

Xplan User Details Report

User Guide
V1.0

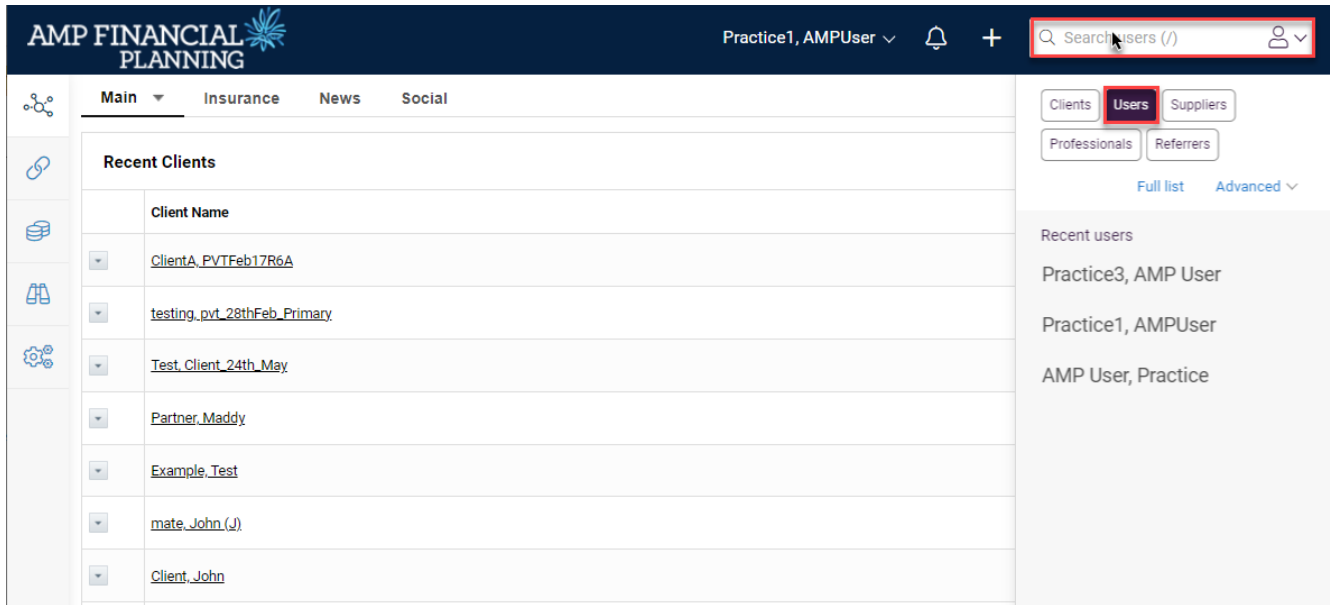
1. Introduction

Running this report in Xplan will provide an overview of Active & Datafeed only users showing access level details and total the cost for each user.

2. How to run the user report

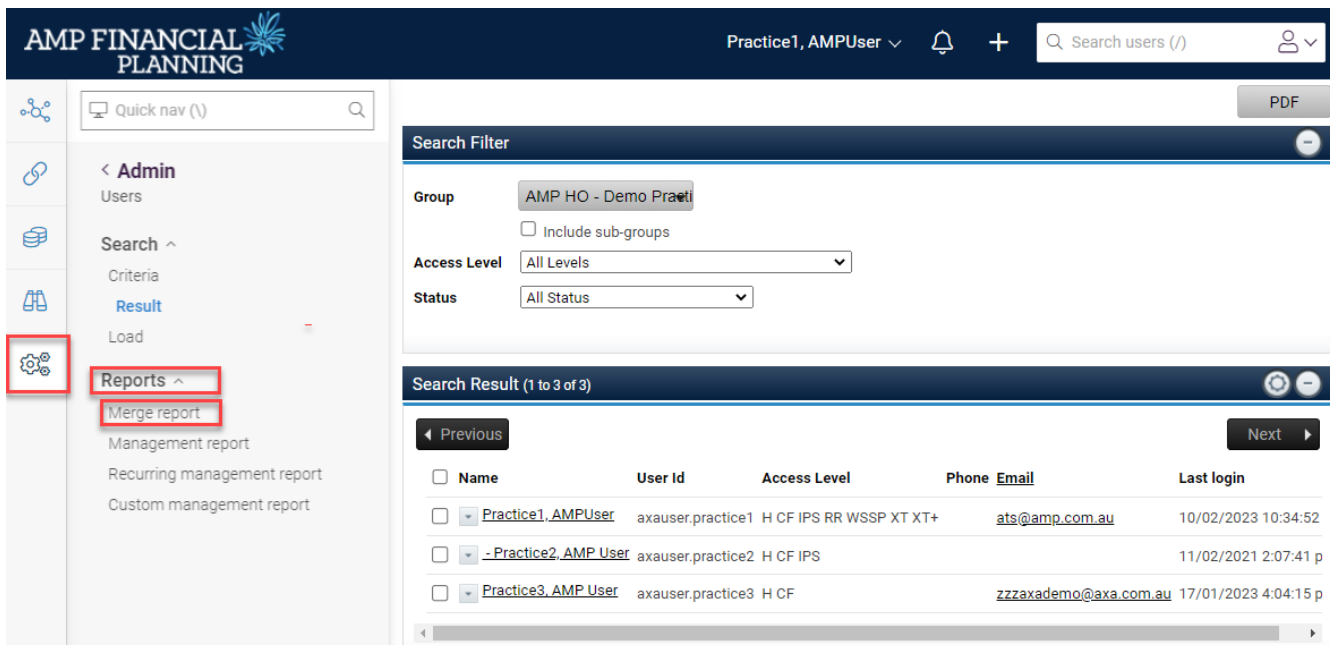
In the top right hand corner of the screen place your cursor into the search box.

