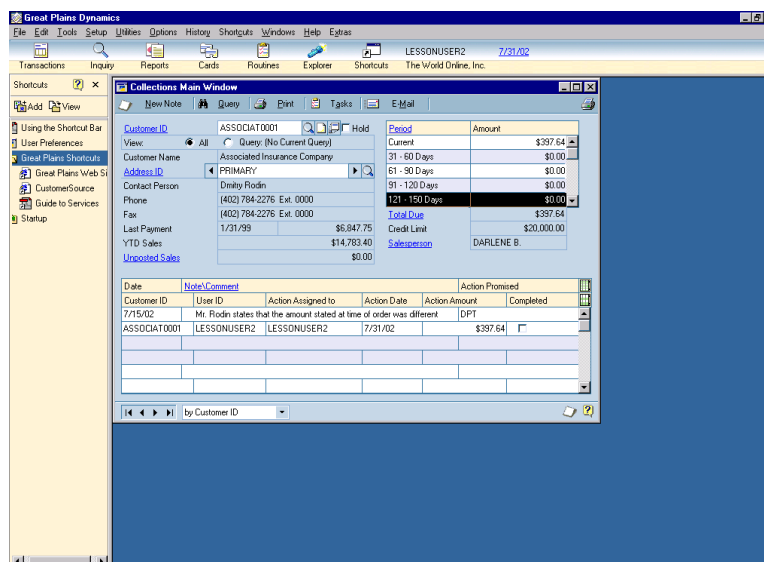# Collections Management

Collections Management helps you improve cash flow and reduce bad debts expense. Centralized customer contact and collection functions make it easy to target overdue customers, track unlimited contact notes, and automate the follow up actions and reminder dates for collections.

Features and Benefits

Collections Management automates many of your collections activities by maintaining detailed records of your customer contacts and allowing you to schedule follow up actions, assign "To Do" items, print out documents commonly requested by the customer, target customers matching certain criteria, and track detailed contact notes for sales purposes.

Access all your information from a single window: The Collections Management Main window acts as the control center for your Accounts Receivable. Virtually every key function or piece of information you need to see can be accessed directly from this window or with a single click of your mouse.


Collections Management Main window is the control center for all your collections information. All the information you need is right here or a single click of your mouse away.

- Instantly view all contact notes that have been created for the defined customer you wish to access.

- Easily create a new note for customers to use as reference points later on.

- Quickly and efficiently assign follow-up actions for yourself or others to complete at a later date.

- Organize your information to be more effective by only working with those customers who matched the query that was generated by Collections Management Query window.

Effectively target overdue customers: Collections Management enables you to build queries that can be used to target and view customers that meet a certain user defined criteria. You can then easily execute this query each day targeting your efforts on those customers needing attention.
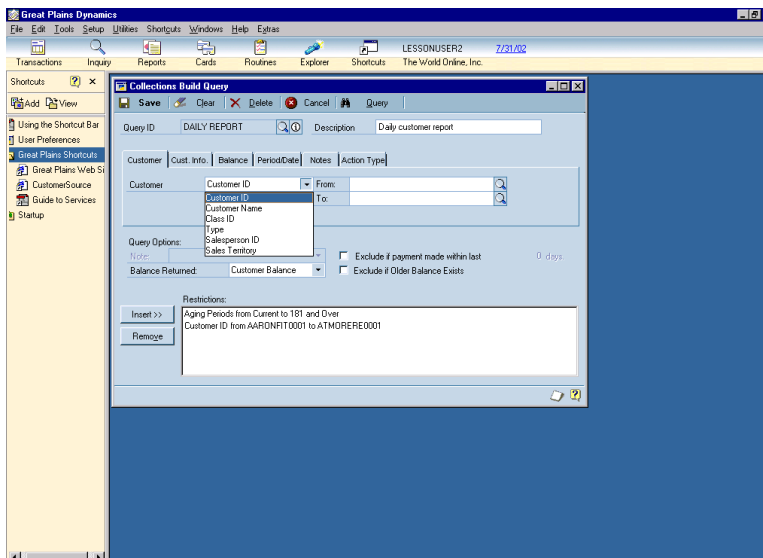

For your Collections to be most effective, you need to be able to target and view customer who meet certain specific criteria meaningful to you.

- Target overdue customers by selecting from five specific ranges: Customer, Balance, Notes, Credit Manager, and Commitment Status. Print a list of the customers in a query to have as a reference.

- Any customers who have made a payment will be removed from the list and any new customers with newly overdue payments will be added to the query you execute.

- Store one query at a time, then easily refresh the data, or view a different query by simply opening the query builder window and choosing the one you wish to run. You may store an unlimited number of query definitions.

