

# Credit Management for SYSPRO

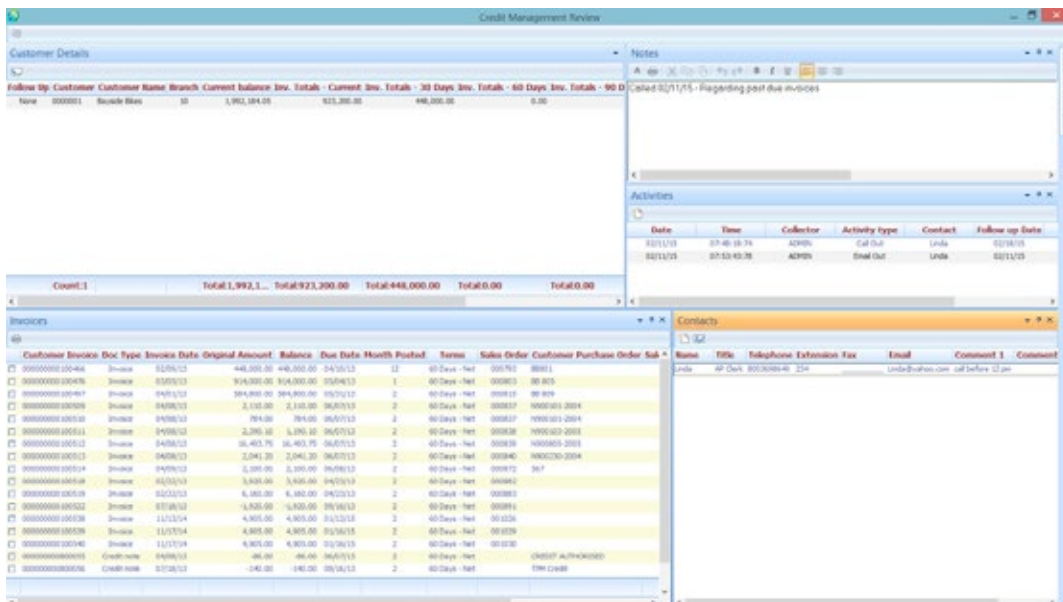


The Credit Management module can help you minimize your collections workload, improve cash flow, and reduce bad debt expense. It delivers clear and personalized information views and automated bad debt management tools; allowing your organization to increase profit with streamlined, tailored, and efficient collections tools.

Access to collections data is quick and easy. View all collections information, including contact notes and "to do" tasks, from a single window. A personalized interface gives the exact information you need, how you need it displayed.

## The benefits of Credit Management

- Identify overdue invoices
- Track detailed activities of collection efforts
- Record history of collection efforts
- Hold details of multiple contacts per customer
- Detailed query of current and prior collection details



# Credit Management for SYSPRO



## Matching Credit Management 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
- 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

## 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 with SYSPRO

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