

Collect v5 for End Users for SunSystems

Duration: ½ Day

Prerequisite: No prior SunSystems or Collect knowledge is assumed. An understanding of internal procedures would be advantageous.

Who Should Attend: Any user who is responsible for debt collection for their organisation.

What You Will Learn: At the completion of this training session participants will be competent to:

- Define basic Collect maintenance functions
- Create allocation descriptions
- Create and use search sets
- Create and maintain account details
- Set up a to-do list
- Produce reports to analyse data

Course Content – Collect v5 for End Users for SunSystems

Introduction and Overview

- Creating new payment notes
- Using to-do lists
- Running search sets
- Generating debtor statements

Maintaining Collect Details

- Creating new action codes
- Defining new contact categories
- Creating address records and contact details for debtor accounts
- Defining default invoice and statement comments and details
- Determining allocation description
- Creating and running search sets
- Performing global update
- Customising Collect options

Additional Features

- Viewing account statistics
- Drilling down to transaction details
- Splitting transactions
- Archiving notes
- Using search sets to update allocation markers
- Updating account analysis codes & account status in SunSystems using Collect account analysis update
- Performing a customer details inquiry
- Adding attachments to notes
- Emailing notes
- Reprinting invoices
- Planning your time
- Finding an account

Collect Reporting

- Ageing summary report
- Ageing details report
- Debt recover analysis report