



# FIGARO FRONT OFFICE

## InterAction for Business Getters

### About the course

The purpose of this course is to provide Administrators with the skills required to enable Corporate Actions for processing in InterAction and to monitor their progress. 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:

- Enable an event in InterAction
- Add notes and a reply by date to an Event
- Record client responses
- Email Business Getters who have outstanding responses
- Define rules and letters
- Assign rules and letters to an event
- Close and archive completed events

### Who should attend the course?

- This course is designed for Corporate Action Administrators who already possess a basic knowledge of corporate action processing in Figaro.
- 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 Corporate Actions Processing.

### Course Content

#### Part 1: Managing Events

- View Events
- Edit Events
- View an Event's Client List
- Client Actions
- Monitor Events
- Delegate Exercise

#### Part 2: Client Communication & Alerts

- Define Rules
- Assign Rules to Events
- Create Letter Templates
- Assign Templates to Rules
- Delegate Exercise
- Alerts

### Course Details

- Duration: 2 Hours
- Course booking reference: **FIGAROe19K**

### 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)



# FIGARO FRONT OFFICE

## InterAction for Business Getters

### About the course

The purpose of this course is to provide Business Getters with the skills required to easily expedite all their duties associated with current corporate actions in InterAction. 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:

- View enabled events by various filter options
- Communicate via letter and email to clients about forthcoming corporate events
- Reflect client choices in optional events
- Monitor the progress of corporate actions

### Who should attend the course?

- This course is designed for Business Getters who already possess a basic knowledge of Corporate Actions.
- 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: Viewing Events

- Open InterAction
- Event List Filters
- Summary Option

#### Part 2: Manage Events

- Mark as Seen
- Delivery Modes for Communications
- Generate Letters / Emails
- Recording Client Choices for Optional Events
- Monitoring Client Statuses
- Alerts
- Delegate Exercise

### Course Details

- Duration: 2.0 Hours
- Course booking reference: **FIGARO874T**

### 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](mailto:training@jhc.co.uk)