New User Core Course

What is this course about?

The course aims to teach participants how to:

- Efficiently navigate XPLAN
- Understand its functionalities including entering client data
- Manage clients using XPLAN's CRM (Client Relationship Management) tools

Who should attend this course?

- Any new XPLAN users particularly those who are in administration or support roles

Pre Requisite

- Basic Microsoft skills
- Good knowledge of Financial Planning concepts

Time

Half Day

Learning Outcome

After completing this course, participants will be able to:

- Navigate XPLAN efficiently
- Create a new client in XPLAN
- Enter client information into a Wizard
- Use Client Management Tools available in XPLAN including:
    - Diary management
    - Task and workflow management
    - Client file notes
    - Client lists and reporting
    - Correspondence including emails
- Use a Wizard to provide recommendations and generate a Statement of Advice for your client

How do I register for this course?

Contact your Account Executive or view the XPLAN Training Listing on our website.

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