

The logo features a stylized blue 'X' icon composed of two overlapping chevron shapes. To its right, the word 'eppo' is written in a white, lowercase, sans-serif font. The 'X' icon and the 'e' in 'eppo' are connected.

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

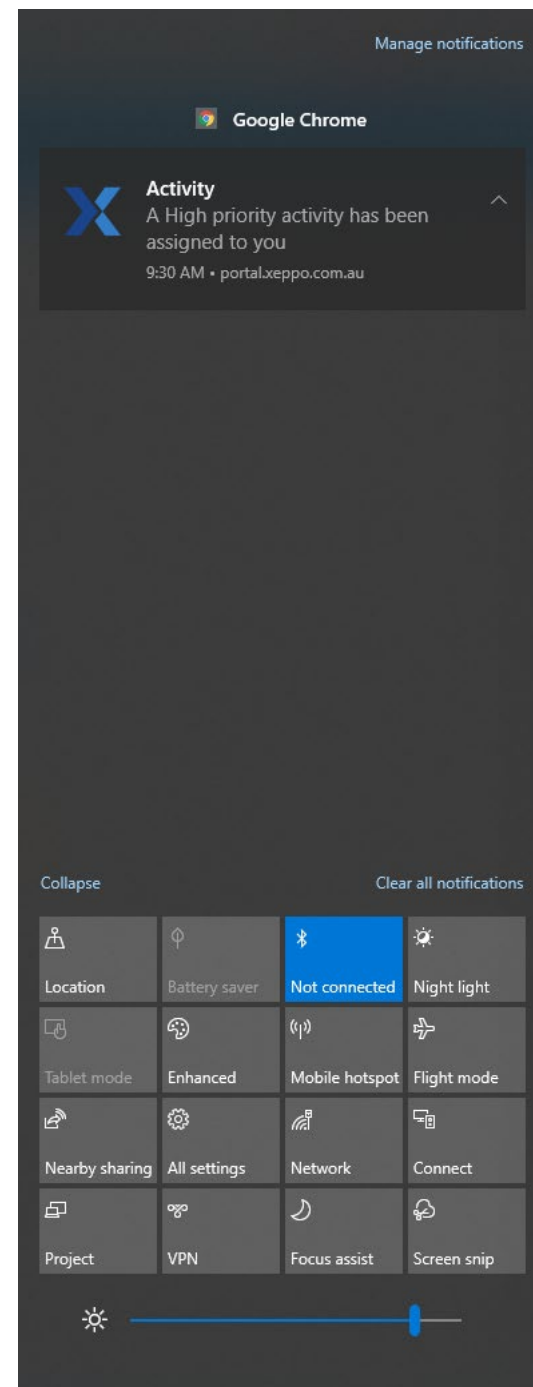
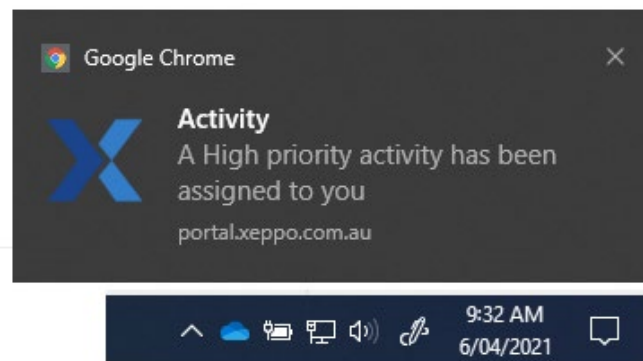
Key Firm Contacts

