

Session description

Xplan CommPay

LodgeView

Online session

Sept 2019



What is this session about?

The CommPay session is aimed at providing participants with knowledge and experience of CommPay including:

- Dashboard Widgets
- Lodging Expected Revenue using various methods
- CommPay Central – Adviser Functionality including Reports
- Client Mapping
- Merge Report (Fee Disclosure Statement)

This is achieved through expert knowledge, hands-on applications, interactive exercises and real-life scenarios.

Who should attend this session?

- Any new Xplan user that is part of a Dealer Group that utilises CommPay to manage the revenue for their business.

Time

Self-paced

Learning Outcome

After completing this session, you should be able to:

- Set up the dashboard for easy viewing for revenue
- View existing transactions and policies
- Run reports and view Revenue Analysis Data
- Map CommPay clients to Xplan clients
- Merge a Fee Disclosure Statement (FDS)

- Lodge expected revenue summaries
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How do I register for this session?

This training requires no registration. Training is available on demand through the [Iress Community](#) as eLearning. Please note, registration is required to access the Community.

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