

Threads

Supplementary Course

What is this course about?

This course is aimed at providing users with a high-level understanding of Threads and its various functions. You will go through the process of how to effectively build, activate and use threads along with running reports on this information.

Who should attend this course?

- Practice Managers
- System Administrators

Prerequisites

- Completion of an XPLAN New User course
- Good knowledge of Financial Planning concepts

Time

Half day

Learning Outcome

After completing this course, participants will be able to:

- Understand the role Threads can play within your business
- Learn how to build and maintain Threads
- Understand how to utilise the different features of a Thread
- Apply Threads to both an individual and a group of clients
- Run reports with valuable information gained from your Thread

How do I register for this course?

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