



FIGARO FRONT OFFICE CRM & Document Generation

About the course

The purpose of this course is to provide delegates with an in-depth working knowledge of the Client Relationship Management (CRM) and Document Generation functionalities in Figaro and how to apply these in the business environment. 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 where relevant, will be able to:

- Understand document generation and how it can be applied in the business environment
- Create a single document template
- Amend and delete document templates
- Generate and print a single document for a client and for an associated person
- Generate and print multi document
- Generate and print a mail-shot
- Understand the concepts of CRM and Workflow and how they can be applied in a business environment
- Create and amend CRM templates
- Search, view and modify events via the CRM tab
- Add events/actions to persons, clients and to users
- Manage assigned actions

Who should attend the course?

- This course is designed for both front and middle office personnel who already possess a basic knowledge of FIGARO Front Office Enquiry
- 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 passed FIGARO Front Office Enquiries 1

Course Content

Part 1: Documents & Document Generation

- Viewing Documents
- Document Generation Concepts & Application
- Document Templates & Maintenance
- Single, Multi & Mail shot Document Generation
- Delegate DocGen Exercise

Part 2: CRM/Workflow

- CRM/Workflow Concepts & Application
- CRM Templates
- CRM Tab – Viewing, Adding & Modifying
- Managing Assigned Actions
- Delegate CRM Exercise

Course Details

- Duration: 3 hours
- Course booking reference: **Figaro627R**

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

