

COURSE OUTLINE – (FP08) CUSTOMER MANAGER

Overview

Customer Manager has been designed to enable users to effectively manage and control all interactions with a customer or party. It increases the speed at which staff can service customers by providing real-time access to customer information and by giving the user a single view of each customer's details, such as contacts with the customer, customer-related tasks, documents (incoming and outgoing), accounts, customer relationships, competitor information etc... In addition, party payment preferences can be held which feed into the Payments Manager component.

Objectives

To provide attendees with an understanding of all functionality contained within the Customer Manager application, and how this functionality interacts with, and can be applied in the context of an overall FINEOS Solution Implementation.

Who should attend?

All Project Resources involved in the Business Configuration of a FINEOS Solution and all End Users who will be using the FINEOS Customer Manager component.

Topics

Introduction & Overview

- Accessing Customer Manager
- Terminology & Definitions

Working with Parties - core

- Completing a party search – person & organisation
- Adding a new party record – person and organisation

Tasks

- Add/Edit/View tasks

Contacts

- Add/Edit/View contacts

Documents

- Add/Edit/View documents
- Document properties

Relationship details

- Add/Edit/View relationships

Extra Information details

- Add/Edit/View extra information

Portfolio details
Prompts
Case History details
Occupation details
Payment Preferences

- Add/Edit/View payment preferences
- Set-up account numbers

Appointments
Usability features

- Refresh list views
- Pin screen
- Filtering options
- Recent items
- Moving items
- Toolbar icons
- Setting favourites
- Keyboard shortcuts

Pre-requisites

Attendance at the FINEOS Process Manager module would be preferable but not mandatory.

Format & Duration

Training Format	Description	Maximum number of attendees	Duration
Classroom	An instructor-led session combining a blended learning approach of theory, hands-on exercises and knowledge checks	8	One Half Day

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