

# Collection Module

## Objective

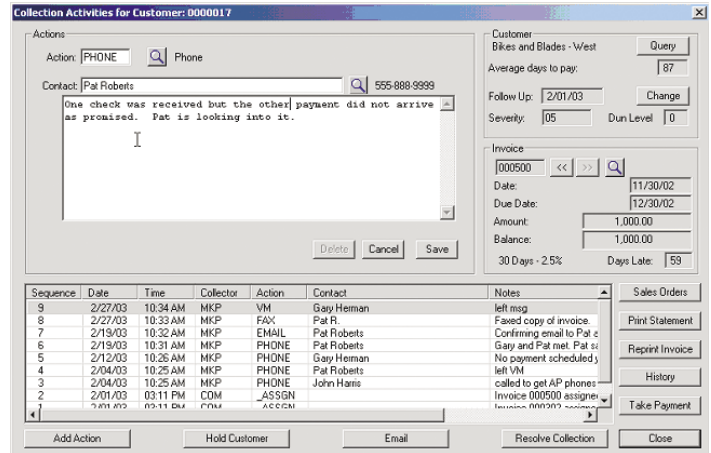
Serves as a proactive tool for debt collectors by assigning invoices to collectors, monitoring collection efforts and retaining account collection history.

## The value of the Collection Module

- Identifies overdue invoices
- Assigns invoices to designated collectors
- Tracks detailed activities of collection efforts
- Retains the number of times an account goes into the collection phase
- Records history of collection efforts
- Holds 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

## The value of the Collection Module

- 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)