

Credit Control

Any communication can be allocated a next action date so you can have an automated reminder of diary notes or letters that need follow up.

Credit control is enhanced because you have a list of items to be followed up on the day they are due. Significant administration efficiencies can be made using this facility. It will minimise the risk of missed credit action that would result in higher bad debts because each item will be displayed to you on the date it is due for review.

Communications can be allocated to staff members.

This means that each member of staff is able to review the communications that are applicable to them. This becomes particularly important where there are a number of credit controllers looking after a ledger. Each credit controller can review the communications they need to deal with for the day, based on the next action date.

Management can ignore the staff indicator when they want to review all communications due to be followed up for a particular day.

Reprint Communications

Most communications are derived from a "Master" communication. As a result every document created by MS Word™ does not need to be held in the system. This allows you to save on disk storage capacity, while still retaining the ability to reprint any communication at any time.

If a communication does need to be reprinted, the system will link to the master MS Word™ document and insert the details of the communication at the date it was created. You can reprint a previous communication at any time on request. Hours will be saved compared with the old method of pulling a manual file and photocopying the original letter. Communications don't get lost, and are always accessible.

There is a facility to print a summary of all communications. This option allows you to print the complete history of all communications you have had with a client account.

If you need to go to Court to recover a debt, this report makes it easy for the Court to determine the credit history and relations you have had with the client. It is concise and easy to follow.

One off Communications

These can be generated specific for a particular client.

They do not rely on a master MS Word™ document for the regeneration of the letter at any time. Instead a copy of the full letter is held by the system.

When creating these one off communications for a client, you are able to open MS Word™ from within the communication screen and then type whatever text you require for that client. These communications can also be reprinted at any time.

Automated Communications

Communications can be generated automatically based on a predefined event or transaction.

Examples are:

- Overdue letters based on your decision as to who should get these, and the severity of letter they should get
- Marketing letters based on an extraction of specific clients in the database with a particular attribute, and/or credit rating
- Monthly invoices for leases or interest charged to an account
- Not sufficient funds letters can be generated from a Cash Book transaction when that transaction is identified in the daily transaction download from the bank.

Once these letters are generated you just need to print, sign and mail them. The whole process is extremely fast and efficient.

At the time a particular communication is generated, a fee can be charged to the account automatically. This is most useful for overdue letter charges and not sufficient funds letters.

"We utilise the communications to the max, it is great having all correspondence saved on the clients account" - Janet Bennett, Nelson Finance Centre Ltd

Minimum Hardware Requirements

IBM compatible PC with a minimum of 128Mb RAM
Pentium II processor 350MHz
Laser Printer
CD Writer for Backup

Software Requirements

Microsoft Windows 98, NT, 2000 or XP
Microsoft Office 97, 2000 or XP

Networking

Windows NT4, 2000 or 2003
Terminal Services supported
If more than 5 users then we recommend MSSQL Server, otherwise MSDE will be used as the database.
File Sever with 256Mb RAM minimum, preferably 512 Mb
Pentium III 500Mhz processor