

INTEGRATION = TIME SAVINGS!

Ordering your documents should be an easy and time efficient process - after all, your time is better spent servicing your clients. This is where integration can help.

Though the integration provided by Topdocs, you can streamline your document ordering process by pre-populating your document order forms with information already in XPLAN or Class Super.

How does integration benefit you?

Integration in this example is all about getting systems working efficiently together. It's about entering client data in one location and then being able to use the same information elsewhere - thereby eliminating the need to rekey or cut and paste information. It's also about supporting workflow processes so you can order a document without leaving the application you're already using.

Most importantly, the benefit this integration provides you is increased efficiency and improved accuracy. Essentially, using the Topdocs integration available, you can order Topdocs' quality documentation but spend a fraction of the time it would normally take to complete a document order.

How does the Topdocs integration work?

For XPLAN users

Topdocs integration is available in XPLAN versions 2.1.8 and above. Importantly, you don't need an eApplications licence to use the Topdocs integration functionality.

If you're a financial planner, chances are you use XPLAN to do your statements of advice. The Topdocs integration with XPLAN means that once you have entered your client data into XPLAN, you can use that information to pre-populate your Topdocs document order forms – meaning you can order your client documentation in a fraction of the time. The following three steps outline how to order a Topdocs document through XPLAN.

STEP 1 – Record your Topdocs details in XPLAN

First, you need to enter your Topdocs username and password details into XPLAN. This streamlines the ordering process. To record your Topdocs details in XPLAN:

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

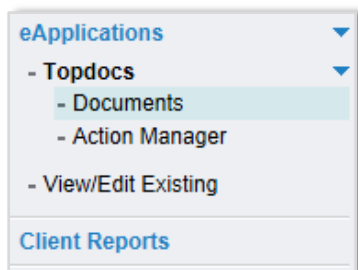
If you don't have a Topdocs username and password, you can register for free at the Topdocs website, www.topdocs.com.au

STEP 2 – Select the document you wish to order

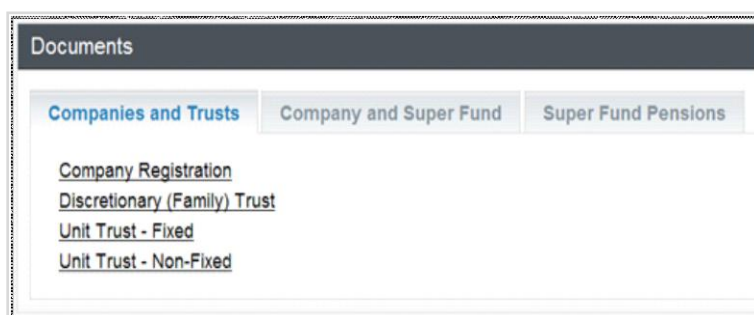
Once you have entered your client's details in XPLAN, simply select the type of document that you wish to order from the e-applications menu.

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

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- Next, select the document you would like to order



STEP 3 – Submit your order

After selecting the document you wish to order, you will be automatically logged into the Topdocs Document Portal. At this point you can also order related documents by selecting them from the picklist provided, as below.

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. ?

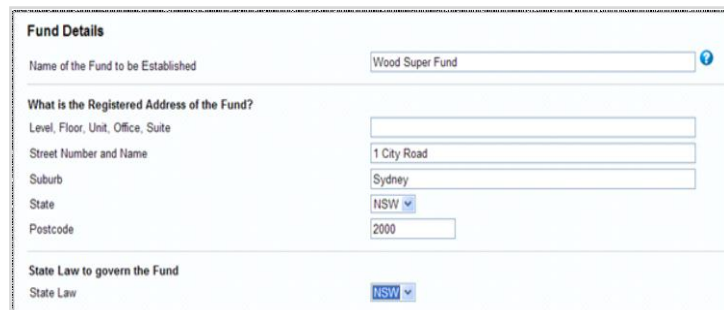
Available Additional Documents to Order	Instant Download Price	Select
ABN and TFN Registration for the Super Fund	\$99.00	<input type="checkbox"/>
Register a Company to act as Trustee of the SMSF	\$569.00	<input checked="" type="checkbox"/>
Order a Company Seal for your Company	\$55.00	<input type="checkbox"/>
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, automatically pre-populated using your client's details from XPLAN.

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Fund Details

Name of the Fund to be Established: Wood Super Fund

What is the Registered Address of the Fund?

Level, Floor, Unit, Office, Suite:

Street Number and Name: 1 City Road

Suburb: Sydney

State: NSW

Postcode: 2000

State Law to govern the Fund: NSW

- Simply enter any further information that is required and submit your order – it's that easy!

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

If you would like to see step by step instructions on how the Topdocs and XPLAN integration works, please view our [XPLAN integration video on the website](#).

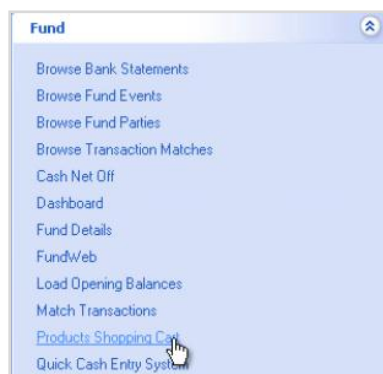
For Class Super Users

Topdocs provides a number of integration functions with Class Super; the most widely used being the ability to order documents online using client information already stored in Class Super.

Ordering your Topdocs documents using information already stored in Class Super is easy – simply select the document you wish to order, log into the Topdocs Document Portal and press submit!

STEP 1 – Select the document you wish to order

- In Class Super, select your client from the client list
- Then select **Fund** then **Products Shopping Cart**



At this point you will see a number of products that you can purchase. To order a Topdocs document:

- Select **Topdocs** from the **Trust Deeds and Trustees** or **Pensions** sections, depending on the document you would like to order

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- Next, select the document you would like to create by clicking on **Add to List** then tick the **Financial Services Guide** box and click **Apply Now**

- Click Online Application. This will launch the Topdocs Document Portal sign in screen.
- Sign in with your username and password.
- If you haven't used the Topdocs Document Portal before, you can register for free at this point by clicking on Register **Now**

STEP 2 – Submit your order

Once you are logged into the Topdocs Document Portal, you will see a reference screen which outlines other related documents you can order at the same time.

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

OK Cancel

- Once you have made your selections, click **OK**.

Your document order form will then be displayed, pre-populated with the client's details from Class Super!

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Fund Details	
Name of the Fund to be Established	<input type="text" value="CONVOY SUPERANNUATION FUND"/> ?
What is the Registered Address of the Fund?	
Level, Floor, Unit, Office, Suite	<input type="text"/>
Street Number and Name	<input type="text" value="22 Albert Road"/>
Suburb	<input type="text" value="South Melbourne"/>
State	<input type="text" value="VIC"/> ▼
Postcode	<input type="text" value="3450"/>
State Law to govern the Fund	
State Law	<input type="text" value="VIC"/> ▼

- Simply enter any further information that is required and submit your order – it's that easy!

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

If you would like to see step by step instructions of how the Topdocs and Class Super integration works, please view our [Class Super integration video on the website](#).

More information

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