

## Introduction to the Order Generator

### About the course

The purpose of this course is to provide an overview of the Order Generator program for either front or middle office personnel. The course is based on everyday scenarios and includes a hands-on element using a generic FIGARO system.

### Course Objectives

On completing the course, the successful delegate will be able to:

- Sign on and navigate through the Order Generator screens
- Understand and maintain Work Sets
- Rebalance portfolios in line with associated models
- Switch into and out of selected stock
- Generate orders for the Order Routing module

### Who should attend the course?

- This course is designed for Users who already possess a basic knowledge of FIGARO Front Office.
- It is suitable for both new users and those experienced users who have learnt on the job and want to fill gaps in their knowledge.

### Course Prerequisites

- Delegates should have attended the Front Office Enquiry 1 & 2 courses.

### Course Content

- The concepts of rebalancing
- Viewing Person / Client Details
- The Model Set-up
- Creating a Work Set
- Generating reports
- Rebalancing Funds
- Validating & Committing Orders
- Compliance
- The Dealing Slip
- Rebalancing Unit Trusts
- The Reverse Portfolio
- The 'Switching' module

### Course Details

- Duration: 1 Day
- Course booking reference: **TBA**

### Course Venues

Courses can be held at our fully equipped training facilities in London (details below) or delivered on your premises

- JHC Plc, Ground Floor West, Cottons Centre, Cottons Lane, London SE1 2QG

### Contacting JHC Plc

For information on booking this course please contact our training department:

- Ph. 0207 367 6534
- Email: [training@jhc.co.uk](mailto:training@jhc.co.uk)