Click on Users and hit Enter on your keyboard



A list of users for the practice will load.

Navigate to the cog wheel in the left-hand panel and click on Reports > Merge Report



Select the category **Xplan User Reports** from the drop down menu. Click on the arrow next to the report

Select Merge Template

Target Clients: All Listed Users

Report Category: Xplan User Reports

| Action Name | Type | Description |
|---------------------------------|-------------|---|
| Xplan 2FA check | Entity List | |
| Xplan User Access Level Details | Entity List | Summary of Xplan users and current charges (does not include Salesforce only users) |

Click **Execute**

The report will now start generating and when it is ready for download it will be available in the notification bell at the top of the screen. Click on the **notification bell** and download the report

AMP FINANCIAL PLANNING

Practice1, AMPUser

Search users (/)

Execute Back

Select Template Files

Select the template files that you wish to include/exclude during a report merge.

- Selected template files will be concatenated to form one single output file.
- There must be at least one template file selected for merge.

| <input checked="" type="checkbox"/> Name | Description |
|--|-------------|
| <input checked="" type="checkbox"/> Xplan User Access Level Details.xlsx | |

AMP Xplan - Google Chrome

amp.xplan.iress.com.au/home/usermsg?login_role=...

Action Close

Sender: Practice1, AMPUser

Received: 10/02/2023 11:06:59 am

Subject: Xplan User Access Level Details Merge Report Result

The merge report requested to be generated at 10/02/2023 11:06:59 am is now ready to be downloaded.

Download Report

Template: Xplan User Access Level Details

Generation Time: 5.872 sec

Conversion Time: 1.831 sec

Open the Excel file and click on "Enable Editing"

PROTECTED VIEW This file has been verified by Microsoft Defender Advanced Threat Protection and it hasn't detected any threats. If you need to edit this file, click enable editing. **Enable Editing**

| Practice Payee Id | Practice Name | Licensee | Xplan Instance | clientHUB | Total Costs (ex. GST) | Fortnightly | Yearly | | | | | | |
|-------------------|---------------|----------------------|----------------|---------------------------|-----------------------|-----------------|-------------------------------|----------------------------|--------|---------|----------------|---------------------------------|-----------------------|
| 0 | | | Single Site | | | \$0.00 | \$0.00 | | | | | | |
| Entity ID | Entity Name | Current Access Level | Datafeed Only | Hosting and Client Focus* | Portfolio System IPS* | Risk Researcher | Wealth Solver Super & Pension | Wealth Solver Investments# | Xtools | Xtools+ | Alerts Manager | Fortnightly Deduction (ex. GST) | Yearly cost (ex. GST) |
| 0 | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | \$65.93 | \$1,582.32 |
| 0 | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | \$207.24 | \$4,973.64 |
| 0 | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | \$127.64 | \$3,063.24 |
| 0 | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | \$65.93 | \$1,582.32 |
| 0 | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | \$0.00 | \$0.00 |

After you have clicked on enable editing the user details will populate into the report

| Practice Payee Id | Practice Name | Licensee | Xplan Instance | clientHUB | Total Costs (ex. GST) | Fortnightly | Yearly | | | | | | |
|-------------------------|-----------------------|--|----------------|---------------------------|-----------------------|-----------------|-------------------------------|----------------------------|--------|---------|----------------|---------------------------------|-----------------------|
| AMP HD--Demo Practice B | | Charter Financial Planning Limited (Charter) | Single Site | No | | \$492.91 | \$11,829.84 | | | | | | |
| Entity ID | Entity Name | Current Access Level | Datafeed Only | Hosting and Client Focus* | Portfolio System IPS* | Risk Researcher | Wealth Solver Super & Pension | Wealth Solver Investments# | Xtools | Xtools+ | Alerts Manager | Fortnightly Deduction (ex. GST) | Yearly cost (ex. GST) |
| 512899 | AMP User, Practice | H CF | Yes | Yes | | | Yes | | | | | \$65.93 | \$1,582.32 |
| 513922 | Practice1, AMPUser | H CF IPS RR WSSP XT XT+ | Yes | Yes | Yes | Yes | Yes | | Yes | Yes | | \$233.42 | \$5,601.96 |
| 520075 | - Practice2, AMP User | H CF IPS | Yes | Yes | Yes | | | | | | | \$127.64 | \$3,063.24 |
| 520085 | Practice3, AMP User | H CF | Yes | | | | | | | | | \$65.93 | \$1,582.32 |