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

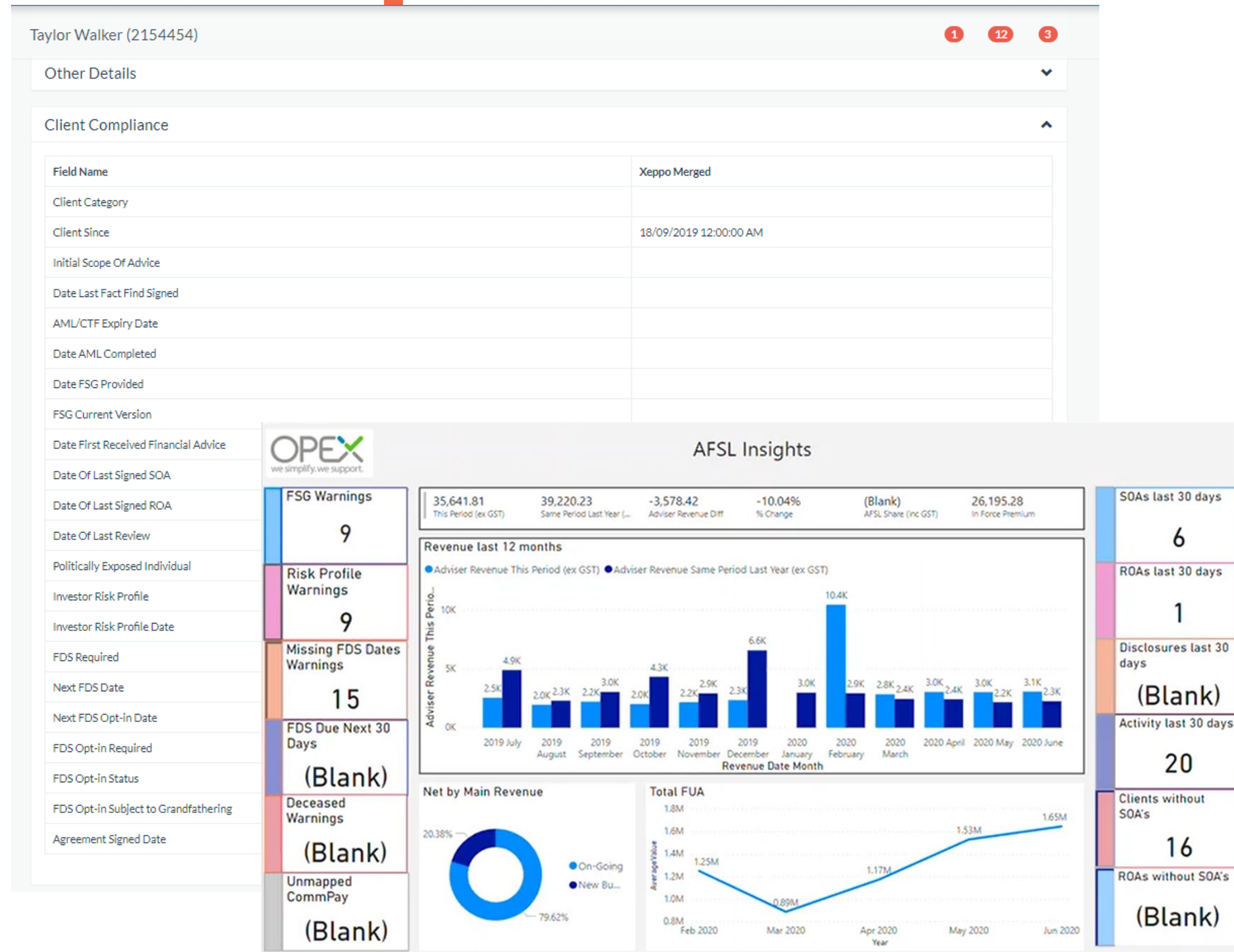


Key Firm Contacts

- 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

The screenshot displays the Xeppo user interface. At the top, the client profile for 'Flenders, Homer (2104974)' is shown with an 'Active' status. Below this, a breadcrumb trail indicates the path: Home / Groups / Homer Flenders Group / Clients / 1600266. A navigation bar includes tabs for Practice, Client, Dashboards, Apps, Details, Request, and Admin. The main content area is divided into two sections. The left section, titled 'Practice', contains three cards: 'Debtors Outstanding', 'Jobs', and 'Quotes'. The right section, titled 'Key Firm Contacts', lists three contacts: 'Client Adviser', 'Client Adviser', and 'Client Adviser - Xeppo'. A 'Create' button is visible in the top right corner of this section. Below the main content area, a 'Settings' panel is open, showing various configuration options. The 'Key Firm Contacts' setting is highlighted, and the 'New Contact Type' button is visible. The 'Client Adviser - Xeppo' option is selected, and the 'Edit' and 'Delete' buttons are shown at the bottom of the list.

