feature by searching ***Reassign a Project Participant*** within our Support Portal



AFSL App (provided by Opex)



- App created to assist Australian Financial Services Licensees (AFSL) with managing important adviser information such as:
  - Authorised Representative (AR)/Corporate Authorised Representative (CAR) details
  - Audits
  - Incidents/Breaches
  - Complaints…..
- Manage outstanding Incidents/Breaches and Complaints up until resolution
- You can find more information about this App by contacting Opex Consulting at *support@opexconsulting.com.au*

Q2 Preview

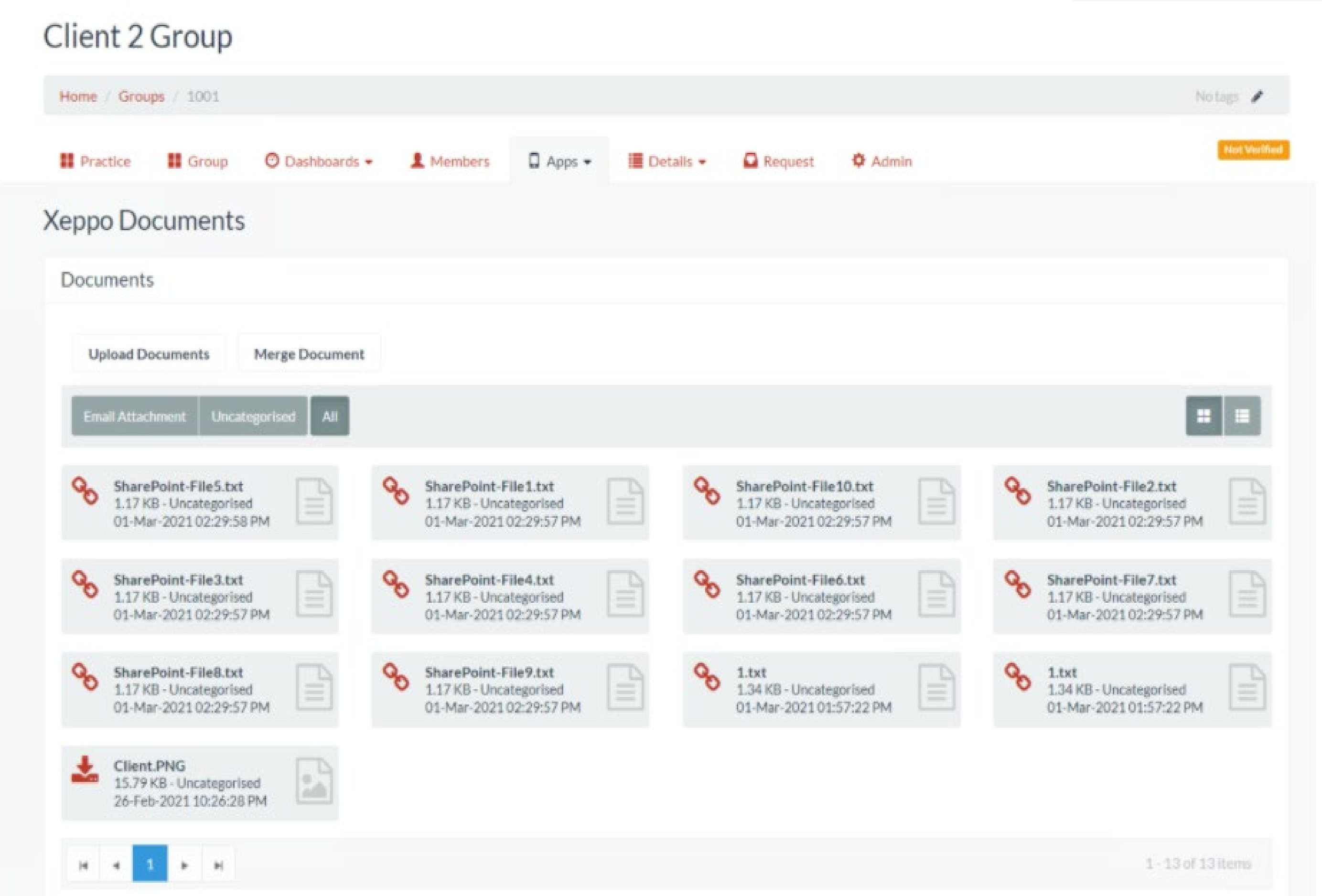
New Features

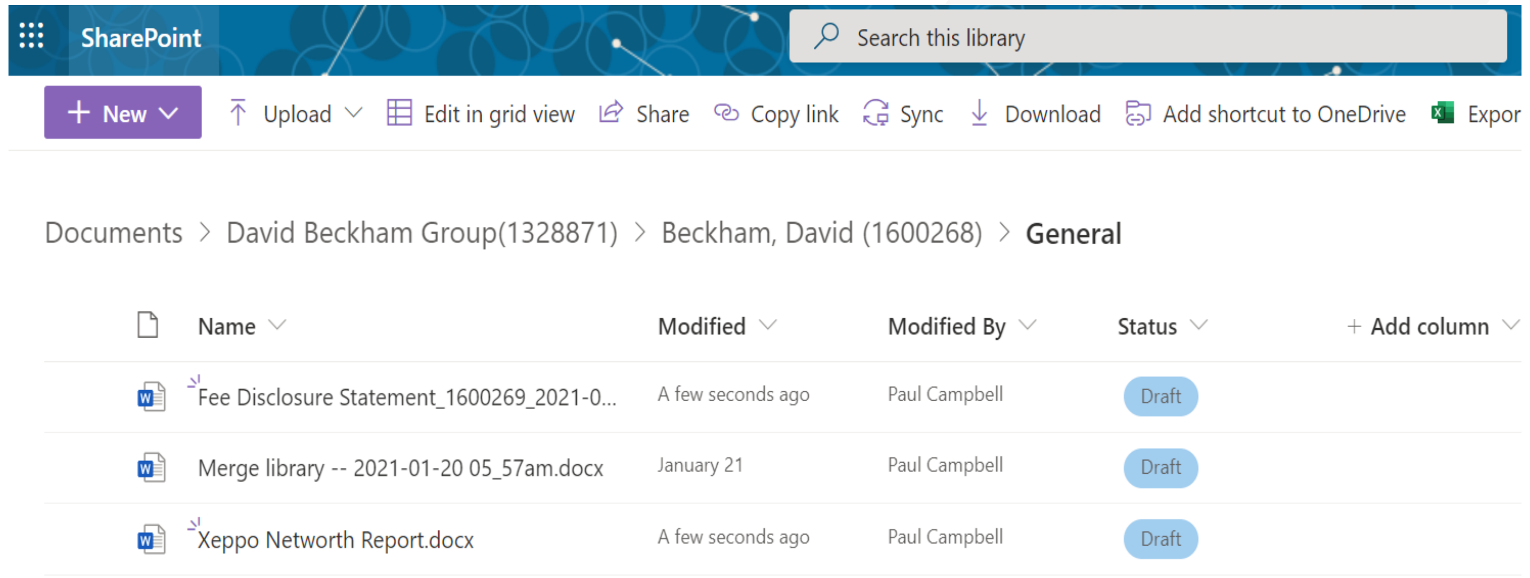
- SharePoint Integration
- Add/Edit Insurance in Xeppo
- Sync Insurance with Xplan
- Additional Data Capture fields as part of Fact Find Project
- New Connectors

Educational Series

- Pre Recorded Webinar series focusing on *Knowing* your client
- Update to our Support Portal

