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

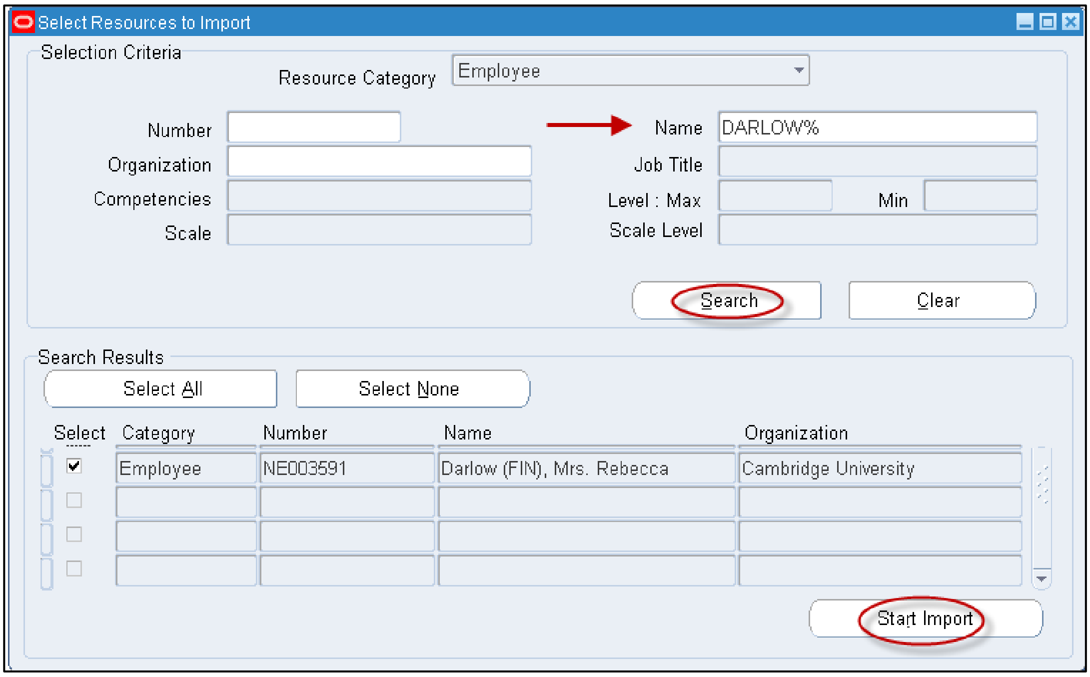
To enable a new member of the department who uses the Accounts Receivable module to be part of the collector group, you will need to carry out the following steps below.

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**

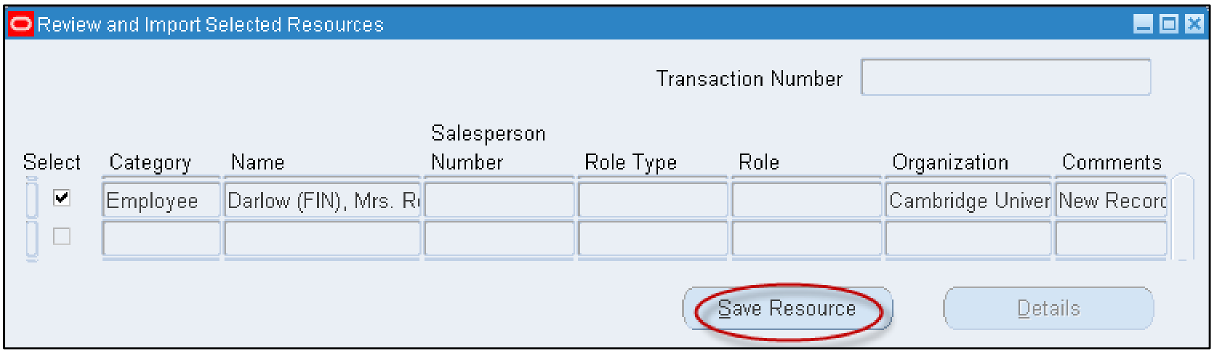
Navigate: **Resource Manager → Maintain Resources → Import Resources**

