



# Collection Management Solution

## InnoVergent Solutions for Intacct Financial Accounting

It goes without saying: cash in the bank is better than receivables outstanding. Yet every business struggles to keep aged receivables down—mostly due to manually sending email reminders and searching for and resending documents and invoices to customers. InnoVergent's Collection Management Solution automates the tedious, redundant aspects of collections and frees you up to handle true exceptions, and focus on the strategic aspects of running your accounting department.

InnoVergent's Collection Management Solution integrates flawlessly with Intacct Financial Accounting giving you greater automation, control and visibility into your aged receivables.

Managing invoices and communications with customers can be difficult and time-consuming. Customers may have multiple open invoices, due dates, and terms further complicating the collections process. InnoVergent has designed and built Collections Management Solution with the end-user in mind—simplifying, automating and streamlining the process of effective collections management.

Utilizing the power of Intacct Platform Services, InnoVergent's Collection Management Solution automates common tasks associated with reminding customers about outstanding invoices. Whether auto-generating or closing a collections management record, from configuring recurring emails to customers or internal users (sales reps), or flagging customer contacts—InnoVergent has built the automation your current process is lacking.

### Collection Management Solution Features

- Integration with Intacct Standard Objects (AR, OE, and Contacts)
- Automates processes and escalation procedures with customized workflow
- Customer invoice portal
- Includes standard reports as well as user-defined ad-hoc reporting
- Automatic email and alert notifications
- Simple to use file attachment capabilities
- User-specific follow-up lists, tasks, and alerts
- Automatic or manual generation of collection cases
- Configurable and unlimited statuses, workflow steps, and Intacct users
- Unlimited management of collection activities and comments
- Manage customer and contact holds and alerts
- Full Audit trail
- Integration with Intacct Financial Accounting means no duplication of data.

Back to List

Collection Record: CO-ARIN-1009

Edit Delete Left Voicemail Agreed to Pay Requested More Information Refused to Pay More actions

Collections Company Information System Info and Audit Trail

<b>Collection Information</b>			
Collection Record	CO-ARIN-1009	Collection Record Status	Open
Related AR Invoice	87	Invoice Amount Due	\$2,342.00
Assigned Employee	9	Assigned Employee	Thomas Smith
Customer Name	Promark	Stop Automatic Emails	No
Related Documents		Closed Date	
Follow-Up Date	10/29/2011		

<b>Outstanding Invoice Details</b>			
Created Date	08/01/2011	Transaction Currency Type	USD
Invoice Number	ARIN-009	Invoice Terms	N30
Invoice Description	Marketplace II		

Billing Contact Info

Comments | New Comment  
No records to display.

Workflow Information  
Workflow Status: New Collection - Low Priority

<b>Header</b>		Additional Information	Collection Information
Date	10/06/2011	Transaction Amount Due	0.00
OL Posting Date	10/06/2011	Date Fully Paid	10/06/2011
*Customer	PR0001 - Promark	Supporting Document ID	
Invoice Number	ARIN-1007	Project	
Reference Number	2342342	Vendor	
Description	Goods Received	Employee	
Term	N30	Item	
*Due Date	10-02-2011	Place into Collections	<input checked="" type="checkbox"/>
Transaction Currency	USD	Open Collection Record	<input checked="" type="checkbox"/>
Exchange Rate Date		Collection Assigned To	Carlth, Bill
Exchange Rate Type			
Exchange Rate	1.00		
Transaction Invoice Amount	44,448.00		
Transaction Amount Paid	44,448.00		

  

<b>Items</b>							
*Account Label	Department	Location	*Trans. Amount	Base Amount	Rev Rec	Item	Dimensions
1 SALES	20 - operations	200 - West	1,324.00	1,324.00		Goods Received	Add
2 SALES	25 - Training	100 - corporate	43,224.00	43,224.00		Goods Received	Add
			<b>Total 44,448.00</b>	<b>44,448.00</b>			

Innovative Thinking. Dynamic Results.

For more information, contact us:

866-287-8643

sales@innovergent.com

www.innovergent.com



12700 Century Drive, Suite A | Alpharetta, GA 30009 | 866.287.8643

