A Comparison of Xeppo Group Insights Versions

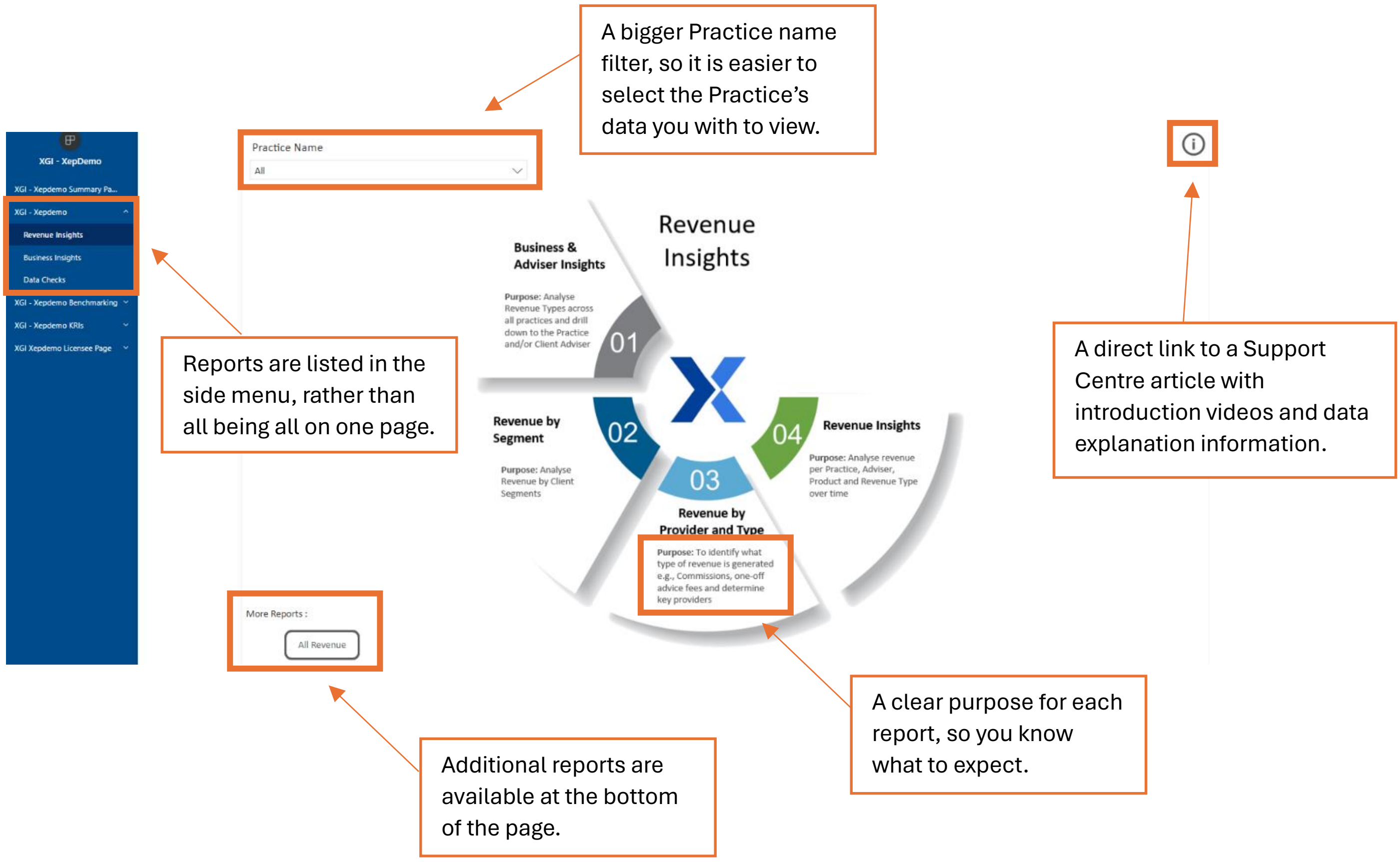
How the newest version of XGI improves the Revenue Insights, Business Insights, and Data Check reports.

Introduction

Xeppo Group Insights has undergone a visual transformation, making it easier to find the data you need.

