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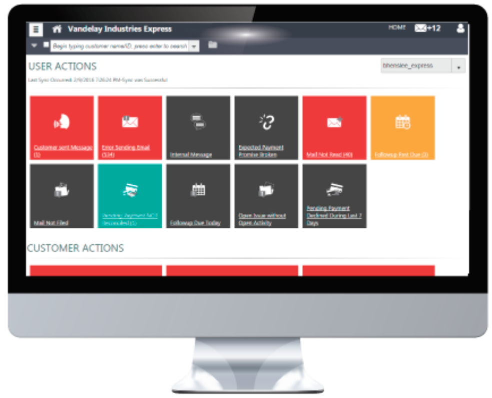
EPICOR Cash Collect

User Options:

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.

Manager Users

Manager Users are a special type of credit user that can do everything that a credit user can do. In addition, they may be assigned credit users and can view activities and dashboards for their assigned users.

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.

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.

