



# 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: 1 Day
- 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 LLP, 3 More London Riverside, London SE1 2AQ

## 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)