SharePoint Integration



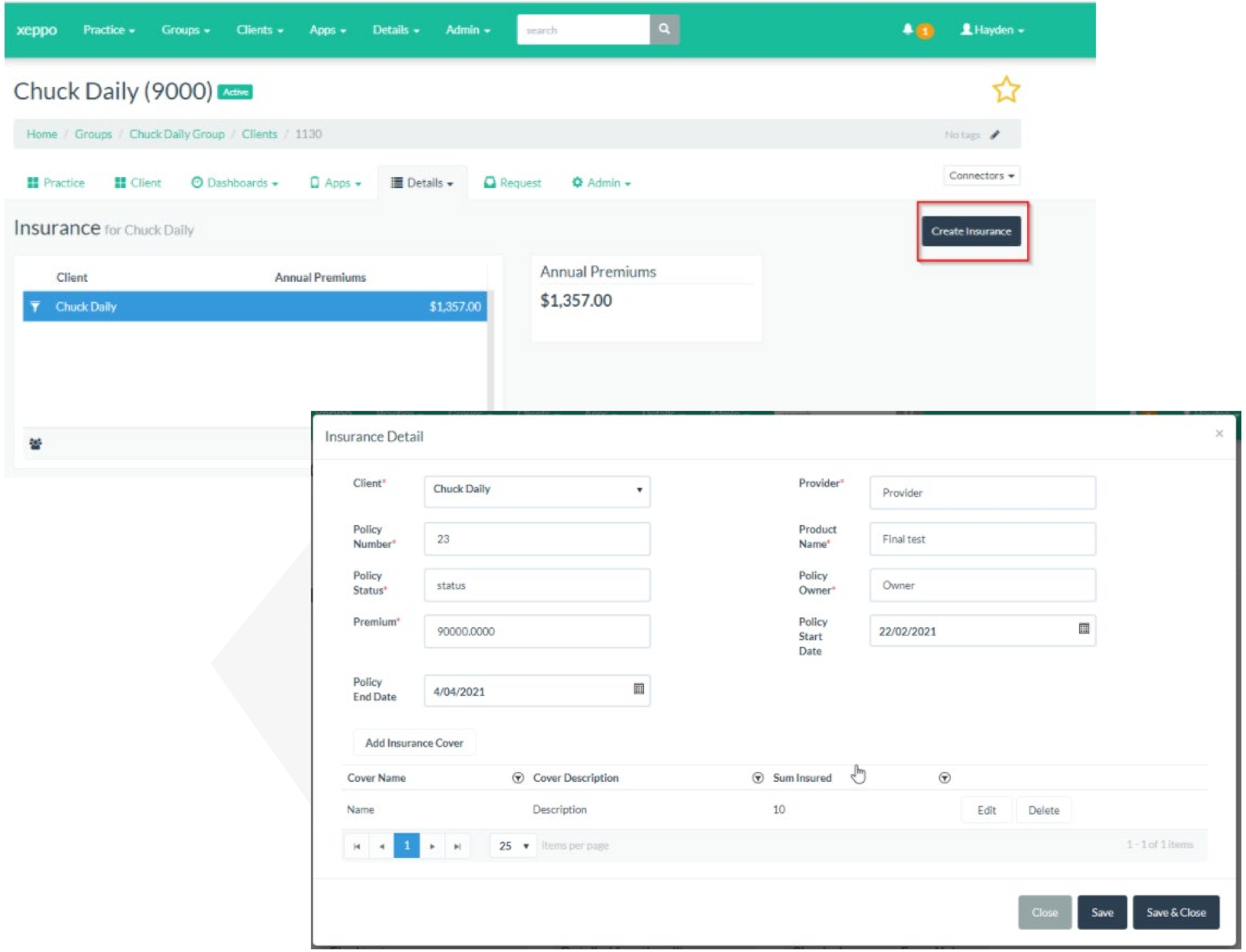


- Phase 1 (Early Q2) Deliver SharePoint integration:
  - Select SharePoint site (Your SharePoint instance)
  - Then SharePoint folder where client documents exist
  - Then look for Xeppo Group code at the end of the folder name to then provide documents in the documents apps
- Phase 2
  - Work through additional requirements for connection based on user feedback
- Contact *support@xeppo.com.au* if you are interested being included as an early adopter for our SharePoint integration

