



## Integration overview

By integrating IRESS XPLAN with Practifi you'll experience a seamless flow of data between the two systems, keeping your clients in sync, along with their most critical financial information. Experience a unified view, unlock business efficiency and spend more time creating the best strategies for your valued clients.

You can find additional information in our Knowledge Base [here](#) by searching for "XPLAN". Alternatively, reach out to your Customer Success Manager or [contact us](#) to learn more.

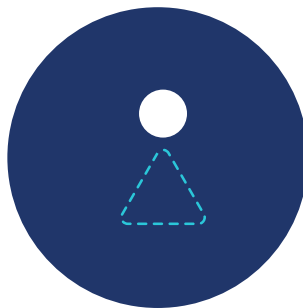


## Benefits for you



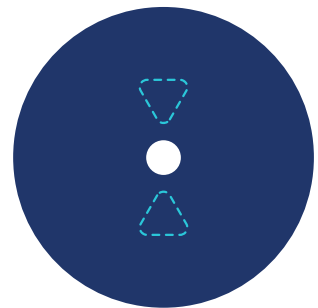
### Efficiency

Reduce error and eliminate the task of manually updating asset and holding balances between systems.



### Strategy

Free up your time and use it to grow your client relationships and improve your advice strategies.



### Unified View

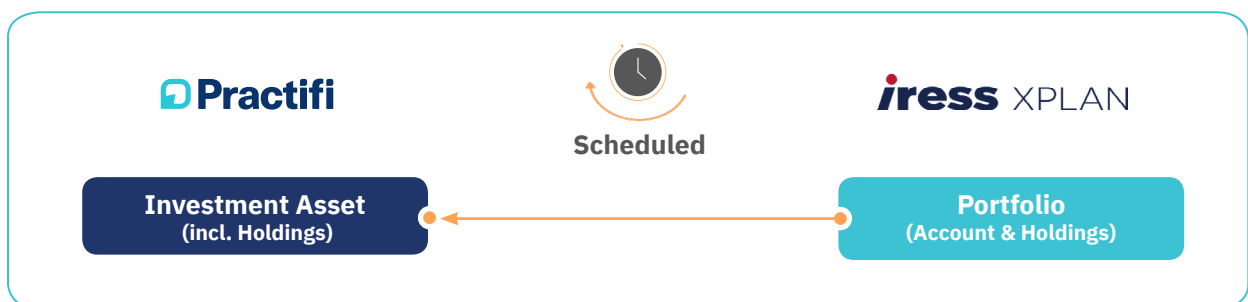
Unify the client record within Practifi and view all of your clients' portfolio positions at a glance.



## Data mapping & syncing

### 1. One-Way Sync

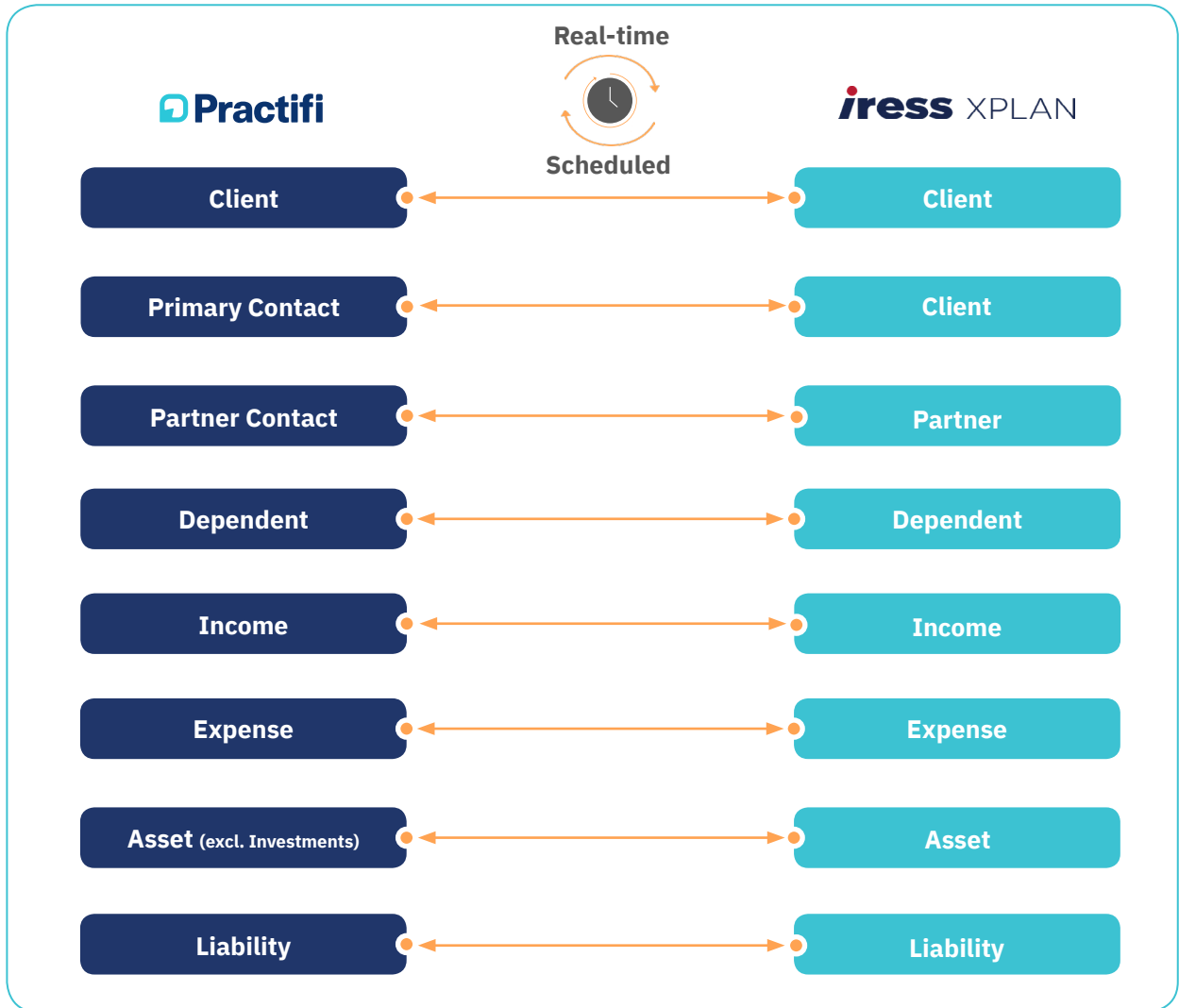
The below record is synced from XPLAN to Practifi only; no changes can be made to this record in Practifi. Records can be synced according to a desired schedule.



## Data mapping & syncing

### 2. Two-Way Sync

Records are sent to and received from XPLAN at the client level. The below records are synced from Practifi to XPLAN in real-time, and on a scheduled basis in the other direction. The sync schedule is set based on the amount of data shared between the two systems.



### Coming soon



Insurance



Superannuation



Goals & Objectives

