Over of Sungard Investran including the four tools associated

- Accounting
- CRM
- Report Wizard
- Reporting services

Accounting:

- How to create and modify batches
- What all options available while creating and posting batches
- Mandatory fields in the batches
- Importance of transaction type, Deal & Position, Dates, Allocation rule,etc.
- Defining search criteria and their uses
- How to delete or purge a batch
- How to use the templates for booking batches

CRM:

- What is CRM
- How to create a new contact
- What are all the mandatory fields while creating an Investor or Contact
- How to modify or delete an existing contact or Investor
- How to Link a existing or new contact to the Investor

Report Wizard:

- What's the purpose of Report wizard
- How to create a new report
- How to amend an existing report or create a copy of it
- Using parameters to pull a report with specification as required by the business
- Linking the report wizard to Excel
- How to download a report either in excel or pdf

Reporting Services:

- What's reporting services
- Usage of predefined templates in Reporting services
- How to generate and download Call, Distribution or Quarterly Notices
- How to send communications to the investors through reporting services