

Collections for SYSPRO

Serves as a proactive tool for debt collectors by assigning invoices to collectors, monitoring collection efforts and retaining account collection history.

The Value of Collections for SYSPRO

- ▶ Identify overdue invoices
- ▶ Assign invoices to designated collectors
- ▶ Track detailed activities of collection efforts
- ▶ Retain the number of times an account goes into the collection phase
- ▶ Record history of collection efforts
- ▶ Hold details of multiple contacts per customer
- ▶ Transfer accounts from one collector to another, temporarily or permanently
- ▶ Transfer temporary reassignments back to original collector
- ▶ Detailed query of current and prior collection details

Matching Collections to your business

- ▶ Customize levels for automating collections, e.g., minimum overdue balance, minimum number of days overdue, etc.
- ▶ Include specific invoices that would not automatically be selected
- ▶ Assign invoices to collectors based on customer, class, geographic area or branch
- ▶ Capture Dun & Bradstreet information
- ▶ Review daily workload at-a-glance in summarized form, assign priorities and sequence accordingly
- ▶ Drill down to collection details and activities to-date
- ▶ View details of overdue invoices and drill down to sales order line details.
- ▶ Assign security levels as needed for confidentiality
- ▶ Use collection history proactively, e.g., view notes to avoid prior stalling techniques and methods of resolution
- ▶ Reprint invoices and send emails from within the collection screen
- ▶ Schedule follow-up call
- ▶ User-defined activity, severity and resolution codes

Reporting

- ▶ Management reports available in summary or detail
- ▶ Optionally include invoice details, activities and fully expanded notes
- ▶ Report on active accounts by collector
- ▶ Report on collection history by customer

Prerequisites

- ▶ SYSPRO 6.0 Revision 6 or higher
- ▶ Accounts Receivable Module

Integration

- ▶ Sales Orders (for viewing order details and reprinting invoices)
- ▶ Office Automation (required for faxing and emailing)

