



FIGARO BACK OFFICE

Introduction to Client Inception

About the course

The purpose of this course is to provide delegates with the practical knowledge to inception and maintain Persons and Clients within Figaro Back Office. 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:

- Understand the concepts of Persons and Clients
- Understand what pre-defined data needs to be in place before incepting a client
- Incept Clients
- Add additional details to client records (including: addresses, S18 details, tax statuses, preferred settlement currencies, KYC details & EUSD details)
- Amend Person details
- Amend Person / Client links and authorities
- Create Diary Entries
- View Persons and Clients in Front Office

Who should attend the course?

- This course is designed for client data clerks who already possess a basic knowledge of FIGARO Back 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 already passed Figaro Accounts Overview.

Course Content

Part 1: Client Inception

- Person & Client Concepts
- Pre-defined Client Data
- Client Set Up
- Client Additional Details

Part 2: Persons / Linking & Additional Data

- View/Amend Person Details
- Person & Client Relationships
- KYC Data
- Pack Print Diary
- Delegate Test

Course Details

- Duration: 4 hours
- Course booking reference: **FIGARO7669**

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

