New User
Core Session

What is this session about?

This session is aimed at providing new users with an understanding of onboarding a client using XPLAN and some of XPLANs client management and administrative capabilities.

In this session, you will see how XPLAN and the client management functions within XPLAN will fit in with your current business practices.

Who should attend this session?

- 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 session, participants will be able to:

- Navigate XPLAN efficiently
- Create a new client in XPLAN
- Create a Trust and link to a client
- 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

How do I register for this session?

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

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