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

The screenshot displays the Xeppo Activities web application. The top navigation bar includes the Xeppo logo, a search bar, and user information (Costa). The main section is titled 'My Active Projects' and shows a table of project records. Two records are selected: 'Beckham, David' and 'Bruce Smith'. An 'Actions' dropdown menu is open, highlighting the 'Reassign Project Participant' option. A modal window titled 'Reassign Project Participant' is displayed, showing the current project participant as 'Costa Filippou' and the new project participant as 'Rohan Test'. The modal also includes a checkbox for 'Reassign projects' activities, which is checked. A red warning banner at the top of the modal states: 'You are about to update the participants of the selected projects to a new user. This action cannot be undone!'. A 'Reassign Projects' button is at the bottom of the modal.

Entity Name	Topic	Project Stage	Project Value	Est. End Date	Assigned to	Assigned to team	Modified
<input checked="" type="checkbox"/> Beckham, David	Annual Service Program	3rd Quarter	\$10,000.00	10-Feb-2021	Costa Filippou	Investment	05-Mar-2021 08:05:53 AM
<input checked="" type="checkbox"/> Bruce Smith							

Choose Records ☒ Selected records (2 records selected)

You are about to update the participants of the selected projects to a new user. This action cannot be undone!

Current Project Participant*

New Project Participant

Reassign projects' activities ☒
Tick this box to assign open and pending activities to the new project participant.

Reassign Projects

Close

AFSL App (provided by Opex)

Taylor Walker (2154454)

Home / Groups / Taylor Walker Group / Clients / 844702

Practice Client Dashboards Apps Details Request Admin Connectors

AFSL Details

Save Cancel ↔

Operations

Practice/Business/CAR Name*
Adelaide Crows

Licensee Name*
Adelaide Crows Licensee

AFSL Number*
Test 2 AFSL

Representative Type
CAR

CAR Number
229393

AR Number
338383

Agreement Date
1/01/2018

Authorisation Date
1/01/2018

Primary Coach
Bob Biggles

Website
opex.com.au

Fee Arrangement
None

Licensee Split
10.00

Business Split
20.00

Adviser Split
70.00

Termination Date

Education

Designations
DipFS (FP), BApp Fin a

FASEA Exam Date Notified
1/01/2020

FASEA Exam Date Sat
2/01/2020

FASEA Exam Date Complete
3/01/2020

FASEA Training Complete ☒

Current Training Details
Here are some notes about your current training details.

Audit Incident/Breach Complaint Restriction PD Membership Qualification Tax Practitioner FSG

Adviser Profile

Audit History

Create Delete

- 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

The screenshot displays the Xeppo Documents interface. At the top, it shows 'Client 2 Group' and navigation tabs for Practice, Group, Dashboards, Members, Apps, Details, Request, and Admin. Below this, the 'Xeppo Documents' section shows a list of documents with columns for Name, Modified, Modified By, and Status. The documents listed are:

Name	Modified	Modified By	Status
SharePoint-File1.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File2.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File3.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File4.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File5.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:58 PM	
SharePoint-File6.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File7.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File8.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
SharePoint-File9.txt	1.17 KB - Uncategorised	01-Mar-2021 02:29:57 PM	
1.txt	1.34 KB - Uncategorised	01-Mar-2021 01:57:22 PM	
Client.PNG	15.79 KB - Uncategorised	26-Feb-2021 10:26:28 PM	

Below the document list, there is a section for 'SharePoint' integration. It includes a search bar and a table of documents:

Name	Modified	Modified By	Status
Fee Disclosure Statement_1600269_2021-0...	A few seconds ago	Paul Campbell	Draft
Merge library -- 2021-01-20 05_57am.docx	January 21	Paul Campbell	Draft
Xeppo Network Report.docx	A few seconds ago	Paul Campbell	Draft

