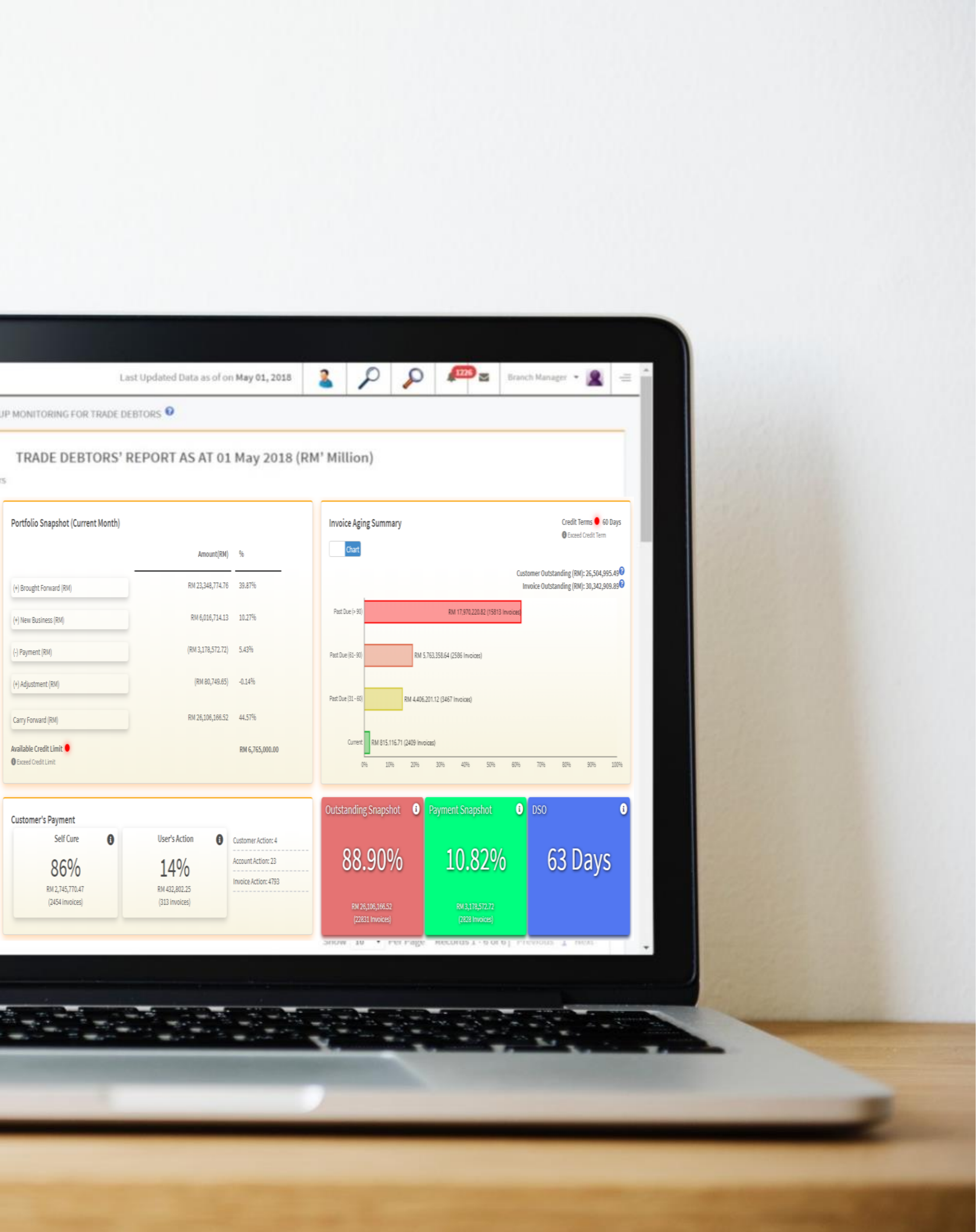


KollectValley

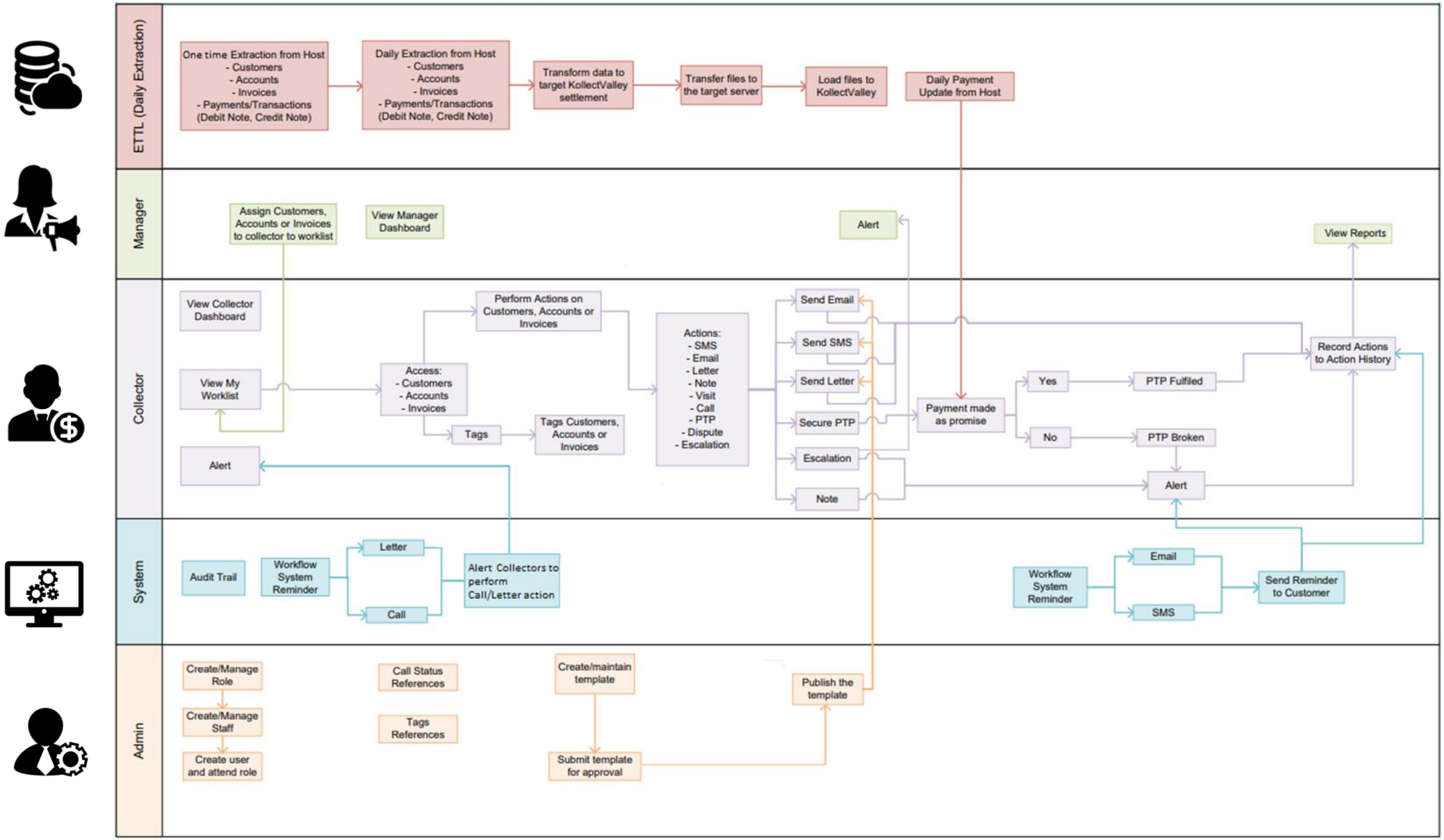
Training Module

Collector

23 SEPTEMBER 2022

Disclaimer: Feature and functions only.

Training Briefing – High Level Process Flow



Briefing Session - Training Schedule

SALIHIN KOLLECT

Time	Application Function
10.30 am – 11.00 am	**<u>Briefing Session</u>**
11.00 am – 11.30 am	**<u>Manager Functions</u>**
	➢ Management Dashboard & Reports
	➢ Master list of Customers, Subsidiaries, Invoices, Transactions and Actions History

Briefing Session - Training Schedule

Time	Application Function
11.30 am – 12.30 pm	**<u>Collector Functions</u>**
	➢ Collector Dashboard
	➢ Quick Access
	➢ Regenerate Templates (SOA, Invoices, Credit Notes & Official Receipts)
	➢ Ad - hoc Actions (Email, Call, Note, PTP, Letter, etc.)

Briefing Session - Training Schedule

SALIHIN KOLLECT

Time	Application Function
