

Session description

Xplan Client Online

Access

Online session

Sept 2019



What is this session about? This session is aimed at providing participants with knowledge and experience of how to enable and maintain a client's access to COA, and also understand the functionality from a client's perspective.

Who should attend this session?

- Any new Xplan users particularly those who will require to assist their clients on how to use Xplan portals

Time Self-paced

Learning Outcome After completing this session, you should be able to:

- Enable COA for clients
- Manage COA
- Use Digital Signatures to set a document to be digitally signed by your client
- Use Widgets and Management Reports to manage COA clients
- Understand the functionality of COA from a client's perspective

How do I register for this session? This training requires no registration. Training is available on demand through the [Iress Community](#) as eLearning. Please note, registration is required to access the Community.

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