New User Course description

Xplan 2021

iress

What is this course about?	This course is aimed at providing new users with an understanding of on-boarding a client using Xplan and some of Xplan's client management and administrative capabilities. In this course, you will see how Xplan and the client management functions within Xplan will fit in with your current business practices.
Who should attend this course?	• Any new Xplan users
Pre-Requisite	• Basic Microsoft skills • Good knowledge of Financial Planning concepts.
Time	Half Day

Learning Outcome	After completing this course, you should 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 management
	    ○ Email management
	    ○ Merging documents
	    ○ Client file notes
	    ○ Client searching

How do I register for this course?	Please visit our 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.

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