Coding Essentials Session description

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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.
Who should attend this session?	• Administrators / Paraplanners / Site Administrators
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.
Time	Full Day
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 other modules

- Include Document Library output

- Know how to test and merge out documents

How do I register for this session?   Please visit our website for the Xplan training schedule and registration form.

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