2.30 pm – 4.30 pm	**<u>Admin Functions</u>**
	➢ Worklist Configuration *(Collectors Assignment)*
	➢ Workflow Configuration *(Reminders Automation)*
	➢ Roles Management
	➢ Staff Management
	➢ Templates Editor
	➢ Parameters Settings
	➢ Payment Listener

Collector Session

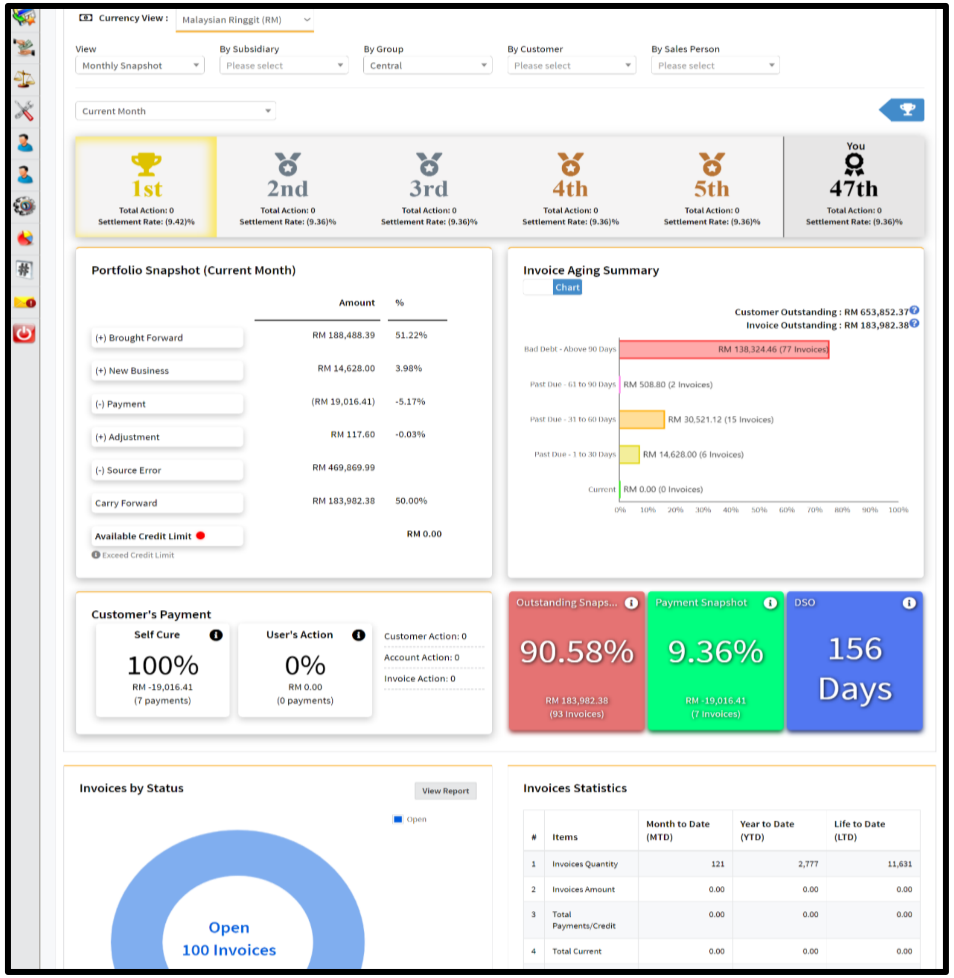
No	Application Function	Status	Completed Date
1	Quick Access (Collectors)	Completed	23/09/2022
2	Template Regeneration (Statement of Accounts, Invoices, Credit Notes, Official Receipts)	Completed	23/09/2022
3	Action – Email	Completed	23/09/2022
4	Action – Letter	Completed	23/09/2022
5	Action – Note	Completed	23/09/2022
6	Action – Visit	Completed	23/09/2022
7	Action – Call	Completed	23/09/2022
8	Action – PTP (Oldest Overdue/Per Invoice)	Completed	23/09/2022
9	Action – Dispute	Completed	23/09/2022
10	Action – PDC	Completed	23/09/2022
11	Action – Escalation	Completed	23/09/2022

