

Microsoft Dynamics Great Plains Collections Management

Target Audience: Microsoft Dynamics GP is an integrated, customizable financial management system. Collections Management provides a comprehensive system to manage your accounts receivable and is an effective collections tool. Great Plains users responsible for collections management would benefit from this course.

Pre-requisite: MS Dynamics Great Plains knowledge

Topics

- Add new notes for effective collections management
- View notes related to transactions
- Maintain a detailed record of your contacts with your customers
- Work with single customer accounts or national accounts
- Set up Collections Management Customer information
- Build queries to target the customers you want to work with
- Send a cover letter, statement and invoice to all customers in your query
- Learn to use collection task window to organize follow ups to help ensure prompt collection
- Learn to create customized letter templates
- Learn to monitor your outstanding accounts receivables using Key Metrics such as Days Sales Outstanding