Easily create and send notices to overdue customers: Collections Management streamlines the printing and faxing of collections letters, statements and invoices to customers. You can send a letter to every customer in your query with the push of a button. And you can send different letters to different customers in your query too. For example, you can create a query and automatically create letters for customers who are 31 – 60 days overdue, and another for those who are 61 – 90 days overdue, all quickly and easily within Collections Management.
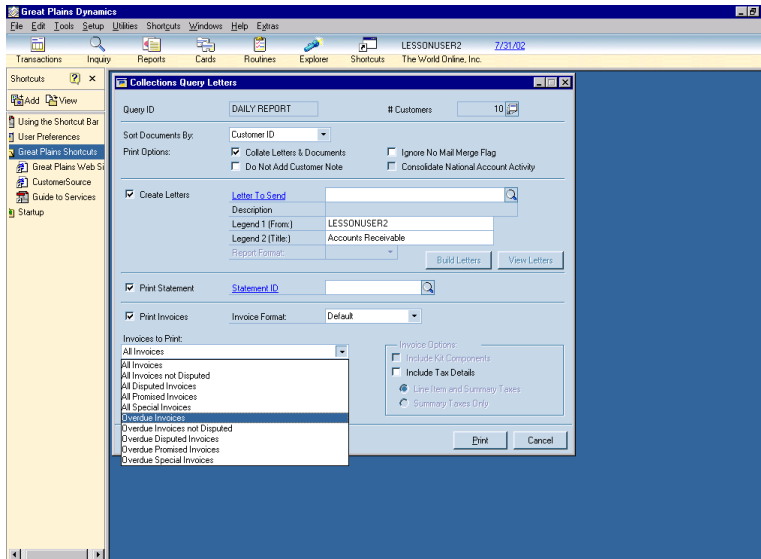

Quickly create letters for all your overdue invoices at one time.

- Create letters directly from a query in which you have executed.

- Collate letters, if you are sending more than one letter to a particular customer, so they are combined at the printer per each customer.

- Choose whether or not you want any notes to print with the letters.

- Define and limit which invoices will print on the letter from all invoices, all disputed invoices, overdue invoices, overdue special invoices and many more.

Follow up reminders: Prompt follow up is a breeze with the assignment of automatic follo wup actions and reminder dates for collections.
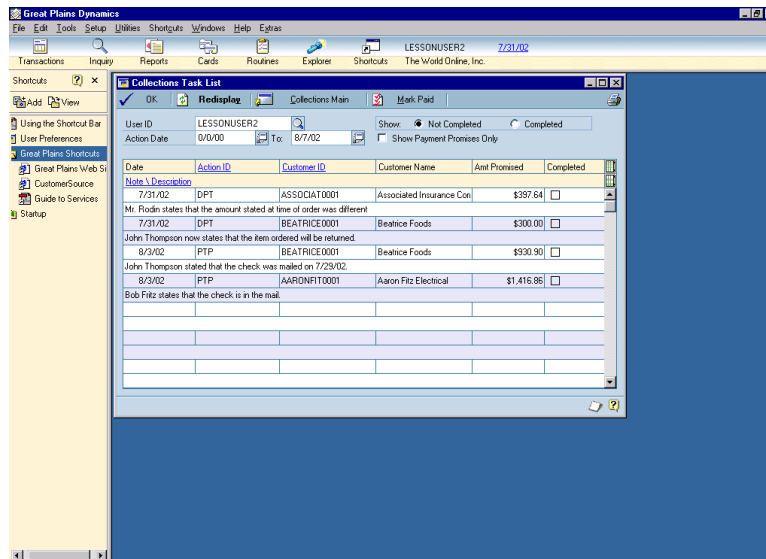
Follow up is simple in the Collections Task List window. Here you can see all your completed or uncompleted tasks, you can even specify a date range to make follow up even more manageable.

- The Collections Task List window enables you to view completed and uncompleted tasks, as well as completed or uncompleted payment promises made by customers.

- The ability to specify a date range makes your collections activities more manageable.

- The Mark Paid button automatically removes tasks on your list if an invoice with an attached promised payment commitment has been paid in full.

Additional uses for Collection Management: In addition to using Collections Management for your collections processes;

- You will have access to pertinent information about your customers to handle various requests such as faxing an invoice they may have misplaced or need sent to another location.

- The ability to assign customers to a specific Credit Manager helping divide the collection work that need to be accomplished.

- Send customized emails to your customers using Collections Management Email.

- Keep track of all follow-up actions created in Collections Management and close the items as they are completed keeping your Collections Management up-to-date.

- Collections Management integrates seamlessly with Great Plains Receivables Management for greater control over your cash flow and expenses.

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