

Avaloq Introduction

Avaloq Business Basics – Training Programme

This course provides a practical and hands-on training on the Avaloq Banking System from a User perspective. Participants will have a chance to discover system functionality and features with practical exercises while learning about Avaloq's basic concepts.

The Avaloq Introduction Course covers the following topics:

- **Object Model (Static data concepts)**
- **User interface (Classic client)**
- **Order entry (including Wizard) and Workflow engine**
- **Data retrieval applications (Lookup; CRM Desk – partially and Portfolio; Navigator and Tasks application – Orderbooks)**

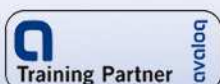
The course includes the following exercises:

- **Client Static Data – open a new bank client**
 - Client Wizard
- **Client Static Data – modify/view a bank client**
 - Address
 - Business Partner / Person
 - Container
 - Money Accounts
- **Cash related transactions**
 - Cash Desk (Cash deposit / withdrawal)
 - Money Transfer (internal account transfers)
 - Payments (external) / Standing Order
 - Foreign Exchange (FX Trade)
- **Security related transactions**
 - Stock Exchange
- **CRM – Schedule Client Meeting**
- **Orderbooks / Reports**
 - Searching existing, plus storing new task templates

Duration: 1.5 days

Designed specially for Business Users, this course is the fruit of our considerable Avaloq experience. Throughout the course, the emphasis is on practical, real-world examples and hands-on exercises. By the end, participants will have a better know-how of the Avaloq System.

For more information or course registration please visit our website's training section.



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