



Creating a Collector

The Collections module is now incorporated with the Accounts Receivable module as opposed to being a stand-alone module. This is to support departmental users to manage and improve credit control.

“Collectors” are individuals defined within a department to monitor and collect customers’ debts. The intention within CUFS is that all those with a departmental AR responsibility (other than AR Inquiry) should also have access to their departmental Collections module. This is achieved by allocating the user to their appropriate departmental “Collector”.

Creating a New Collector

To enable a new member of the department who uses the Accounts Receivable module to be part of the collector group, you will need to carry out the following steps below.

Prerequisite: Ensure the new employee has been set up in the HR module within the system as you cannot create them as a collector if this is not the case.

Responsibility: CRM Administrator

Navigate: Resource Manager → Maintain Resources → Import Resources

1. Enter the employees surname in the name field followed by the wildcard (%) and click on **Search**.
2. The results of your search will be displayed as seen below:

Select Resources to Import

Selection Criteria

Resource Category: Employee

Number:

Organization:

Competencies:

Scale:

Name: DARLOW% (indicated by a red arrow)

Job Title:

Level: Max Min

Scale Level:

Search

Search Results

Select All

Select	Category	Number	Name	Organization
<input checked="" type="checkbox"/>	Employee	NE003591	Darlow (FIN), Mrs. Rebecca	Cambridge University
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

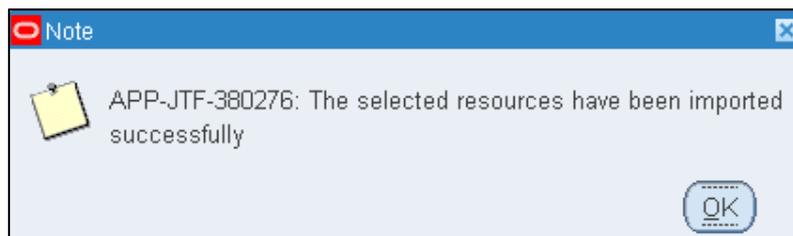
Start Import

3. Unselect (ie. un-tick) the employees that you do not wish to make Collectors.

4. Click on **Start Import**
5. This will take you to the *Set Resources Attributes* screen: enter a **Start Date** and then click on **OK**. The date of creation will default in but you can make changes if you are require.
6. This will take you to the *Review and Import Selected Resources* screen. Here you will need to click **Save Resources**.

Select	Category	Name	Salesperson Number	Role Type	Role	Organization	Comments
<input checked="" type="checkbox"/>	Employee	Darlow (FIN), Mrs. R				Cambridge Univer	New Record
<input type="checkbox"/>							

You will see a note pop up stating 'The selected resources have been imported successfully'. Click **OK**.



7. Click on the **Details** button which will now be available

Select	Category	Name	Salesperson Number	Role Type	Role	Organization	Comments
<input checked="" type="checkbox"/>	Employee	Darlow (FIN), Mrs. R				Cambridge Univer	New Record
<input type="checkbox"/>							

8. You will now be in the *Resource* screen. For each person add both of the following roles type and role:
 - Collections – Collections Agent
 - Collections – Collections Manager

“Agent” will allow a user to see all those tasks assigned to them whereas “Manager” will allow a use to see all tasks across the Collector Group (I.e. across the Department).

Role Type	Role	Manager	Admin	Member	Lead	Start Date	End Date
Collections	Collections Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014	
Collections	Collections Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014	

After populating these fields click on the save icons in the top tool bar or use Ctrl+S

9. Click on the 'Groups' tab. In this tab you will need to populate the following:

- a) **Groups** Select the two letter department code of the new employee (XX) from the list of values.

Each department will have one "Collector Group" for all its external customers.

- b) **Group Member Roles** Enter 'Collections Manager' and 'Collections Agent' in any order.

10. Click 'Save'. This has now assigned the new employee to the departmental collector group.

Name	Manager	Admin	Member	Lead	Start Date	End Date
Collections Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014	04-MAR-2014
Collections Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014	04-MAR-2014

Changing collector group of an existing employee

If the employee is allocated to a department already and they are transferring to another department they will need to be moved from the old collector group to the new collector group. To make the change you must carry out the following procedures listed below.

Responsibility: CRM Administrator
Navigate: Resource Manager → Maintain Resources → Resources

1. Enter the employees last name in the 'Name' field followed by the % wildcard and then click on 'Find'.

The screenshot shows the 'Find Resources' dialog box with the following fields and values:

- Resource:** Number (empty), Category (dropdown), Name (DARLOW%), Transaction Number (empty), Start Date (empty), End Date (empty).
- Salesperson:** Number (empty), Sales Credit Type (empty), Name (empty), Analyst (empty), Receivables Flag (dropdown).
- Service:** Support Site (empty).
- Interaction Center:** Interaction Center (empty).

Buttons at the bottom: Clear, New, Find (circled in red).

2. This will take you to the 'Resources Search Results' screen. Click on 'Resource Details'.
3. Click on the 'Groups' tab.
4. Here you can do follow one of two paths:
 - a) If it is a straight forward move from one collector group to another:

- o End-date the existing **Group Name** and then click 'Save'.

The screenshot shows the 'Resource' details screen for Rebecca Darlow (FIN). The 'Groups' tab is selected, and the 'EA Collections Group' is highlighted. The 'Group Member Roles' table is shown below.

Name	Manager	Admin	Member	Lead	Start Date	End Date
EA Collections Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014	04-MAR-2014
EA Collections Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014	04-MAR-2014

Group Description: EA Collections Group

- Select the new **Group Name** (new department code XX) and add **Collections Agent** and **Collections Manager** as the roles
- **'Save'**

Groups	
Name	
EA	
MA	

Name	Admin			Lead			Start Date	End Date	
	Manager	Member	Lead	Member	Lead				
Collections Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014		
Collections Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04-MAR-2014		

b) If you are simply adding another collector group for the existing employee

- then no end date is required of the existing set up.
- Click in to the line below the existing Group Name and add in the new collector '**Group Name**' Name (new department code XX)
- change the Group Member Roles to **Collections Agent** and **Collections Manager**
- then click on **'Save'**.