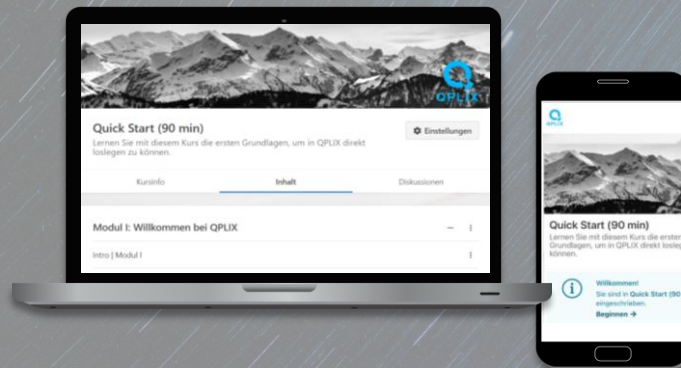




DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

QPLIX is your digital working environment in everyday life - always and everywhere available when you need the wealth management software. The QPLIX Academy now also offers you this digital experience for learning. With the new online tutorials, you benefit from the flexibility, individuality and efficiency of digital learning content.



With our online tutorials, you can acquire your QPLIX knowledge by yourself. You can do so comfortably from your home office or office and at your own pace. Your knowledge is tested, deepened and expanded with a balanced mixture of user-friendly theory, clear and comprehensible video material and various tasks.

Please note: Our offerings are only bookable for contracted QPLIX customers.

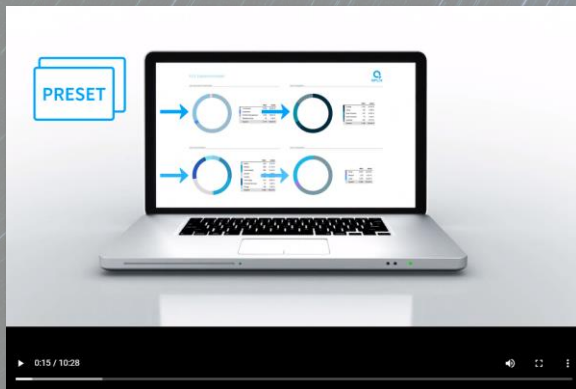
interactive – practical - digital





DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally



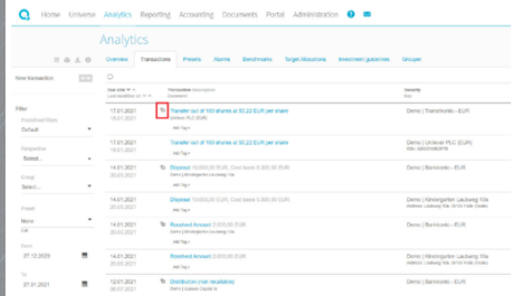
Comprehensively presented theory with many explanatory and instructional videos

Interactive tasks in the system with solution videos

Task | QPLIX Manual

The QPLIX manual provides you with a great deal of information on how to use the software. Among other things, all of the software's views as well as its buttons and options are explained.

Use the manual to find out what the red-marked sign means.



Task | Analytics & Reporting

Which statements about analytics & reporting in QPLIX are CORRECT?

- The analytics tool provides the possibility to view each asset from different perspectives and using different evaluation metrics.
- A preset forms the basis for each evaluation. However, presets are not required for reporting.
- Users can create their own evaluations, but also use existing templates.
- Reports are freely configurable.

Various questions for an optimal knowledge test





DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Quick Start | Free of charge | Duration: 90 min

This course covers the system's most important basics and provides an overview of its key functions and sections

After this tutorial you will

- know QPLIX's most important key functions,
- know our products and corresponding features,
- understand our way of working and how you can benefit from it,
- know all about our supporting measures (including our manual and release notes) enabling you to quickly help yourself,
- know the software's different system sections and how to navigate through them,
- know the software's most important basics which are fundamental for a successful application.

Furthermore, you will be able to

- call up securities (liquid & illiquid assets),
- call up allocations,
- generate reports.

Required QPLIX knowledge:

- none
- this course is a foundation course addressing users who have no application experience with the contents.

This course is particularly suitable for:

- users who have not worked with the software yet and need a first introduction.

Further information

- You do not need access to a QPLIX system for this online tutorial



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Universe & Administration | Duration: 150 min

In this course you will get to know the basic functions of the Universe and Administration section. In addition to the creation of securities and legal entities, this also includes master data maintenance and administrative activities.

After this tutorial you will

- know the basic functions of the Universe and Administration section,
- understand the investment universe, and know how to create new securities in the system,
- know the concept of common properties and understand how master data maintenance works in QPLIX,
- know the different user settings and how to assign visibility rights and permissions in the system.

Furthermore, you will be able to

- create securities and add classifications,
- configure common properties and store them on the appropriate levels (master data maintenance),
- create legal entities, groups and clients,
- set permissions and visibility rights.

Required QPLIX knowledge:

- basic overview of the software (For this we recommend the course "01 | Quick Start")
- this course is a foundation course addressing users who have no application experience with the contents.

This course is particularly suitable for

- users who create securities, assets and legal entities (incl. groups/clients), maintain master data and/or manage users.

Further information:

- for this online tutorial, you will be provided with your own test system with an anonymous user.



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Accounting logic and transactions | Duration: 150 min

This course provides basic knowledge about accounting and transactions in QPLIX, which is the basis for successful transaction recording.

After this tutorial you will

- know the accounting logic in QPLIX and know in which software areas the configuration can be viewed and edited,
- understand the structure and how charts of accounts work,
- know about the transaction mask and the transaction record,
- understand the concept of different entry types,
- be able to find and control transactions.