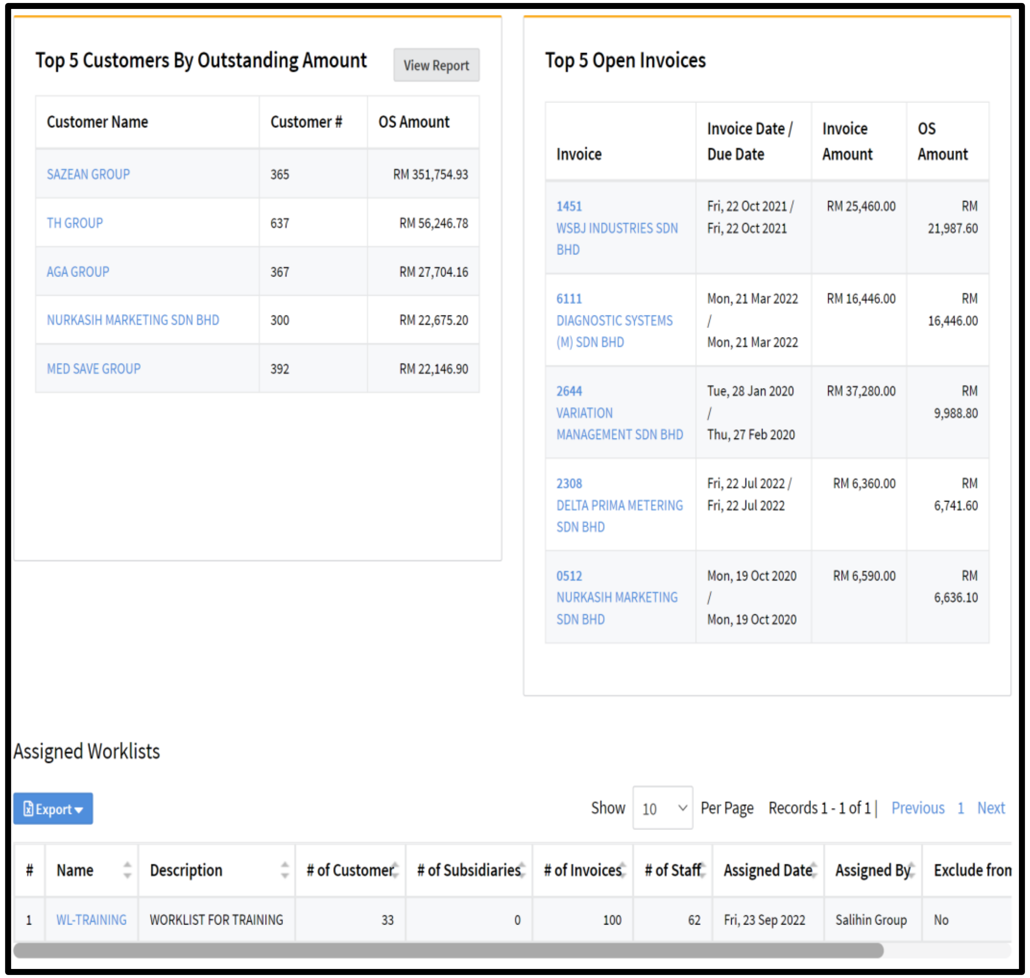
Scenario 1: Dashboard – Collectors

Status: Completed

Scenario

1. Click Dashboard “Collector”
2. Monitor across the worklist of Customers, Portfolio Snapshot, Customer Payment Summary, DSO.
3. Filter by Subsidiary, Collector, Customer, etc.
4. Select second level filter to preview a specific month.





Comments

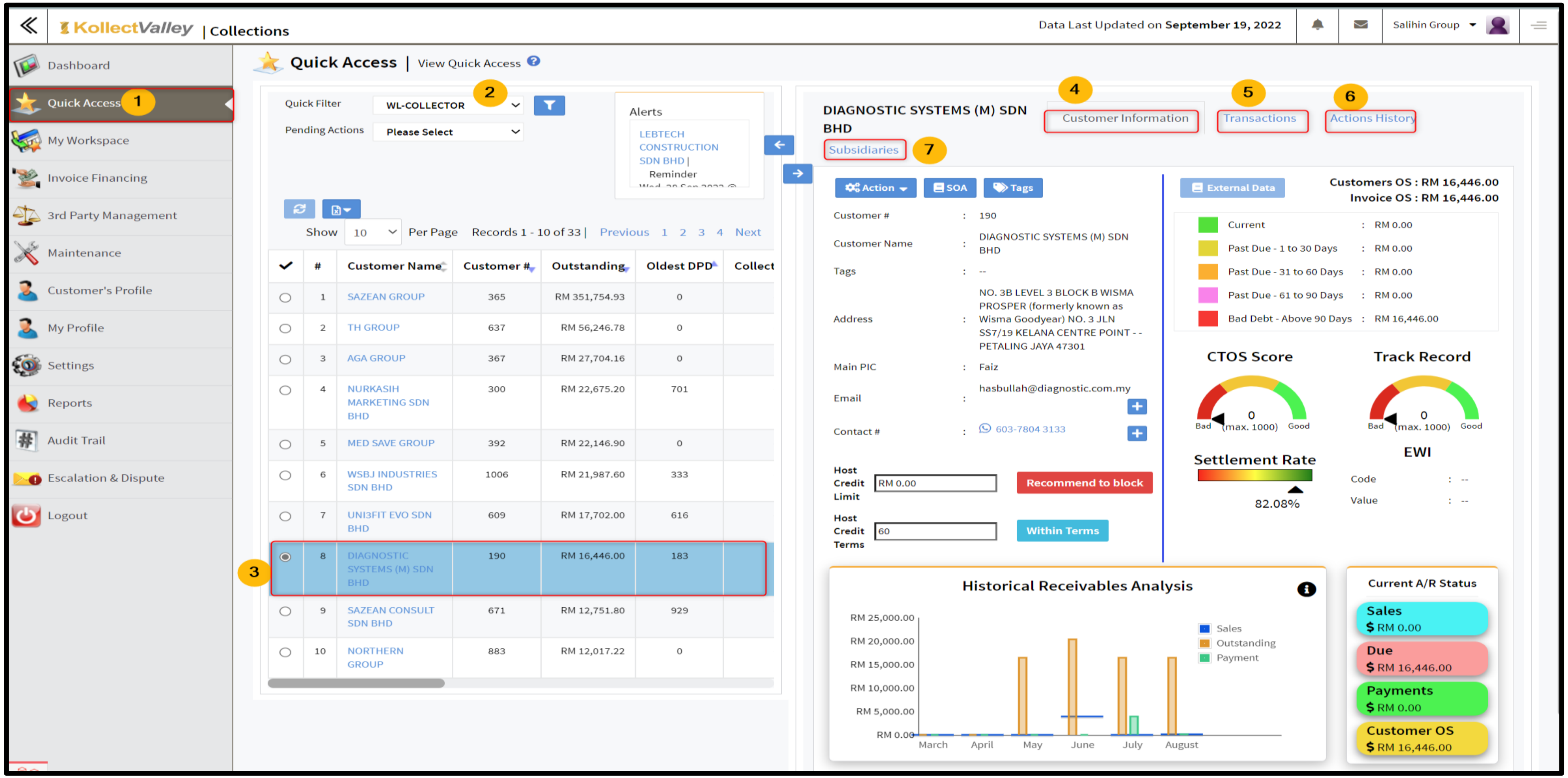
Detailed ready-made analytics of multi-dimensional data