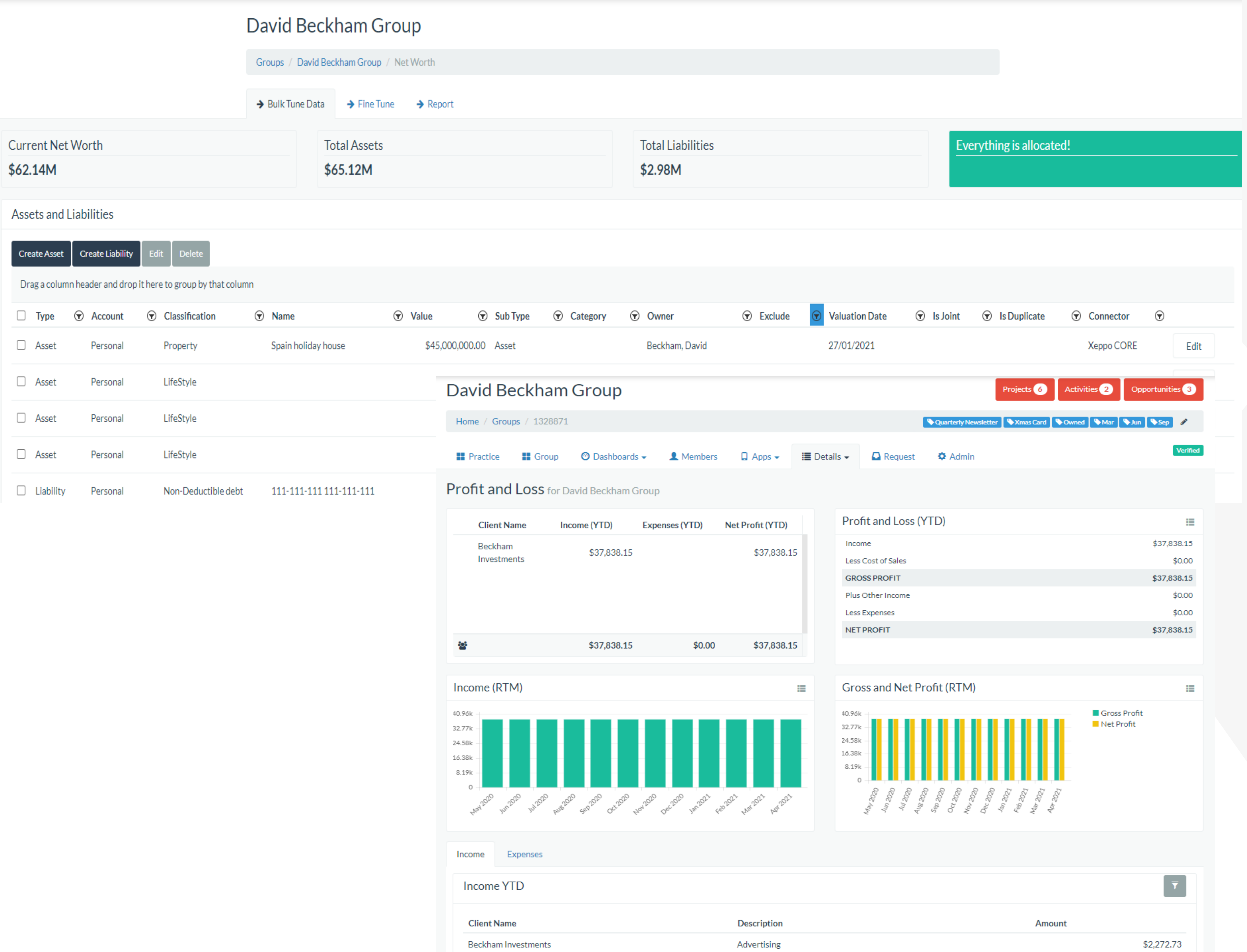
Insurance

- Finalise addition of all fields required to capture Insurance information in Xeppo
- Allow practices to create Insurance Policies directly into Xeppo
- Aiming to finalise 2 way Sync for Insurance Policies with Xplan for:
  - Adding new Insurance Policies into Xeppo and syncing those to Xplan
  - Editing existing Insurance policies from Xplan and sending updates to Xplan

Contact *support@xeppo.com.au* if you are interested being included as an early adopter for our Xplan Insurance 2 way sync



Additional Fact Find Data



- Add additional fields for the following data entry points:
  - Assets (Lifestyle assets only)
  - Liabilities
  - Income
  - Expenses
- Firstly look to add the additional fields and ingest the data from source systems
- Secondly allow practices to add data for the above directly into Xeppo and edit existing data
- Lastly we will be looking to sync this data back to Xplan once edited in Xeppo

New Connectors

- Adviserlogic
  - Client Details
  - Portfolio
  - Assets
  - Liabilities
  - Insurance
  - Dependants

