



# Client exists in both portals




  
Connect client from portal and Xplan  
Instructions to Connect




  
Import or export information as required  
(Import recommended to establish item connection)



  
Create room for client




  
Send digital form




  
Request additional document action with To-dos and get form signed in the room



  
Digital form may be sent to client to review information from portal



  
Export to Xplan from portal