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:

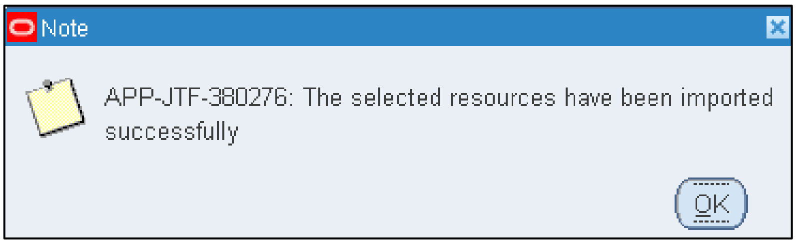


3. Unselect (ie. un-tick) the employees that you do not wish to make Collectors.

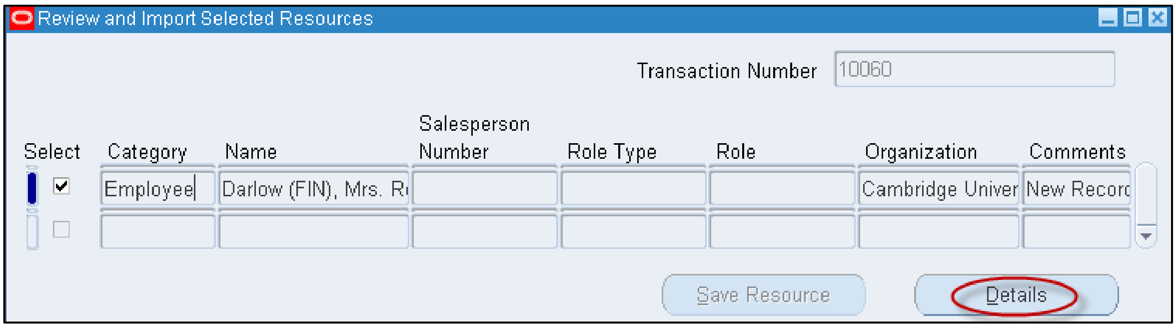
4. Click on **Start Import**
5. This will take you to the *Set Resources Attributes* screen: enter a **Start Date** and then click on '**OK**'. The date of creation will default in but you can make changes if you are require.
6. This will take you to the *Review and Import Selected Resources* screen.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



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

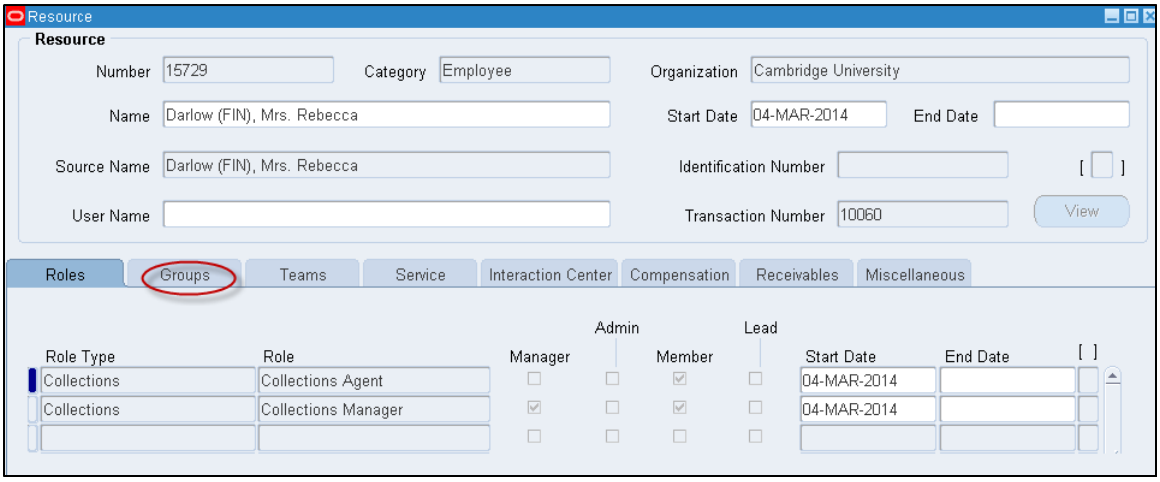


7. Click on the '**Details**' button which will now be available



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).