- Netwealth Connector
  - Client Details
  - Portfolio Holdings

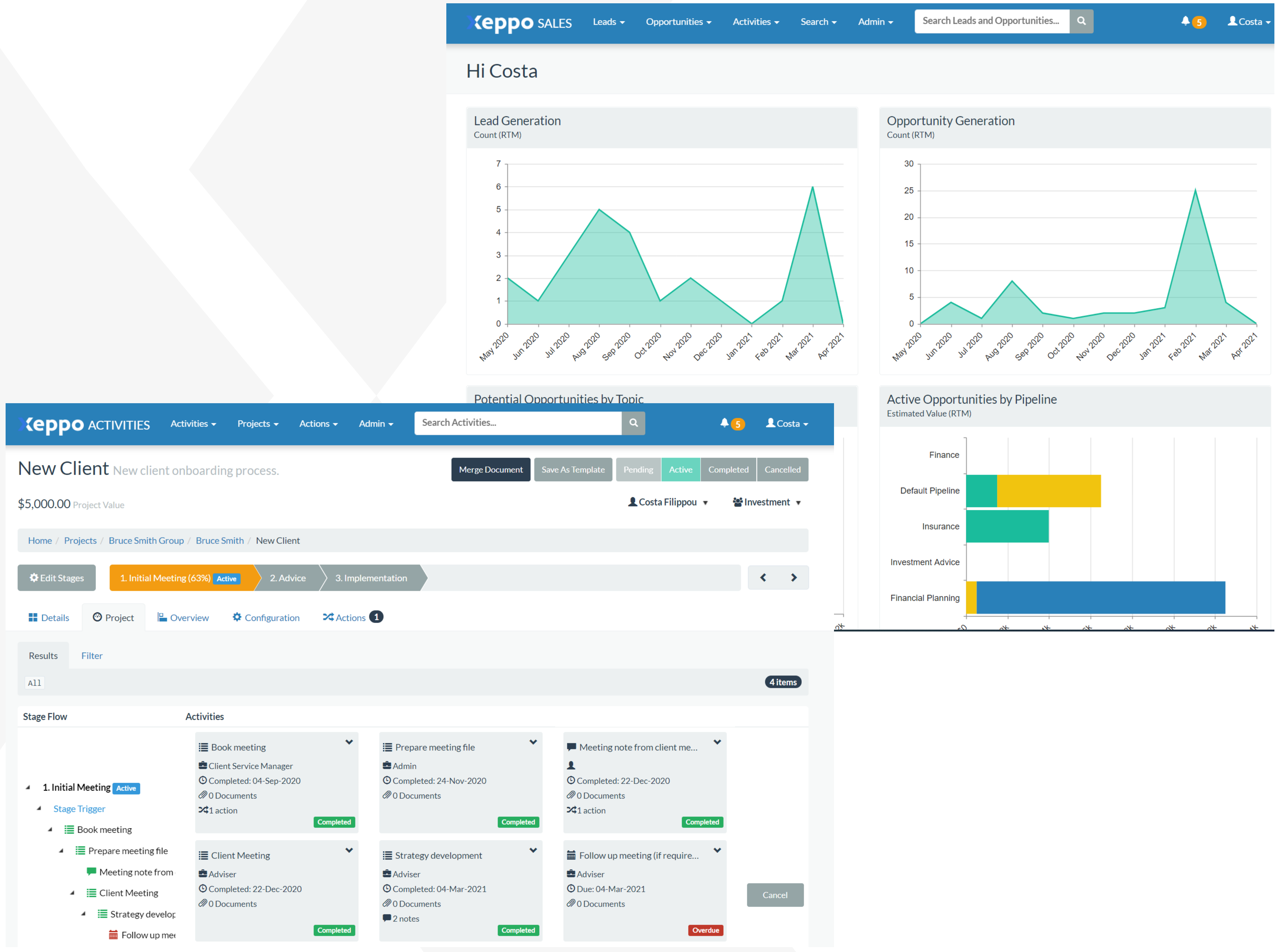
- Midwinter
  - Client Details
  - Portfolio
  - Assets
  - Liabilities
  - Insurance
  - Dependants

App Enhancements Focus

- Continuously working on enhancing our Core Applications

- Over the Quarter we will be mainly focusing on enhancements to the:
  - Activities App (inc. Projects), and
  - Sales App

- We will also look to make some minor enhancements to the:
  - Marketing App, and
  - Net Worth App



Educational Series

Xeppo Support Centre > Xeppo User Guide

XEPPO USER GUIDE

Xeppo user documentation.