Required QPLIX knowledge:

- basic overview of the software (For this we recommend the course "01 | Quick Start")
- understanding of the difference between securities and investments (For this we recommend the course "02 | Universe & Administration")
- this course is a foundation course addressing users who have no application experience with the contents.

This course is particularly suitable for

- users who want to create and view transactions and understand the basic concepts.

Further information:

- for this online tutorial, you will be provided with your own test system with an anonymous user.



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Analytics | Duration: 150 min

This course focuses on the basic functions of the analytics section, where you can deepen your knowledge around the application and configuration of analyses.

After this tutorial you will

- know the basic functions of the analytics section,
- understand the concept of "preset" and know what it is used for,
- know how to open and analyze asset allocations,
- be able to customize presets and understand the structure and individual configurations (incl. filters, metrics & grouping),
- be able to create, release and manage your own presets.

Required QPLIX knowledge:

- basic overview of the software (For this we recommend the course "01 | Quick Start")
- this course is a foundation course addressing users who have no application experience with the contents.

This course is particularly suitable for

- users who analyze assets, make investment decisions and/or are involved in asset controlling.

Further information:

- for this online tutorial, you will be provided with your own test system with an anonymous user.



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Reporting & Portal | Duration: 150 min

Learn all about QPLIX reporting and learn how to customize and configure reports. You'll also practice navigating the portal and understand how it relates to reporting.

After this tutorial you will

- know the basic functions of the reporting section and the portal,
- understand how report creation and sharing works,
- know the options for creating and working with report templates,
- know the meaning of so-called presets for the reporting section,
- know the navigation and reporting options of the QPLIX customer portal.

Furthermore, you will be able to

- know the navigation and reporting possibilities of the QPLIX customer portal.
- modify and process existing report templates,
- create simple analyses and integrate them into reporting,
- create your own report templates using the various elements available in QPLIX,
- navigate within the customer portal and run live evaluations there,
- use the reporting functions of the customer portal.

Required QPLIX knowledge:

- basic overview of the software (For this we recommend the course "01 | Quick Start")
- basic knowledge of analysis options and concepts (For this we recommend the course "04 | Analytics")
- this course is a foundation course addressing users who have no application experience with the contents

This course is particularly suitable for

- users entrusted with the analysis of diversified assets.

Further information:

- For this online tutorial, you will be provided with your own test system with an anonymous user.



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Liquid Assets | Duration: 150 min

In this course you will go over the complete cycle of stocks, bonds and many more in the QPLIX system - from investment including quote supply and master data maintenance to ad-hoc evaluation and presentation in reports and in the portal.

After this tutorial you will

- know which liquid assets can be represented in QPLIX,
- understand how the quote and data supply in QPLIX works and which options are available to you in the automation of liquid assets,
- be able to (manually) create bank accounts, shares/open funds and bonds in QPLIX, maintain their master data, record transactions and evaluate them in analytics and reporting.

Required QPLIX knowledge:

- basic overview of the software (For this we recommend the course "01 | Quick Start")
- understanding of the accounting logic in QPLIX (For this we recommend the course "03 | Accounting logic and transactions in QPLIX")
- this course is a foundation course addressing users who have no application experience with the contents.

This course is particularly suitable for

- users who create, book and evaluate liquid assets (such as bank accounts, stocks, funds, bonds) in analytics and reporting.

Further information:

- for this online tutorial, you will be provided with your own test system with an anonymous user.



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

Illiquid Assets | Duration: 150 min

This course covers the complete cycle of real estate and private equity in the QPLIX system - from creation including master data maintenance to ad-hoc evaluation and presentation in reports and the portal.

After this tutorial you will

- you know which illiquid assets can be represented in QPLIX,
- be able to (manually) create real estate, private equity and direct holdings in QPLIX, maintain their master data, record transactions and evaluate them in analytics and reporting.

Required QPLIX knowledge:

- basic overview of the software (For this we recommend the course "01 | Quick Start")
- understanding of the accounting logic in QPLIX (For this we recommend the course "03 | Accounting logic and transactions in QPLIX")
- this course is a foundation course addressing users who have no application experience with the contents.

This course is particularly suitable for

- users who create illiquid assets (such as real estate, private equity funds, direct holdings), book them and evaluate them in analyses and reporting.

Further information:

- for this online tutorial, you will be provided with your own test system with an anonymous user.



DIGITAL LEARNING

QPLIX Basics – Learn the basics digitally

PRICING

- Price per online tutorial | access for 6 weeks 50 € pp.*
- Complete QPLIX Basics package** | access for 12 weeks 250 € pp.*

**Invoices are generated monthly, based on the number of online tutorials booked in that month. The stated rates are net prices and do not include the legally owed value added tax, if applicable.*

***The complete QPLIX Basics package includes all seven online tutorials.*

CONTACT & REGISTRATION



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For registration, go to
<https://www.qplix.com/solutions/services/academy>.

If you have any questions, please feel free to call us, +49 89 998 2716 86 (Tanja Unsöld), or send an email to academy@qplix.com.

PROCESS

STEP 1 |



24 h



Register for one or more online tutorial(s) on our website.

STEP 2 |



directly



Receive login data for our tutorial platform as well as access to a QPLIX test system as anonymous user.

STEP 3 |



Start online tutorial with interactive tasks for maximum learning success.

TECHNICAL REQUIREMENTS

- Notebook or tablet
- System access (Okta or Token)
- Internet

We recommend the use of two screens. This allows you to view course content and assignments on one screen and perform assignments in your QPLIX test system on the other.

GOOD TO KNOW

All online tutorials can be paused at any time. This way, you can complete a tutorial at your own pace, stopping and resuming whenever it suits you.