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.