

COURSE OUTLINE – (FTB-P-008)

FINEOS INTERMEDIATE CONFIGURATION - RECURRING PAYMENTS

Overview

The ***FINEOS Intermediate Configuration - Recurring Payments*** course explains the main concepts behind the configuration and set up of recurring payments on the FINEOS system. The course includes exercises to show how to configure recurring payments.

Objectives

To provide attendees with an understanding of the configuration functionality within the FINEOS application in relation to payments. It builds on the configuration basics as provided in the FINEOS Intermediate Configuration - Front Office course.

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

- Recurring payments

Who should attend?

Anyone involved in the configuration of the FINEOS payments component:

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

Pre-requisites

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

Module 1: Introduction to configuring recurring payments

- Understanding case configuration
- Understanding claim-benefit relationships
- Demonstrating sample recurring payment benefits




Module 2: Configuring recurring payments

- Enabling customisers for recurring payments
- Setting up claim-benefit relationships
- Configuring Payment Details
- Configuring party case roles

Format & Duration

Delivery	Tutor-Led Practical	Duration	1/4 Day
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.			

For further information, contact FINEOS Training Services:

 training.services@FINEOS.com  +353 (0)1 639 9700	 Training Services, FINEOS Corporation, Pembroke House, 8-10 Lwr Pembroke St, Dublin 2, Ireland
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