Scenario 2: Quick Access – Collectors

Status: Completed

Scenario

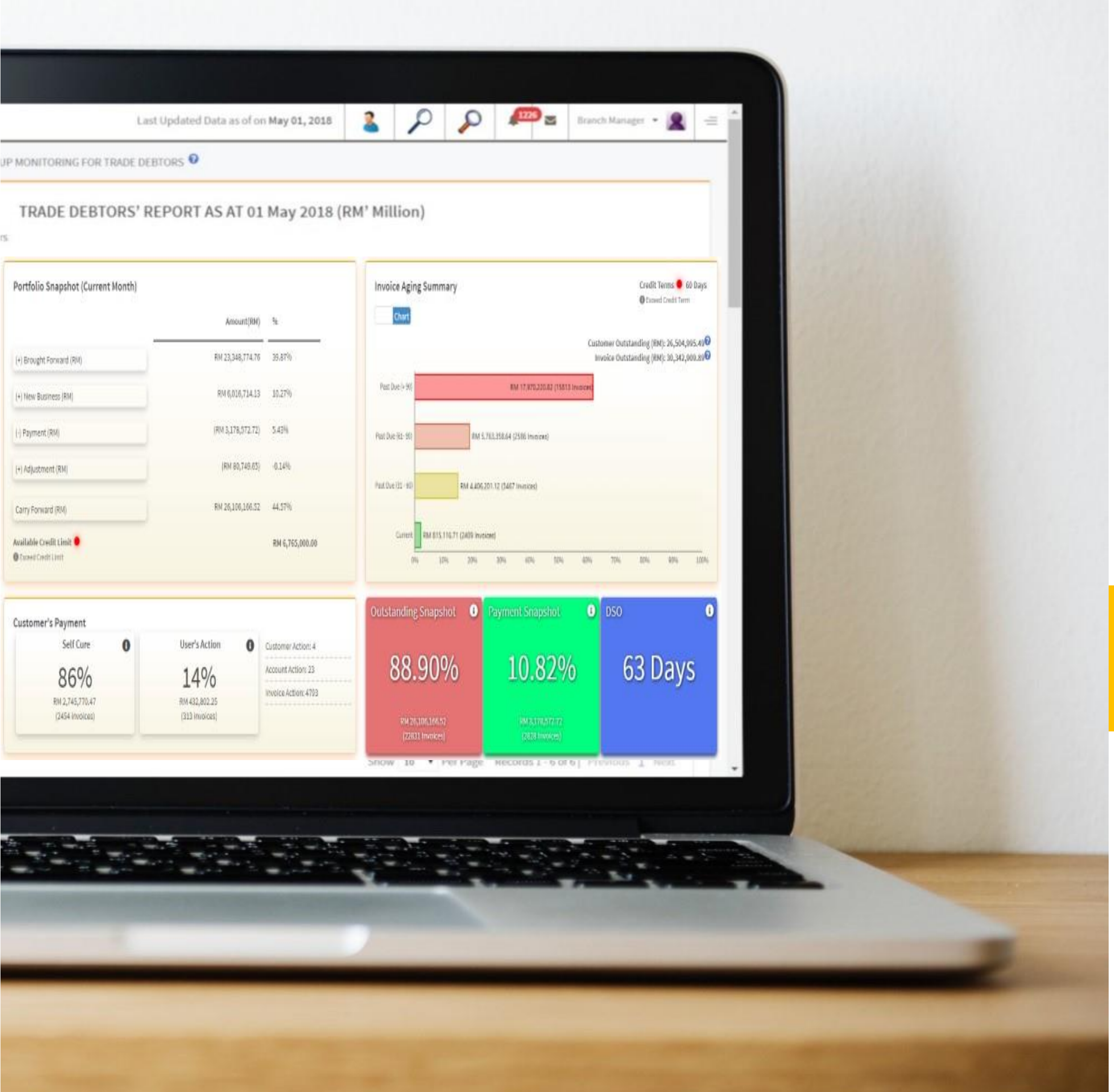
1. Click Quick Access
2. Quick Filter "WL-COLLECTOR."
3. Click on the customer to choose the customer in order to display Quick Access view
4. Click Customer Information to view Customer #, Customer Name, Address, Main PIC, Email, and Contact #.
5. Click Transactions to view transactions and invoices belonging to the customers.
6. Click Actions History to view actions.
7. Click Subsidiaries to view Subsidiaries of the customers.



Comments

An overview of the application's main modules which allows users to gain an insight into each main function of the application (e.g., Customer information, Transactions, Actions History and Subsidiaries)