User Series Training Webinars

- Session 1: Xeppo Core
- Session 2: Xeppo CRM
- Session 3: Sales
- Session 4: Activities
- Session 5: Projects
- Session 6: Documents & Marketing

See all 7 articles

Xeppo Support Centre > Admin User Guide

ADMIN USER GUIDE

Xeppo Administration documentation requires a login.

Admin Series Training Webinars

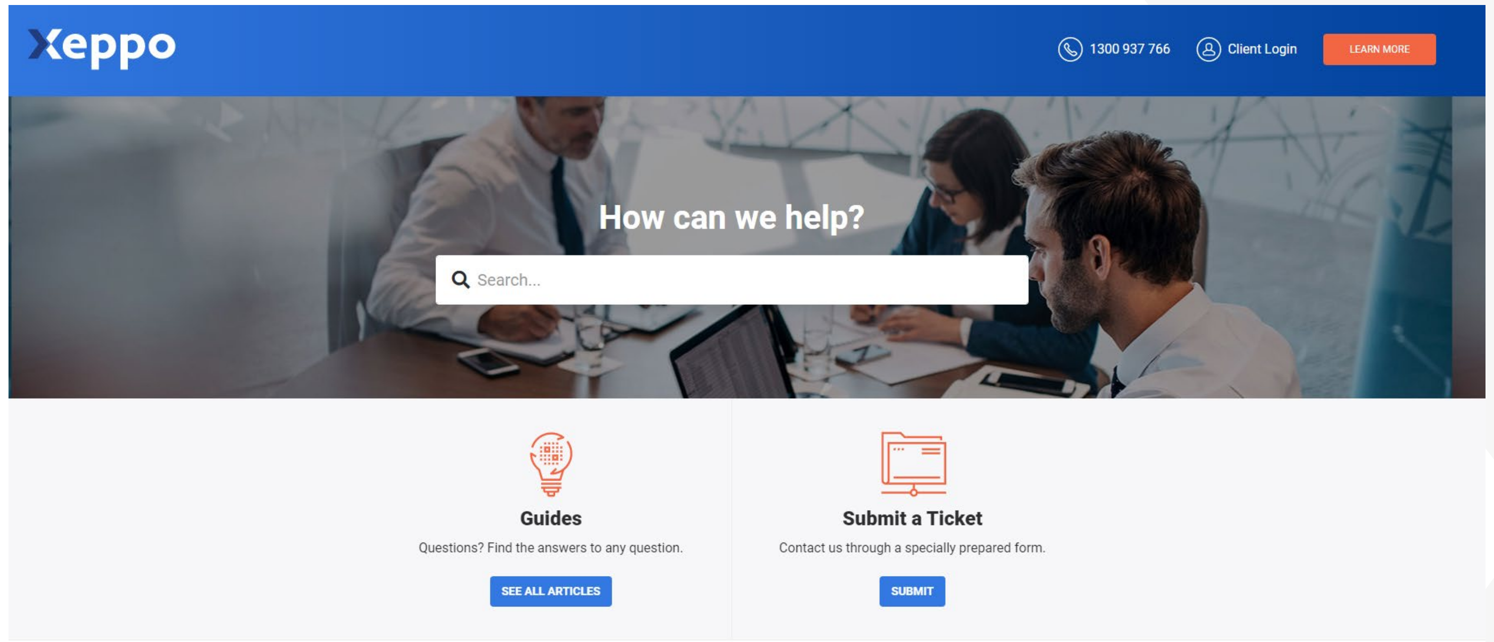
- Session 1: Matching & Grouping
- Session 2: Users & Security Groups
- Session 3: Tags
- Session 4: Fee Categories
- Session 5: Data Discrepancies
- Session 6: Managing Change Requests

