ANYTIME COLLECT RESOURCE GUIDE

RESOURCES

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SUCCESS STORIES

SUCCESS STORIES		
Bitly		X
MRI Real Estate Software		X
PolyPortables		X
Advanced Discovery		X
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BEGA		X
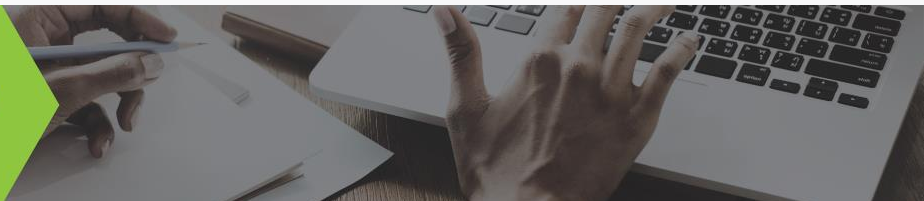
WHITEPAPERS

Accounts Receivable Software Buyers Guide		X
The ROI of Accounts Receivable Software		X
Tips and Tricks for Increasing Collection Call Success	X	X
How to Build a Collection Strategy		X
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Using Automated Email to Improve Accounts Receivable		X
Credit Risk Management Guide		X
How to Eliminate Invoice Disputes	X	X

CREDIT, INQUIRY, MANAGER & CUSTOMER USERS

CREDIT USERS
Credit Users can be assigned accounts and can manage every aspect of your credit and collections process including phone calls, emails, manage disputes, and other activities.

Credit Users may be assigned to each other to create credit teams. This is recommended in most businesses as it is ideal to have a back-up when a credit rep is on vacation or when workloads for some credit representatives are high when others have less issues to handle.

INQUIRY USERS
CFO's, presidents, controllers, branch or division managers, and other executives need to know what's happening with their cash flow. Inquiry users can only view information and make general account notes. Sales representatives are also common inquiry users as they can login to find out what's happening for their assigned accounts.

"This past year we were able to reduce our accounts receivable by over $1.5 million and a lot of that I attribute to this program, this software."

- Ben Burford, Credit Manager for PolyPortables
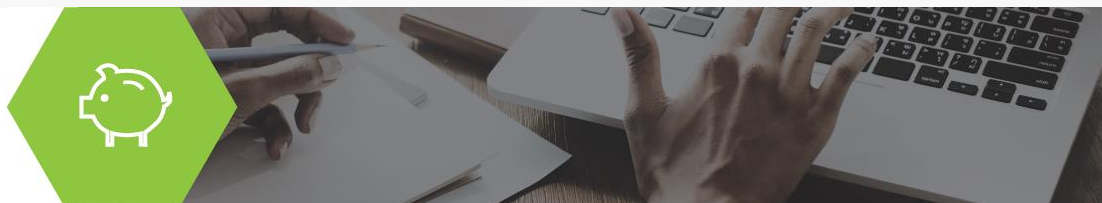
CUSTOMER PORTAL

Customer users may be assigned to your customer accounts so they can log-in to view statements and to make online payments. Customers accessing the portal from the Online Bill Pay module do not need to be setup for the Customer Portal. Customer users are setup as a single log-in for each customer account, not for individual contacts.

ADMINISTRATIVE USERS

At least one user in the system must be defined as an administrative user. Only admin users can setup and change system parameters. Other credit users can also be setup with admin rights to maintain the system.
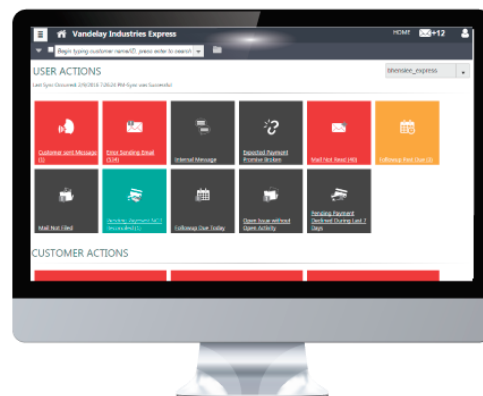
AUTOMATED MESSAGING

HOW IT WORKS

Epicor Cash Collect allows you to send email manually or automate outbound email communication based on email templates and account or invoice specific rules. The system monitors your email server and automatically retrieves inbound email responses received from customers. Email communications can be associated to specific credit issues or invoices providing a 360-degree view of inbound and outbound email communication.

Automated email works with IMAP-compatible email systems enabling and automating communication with your customers, sales team, employees, executive team, and others who need timely and accurate information.

ONLINE BILL PAY

CUSTOMER CARD PAYMENTS AND CUSTOMER ACH TRANSACTIONS

Electronic Invoice Presentment and Payment (EIPP) enables you to automatically send invoices and statements to customers so they can pay their bills in a secure online portal via ACH or credit card. EIPP Bill Pay can be enabled for selected companies in the system. Further, you can enable online payments for all of your customers or only for a select group of customers. You can also set acceptable amounts for online payments to restrict unauthorized payments online.

