



XPLAN Mortgage - Trigold Sourcing Data Transfer from Prospector Guide

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1. Introduction

This guide is designed to take you through the process of transferring your client contact data from Trigold Prospector into XPLAN Mortgage to save you having to re-key all the information and so you have all your client contact details in the new system to get you started.

Please note all your data will also remain in Prospector. It simply takes a copy of your data.

Further information about XPLAN Mortgage can be found here:-

<http://mortgagesupport.iress.co.uk/products/xplan-mortgage.aspx>

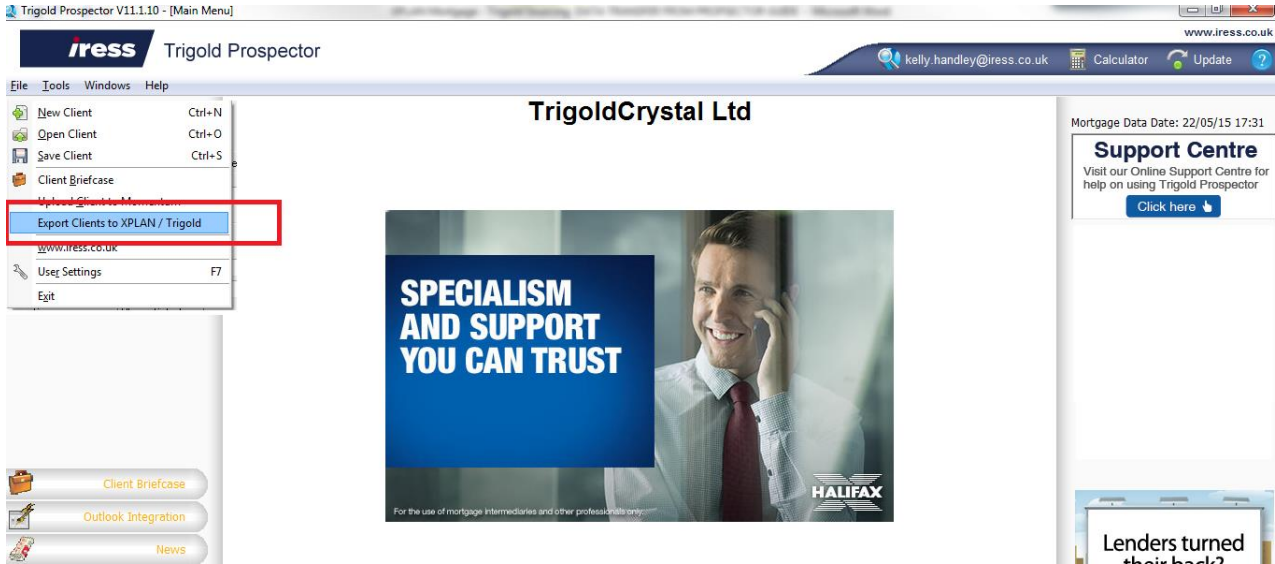
2. Fields that will get Transferred

The following fields will be copied from Trigold Prospector to XPLAN Mortgage

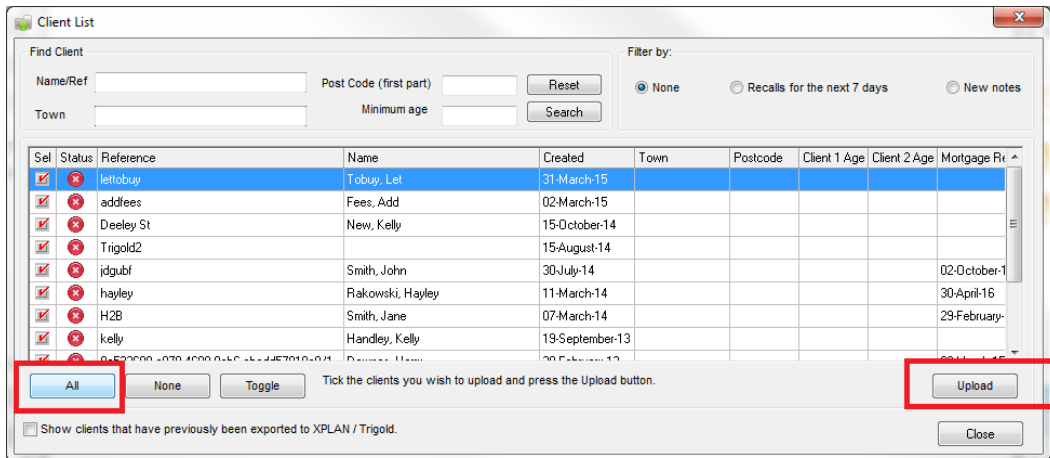
APPLICANT1 DETAILS	APPLICANT2 DETAILS
Title	Title
First Name	First Name
Middle Name	Middle Name
Surname	Surname
DOB	DOB
Gender	Gender
Marital Status	Marital Status
Business Tel No	Business Tel No
Mobile Tel No	Mobile Tel No
Home Tel No	Home Tel No
Email	Email
AddressLine1	AddressLine1
AddressLine2	AddressLine2
AddressLine3	AddressLine3
AddressLine4	AddressLine4
Postcode	Postcode
County	County
TimeAtAddress	TimeAtAddress
APPLICANT1 PREVIOUS ADDRESS	APPLICANT2 PREVIOUS ADDRESS
AddressLine1	AddressLine1
AddressLine2	AddressLine2
AddressLine3	AddressLine3
AddressLine4	AddressLine4
Postcode	Postcode
County	County

3. Identify Clients in Trigold Prospector to Transfer

To begin the data transfer please make sure you have done an update to Trigold Prospector.

