# Coding Essentials
# Course description

Xplan 2021

iress

| **What is this course about?** | This course is aimed at providing participants with knowledge and experience required to commence coding documents, ranging from a basic letter to more complex documents.  This is achieved through expert knowledge, hands-on applications, interactive exercises and real-life scenarios.

This course provides an overview of Coding template documents, enabling participants to effectively create new templates as well as making changes to existing templates. |
| --- | --- |
| **Who should attend this course?** | • Administrators / Paraplanners / Site Administrators |
| **Pre-Requisite** | • Completion of the Xplan New User course.
• Good knowledge of Financial Planning concepts.
• Understanding of the basic workings of the different Xplan modules especially Portfolio, Xtools+, Risk Researcher, and Wealth Solver. |
| **Time** | Half Day |
| **Learning Outcome** | After completing this course, you should be able to:

• Understand the basis for Xplan coding
• Know where to find the Xplan Template Library
• Use the XWord toolbar
• Code a basic letter
• Incorporate tables into documents
• Include information using 'if' and 'else' statements |

- Include output from Portfolio, Xtools+, Risk Researcher, and Wealth Solver

- Include Document Library output

- Know how to test and merge out documents

**How do I register for this course?**

Please visit our [website](website) for the Xplan training schedule and registration form.

## Iress Training

No-one knows our software better than we do, and we really understand the specialist needs of financial services businesses like yours. We'll work with you to ensure everyone within your business is able to use the system effectively. We offer a wide choice of training options to suit everybody including role-based and module-based training, and a variety of delivery methods.

**iress.com/support/training**

**iress**

**iress.com**

Australia • Asia • Canada • New Zealand • South Africa •United Kingdom