



Introduction to FIGARO Web

About the course

The purpose of this course is to provide information on how to navigate FIGARO Web, send secure messages manage them using FIGARO CRM. This course is designed for front, middle office personnel, and is also suitable for Independent Financial Advisers. The course is based on everyday scenarios and includes a hands-on element using a generic FIGARO system.

Course Objectives

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

Navigate FIGARO Webs:

- Portfolio menu
- Perform Stock searches.
- Research stock
- Place orders
- View Active Orders
- View & Download transaction history, Cash Statements
- View, create and send secure messages
- View Documents, Corporate Actions & download forms

Use some areas of FIGARO CRM:

- Open Enquiries & CRM
- Search for clients
- View a client's/person's CRM secure message
- Create an Action
- Create a Secure message for a Client or Person
- Set Secure message as High Priority
- Delete a secure message from the web

Who should attend the course?

- 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 Content

FIGARO Web Navigation

- Login and search for a client
- View Account summary & Portfolio screen
- Stock Search, place a Buy/Sell order
- View Active Orders
- Transaction History & Cash Statement
- Client details
- Secure messages
- Documents, Corporate Actions & Forms
- Enter the Research area

FIGARO CRM - Enquiries

- Login and Navigate Enquiries CRM
- View Secure messages
- Understand the different status settings
- Authorise a secure message
- Create, Close, recall a secure message
- Create an action
- Search historical messages

Course Details

- Duration: 2.5 hrs
- 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 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