



## Collections for SYSPRO

### Overview

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)

