Xeppo

Admin Training
EXISTING PRACTICES

Admin Training Progress Tracker

Track the progress of your self-guided learning and review tasks to understand how Xeppo is configured for your practice.

Use this tracker to:

- Keep track of your self-guided learning progress
- Track the review tasks you have completed
- Note anything you need to follow up internally
- Note anything to follow up with Xeppo Support

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Phase 1 – Users and Security Groups

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Security (20-25 mins)	Xeppo Security Module: Overview	☐
	Steps to set up Security	☐
	Creating and Modifying Users & Teams	☐
	Create or Modify a Security Group	☐
	Manage Permissions	☐
	Impersonation	☐
	Grant Client Access to Xeppo	☐
	Terminology	☐
Topic 2: Security Permissions (10-15 mins)	Managing Security Group Users & Teams	☐
	Managing Core Capabilities	☐
	Managing App Capabilities	☐
	Managing Direct Permissions	☐
	Inherited Permissions	☐
Topic 3: Two-factor Authentication (2-5 mins)	Setting up Two-factor Authentication (2FA)	☐
	Managing Two-factor Authentication (2FA)	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
23 minutes	Users & Security Groups	☐

Review Tasks

Tasks	Complete
Review security requirements for your practice and how these principles have been applied in Xeppo	☐
Review default settings for the Practice user and Client user Security Groups	☐
Review the list of current Xeppo users new users for your practice	☐
Review Teams and members of Teams, if using this functionality	☐
Set up two-factor authentication (2FA) and record your 2FA recovery codes somewhere safe - you may choose to remind other users of this requirement	☐

Notes

Phase 2 - Admin Settings, Themes & Power BI

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Settings & Theme (20-25 mins)	Theming your Xeppo Portal	☐
	Admin Settings Menu	☐
Topic 2: Xeppo Insights Power BI (20-25 mins)	Xeppo Insights Template App Installation and Configuration	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
13 minutes	Settings	☐

Review Tasks

Tasks	Complete
Review your Xeppo portal Theme in the Admin menu	☐
Review the Client Data settings in the Admin Settings menu	☐
Review the Notification settings in the Admin Settings menu	☐
Review Client, Insurance and Cashflow Lookup Fields in the Admin Settings menu (if you will be updating these fields directly in Xeppo)	☐
Review the Partner Relationships mapping in the Admin Settings menu	☐
Check prerequisites to install the Xeppo Insights for Power BI (if applicable to your practice)	☐
Log in to Power BI and install Xeppo Insights from the app store (subject to meeting prerequisites)	☐

Notes

Phase 3 - Connectors

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Connectors General (45-50 mins)	Available Connectors	☐
	Create New Connector	☐
	Manage Connectors	☐
	Connect Field Priorities	☐
	Connector Status Updating	☐
	SFTP File Delivery using FIleZilla	☐
Topic 2: Monitor Connectors (5-10 mins)	Monitor Connectors	☐

Review Tasks

Tasks	Complete
Review connector status to ensure they are functioning as expected	☐
Review connector priority order	☐
If using SFTP to deliver files, review the process for file delivery	☐
Explore opportunities for additional connectors if applicable	☐

Notes

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Phase 4 - Client Matching

Self-Paced Learning – Articles

Topic	Articles	Complete
Topic 1: Client Matching (60-70 mins)	Client Matching Overview	☐
	Client Auto Matching	☐
	Client Wizard Matching	☐
	Manual Matching Basics	☐
	Processing Unmatched Clients	☐
	Client Review Page	☐
	Merge Xeppo Codes	☐
	Inactive Source Client Deletion	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
20 minutes	Matching & Grouping	☐

Review Tasks

Tasks	Complete
Address unmatched Clients in Xeppo using the Matching Wizard and Manual Matching	☐
Process unmatched Clients - Ensure you have exhausted all possible matches prior to processing unmatched clients	☐
Repeat the above steps to match additional records as more information is ingested from your source systems and/or more connectors are added	☐
Review the Client Review page to review your matching before moving on to the next Phase of training on Grouping	☐

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Phase 5 - Grouping & Primary Contacts

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Grouping (30-35 mins)	Client Grouping Overview	☐
	Auto Grouping	☐
	Group Review	☐
	Group Verification	☐
Topic 2: Primary Contacts (5-10 mins)	Primary Contacts	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
20 minutes	Matching & Grouping	☐

Review Tasks

Tasks	Complete
Review and verify groups in Group Review	☐
Identify groups that do not have a primary contact and assign a primary contact for those groups	☐

Notes

Phase 6 - Fee Categories & Tags

Self-Paced Learning – Articles

Topics	Ar icles	Complete
Topic 1: Fee Categories (10-15 mins)	Ranking by Fee Categories Overview	
	Building Fee Categories	
Topic 2: Tags (10-15 mins)	Introduction to Tags	
	Create a Tag	
	System Tags for Custom Fields	

Self-Paced Learning – Video & Webinars

Duration	Videos	Complete
16 minutes	Fee Categories	
18 minutes	Tags	

Review Tasks

Tasks	Complete
Map uncategorised revenue to Fee Categories	
Review current mapping of revenue to fee categories	
Review and understand how tags are currently being used within your practice - for example, review months or system tags being imported	
Explore potential where tags may be useful within your practice	

Notes

Phase 7 - Data Management

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Data Discrepancies (65-75 mins)	Data Discrepancies Overview	☐
	Ignore Data Discrepancies - Settings	☐
	Data Comparison Fields	☐
	Compare Client Records	☐
	Client Data Discrepancies - Viewing	☐
Topic 2: Change Requests (10-15 mins)	Creating a Change Request	☐

Self-Paced Learning – Video & Webinars

Duration	Videos	Complete
21 minutes	Data Discrepancies	☐
19 minutes	Change Requests	☐

Review Tasks

Tasks	Complete
Review Data Discrepancy Settings in Admin > Settings > Data Discrepancy Processing - this will need to be reviewed each time new connectors are added	☐
Review and address data discrepancies	☐
Ignore data discrepancies that do not require action in a source system	☐

Notes

Phase 8 - Regular Tasks, Xeppo Core & Beyond

Self-Paced Learning – Articles

Topics	Articles	Complete
Topic 1: Important Regular Admin Tasks (30-40 mins)	Admin Callouts	☐
	Monitor Connectors	☐
	Monitor Security	☐
	Change Requests	☐
Topic 2: Xeppo Core (15-20 mins)	My Account Menu	☐
	Searching	☐
	Group Page Overview	☐
	Client Page Overview	☐
	Introduction to Views	☐
	Dashboards	☐

Self-Paced Learning – Video & Webinars

Duration	Video	Complete
70 minutes	Xeppo Core	☐

Review Tasks

Tasks	Complete
Review and understand who has responsibility for regular Admin tasks within your practice - processing of unmatched clients, data discrepancies, fee categories, change requests and monitoring connectors	☐
Review and understand who has responsibility of Admin tasks relating to security - regular reviews of users and user permissions, security groups and teams	☐
Review all settings in Admin > Settings, if changes are required follow up within your practice with the relevant personnel	☐
Get to know Xeppo along with the Xeppo Core video	☐

Notes