- 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

The screenshot displays the Xeppo web application interface. At the top, a green navigation bar contains the 'xeppo' logo and various menu items: Practice, Groups, Clients, Apps, Details, and Admin. A search bar and user profile (Hayden) are also present. Below the navigation bar, the main header shows 'Chuck Daily (9000)' with an 'Active' status and a star icon. A breadcrumb trail indicates the path: Home / Groups / Chuck Daily Group / Clients / 1130. A secondary navigation bar includes icons for Practice, Client, Dashboards, Apps, Details, Request, and Admin. The main content area is titled 'Insurance for Chuck Daily' and features a table of annual premiums. A 'Create Insurance' button is highlighted with a red box. An 'Insurance Detail' modal is open, showing fields for Client (Chuck Daily), Policy Number (23), Policy Status (status), Premium (90000.0000), Policy End Date (4/04/2021), Provider (Provider), Product Name (Final test), Policy Owner (Owner), and Policy Start Date (22/02/2021). Below these fields is an 'Add Insurance Cover' button and a table with columns for Cover Name, Cover Description, and Sum Insured. The table contains one item with a sum insured of 10. At the bottom of the modal are 'Close', 'Save', and 'Save & Close' buttons.

Client	Annual Premiums
Chuck Daily	\$1,357.00

Client*	Provider*
Chuck Daily	Provider

Policy Number*	Product Name*
23	Final test

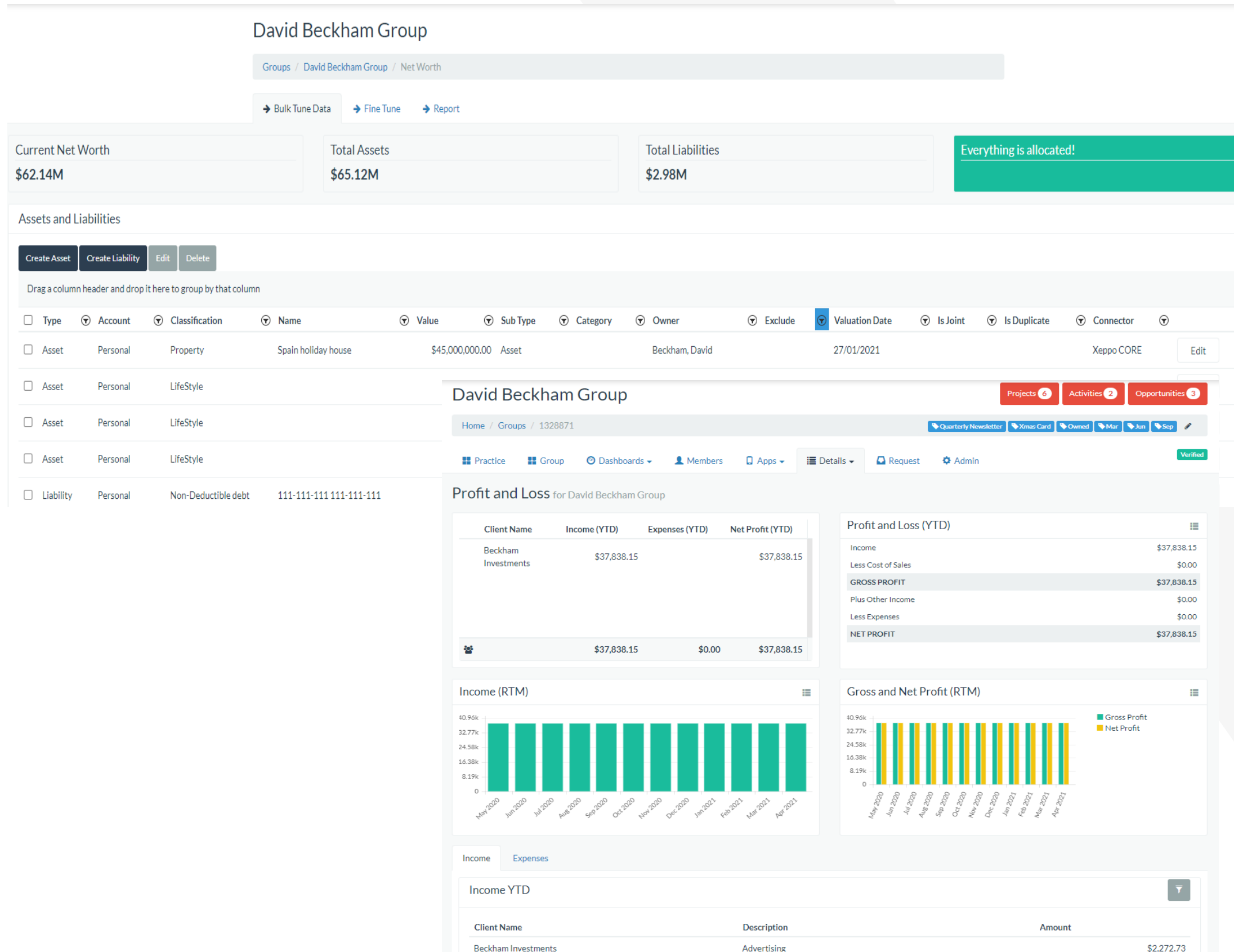
Policy Status*	Policy Owner*
status	Owner

