

COLLECTIONS PORTAL

Financial Management

Following up on past due customer accounts is not one of the most pleasant business tasks, but it is an important one. Every business has customers who seem to procrastinate on sending a check until you give them a polite but firm reminder. If you'd like to make your collection efforts more organized and easier, use SouthWare's Collections Portal. The Collections Portal requires Accounts Receivable and TaskWise™.

Benefits

- Know who needs a collection call
- Systematically follow up with every customer who needs attention
- Keep track of customer promises
- Review and record the status of each outstanding invoice during a collections call
- Know what was said on past collection calls
- Know when to withhold further credit to a customer
- Know which customers have exceeded their credit limit
- Decide how frequently to follow up with each customer
- Instantly access the details of an invoice to answer any questions

The screenshot displays the SouthWare Collections Portal interface. At the top, there's a navigation bar with 'Launch' and a search field. Below that, the 'Customer view' section shows account details for 'Carl Sanders' with a balance of \$12,000.00. A table below lists 'Open Invoices' with columns for Invoice Number, Due Date, Balance Due, Current Date, Called Date, and Days Due. The table contains several rows of data, including invoice numbers like 100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 161, 162, 163, 164, 165, 166, 167, 168, 169, 170, 171, 172, 173, 174, 175, 176, 177, 178, 179, 180, 181, 182, 183, 184, 185, 186, 187, 188, 189, 190, 191, 192, 193, 194, 195, 196, 197, 198, 199, 200. The interface also includes a sidebar with navigation options like 'Collection Alerts', 'Scheduled Invoices', and 'Management Review'.

View Customer's Past Due Invoices and Status

With the Collections Live Portal you can quickly identify the customers that need collection attention based on alerts, scheduled calls, past due commitments, past due balances, etc. You can then zoom to the Customer Collection Portal to research and record your collection follow-up efforts.