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

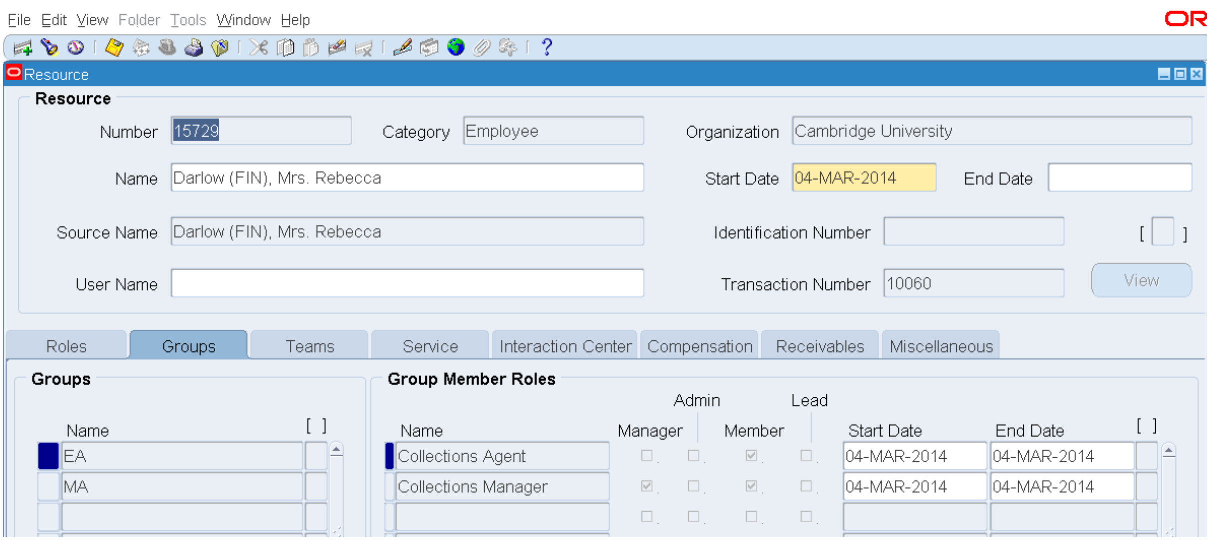
9. Click on the '**Groups**' tab. In this tab you will need to populate the following:

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.