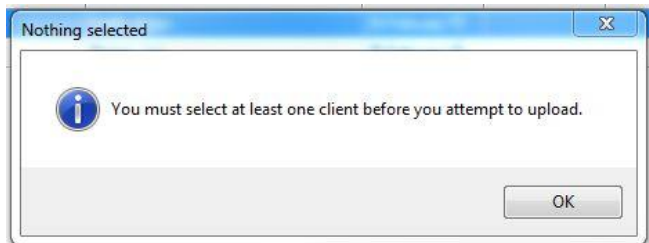


Click on File and you will then see an option for 'Export Clients to XPLAN / Trigold'



Select 'All' or select individual clients that you wish to upload into XPLAN Mortgage. Then click the 'Upload' button

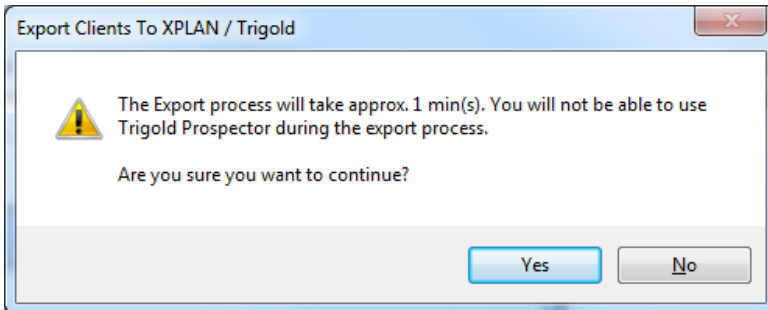
If no clients have been selected, the following message will be displayed:



4. Confirming the Transfer

Upon successfully clicking the 'Upload' button a pop up will appear telling you approximately how long the transfer will take.

Note - During this time you will not be able to use Trigold Prospector. You must also have internet access for the transfer to take place.

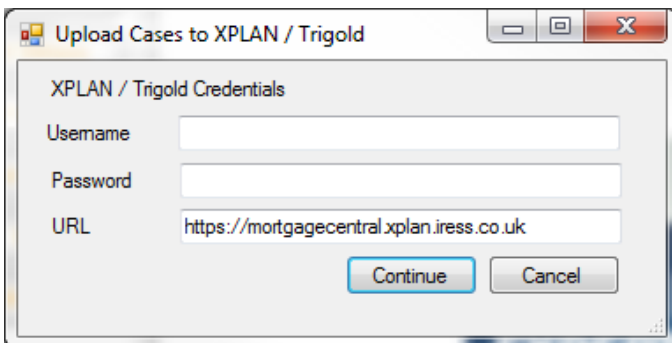


Clicking on "No" will cancel the transfer and return you back to Trigold Prospector.

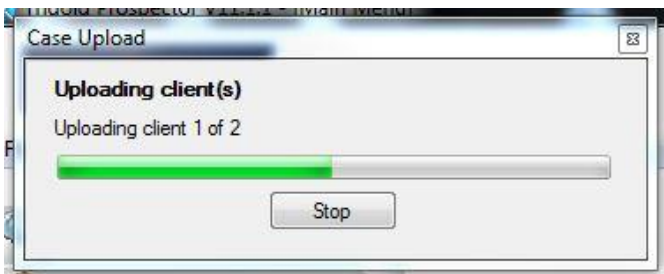
Clicking on "Yes" will display a login screen.

5. Entering Your Credentials

You will then be presented with a login screen, which requires your XPLAN Mortgage credentials (username and password). These will have been sent to you via email.