Premium*	Policy Start Date
90000.0000	22/02/2021

Policy End Date
4/04/2021

Cover Name	Cover Description	Sum Insured
Name	Description	10

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

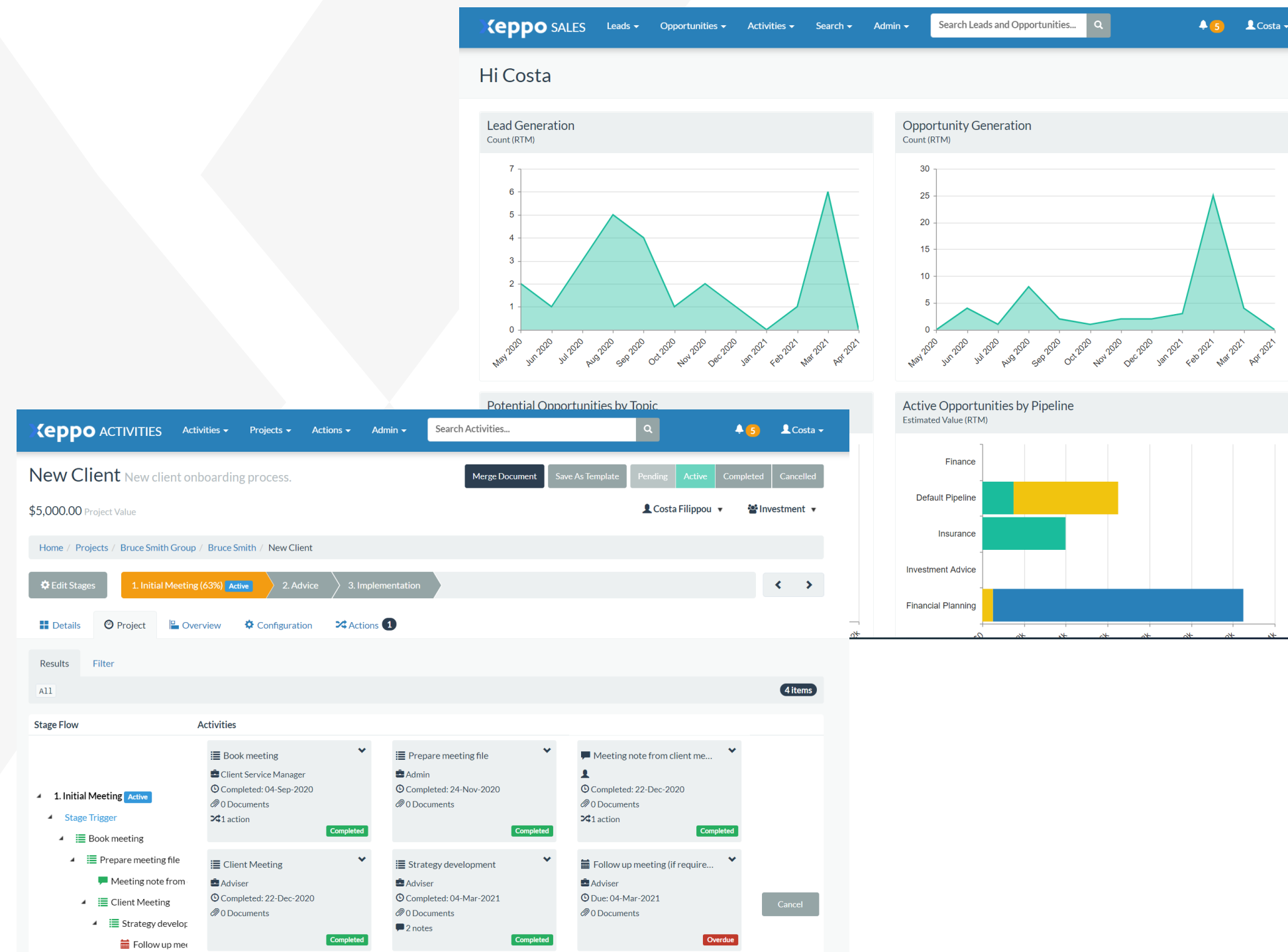
- **Netwealth Connector**
 - Client Details
 - Portfolio Holdings



