

Collect v5 for Administrators for SunSystems

Duration: 1 Day

Prerequisite: No prior SunSystems 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, as well as the maintenance of the Collect system.

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

- Use Collect for regular debt collection activities
- Create and maintain debtor contact letters
- 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 Administrators for SunSystems

Introduction and Overview

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

Creating New Customer Letters

- Creating new letters in MS Word for use in a search set

Maintaining Collect Details

- Creating new action codes
- Defining new contact categories
- Creating address & contact details for debtor accounts
- Categorising journal types
- Defining journal type and source
- Maintaining invoice & statement details
- Defining allocation descriptions and search sets
- Defining statement ageing
- Defining invoice calculation columns
- Using integrated systems
- Defining DSP analysis maintenance
- Maintaining run history records
- Copying action codes
- 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
- Adding attachments & emailing notes
- Reprinting invoices
- Using the to-do calendar
- Finding an account

Collect Reporting

- Ageing summary and ageing details report
- Debt recovery analysis report
- DSO reporting

Active Task Maintenance

- Active task maintenance process flow
- Scheduling the running of a search set
- Activating a scheduled job

Collect User Security

- Creating functional security definitions and data set groups