Templates



Templates Regeneration

SOA, Invoice, Credit Note & Official Receipt

Scenario 1: Template – "Parent" Group SOA

Status: Completed

Scenario

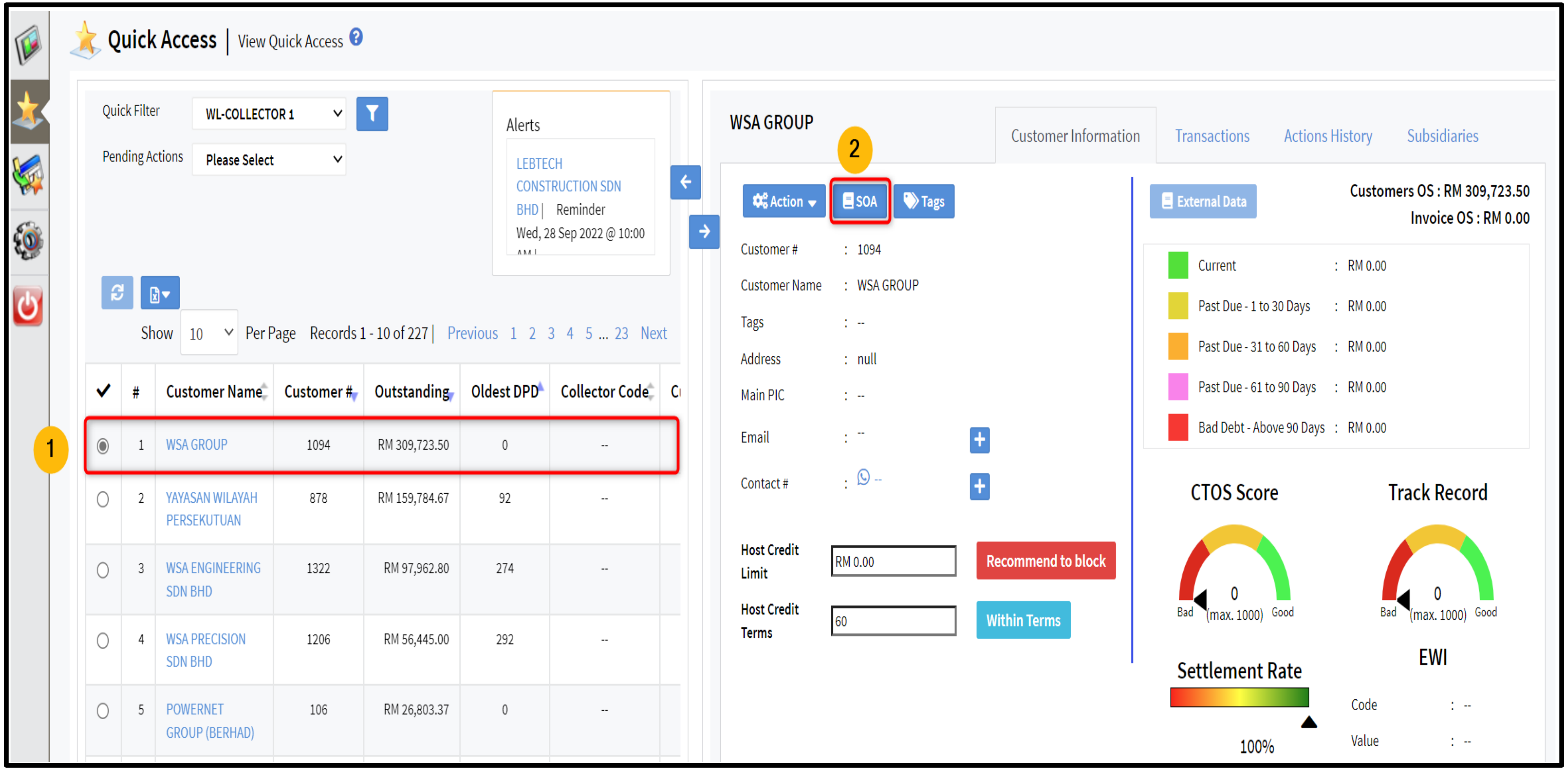
1. Click and choose a Parent Customer
2. Click "SOA"
3. Group SOA template will generate in a separate tab.

Sample:

Customer : WSA GROUP

Expected Result:

Group SOA generated for Parent WSA GROUP



Comments

To view the "Parent" Group Statement of Account (SOA)

Scenario 1: Template – “Parent” Group SOA

Status: Completed

Scenario

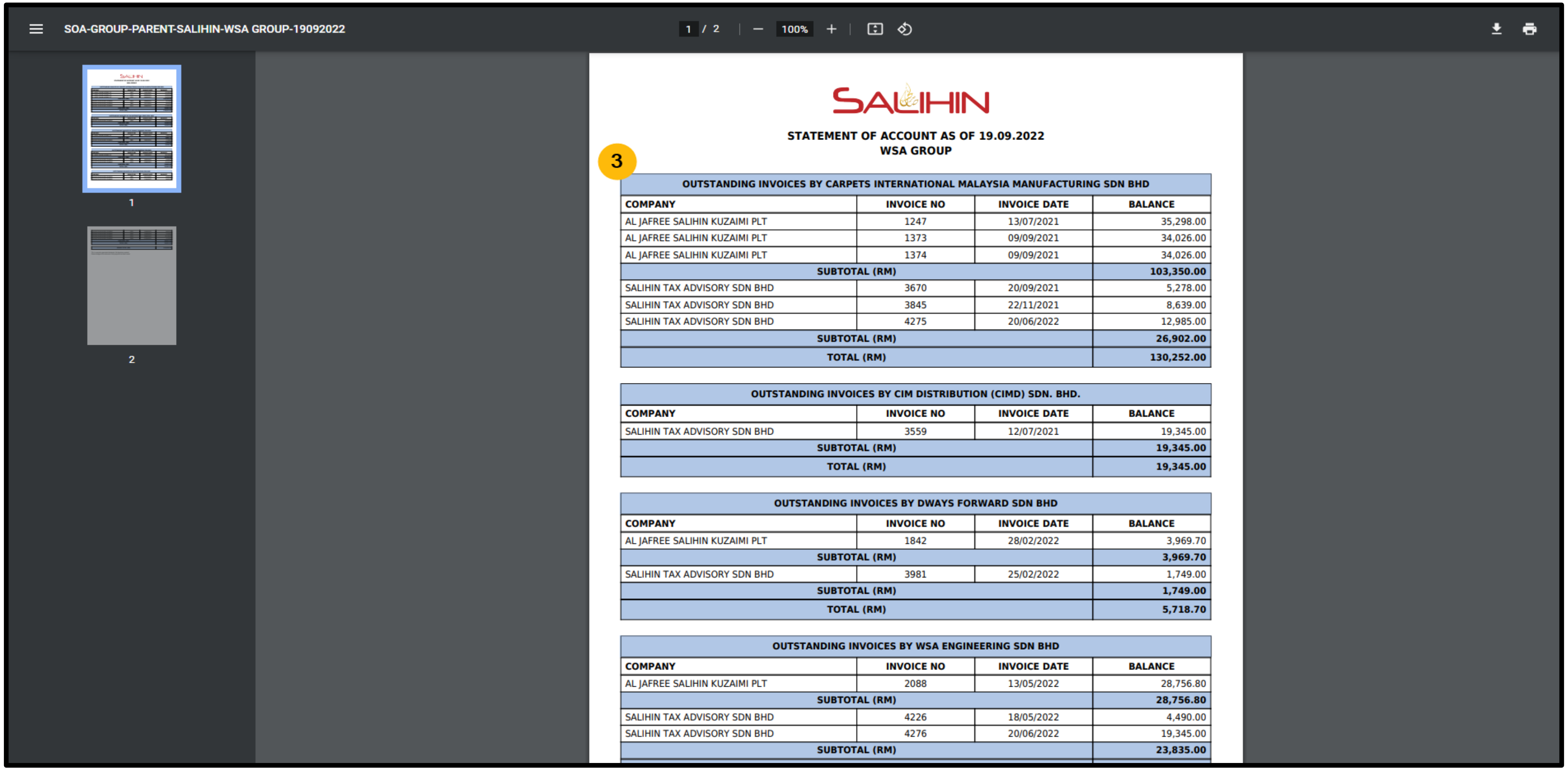
1. Click and choose a Parent Customer
2. Click “SOA”
3. Group SOA template will generate in a separate tab