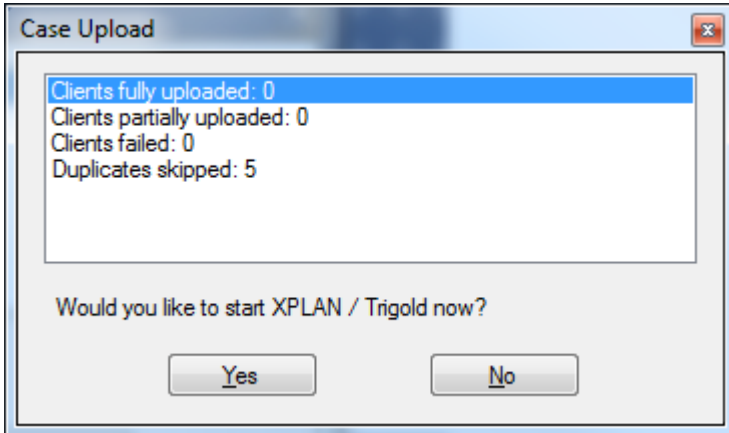


Once valid credentials have been provided the copy process will begin

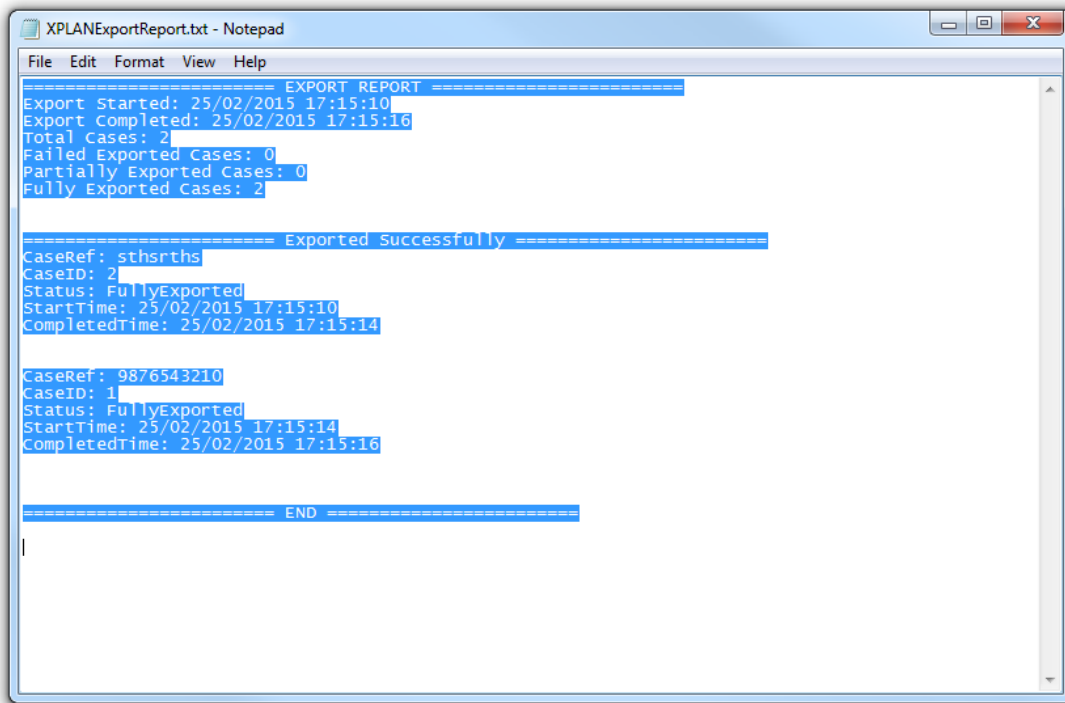


6. Completion Report

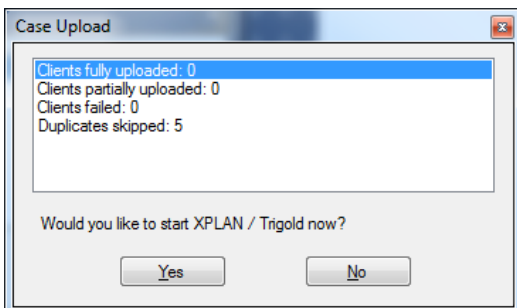
On completion, a report will be displayed detailing the number of clients that were uploaded. The number of those which succeeded, and the number of those which failed, (maybe due to duplication).



The Report information is also exported in CSV formats.



7. Launching XPLAN Mortgage



To launch XPLAN mortgage either click Yes on the above screen or launch using the following URL

<https://mortgagecentral.xplan.iress.co.uk>

Once in XPLAN Mortgage if you click on 'Client Search' either from the top left hand menu or the recent clients portal you will be able to see all of your client details.

The screenshot displays the XPLAN Mortgage web application interface. On the left, a dark blue navigation menu contains the following items: Dashboard, Client search (highlighted with a red box), Help, and Logout. Below the menu is a green promotional banner for the Broker Support Team. The main content area is titled 'XPLAN Mortgage' and features a search bar with the text 'Clients'. Below the search bar, there are two main sections: 'Recent clients' and 'Best buys'. The 'Recent clients' section lists several clients with their names and contact information, and a 'Client search' button is highlighted with a red box. The 'Best buys' section displays a table of mortgage offers from various providers.

	Initial rate	Initial period	Revert rate	APR
Accord	1.69%	31/08/2017	5.79%	5.20%
Leah Housing Society	1.70%	31/07/2017	5.69%	5.10%
IRESS	1.75%	2 years	5.54%	5.00%
TSB4Inter...	1.79%	31/07/2017	3.99%	3.80%
Accord	1.79%	31/08/2017	5.79%	5.20%
Accord	1.79%	31/08/2017	5.79%	5.20%
Beverley	1.82%	2 years	4.75%	4.40%
Beverley	1.82%	2 years	4.75%	4.40%
Nationwide	1.84%	30/09/2017	3.99%	3.80%
Nationwide	1.84%	2 years	3.99%	3.80%

Build: 1175 (01/05/2015)
<https://mortgagecentral.xplan.iress.co.uk/prime/#/client/search/>



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