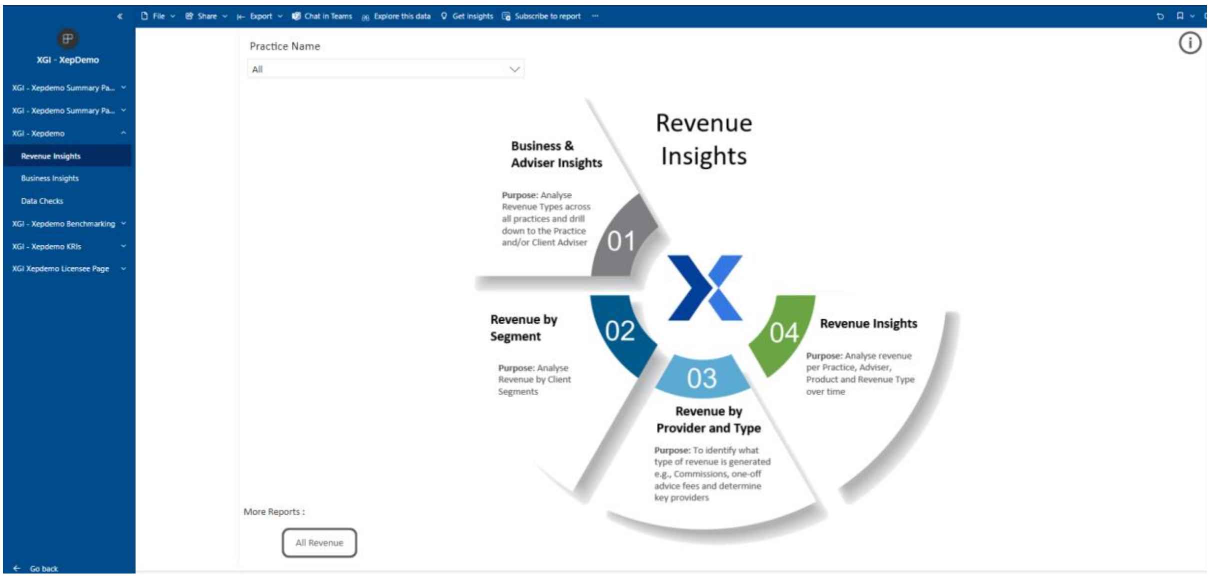
Previously, the Insights Report within Xeppo Group Insights contained links to all reports on one page. The large number of reports could be overwhelming, and feedback suggested that finding the correct report was challenging.

To combat this, we have redesigned the Insights report home page to be three separate pages, based on the reports contained within. This new design mimics Xeppo Insights Premium, our reporting suite for Practices. Each report has a clear purpose, so you know what data you will be viewing, and there is a direct link to support documentation, so new users can easily learn how to use these reports. The reports themselves have also received a visual update, however, the data remains the same.



Some of the reports have been consolidated or moved to a be under a different heading. Any major changes to the reports are listed below.

Revenue Insights



Business & Adviser Insights - This is a combination of the Business Summary and Adviser Summary Pages.

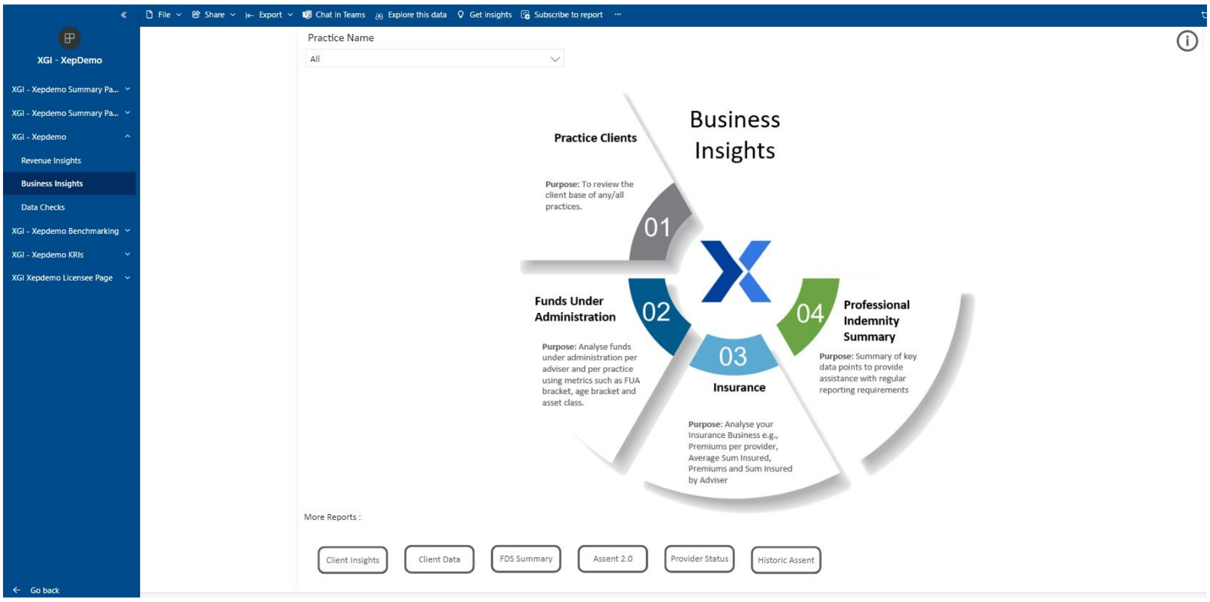
Revenue by Segment – Unchanged from the previous version of XGI.