Sample:

Customer : WSA GROUP

Expected Result:

Group SOA generated for Parent WSA GROUP



SALIHIN

STATEMENT OF ACCOUNT AS OF 19.09.2022
WSA GROUP

OUTSTANDING INVOICES BY CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD			
COMPANY	INVOICE NO	INVOICE DATE	BALANCE
AL JAFREE SALIHIN KUZAIMI PLT	1247	13/07/2021	35,298.00
AL JAFREE SALIHIN KUZAIMI PLT	1373	09/09/2021	34,026.00
AL JAFREE SALIHIN KUZAIMI PLT	1374	09/09/2021	34,026.00
SUBTOTAL (RM)			103,350.00
SALIHIN TAX ADVISORY SDN BHD	3670	20/09/2021	5,278.00
SALIHIN TAX ADVISORY SDN BHD	3845	22/11/2021	8,639.00
SALIHIN TAX ADVISORY SDN BHD	4275	20/06/2022	12,985.00
SUBTOTAL (RM)			26,902.00
TOTAL (RM)			130,252.00

OUTSTANDING INVOICES BY CIM DISTRIBUTION (CIMD) SDN. BHD.			
COMPANY	INVOICE NO	INVOICE DATE	BALANCE
SALIHIN TAX ADVISORY SDN BHD	3559	12/07/2021	19,345.00
SUBTOTAL (RM)			19,345.00
TOTAL (RM)			19,345.00

OUTSTANDING INVOICES BY DWAYS FORWARD SDN BHD			
COMPANY	INVOICE NO	INVOICE DATE	BALANCE
AL JAFREE SALIHIN KUZAIMI PLT	1842	28/02/2022	3,969.70
SUBTOTAL (RM)			3,969.70
SALIHIN TAX ADVISORY SDN BHD	3981	25/02/2022	1,749.00
SUBTOTAL (RM)			1,749.00
TOTAL (RM)			5,718.70

OUTSTANDING INVOICES BY WSA ENGINEERING SDN BHD			
COMPANY	INVOICE NO	INVOICE DATE	BALANCE
AL JAFREE SALIHIN KUZAIMI PLT	2088	13/05/2022	28,756.80
SUBTOTAL (RM)			28,756.80
SALIHIN TAX ADVISORY SDN BHD	4226	18/05/2022	4,490.00
SALIHIN TAX ADVISORY SDN BHD	4276	20/06/2022	19,345.00
SUBTOTAL (RM)			23,835.00

Comments

Able to generate/view the Statement of Account (SOA)

Scenario 2: Template – “Child” SOA

Status: Completed

Scenario

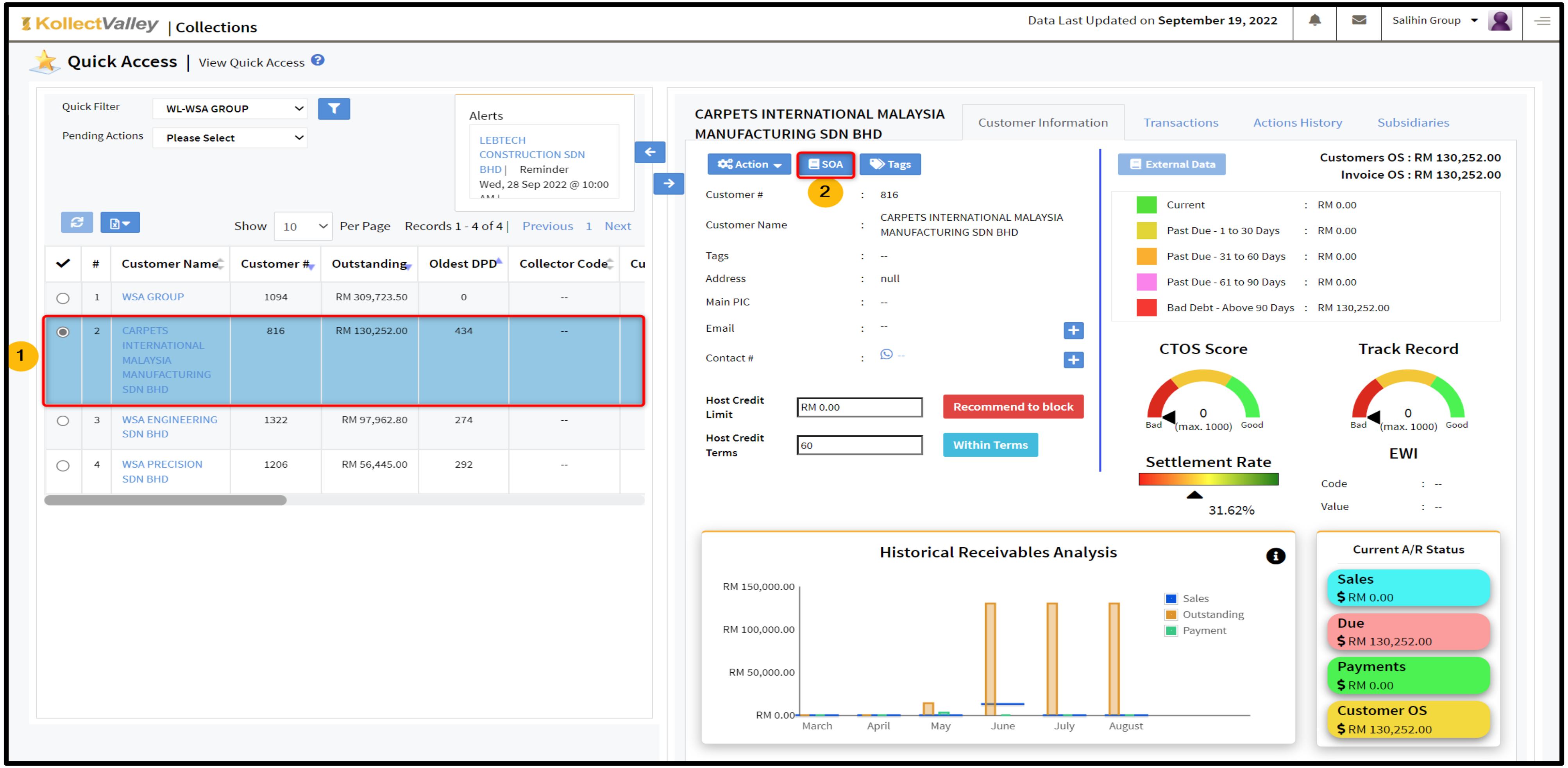
1. Click and choose a Child Customer
2. Click “SOA”
3. Child SOA template will generate in a separate tab

