

# Coding Essentials Session description

Xplan June 2020 Major Release



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**What is this session about?**

This session 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 session provides an overview of Coding template documents, enabling participants to effectively create new templates as well as making changes to existing templates.

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**Who should attend this session?**

- Administrators / Paraplanners / Site Administrators

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**Pre-Requisite**

- Completion of the Xplan New User session.
- Good knowledge of Financial Planning concepts.
- Understanding of the basic workings of the different Xplan modules especially Portfolio, Xtools+, Risk Researcher, and Wealth Solver.

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**Time**

Full Day

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**Learning Outcome**

After completing this session, you should be able to:

- Understand the basis for Xplan coding
- Know where to find the Xplan Template Library in HELP
- 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

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

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

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