

Datafeed Mapping

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

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

								Export	Add Mapping
External	Adviser M	appings							
Provider	All		~	Valid Credentials All 🗸	User Login Capabilities 🛛 All 🗸				
User	Jason Ha	ayes		•					
Action	User	Provider	Adviser ID	Credentials Username	Valid Credentials	Credentials Expiry	Comment	Lock	Upload

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

			Save	Cancel
Add External Adviser ID				
Provider	OneVue SMA 🗸			
Description	The adviser ID for OneVue SMA		1	
Adviser Name	Advisor Name as registered with the provider, if different to the Xplan users name			
Adviser ID	Up to 30 characters	2. Click Save		
Comment	1. Enter here			
Add more				

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

		Save	Cancel
Add External Adviser ID			
Provider	OneVue UMA		
Description	The adviser ID for OneYue UMA		
Adviser Name	Adviser Name as registered with Provider, if it is different to the Xplan user name		
Adviser ID	Up to 30 characters	2. Click Save	
Comment	1. Enter here	[] 	
Add more			

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

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

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

Ends.