



## AdvicePro Training Courses

**These are practical, hands-on short courses suitable for advisers, caseworkers, volunteers and managers who already have experience of using AdvicePro.**

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### **Productivity Manager**

**9.30am – 12.30pm**

- What is Paperless? Utilise AdvicePro Letter functionality, including Case Notes, files and scanned documents
  - Record Case Outcomes (financial and non-financial) and manage referrals
  - Overview of the Diary facility (task management, key dates and appointments), automated reminders and integration with MS Outlook calendar
  - Learn how to manage your Workflow and value-added activities rather than administration
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### **Reporting**

**13.30pm - 16.30pm**

- Choose from over 100 different in-built reports to help you gather data and analyse the information you require quickly and effortlessly
  - Building new reports across date ranges about case Outcomes, Issue types, Referral sources, Work completed against cases and client groups, and more
  - Produce reports and statistics to meet the requirements of your funder and share via email or a Publisher on AdvicePro
  - Use Advanced Reporting functionality to help you to identify clients with missing data, and more. Caseworker will be able to instantly update records for clients and cases
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**Cost**  
Each session:

**AdviceUK members**  
£75 + VAT

**Non-members**  
£100 + VAT

To register or for more information, contact Steve Thorpe by email:  
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