XPLAN Solutions: Client Portal

What is this session about?	This session aims to provide an overview of Client Portal and how it can be used to enhance your client service offering. The focus is on providing an understanding of the Client Portal offering and the process involved to provide clients with access, along with a detailed look at the secure two-way messaging system allowing notifications, messages, document sharing and digital signatures.
Who should attend this session?	XPLAN users such as Advisers, Practice Managers and Licensees, who want to enhance their service offering to clients by providing access to messaging/assets/portfolio details via the Client Portal Note: the back-end setup of Client Portal will not be covered in this session.
Prerequisites:	• Completion of an XPLAN New User Course. • Basic understanding of XPLAN and modules such as Client Focus and Portfolios (IPS).
Recommended Pre Learning	XPLAN New User classroom session or video recording
Time	Up to 1 hour.
Learning Outcome	After completing this session, participants should be able to: • Identify the Client Portal package options • Set up logins for clients to access Client Portal • Login to Client Portal via the Adviser and Client View • Use secure messaging with your clients • Use digital signatures via the Client Portal
How do I register for this session?	Contact your Account Executive or view the XPLAN Training Listing on our website.