Revenue by Provider and Type – This is a combination of Revenue Charts and Revenue Tables.

Revenue Insights – Unchanged from the previous version of XGI.

All Revenue - Similar to the previous versions All Revenue Report, this is a list of all lines of revenue.

Business Insights



Practice Clients – Unchanged from the previous version of XGI.

Funds Under Administration – This is a combination of FUA, Investment FUA, and FUA by Client. The main FUA report remains unchanged, with the Investment FUA and FUA by Client reports available through the links in the FUA report.

Insurance – Unchanged from the previous version of XGI.

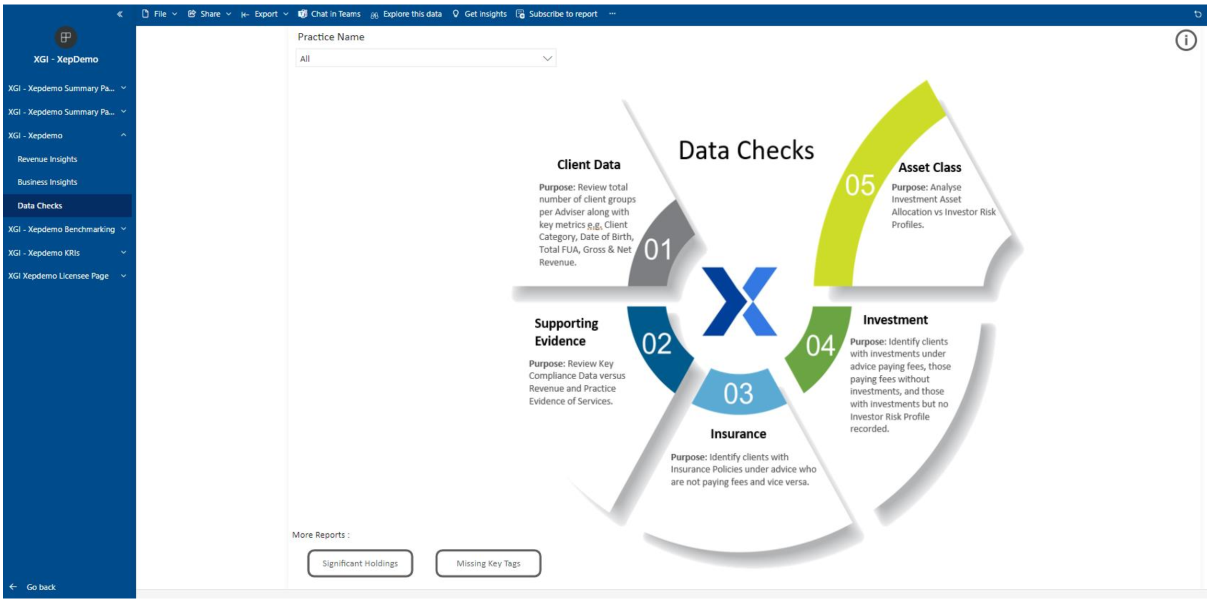
Professional Indemnity Summary – This is the PI Assistance Report, it remains unchanged from the previous version of XGI.

Client Insights - Unchanged from the previous version of XGI.

Client Data – Unchanged from the previous version of XGI.

FDS Summary, Assent 2.0, Provider Status, Historic Assent – These reports were previously located under the FDS heading but have been relocated to Business Insights. The reports are unchanged from the previous version of XGI.

Data Checks



Client Data – Unchanged from the previous version of XGI.

Supporting Evidence – This is the Evidence Data Check Report. It is unchanged from the previous version of XGI.

Insurance – This is the Insurance Data Check Report. It is unchanged from the previous version of XGI.

Investment – This is the Investment Data Check Report. It is unchanged from the previous version of XGI.

Asset Class – Unchanged from the previous version of XGI.

Significant Holdings and Missing Key Tags – These reports were previously located under the Administration heading but have been relocated to data checks. The reports are unchanged from the previous version of XGI.

Need a reminder on how to use Xeppo Group Insights?

Introduction Videos for Dealer Group Head Office Users and Practice Users are available on our Support Centre here. This Support Centre article also includes information on the fields within the reports, and how to filter your data.