XPLAN manual update user guide

For use from 10 June 2022

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As of 10 June 2022, AMP will no longer feed Resolution Life product and policy information into XPLAN, aside from the NZ Lifetrack and ex-AMP products.

You will be able to access all historical information up to this date on XPLAN, however, from 10 June 2022 Advisers will need to access Resolution Life Adviser Portal and manually transfer the information required into XPLAN.

You can view the following information on the Adviser Portal:

- Customer policy details
- Account balances
- Benefit descriptions
- Unit prices and crediting rates
- Investment details
- Instalment premiums
- Withdrawal values

Steps to complete the manual updates are on the next page

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Resolution Life

Steps	Instruction
Step 1	If you need to update information in XPLAN you will need to: • Log into the Adviser Portal here • If you haven't registered for Adviser Portal, follow these instructions
Step 2	Search for the Customer, Policy etc within Adviser Portal Portal navigation user guide is located here along with other instructional help.
Step 3	You will need to manually record the details from Adviser Portal that have changed since 10 June 2022.
Step 4	You will need to navigate to XPLAN Log into XPLAN using your usual credentials Navigate to the area in XPLAN that needs updating Utilise the edit pen icon, this will allow you to manually enter the required details Repeat above until all updates are completed.

Further Support:

Resolution Life Adviser Portal :

If you need further support, please use:-

1. "Click to Chat' via Adviser Portal https://advisor.resolutionlife.com.au/AdviserCentral
2. Contact the Resolution Life call centre
3. Contact the Adviser Relationship Management Team (NZ) or the Business Partnership Team (Aus)

XPLAN:

1. Your IRESS account manager
2. Contact IRESS Helpdesk. Iress | Software support