

## COURSE OUTLINE – (FTB-P-006)

### FINEOS GUI USAGE - AD HOC PAYMENTS

#### Overview

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The ***FINEOS GUI Usage - Ad hoc 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 ad hoc payments.

#### Objectives

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

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

- Manage ad hoc payments
- Manage payment amounts
- Process ad hoc payments.

#### Who should attend?

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Anyone involved in the development, testing and use of FINEOS Ad hoc 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 ad hoc payments

- About ad hoc payments
- Payments Manager functionality

### Module 2: Managing ad hoc dues

- Setting up ad hoc dues
- Editing ad hoc dues
- Cancelling ad hoc dues
- Deleting ad hoc dues

### Module 3: Managing payment amounts

- Deactivating payment amounts




### Module 4: Processing payments

- Manually generating ad hoc payments
- Processing payments
- Managing overpayments on ad hoc dues

## 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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