Client exists in Xplan only

↓

Create client in portal from integration Xplan

Adding client from Xplan

↓

Once added, Import Items from Xplan
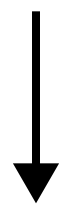
Import data from Xplan

→ **Create room for client**

↓

Send digital form

↓

Get client to complete a digital fact find, create to-dos for additonal data etc

How do I send a digital form

↓

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

←

Review data and export to Xplan

Export information to Xplan