Intelliflo

Training courses and costs

Training to achieve

We believe that our system should be simple to use and as a Net Native solution you will benefit from an architecture which, at its core, is easy to navigate and understand.

Training is a vital part of understanding how to best utilise any system so we insist that all our customers take one of our “Intelligent Office Introduction” courses as this allows you to use the key functionality of the system. Our training solutions include eLearning or if preferred face to face private onsite or online training.

The introduction course identies which areas you will use and indeed any areas you may require further training on. We are constantly adding new functionality to the Intelligent Office system as part of our ongoing process of listening to client feedback to evolve the training services we offer. Training for all of our clients is encouraged to cover all the areas you will use in the system as well as new functions or indeed to refresh your knowledge in existing areas.

Private training

Private training days allow you to have the face to face contact with one of our Learning and Development Consultants, but in a private environment for you and your company employees. You will benefit from the personalised interaction with one of our consultants and the course material provided.

These courses can be undertaken at your own premises or venue (a suitable classroom with configured workstations/laptops must be provided). A training kit can be provided upon request dependent upon availability and location.

All our training courses are conducted between 10am – 4pm allowing us to cover one of our standard agendas or indeed an agenda of your own design (subject to agreement with our trainers). The maximum capacity for any course is 8 delegates.

Online training

The online training sessions are web-based remote training of between 30 minutes and 2 hours to supplement your initial training on the system.

These short sessions cover one of our set agendas or you can take the opportunity to devise your own agenda (subject to agreement with our trainers).

We have the facilities to arrange conference calls and web-based connections to multiple PC’s.

The range of courses

We currently offer a range of standard courses to suit various parts of the system and indeed the opportunity to construct your own agendas with a bespoke training session. Details of our courses are given below however please contact us if you wish to construct your own agenda. All face to face courses run from 10am-4pm and we keep to a maximum of 8 delegates. For online training we strongly recommend that groups are kept to a maximum of 4 delegates.

Private client site training	Time	Suggested delegates	Elements covered
Introduction to Intelligent Office **Full day**	10am - 4pm	All new users to Intelligent Office or those wanting a refresher	Your introduction to Intelligent Office, which includes the following areas: basic navigation, adding leads and clients, fact finds, document management, quotes, life cycles, plans and fees, and management information reporting. Workbooks included.
Introduction to Intelligent office (Mortgage users) **Full day**	10am - 4pm	All new mortgage users of Intelligent Office or those wanting a refresher	Your introduction to Intelligent Office, which includes the following areas: basic navigation, adding leads and clients, fact finds, document management, quotes, Trigold and Mortgage Brain integration, life cycles, plans and fees and MI reporting. Workbooks included.
Advanced introduction to Intelligent Office **Full day**	10am - 4pm	System administrators Office managers Office administrators Sole users	Your advanced introduction to Intelligent Office, which includes the following areas: configuration and permissions, getting started (setup), creating tasks and activities, life cycle designer, adviser charging, adding complex plans, group schemes and user defined MI. Workbooks included.
Income processing **Full day**	10am - 4pm	Income Processing staff Office managers Sole users	A course for those who process fees and income, which includes the following areas: processing and matching provider statements both electronically and manually, cash processing, client paid fees, adviser changes, introducer setup, reports, payment runs and month ends. Workbooks included.
Document Designer **Full day**	10am - 4pm	Compliance staff Office managers System administrators Office administrators Sole users	This course will enable you to create your standard letter templates and reports within Microsoft Word and explains how to use merge fields from Intelligent Office so that you can generate documents direct from a client record. The course includes initial Document Designer set-up, creating paragraphs and snippets, creating letters with optional paragraphs, tables and prompt boxes plus creating letters that can be issued about multiple plans. Workbooks included.
Compliance monitoring **Full day**	10am – 4pm	Compliance staff System administrators Firm principals Sole users	A course to show you how the system can help you monitor cases and flag compliance issues, which includes the following areas: lifecycle setup, adviser gating, file checking set up, checklists, pre and post sale checks, complaints, reports. Workbooks included.
Bespoke day **Full day**	10am – 4pm	Selected staff dependent upon content	A day agenda agreed in advance with one of our consultants covering those areas of interest to you.

Online courses

Online training	Time	Suggested delegates	Elements covered
Income online	2 hours	Income Processing staff Office managers Sole users	Processing and matching fees and commission manually and with EDI statements. Cash processing and month ends.
Basic compliance online	2 hours	Compliance staff System administrators Firm principals Sole users	Setup, file checking, TandC, KPI's advice cases, checklists and file sign off.
Document Designer - creating basic letter templates	2 hours	Compliance staff Office managers System administrators Office administrators Sole users	Templates and snippets, headers and footers, suitability letters and letter styles.
Adding specialist plans online	1 hour	Office managers System administrators Office administrators Sole users	Group schemes, SIPP, SSAS and wrap.
Building your own reports online	30 minutes	Office managers Compliance staff System administrators Office administrators Advisers Sole users	Creating reports, security, input filters, output columns, report types and saving reports.
Mail merge online	1 hour	Office managers System administrators Office administrators Advisers Sole users	Creating letter templates, finding clients, creating merges, mail merge tasks and viewing outputs.
Bespoke session online (this does not include introductory training)	Charged per 30 minutes up to a maximum of 2 hours per session	Selected staff dependent upon content.	A tailored online agenda agreed in advance with one of our trainers covering those areas of interest to you.

Costs

There is a uniform charging structure applied to all of our training, paid up front, ensuring that the costs are easy to calculate no matter what the course content is.

Cancellation policy

Training will not be confirmed or delivered until receipt of a signed order form. There is no refund of training costs if the training is cancelled by you after receipt of a signed order form.

Contact us

To ensure you get the most from your system we have a dedicated training team who will be able to talk you through in detail all the options, courses and the best delivery methods to ensure you get the most from your training.

If you would like to take this opportunity to learn a new area of Intelligent Office or refresh your knowledge then please contact the Learning and Development Department at learning@intelliflo.com or call **0203 814 2854**.

Private training	Online training
Up front payment: £875 + VAT per day	Up front payment: £50+VAT per 30 minutes
The maximum capacity for any course is 8 delegates on our private courses.	We recommend a maximum of 4 delegates per session.