Hostplus Self-Managed Invest data feed Registration

xplan

Admin

Business ⌄

Relationships ⌄

Service, fees & invoicing ⌄

Integration ⌃

　　Diary

　　eApplications

　　News

　　Email plugins

　　System datafeeds

　　User datafeeds

　　XPLAN connect

　　Xport

Interface ⌄
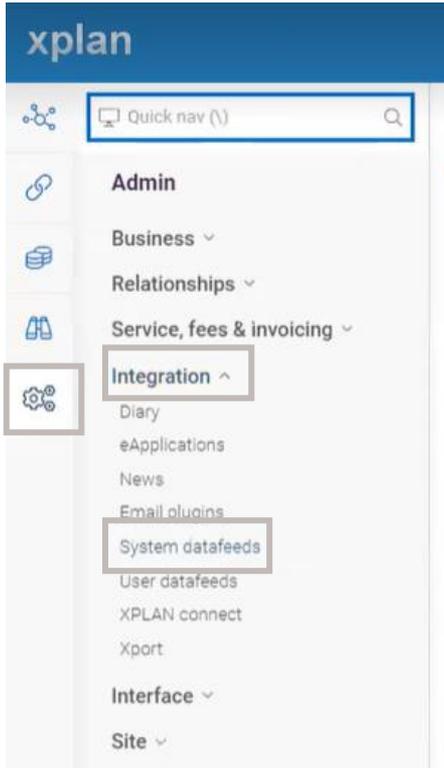
Site ⌄

1. Login to your Xplan site and navigate to the menu on the left then click on the Admin Button (the cogs)

2. Click on 'Integration' and then 'System datafeeds' and you will be directed to a new screen

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< Admin
System datafeeds

Platforms ⌄

Configuration ⌄

Mappings ⌃

　　IPS external accounts

　　Client focus accounts

　　Advisers

　　Modify all
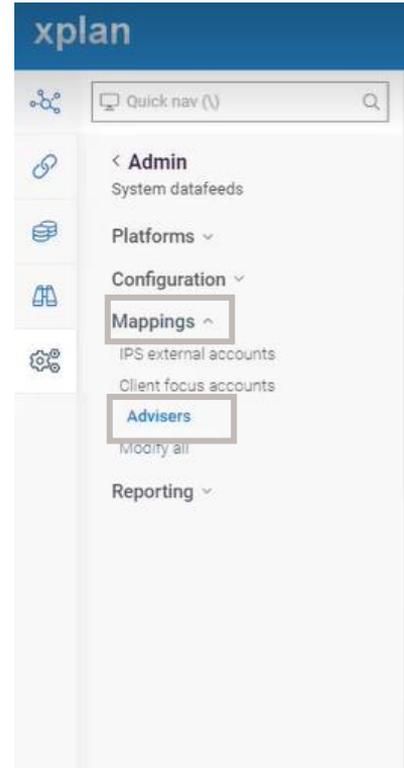
Reporting ⌄

3. Click on 'Mappings' then 'Advisers'

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< Admin
System datafeeds

Platforms ˅

Configuration ˅

Mappings ˄
  IPS external accounts
  Client focus accounts
  Advisers
  Modify all

Reporting ˅

Export   Add Mapping

External Adviser Mappings

Provider   HostPlus SMI   Valid Credentials   All ˅   User Login Capabilities   All ˅

User

Action

	Provider	Adviser ID	Credentials Username	Valid Credentials	Credentials Expiry	Comment	Lock	Upload
✏ x	AAA Training	1234567890ABCDEFGHIJKL	~	~	~		~	~

Dropdown list:
- Equity Trustees Private Wealth Service
- Estela Training
- Evans and Partners
- FDG MDA
- FIIG Securities
- FNZ
- FNZ Securities
- Fidelity Australia
- Fidelity Life (NZ)
- Fiducian
- Fortnum
- Freedom Of Choice
- Generation Life Investment Bonds
- Glacier2
- Goldman Sachs Asset Management
- Grant Samuel
- HUB 24
- HUB 24 Portfolio
- Henderson Global Investors Australia
- **HostPlus SMI**

5. Click on 'Add Mapping'

4. Click on the 'Provider' dropdown box and select 'HostPlus SMI'

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Save   Cancel

Add External Adviser ID

User	Select User ⌄
Provider	HostPlus SMI ⌄
Description	Adviser mapping for HostPlus SMI
Adviser Name	_____ Adviser Name as registered with Provider, if it is different to the Xplan user name
Adviser ID	_____ Adviser codes have 5 to 8 digits (eg. 12345)
Comment	

☐ Add more

6. Select 'User' from the dropdown box and type in the 'Adviser Name' as registered with Hostplus SMI

7. Enter the Xplan 'Adviser ID' that was emailed to you. NOTE: This is not the username you use to login to your SMI adviser portal

8. Click 'Save'

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Export   Add Mapping

External Adviser Mappings

| Provider | HostPlus SMI ⌄ | Valid Credentials | All ⌄ | User Login Capabilities | All ⌄ |
| User | All Users ⌄ | | | | |

Action	User	Provider	Adviser ID	Credentials Username	Valid Credentials	Credentials Expiry	Comment	Lock	Upload
✏ x ⌄	Account test, 1	HostPlus SMI	12345678	~	~	~		~	

This screen confirms the details that you have just added. If you can't see your mapping on this screen, make sure that you have 'All Users' selected

9. Navigate back to the menu on the left and click on the Admin Button (the cogs), then click on 'Platforms' and then 'Summary'

10. Scroll down to find 'HostPlus SMI' and click 'Activate'

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< Admin
System datafeeds

Platforms ^
    Summary
Configuration ⌄
Mappings ⌄
Reporting ⌄

Activate		Glacier2	Off	~
Activate		Goldman Sachs Asset Management	Off	~
Activate		Grant Samuel	Off	~
Activate		Halo Technologies	Off	~
Activate		Henderson Global Investors Australia	Off	~
Activate		Holst Stock Brokering	Off	~
Activate		HostPlus SMI	Off	~
Disable	Edit	HUB 24	On	~
Activate		HUB 24 Portfolio	Off	~
Disable	Edit	Hyperion Asset Management	On	~
Activate		iFast Singapore	Off	~
Activate		Imara S.P. Reid (Pty) Ltd	Off	~
Disable	Edit	Implemented Portfolios	On	~
Activate		ING Direct	Off	~
Disable	Edit	ING Direct Superannuation	On	~
Activate		Interactive Brokers	Off	~
Activate		Intersuisse	Off	~
Activate		Investec Corporate Cash Manager	Off	~
Activate		Investment Administration Services	Off	~
Activate		InvestorFirst Securities	Off	~

Your Hostplus SMI datafeeds should commence within 24-48 hours.