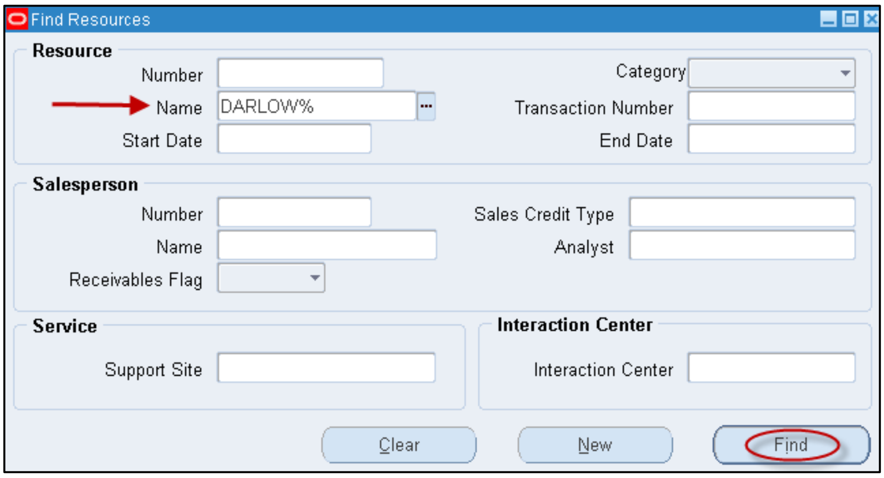


Changing collector group of an existing employee

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**

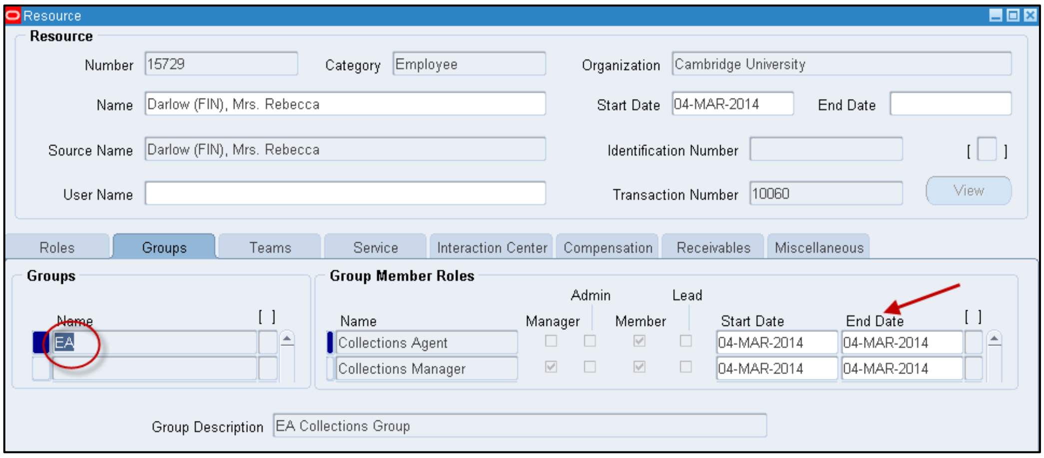
1. Enter the employees last name in the '**Name**' field followed by the % wildcard and then click on '**Find**'.



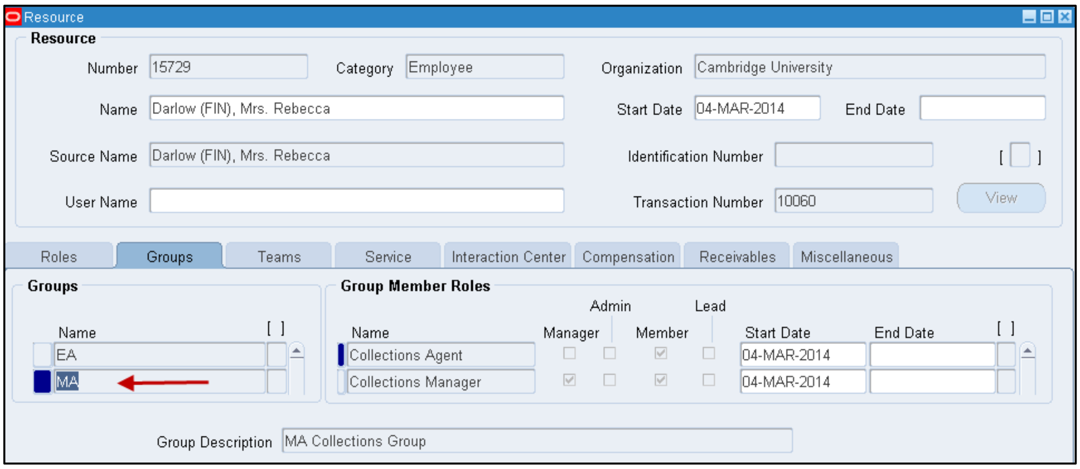
2. This will take you to the '*Resources Search Results*' screen. Click on '**Resource Details**'
3. Click on the '**Groups**' tab.
4. Here you can do follow one of two paths:

    a) <u>If it is a straight forward move from one collector group to another:</u>

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



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



b) <u>If you are simply adding another collector group for the existing employee</u>

- 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**'.