

Getting the most out of XPLAN Diary

What is this course about? This session aims to provide advisers, support staff and administrators with the knowledge of how to integrate and fully utilise XPLAN Diary functionality. The session will demonstrate how advisers and support staff can effectively use XPLAN Diary functionality to streamline their appointment management processes. It will also demonstrate how to configure Diary Sync settings to allow for Outlook and Google Calendar appointment synchronisation.

Who should attend this course?

- All users who are interested in using XPLAN Diary

Suggested Pre-requisites

- New User Course

Time Webinar is 1 hour.

Learning Outcome After completing this course, participants will be able to:

- Set up Diary Sync to Outlook or Google Calendar.
- Configure the Site Settings for XPLAN Diary; including field definitions and system settings.
- Configure the User Settings for XPLAN Diary; including dashboard and preferences.
- Use XPLAN Diary to make appointments (ad hoc and with diary templates); including searching for user availability, bulk modifying user attendees, generating reports.
- Set up XPLAN Diary so that clients can request their own appointments; new clients via XPLAN Connect and existing clients via XPLAN Touch (Client Online Access).
- Use XPLAN Diary with other XPLAN functionality; including Tasks, Threads, Cases, Service Benchmarks, Xmerge (FDS), Time Taken and Invoicing.

How do I register for this course? View the XPLAN Training Listing on our website or contact your Account Executive.