

COURSE OUTLINE – (FTB-F-004)

FINEOS GUI USAGE - FRONT OFFICE

Overview

The ***FINEOS GUI Usage - Front Office*** course takes participants through the use of the FINEOS customer relationship management functionality.

Objectives

To provide attendees with an understanding of the GUI components on the FINEOS application, how to access and use them to their full potential:

At the end of this course participants should know how to do the following:

- Use Customer Manager
- Use Process Manager
- Use Document Manager
- Use Case Manager

Who should attend?

Anyone seeking hands on experience of the FINEOS Front Office components:

- Business & Technical Consultants
- Business Analysts
- Test Engineers
- Software Engineers
- Sales Consultants

Pre-requisites

Courses:

- FTB-F-001 – FINEOS GUI Overview - Front Office
- FTB-F-003 – FINEOS Basic Navigation

Course Content

Module 1: Using Customer Manager

- Customer Manager functionality
- Searching for a party
- Creating a party record

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- Editing a party record
- Deleting party records
- Managing relationships between parties
- Managing contacts with parties
- Managing customer-related activities
- Managing portfolios for customers
- Managing extra party details
- Using prompts
- Adding a case to a party record
- Adding occupation details to a party record

Module 2: Using Process Manager

- Process Manager functionality
- About tasks, processes, and activities
- Accessing work queues
- Managing activities
- Managing tasks
- Viewing a history of activities
- Managing processes
- Managing appointments
- Running Reports

Module 3: Using Document Manager

- Document Manager functionality
- Adding documents
- Using document groups
- Editing document properties
- Transferring documents to different parties or cases
- Changing the status of a document
- Printing documents
- Deleting documents
- Archiving documents
- Saving documents to a document management system
- Viewing documents
- Linking documents to tasks
- Copying eForms
- Using nested eForms

Module 4: Using Case Manager




- Case Manager functionality

- Searching for a case record
- Creating cases
- Managing case details
- Managing parties involved in a case
- Managing documents associated with a case record
- Managing accounts in a case record
- Managing case actions
- Managing case appointments
- Managing case-related tasks
- Using case prompts
- Viewing a list of your cases
- Transferring a case to a different department
- Transferring a case to a different user
- Managing case validations
- Using case aliases
- Maintaining additional information for a case

Format & Duration

Delivery	Tutor-Led Practical	Duration	2.5 Days
Description			
The desired effect for participants on completion of this course is an acquisition of skills i.e. to 'KNOW' how to use a particular area of the FINEOS product. Participants are led through practical exercises relevant to the particular skills area directed and assisted by the tutor.			

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