

## XPLAN INTEGRATION

Topdocs integrates with XPLAN, Australia's most widely used financial planning management tool. This easy to use, time-saving facility means you can order a Topdocs document from within XPLAN and have the client data automatically prefill your Topdocs order form.

### Recording your Topdocs details in XPLAN?

Recording your Topdocs username and password details in XPLAN streamlines the ordering process by automatically signing you into the Topdocs Document Portal to complete an order.

To record your Topdocs details in XPLAN:

- Click on **Preferences > Topdocs > Edit** and enter your Topdocs username and password. Click **Save**.

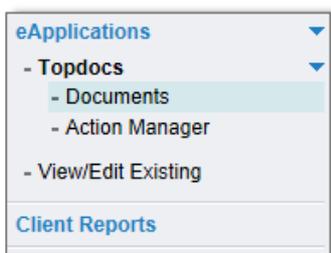


If you haven't used the Topdocs Document Portal before, you can register for free at the [Topdocs website](#) by clicking on the **JOIN** button and following the prompts.

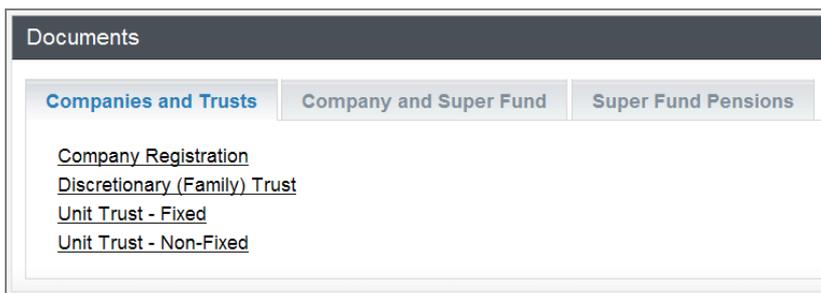
### Ordering a document in XPLAN

To order a document in XPLAN:

- From the main client screen, select **eApplications** from the Navigation menu.
- Select **Topdocs** then **Documents**.



- Next, select the document you would like to order.



You're then automatically signed into the Topdocs Document Portal to complete your order.

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- Type in your **Reference Code**. This code is used to track your order.
- Then select how you would like your documents delivered:
  - **Instant Email Delivery** – your documents are emailed to you as PDFs immediately
  - **Full Service** – your documents are professional printed, bound and delivered to you by express post
- At this point you can also order related documents by selecting them from the picklist provided.

**Welcome**

Enter your reference for this Order :

Type of service for this order : ?  Full Service - \$374.00  
 Instant Email Delivery - \$234.00

Order Additional Documents at the same time

You can order multiple documents using this one form. Select additional documents to order below. ?

Available Additional Documents to Order	Instant Download Price	Select
ABN and TFN Registration for the Super Fund	\$99.00	<input type="checkbox"/>
Register a Company to act as Trustee of the SMSF	\$569.00	<input checked="" type="checkbox"/>
Order a Company Seal for your Company	\$55.00	<input type="checkbox"/>
Investment Strategy for the Fund	\$55.00	<input type="checkbox"/>

**Total Order Amount: \$803.00**

- Once your selections are made, click OK.

Your document order form will then be displayed with your client's XPLAN data prefilled.

**Fund Details**

Name of the Fund to be Established  ?

**What is the Registered Address of the Fund?**

Level, Floor, Unit, Office, Suite

Street Number and Name

Suburb

State

Postcode

**State Law to govern the Fund**

State Law

- Finalise any unanswered questions and complete your payment details.

Your documents are then delivered to you by email instantly or by express post the next day, depending on your selection.

### More information

Should you have any queries or require more information about the XPLAN integration with Topdocs, please contact the team at Topdocs on 1300 659 242.