Sample:

Customer CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD

Expected Result:

Child SOA generated for Customer CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD



Comments

To view the Statement of Account (SOA)

Scenario 2: Template – “Child” SOA

Status: Completed

Scenario

1. Click and choose a Child Customer
2. Click “SOA”
3. Child SOA template will generate in a separate tab

Sample:

Customer CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD

Expected Result:

Child SOA generated for Customer CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD

SOA-GROUP-SALIHIN-CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD-19092022

1 / 1 100%

3

SALIHIN

555 Jalan Samudra Utara 1, Taman Samudra, 68100 Batu Caves, Selangor

STATEMENT OF ACCOUNT

To :

CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD

Date : 19/09/2022

Total Due : **RM 130,252.00**

AL JAFREE SALIHIN KUZAIMI PLT			
COMPANY	INVOICE NO	INVOICE DATE	RM
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD	1247	13/07/2021	35,298.00
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD	1373	09/09/2021	34,026.00
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD	1374	09/09/2021	34,026.00
SUBTOTAL (RM)			103,350.00

SALIHIN			
COMPANY	INVOICE NO	INVOICE DATE	RM
SUBTOTAL (RM)			0.00

SALIHIN TAX ADVISORY SDN BHD			
COMPANY	INVOICE NO	INVOICE DATE	RM
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD	3670	20/09/2021	5,278.00
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD	3845	22/11/2021	8,639.00
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD	4275	20/06/2022	12,985.00
SUBTOTAL (RM)			26,902.00

TOTAL (RM)	130,252.00

This is computer generated statement. No signature required.
Please disregard this statement if the payment has been made.

Comments

Able to generate/view the Statement of Account (SOA)

Scenario 3: Template – Individual SOA

Status: Completed

Scenario

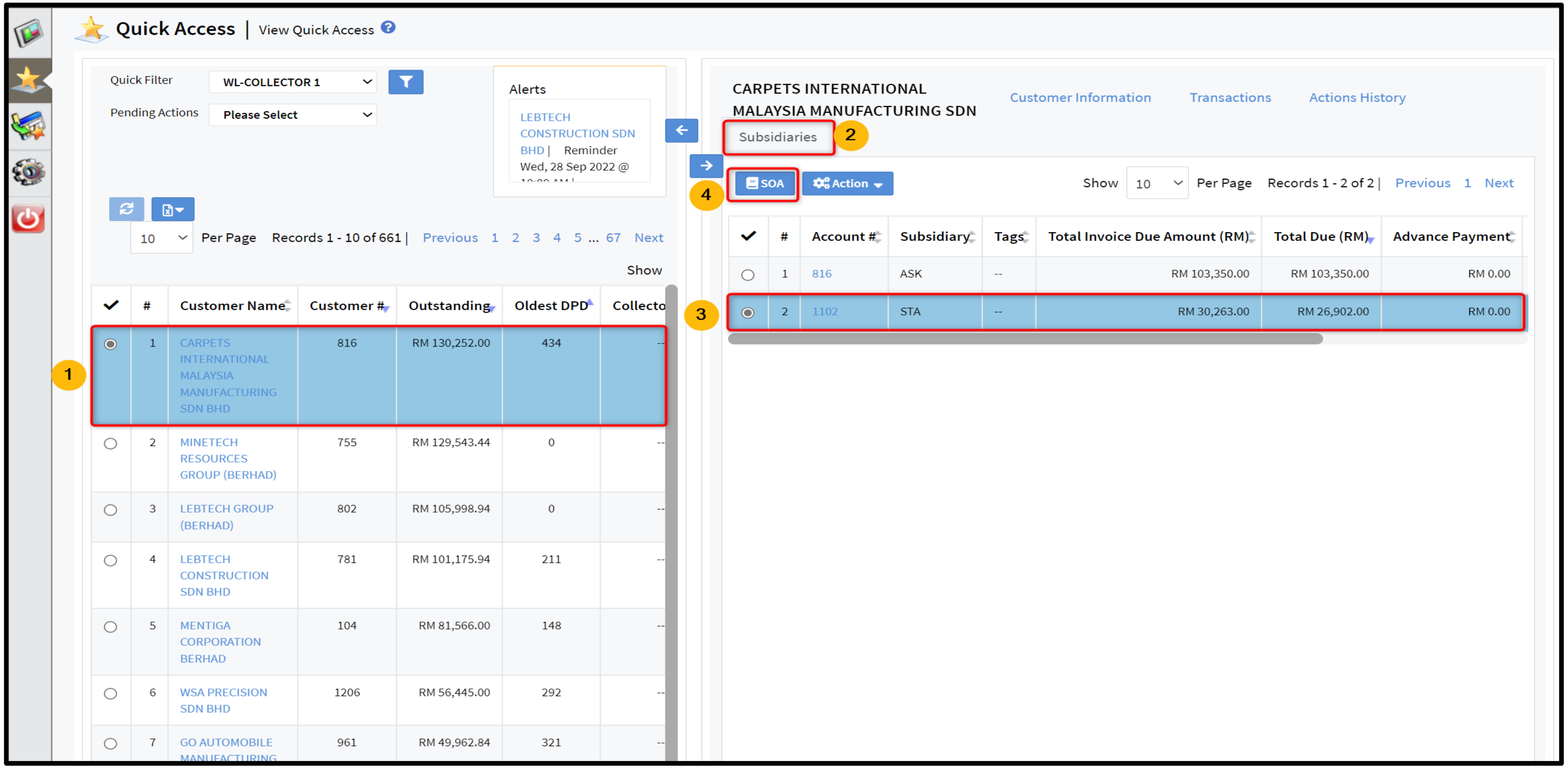
1. Click and choose a Customer
2. Select “Subsidiaries”
3. Choose which subsidiary to generate the SOA from
4. Click “SOA”
5. Individual SOA will be generated in separate tab.

