

# Collect

## Unrivalled Credit Management for Infor SunSystems

### What is Collect?

Collecting due payables is a critical part of the company's financial viability. Collect is the tool of choice for accounts receivable teams. Its credit control and debt collection processes help you reduce bad debt, collect cash faster and minimise your debtor days. All this means that you can reduce Days Sales Outstanding and improve cash flow, while minimising collection costs.

Collect brings new levels of productivity to the busy collections team. The easy to use interface supports the typical multi-tasking demands of a collections clerk. Collect brings increased levels of automation to the identification of your worst offenders and the bulk management of statements and reminder letters.

**Collect keeps it nice and simple and for us Collect has drastically improved the effectiveness of our customer accounting and credit management.**

# Why choose Collect?

## Designed exclusively for Infor SunSystems

- **Single point of entry.** Because all information is held on the SunSystems database, all the required information is at the credit controller's fingertips meaning that absolutely nothing is lost and avoiding the need to find documents and call the customer back.
- **The choice of browser or desktop interface.** Full Collect functionality within the browser allows your people to get the best results whether they are behind the desk or on the road. The refreshed look and feel brings the advantage of tabbed operation and the ability to jump from one area to another without losing the work you were doing. This makes responding to a phone call or query much quicker and easier.
- **Find tool.** One of the most important things for a collector is the ability to quickly find a customer account or invoice when they are on the phone, sometimes with very little reference details. The Find tool allows for quick searches.
- Account status, statistics and history is always at your fingertip during a call or discussion.
- **Automated Processes.** Collect automates the production of sending reminder letters and statements.
- **Collection list generation.** User-defined search set generation produces recommended listings of debtors for collection listings.
- **Automatic close.** Because Collect is fully integrated with SunSystems it knows when transactions are paid. Thus no effort is wasted.
- **Electronic distribution.** Promises, requests, letters and statements can be sent via e-mail, removing the need to print and saving on postage.
- **Transaction and account notes.** An account or transactions can be associated to collection notes over time and notes can be associated with follow up actions and alerts to ensure your collections team are always on top of the process.
- **Prompts for follow up actions.** The credit controller is able to automatically define and date the follow up actions. Collect will prompt for the future action via calendars and action to do lists.
- **Streamline collection activities.** Collect allows different strategies for your categories of debtors.



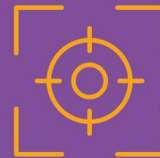
Multi-currency



Works on your data out of the box



User-defined search set generation



Single point of entry



Automatic close

## Features that make **Collect** powerful

**Integration with Word.** Merge data with Word to create custom letters.

**Payment plans.** The user is able to design payment plans for a customer.

**User diaries.** Each user has an online diary that lists their outstanding tasks for each day. This ensures that tasks are never missed.

**Unlimited contacts.** Each customer can have unlimited contact details ensuring that the right contact is used for any given situation.

**Notes can be attached to single or many SunSystems transactions.** A note can comprise an email, phone discussion, copies of documents that have been emailed to the customer or an account manager.

**Drill down to source transactions.** The credit controller can quickly drill down to the transaction source. Collect automatically has drill paths for Contract and Service Billing (CSB), SunSystems Sales Order and SunSystems PSA. It is also possible to establish custom drill paths to any SQL data source.

**Real time view.** Collect works in real time mode with Infor SunSystems.

**Automatically generate action lists.** The auto generate will create lists of recommended debt collection.

**Account Allocation functionality.** Enables Credit Controllers to allocate transactions directly within SunSystems Collect.

**Additional documentation.** As well as attaching relevant transactions to notes, you can attach additional documents, for example Excel, Word, PDF and scanned images.

**Transaction details.** When making calls the credit controller can access the debtor's up to date transactions. They can drill down to investigate transaction detail and even e-mail a copy of the transaction while on the phone.

**Revitalise your accounts receivable process with Collect - the ultimate tool for reducing bad debt, improving cash flow, and increasing productivity for busy collections teams.**



# For more information



## About TouchstoneFMS

At TouchstoneFMS, we are committed to delivering innovative financial management solutions that empower businesses to achieve their goals. By partnering with Professional Advantage, we support our clients' banking business objectives with proven technologies that complement Infor SunSystems, drive efficiency, solve problems, and fuel growth. With a combined 350 years of experience, our team of experts is dedicated to customer satisfaction, providing unparalleled support and guidance to ensure your success.

+44 207 121 4702

[touchstonefms.co.uk](http://touchstonefms.co.uk)

[info@touchstonefms.co.uk](mailto:info@touchstonefms.co.uk)

TouchstoneFMS  
46 Worship Street  
London EC2A 2EA

**touchstone**  
THE SUNSYSTEMS® PEOPLE

---

## About Professional Advantage

Professional Advantage is an international IT consulting and solutions company, with 30 years of experience in helping organisations achieve more by improving their business systems through industry leading software solutions. Originating in Australia, it is one of the country's most awarded solution providers. Our 250-strong global team covers three continents, and has successfully worked with over 1000 organisations.

+44 207 268 9800

[professionaladvantage.co.uk](http://professionaladvantage.co.uk)

[info\\_uk@professionaladvantage.co.uk](mailto:info_uk@professionaladvantage.co.uk)