EMAIL HYPERLINK

A secure hyperlink can be inserted into any email communication (automated or manually created) and sent to your customers. When clicked, the hyperlink takes them to the secure Online Bill Pay portal where they can review invoices and process online payments. They don't have to remember the web page, their user name, or password. The hyperlink takes them to this page automatically making it easier for them to pay you faster. The email hyperlink can be set to expire after a defined number of clicks such as 10 clicks and/or a period of time such as 30 days.

CREDIT CARDS & ACH PAYMENTS

Accept credit card payments online. The system supports all major credit cards including MasterCard, Visa, American Express, and Discover. Extremely competitive rates mean that you could save a considerable amount annually from lower credit card processing fees. Also Accept automated clearing house (ACH) payments from your customers via the secure payment portal.

VERBAL PAYMENTS

Online Bill Pay enables your collections staff to process verbal credit card or ACH payments while on the phone with your customers.

PCI COMPLIANT

Credit card and bank account information is never stored in the system. Confidential information is accessed via a PCI-compliant vault retrievable only from Epicor Cash Collect through an encrypted account identifier.

PHONE CALL MANAGEMENT

Collection representatives can place calls to customer from within the Epicor Cash Collect Call Manager, which are then recorded, transcribed and stored in the system. If a customer calls the accounts receivable agent, the Epicor Cash Collect Call Manager prompts the customer with options to check their balance, review open invoices, check on recent payments, or to speak with a credit representative. The inbound call is also recorded, transcribed and stored. Every action a collection representative takes or customer takes during a phone call is captured in Epicor Cash Collect giving complete visibility into accounts receivable within the organization.

BUSINESS CREDIT MANAGEMENT

BUSINESS CREDIT APPLICATIONS AND ACCOUNT CREDIT SCORING

Epicor Cash Collect Business Credit Management helps manage the credit application process using accurate and timely information and built-in automation so you can create and review business credit applications, understand who to extend credit to, how much credit to extend, and monitor existing customers with periodic credit reviews and account credit scores.

NACM TRADE CREDIT REPORTS

Epicor Cash Collect offers embedded integration with the NACM Trade Credit Report. Credit reports can be viewed online from within the software and store the report. Credit reports are stored as PDF attachments in the customer's account folder, details from the report are stored as notes against the account, and credit data is captured and stored in various fields throughout the application.

This data can be used to create custom credit scoring algorithms combined with our own internal data and setup alerts to monitor customers based on credit scores and generate reports for customers who are due for periodic credit reviews. Reporting accounts receivable back to NACM is automatic but you can flag accounts that you want to exclude from reporting for various reasons.

Anytime Collect

BUSINESS CREDIT APPLICATIONS

Create business credit applications in Microsoft Word and deliver them to customers and prospects for completion. Credit applications may be received back via email or uploaded from the secure customer portal. Completed forms create notifications for your credit team so they can review credit applications and setup credit terms, credit limits, and other details for new customers in your accounting or ERP business software. Business and bank references can also be maintained using Word documents and stored in the account's documents folder for credit reference activities.

CREDIT REVIEWS

Identify the date of the last customer credit review and build alerts so that the system notifies you when customers require a follow-up review of their business credit.

BUSINESS CREDIT SCORING

Track credit scores from up to three external credit bureaus and file full credit reports in account documents folder. Custom credit score formulas can be configured using external credit bureau information, your own internal data, or a combination of the two. You can classify accounts based on credit risk with color-coding to alert you to high risk accounts.

ALERTS AND NOTIFICATIONS

NOTIFICATIONS, EMAIL ALERTS AND ADVANCED SQL DATABASE ALERTS AND SCHEDULED REPORT DISTRIBUTION

Epicor Cash Collect allows you to create filters on grids which can then create email-based notifications for either credit or inquiry users of the system. Alerts are an ideal way to provide periodic reports to executive management or to ancillary users such as sales reps, customer service, and other employees so they know what's happening.

EMBEDDED ALERTS

Epicor Cash Collect Standard and Enterprise Editions include embedded Alerts on most grids throughout the system. Here you can apply filters using any of the data in the grid and then save the Alert. You can then create a schedule for the alert to run and define who should receive the alert.

CUSTOMER SUPPORT

Epicor Cash Collect offers many different options to support users with the system. Not only do we help to make sure users are comfortable using Epicor Cash Collect, but help them with accounts receivable best practices and efficiency goals. Every user can attend monthly free training sessions covering how best to use the software in order to reach the highest ROI. Users are encouraged to join our monthly user group sessions, where customers can meet virtually to discuss best practices, software features, discuss common issues and make suggestions for future updates. Epicor Cash Collect also offers a ZenDesk community where users can place support requests and holds hundreds of articles on how to best use the software, how to navigate the software, how-to videos, recordings of training videos and more. Users are also encouraged to participate in the ZenDesk community to ask and respond to others questions.