

## COURSE OUTLINE – (FTB-P-005)

### FINEOS GUI USAGE - SINGLE DUE PAYMENTS

#### Overview

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The ***FINEOS GUI Usage - Single Due Payments*** course explains the main concepts behind FINEOS Payments Manager and how it manages unscheduled payments. The course includes general payments theory and practical exercises to show how to manage single due payments.

#### Objectives

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To provide attendees with an understanding of how to manage one-off payments to one or more recipients.

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

- Manage single due payments
- Manage reserves for single due payments
- Manage payment amounts
- Process single due payments.

#### Who should attend?

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Anyone involved in the development, testing and use of FINEOS Single Due payments:

- Software Engineers
- Test Engineers
- Business Analysts
- Business and Technical Consultants

#### Pre-requisites

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**Courses:**

- FTB-F-001 – FINEOS GUI Overview - Front Office
- FTB-F-002 – FINEOS Configuration Overview – Front Office
- FTB-C-001 – FINEOS GUI Overview – Claims
- FTB-P-001 – FINEOS GUI Overview – Payments
- FTB-F-003 – FINEOS Basic Navigation
- FTB-F-004 – FINEOS GUI Usage - Front Office
- FTB-C-002 – FINEOS GUI Usage - Claims

## Course Content

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### Module 1: Introduction to single due payments

- About single due payments
- Payments Manager functionality

### Module 2: Managing single due payments

- Setting up approved amount records
- Approving the payment amount

### Module 3: Managing reserves for single due payments

- Reserving money
- Removing a pending reserved amount

### Module 4: Managing payment amounts

- Adding a payment amount
- Activating a payment amount
- Deactivating a payment amount




### Module 5: Processing payments

- Manually generating single due payments
- Processing payments
- Managing overpayments on single due payments

## Format & Duration

Delivery	Tutor-Led Practical	Duration	1/4 Day
<b>Description</b>			
The desired effect for participants on completion of this course is an acquisition of skills i.e. to <b>'KNOW'</b> 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.			

## For further information, contact FINEOS Training Services:

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