- **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

[Home](#) [Xeppo Support Centre](#) > [Xeppo User Guide](#)

XEPPPO 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](#)

[Home](#) [Xeppo Support Centre](#) > [Admin User Guide](#)

ADMIN USER GUIDE

Xeppo Administration documentation requires a login.

Admin Series Training Webinars

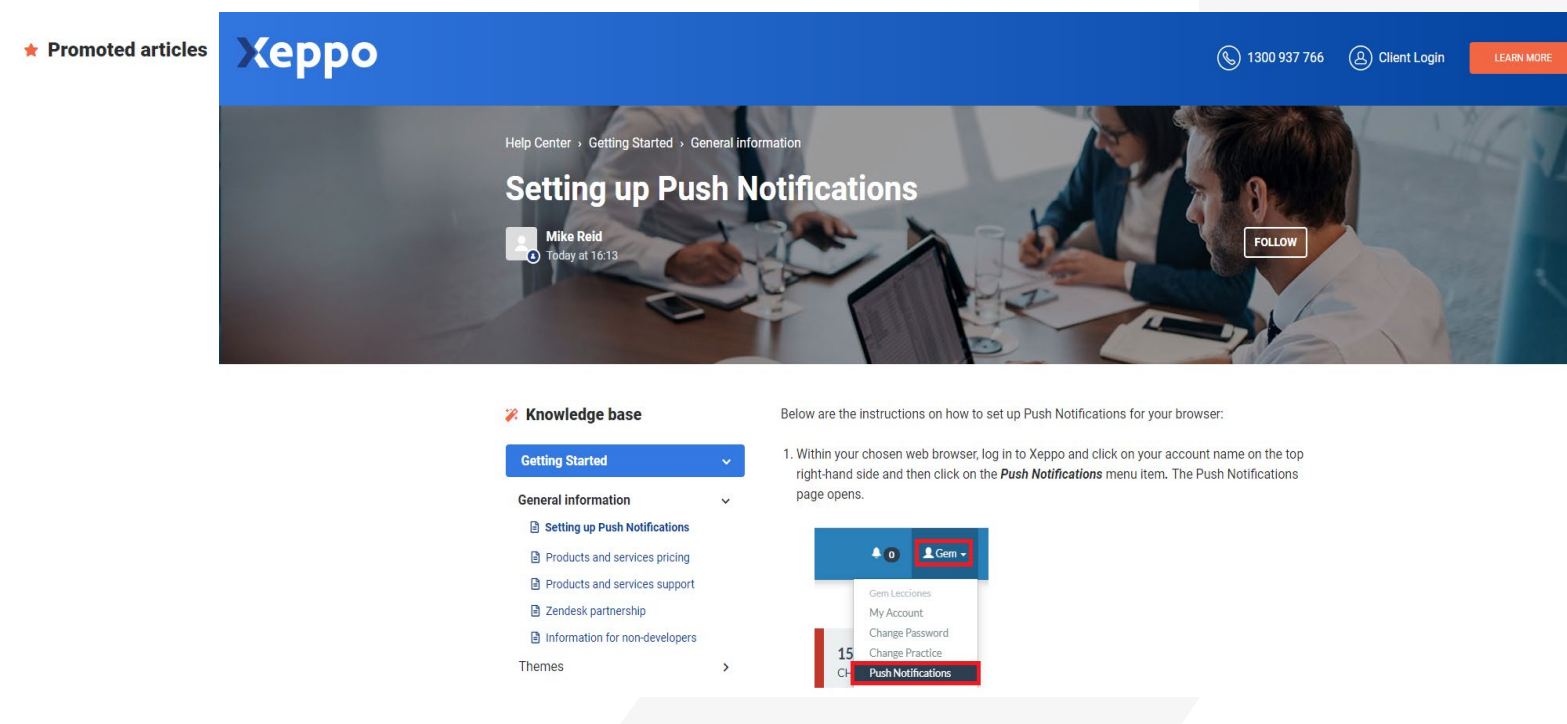
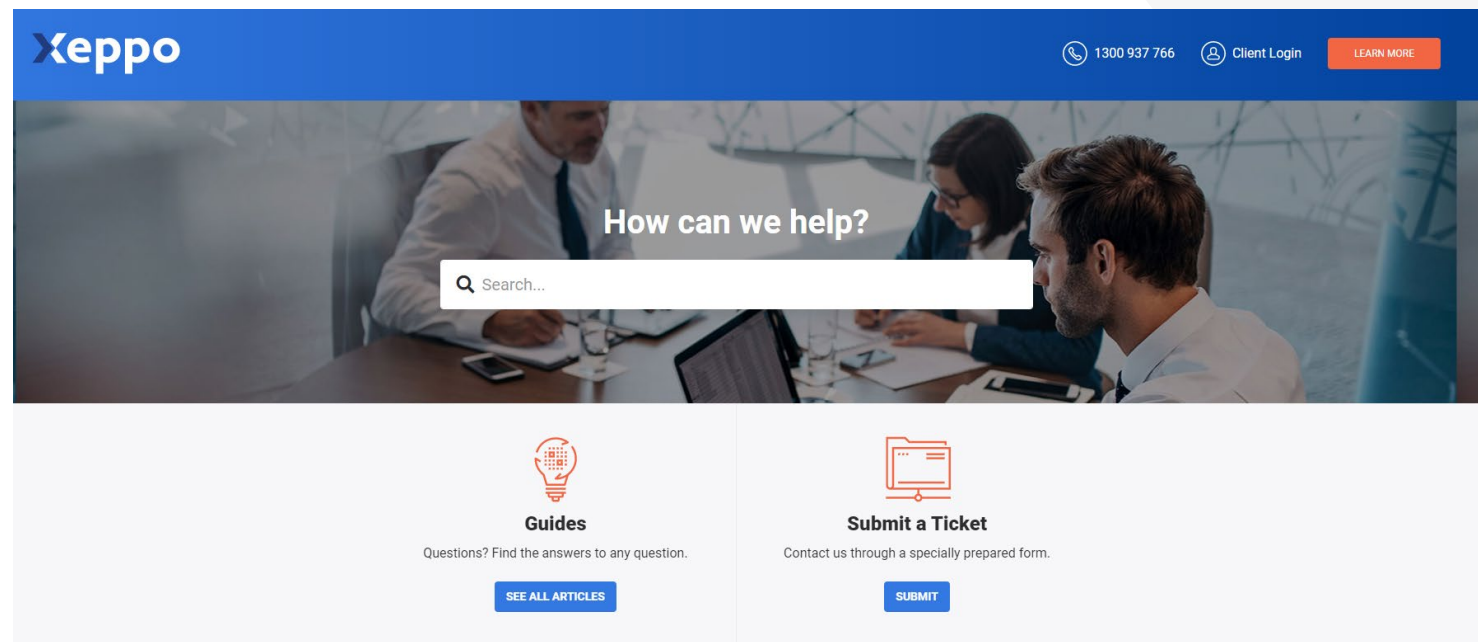
- Session 1: Matching & Grouping
- Session 2: Users & Security Groups
- Session 3: Tags
- Session 4: Fee Categories
- Session 5: Data Discrepancies
- Session 6: Managing Change Requests

[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?