New User Session description

Xplan June 2020 Major Release

What is this session about?	This session is aimed at providing new users with an understanding of on-boarding a client using Xplan and some of Xplan's client management and administrative capabilities. In this session, you will see how Xplan and the client management functions within Xplan will fit in with your current business practices.
Who should attend this session?	• Any new Xplan users particularly those who are in administration or support roles
Pre-Requisite	• Basic Microsoft skills • Good knowledge of Financial Planning concepts.
Time	Half Day

Learning Outcome	After completing this session, you should be able to:
	
	• Navigate Xplan efficiently
	• Create a new client in Xplan
	• Create a Trust and link to a client
	• Enter client information into a Wizard
	• Use Client Management Tools available in Xplan including:
	    ○ Diary management
	    ○ Task management
	    ○ Client file notes
	    ○ Client lists and reporting
	    ○ Correspondence including emails

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

Iress Training

No-one knows our software better than we do, and we really understand the specialist needs of financial services businesses like yours. We'll work with you to ensure everyone within your business is able to use the system effectively. We offer a wide choice of training options to suit everybody including role-based and module-based training, and a variety of delivery methods.

iress.com/support/training