



## Integration overview

By integrating Iress’ financial advice platform 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 Client Success Manager or [contact us](#) to learn more.

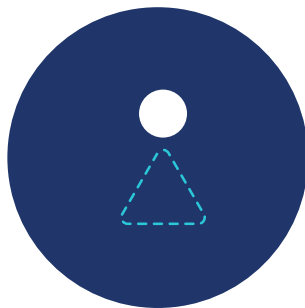


## Benefits for you



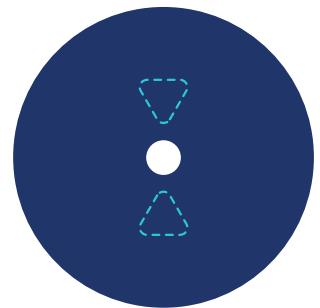
### Efficiency

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



### Strategy

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



### Unified View

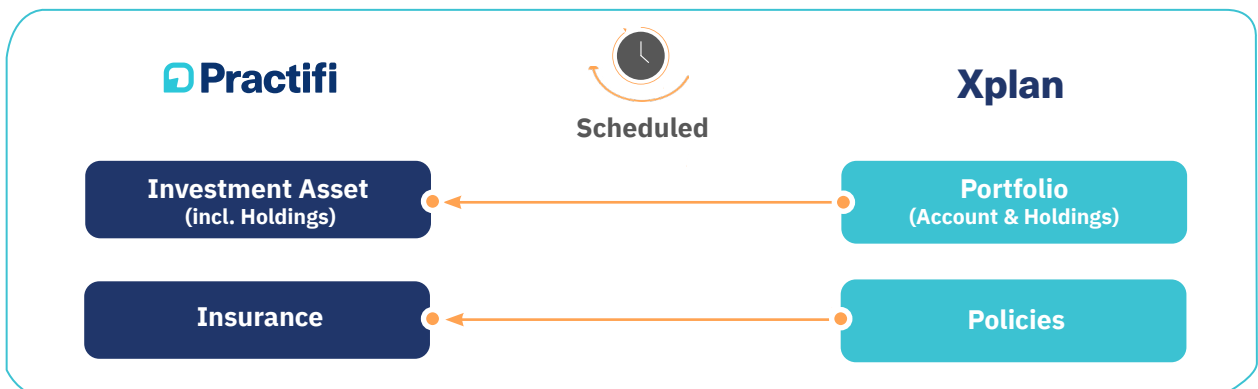
Unify the client record within Practifi and view all of your clients’ portfolio positions at a glance.



## Data mapping & syncing

### 1. One-Way Sync

The below records are 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. Additional fields can be mapped one-way from Practifi to Xplan, which you can find information about in our Knowledge Base.





# 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.

