



# FIGARO FRONT OFFICE

## Enquiries 2

### About the course

The purpose of this course is to provide in-depth knowledge of the advanced functionality in the FIGARO Front Office Enquiries program relevant to either front or middle office personnel. The course is based on everyday scenarios and includes a hands-on element using a generic FIGARO system. A quick quiz will conclude the course.

### Course Objectives

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

- Create journal requests and cash withdrawal requests for clients
- Generate single or mail-merged letters in FIGARO utilising data from lists
- View, create and modify events and actions in the CRM screen as well as in the CRM/Workflow application
- Understand any additional Client List sub-tabs relevant to their business
- View client Orders
- Save Grid and Filter settings
- Understand and utilise the hierarchy view and modelling functions in Valuations
- Understand and utilise the CGT current position and Whatif? functionality
- Understand and utilise the Performance information
- Use the contract calculator for simple, interest bearing and reverse calculations

### 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: Payments and Client Management

- Instructing Payments
- Document Generation
- Client Relationship Management (CRM)
- Advanced Client Lists
- Viewing Orders

Part 2: Enquiry - Advanced

- Advanced Grid management
- Valuation Hierarchy and Modelling
- CGT display and Whatif?
- Performance
- Contract Calculator
- Quiz

### Course Details

- Duration: 3 hours
- Course booking reference: **FRONTO7080**
- Some of the above functions may not be available on the delegate's system depending on how FIGARO has been implemented at their site. The trainer will modify the course accordingly for those users.

### 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)