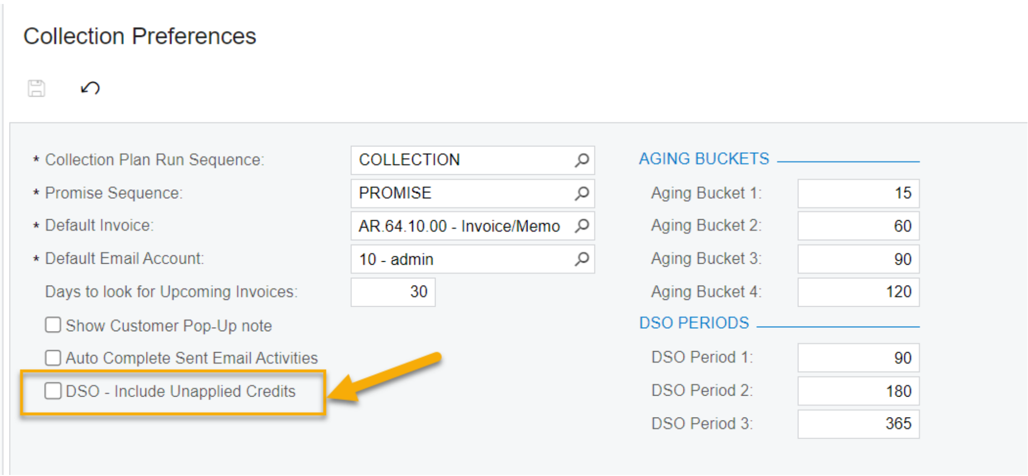
Collections Management Release Notes

[23R2.1.010.0006]

Configuration Option to Include Unapplied Credits in DSO Calculation

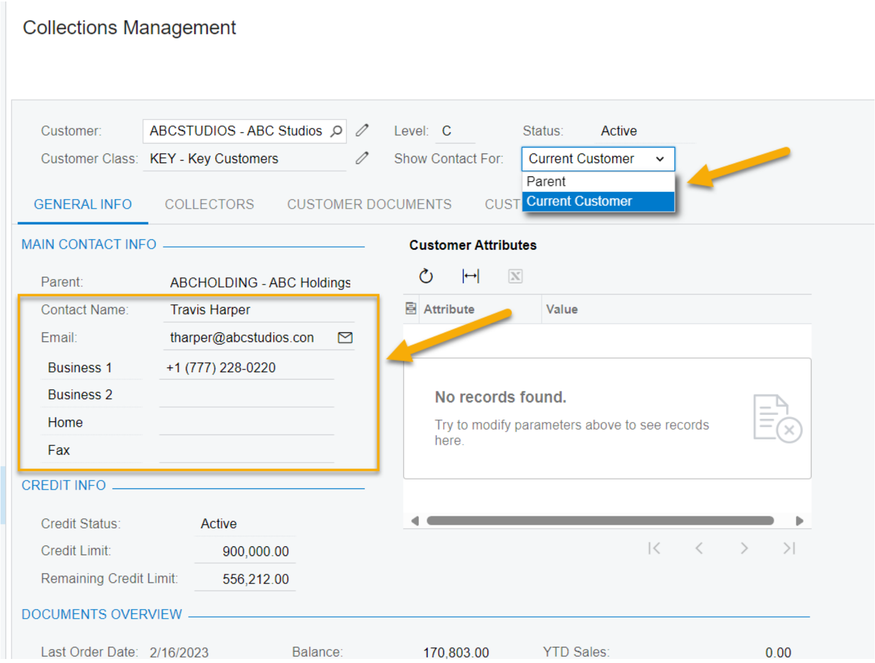
Category: Enhancement



Added a configurable option on the Collections Preference screen to include unapplied payments in the Days Sales Outstanding (DSO) calculation. DSO calculations are visible on the Collections Management screen.

