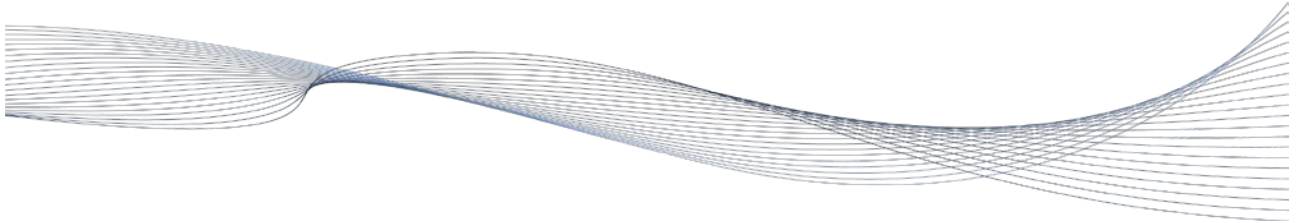


XPLAN New User – Administrator

Core Course

**Overview:**

The course aims to teach participants how to:

- Efficiently navigate XPLAN
- Understand its functionalities including entering client data
- Manage clients using XPLAN's CRM (Client Relationship Management) tools.

Recommended for:

Any new XPLAN users particularly those who are in administration or support roles.

Prerequisites:

- Basic Microsoft skills
- Basic financial planning knowledge.

Duration:

1 day.

Learning Outcomes:

After completing this course, participants will be able to:

- Navigate XPLAN
- Create a new client
- Enter the client's personal information into Client Focus
- Enter the client's existing insurance information
- Enter the client's investment information into IPS
- Use the CRM tools available in XPLAN:
 - Diary management
 - Client file notes
 - Reporting
 - Correspondence including email
 - Email template
 - Document Library
 - Tasks (brief overview)
- Merge a document, for example, Statement of Advice (if applicable).

Register:

Contact your Account Executive or view the [XPLAN training schedule](#) on our website.

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