Datafeed Mapping

Once you have registered / activated your Xplan datafeed with the relevant product provider, you are required to enter the credentials here.

** Please ensure that you amend the User to the advisers' name **

Each Provider may require different credentials to be entered into Xplan. In the screenshots below, OneVue SMA and OneVue UMA are used as examples.

Once entered, click Save in the top right-hand corner.

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As a rule of thumb, datafeeds can take 48 hours to appear. After this time, they will appear here.

You will need to ensure that the data has been auto-mapped correctly. If not, please refer to this instructional video on Iress Community for guidance.

Ends.