Contact Management Display Option

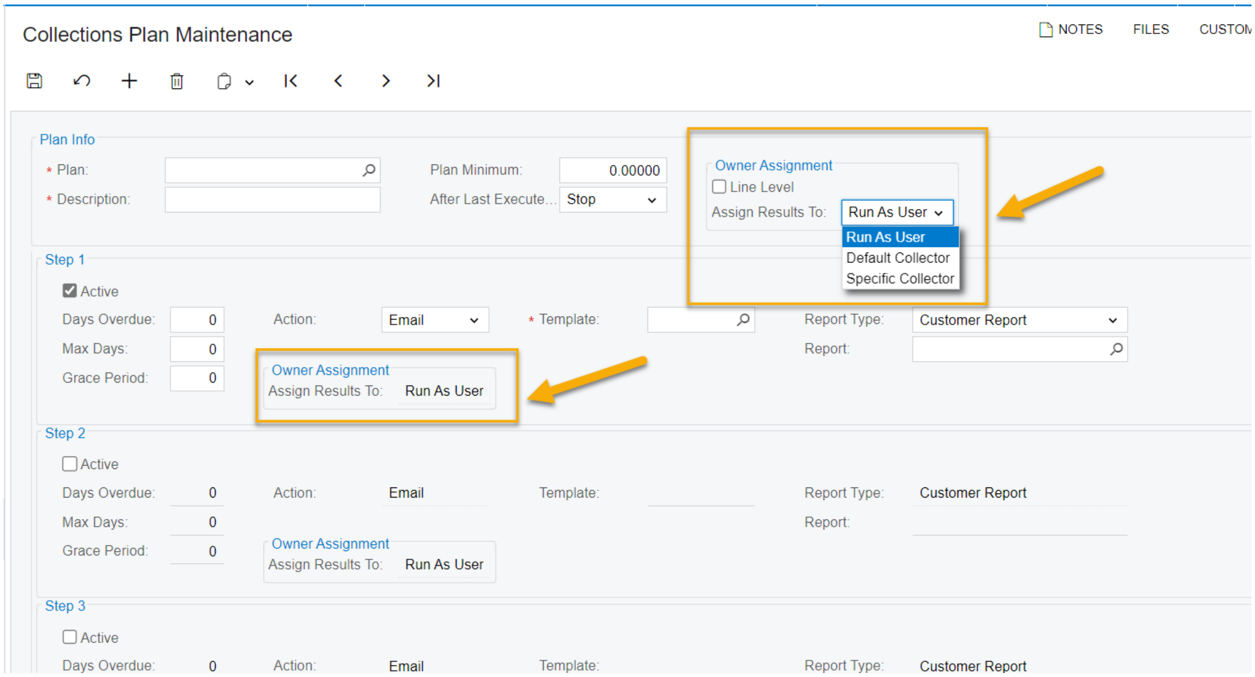
Category: Enhancement



Added an option to display the Contact Information for either the “Current Customer” or the Parent.

Ability to Specify Ownership of Collection Plan Results

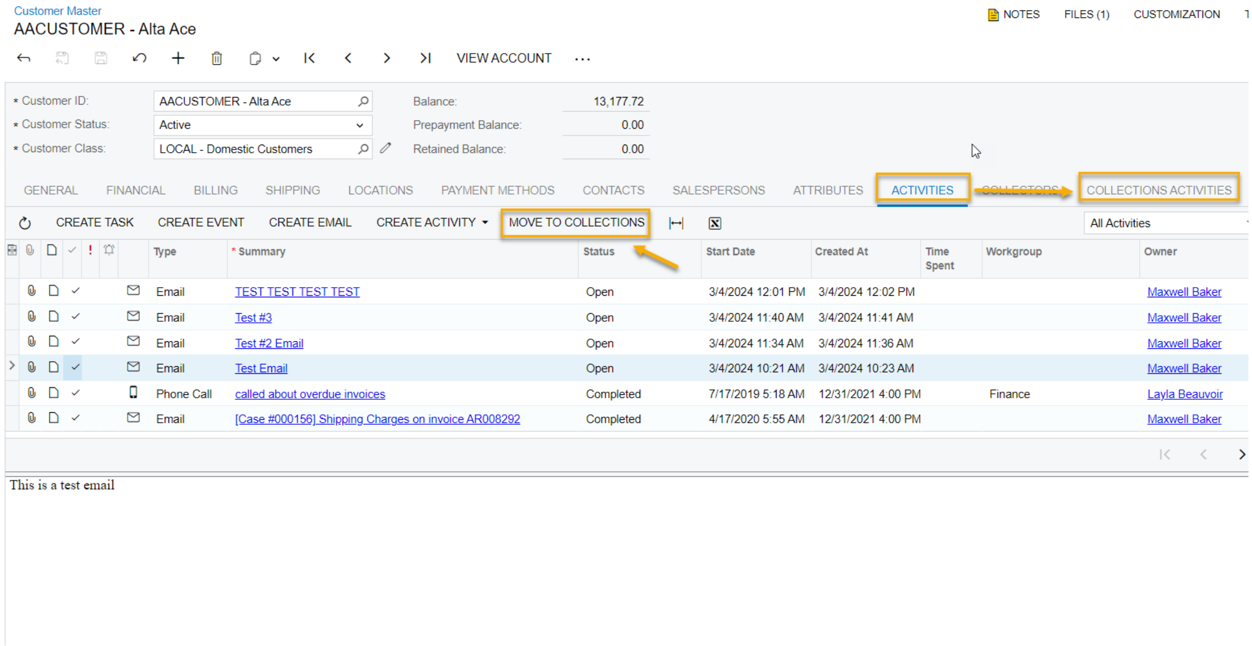
Category: Enhancement



Added capability to specify the "Ownership" of the results of a Collection Plan. Ownership can be specified as the "Run as User", the Default Collector for the customer, or a Specific Collector. These settings can be set at the Plan level, or at the Line Level within the plan.

Move Emails to Collector Activities

Category: Enhancement



Added an Action to move the selected email from the CRM Activities tab to the “Collection Activities” tab to facilitate viewing Collections Activities in a single place within the Customer’s information.