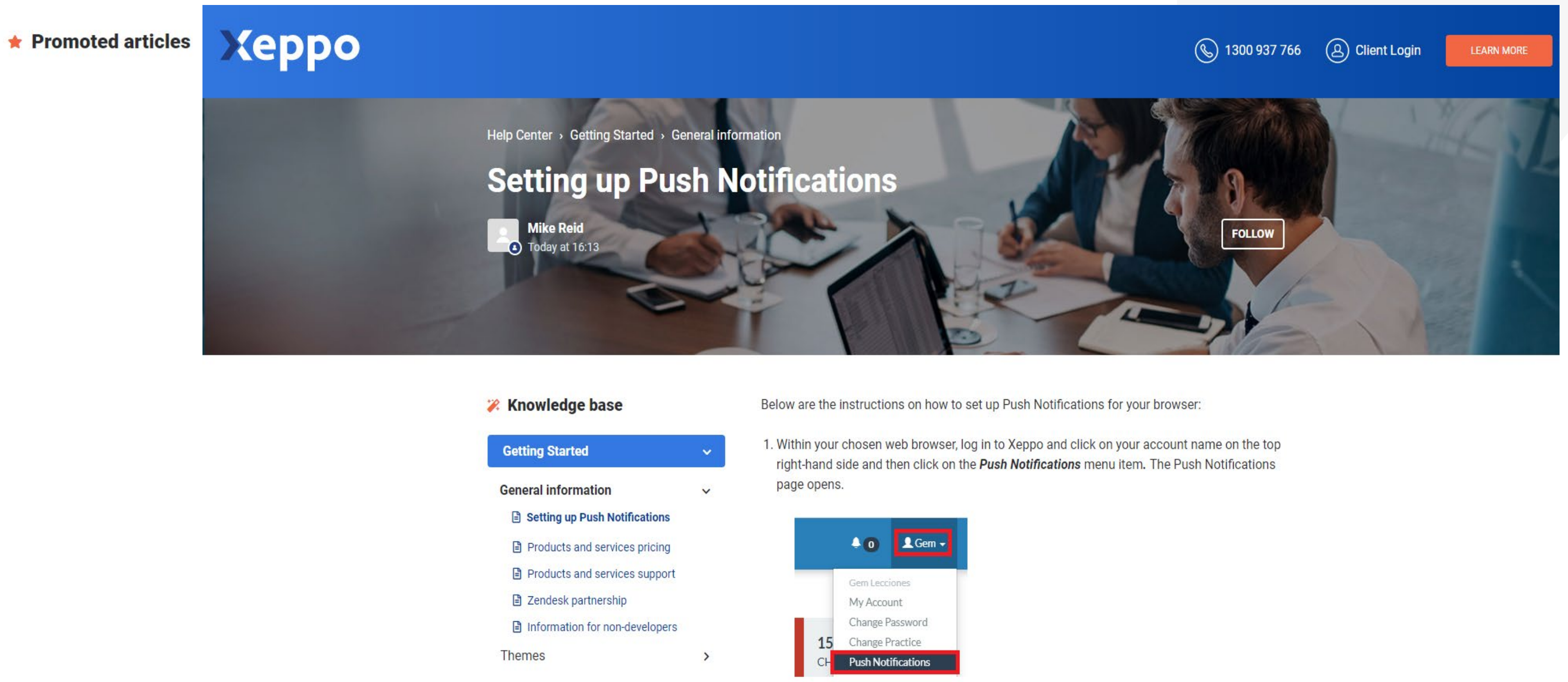
See all 7 articles

- We will be looking to release a series of pre-recorded webinars which we will release to the network over the Quarter

- We will be looking at releasing the following:
  - Understanding your Connectors
  - PowerBI Master Class Series incorporating a basic and advanced webinars to allow you to build your own custom PowerBI reports using your data from Xeppo
  - Formstack Documents Master Class Series incorporating a beginner and advanced webinars to allow you to build your own custom coded and email templates
  - Xeppo Insights PowerBI webinar

Support Portal Update





- We will be re-vamping our Support Portal to make it more user friendly
- We will be reviewing our current content and updating existing and creating more educational material online
- We will be looking to include Step by Step instructional guides and related video content (where possible) to ensure that we deliver educational material to cater for all learning styles

Questions?