
The magic of wizards

What is this webinar about?

Xplan wizards offer an efficient and effective way of updating client data, generating advice documents and overall supporting the advice process. Common wizards used include New Client, Review, Fact Find, Record of Advice and Statement of Advice. Wizards are flexible and customisable and can be used across the entire advice process, and specifically designed to meet your business needs.

This session provides an in-depth understanding of how the many features of Xplan wizards can be used to support your business needs.

Who should attend this session?

Site Administrators & Practice Managers

Prerequisites

- Existing Xplan user or completion of New User course

Time:

1 hour

Learning Outcomes:

After completing this session, participants will be able to:

- Identify where in the advice process a wizard may be helpful to users
- Understand where scenario, and entity list wizards can be used
- Use advanced features such as conditioning, speed groups and applying alert rules against a wizard page
- Create automatic activities upon completion of a wizard
- Include embedded media content such as videos

How do I register for this session?

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