



# Management Fees System Maintenance

## About the course

The purpose of this course is to provide users with the knowledge required to maintain the Figaro Management Fees system. The course is based on everyday scenarios and includes a hands-on element using a generic FIGARO system.

## Course Objectives

On completing the course, the successful delegate will be able to:

- Understand how fees are generated
- Create and amend fee types
- Create and amend charge codes
- Create and amend fee sharing records
- Create and amend fee posting records
- Create and amend Business Getter default client preferences
- Understand how client preference templates can be used
- Understand the overnight fee generation process
- Understand the fee reports produced

## Who should attend the course?

- This course is designed for Users who already possess a basic knowledge of FIGARO Back Office.
- It is suitable for both new users and those experienced users who have learnt on the job and want to fill gaps in their knowledge

## Course Prerequisites

- Delegates should have attended the Figaro Management Fees – Client Set Up & Processing course.
- Delegates should have a basic knowledge of Figaro Accounts.

## Course Content

### Part 1: Fees Configuration

- Fee Types
- Charge Codes
- Fee Sharing
- Fee Posting

### Part 2: Advanced Fees

- Business Getter Defaults
- Client Preference Templates
- Overnight Fee Generation
- Reports

## Course Details

- Duration: 3 Hours
- Course booking reference: **FIGARO5Zz7**

## Course Venues

Courses can be held at our fully equipped training facilities in London (details below) or delivered on your premises

- JHC LLP, 3 More London Riverside, London SE1 2AQ

## Contacting JHC Plc

For information on booking this course please contact our training department:

- Ph. 0207 367 6534
- Email: [training@jhc.co.uk](mailto:training@jhc.co.uk)