

Coding Essentials

Supplementary Course

What is this course about?

This course covers some of the tools and knowledge required to commence coding documents, ranging from a basic letter to more complex documents.

It also provides the knowledge and skills required to make changes to existing templates.

Who should attend this course?

- Administrators
- Paraplanners
- System Administrators

Pre Requisite

- Completion of an XPLAN New User course
- Good knowledge of Financial Planning concepts
- Understanding of the basic workings of the different XPLAN modules

Time

- Half Day

Learning Outcome

After completing this course, participants will 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
- Access Risk Researcher code
- Include Document Library output
- Know how to test and merge out documents

How do I register for this course?

Contact your Account Executive or view the XPLAN Training Listing on our website.