Sample:

Customer : CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD

Expected Result:

Individual SOA generated for Customer CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD



Comments

To view the Statement of Account (SOA)

Scenario 3: Template – Individual SOA

Status: Completed

Scenario

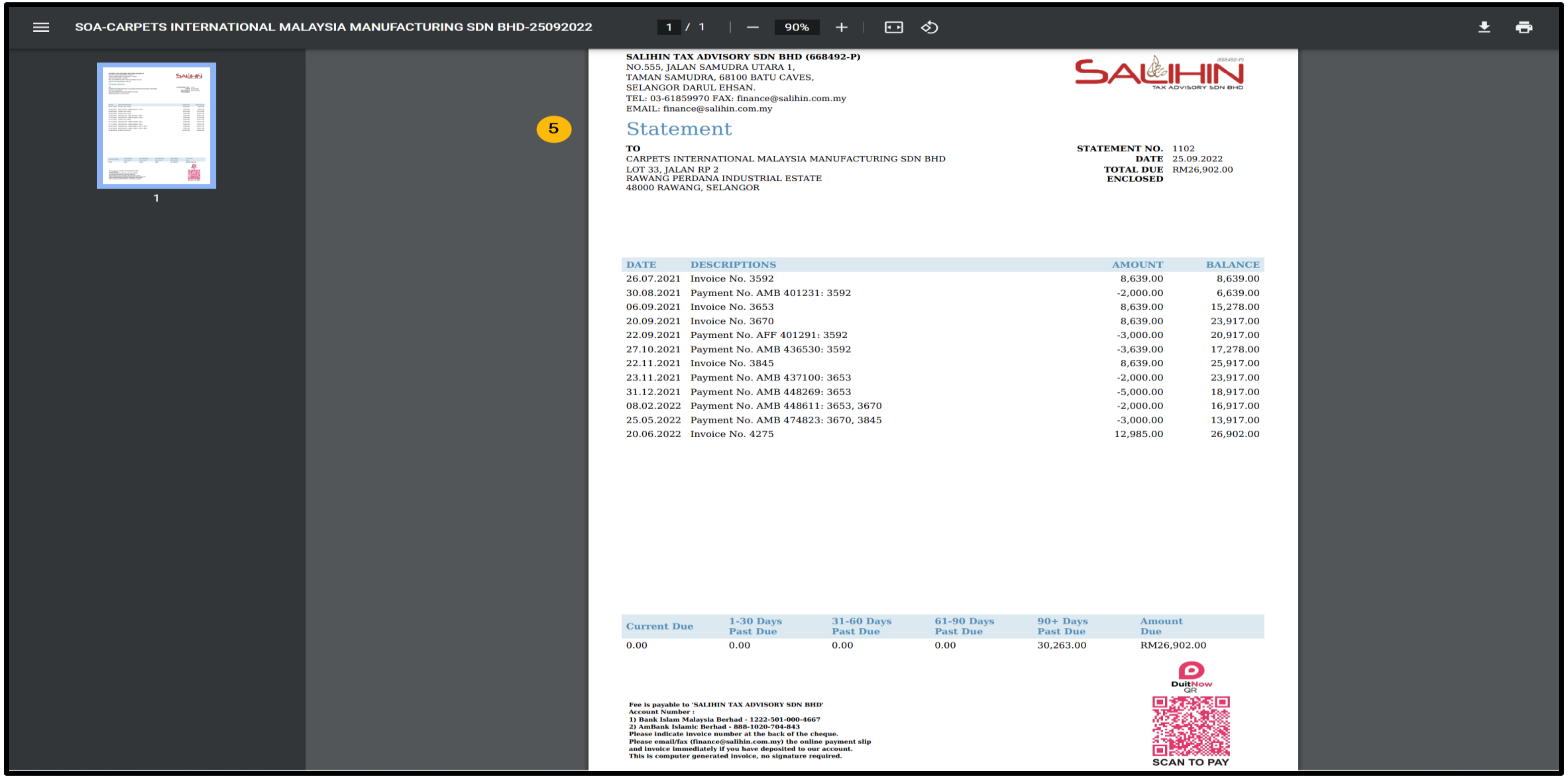
1. Click and choose a Customer
2. Select “Subsidiaries”
3. Choose which subsidiary to generate the SOA from
4. Click “SOA”
5. Individual SOA will be generated in separate tab.

Sample:

Customer : CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD

Expected Result:

Individual SOA generated for Customer CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD



SALIHIN TAX ADVISORY SDN BHD (668492-P)
NO.555, JALAN SAMUDRA UTARA 1,
TAMAN SAMUDRA, 68100 BATU CAVES,
SELANGOR DARUL EHSAN.
TEL: 03-61859970 FAX: finance@salihin.com.my
EMAIL: finance@salihin.com.my

SALIHIN TAX ADVISORY SDN BHD

Statement

TO
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD
LOT 33, JALAN RP 2
RAWANG PERDANA INDUSTRIAL ESTATE
48000 RAWANG, SELANGOR

STATEMENT NO. 1102
DATE 25.09.2022
TOTAL DUE ENCLOSED RM26,902.00

DATE	DESCRIPTIONS	AMOUNT	BALANCE
26.07.2021	Invoice No. 3592	8,639.00	8,639.00
30.08.2021	Payment No. AMB 401231: 3592	-2,000.00	6,639.00
06.09.2021	Invoice No. 3653	8,639.00	15,278.00
20.09.2021	Invoice No. 3670	8,639.00	23,917.00
22.09.2021	Payment No. AFF 401291: 3592	-3,000.00	20,917.00
27.10.2021	Payment No. AMB 436530: 3592	-3,639.00	17,278.00
22.11.2021	Invoice No. 3845	8,639.00	25,917.00
23.11.2021	Payment No. AMB 437100: 3653	-2,000.00	23,917.00
31.12.2021	Payment No. AMB 448269: 3653	-5,000.00	18,917.00
08.02.2022	Payment No. AMB 448611: 3653, 3670	-2,000.00	16,917.00
25.05.2022	Payment No. AMB 474823: 3670, 3845	-3,000.00	13,917.00
20.06.2022	Invoice No. 4275	12,985.00	26,902.00

Current Due	1-30 Days Past Due	31-60 Days Past Due	61-90 Days Past Due	90+ Days Past Due	Amount Due
0.00	0.00	0.00	0.00	30,263.00	RM26,902.00

Fee is payable to 'SALIHIN TAX ADVISORY SDN BHD'
Account Number :
1) Bank Islam Malaysia Berhad - 1222-501-000-4667
2) AmBank Islamic Berhad - 888-1020-704-843
Please indicate invoice number at the back of the cheque.
Please email/fax (finance@salihin.com.my) the online payment slip and invoice immediately if you have deposited to our account.
This is computer generated invoice, no signature required.

DuitNow QR
SCAN TO PAY

Comments

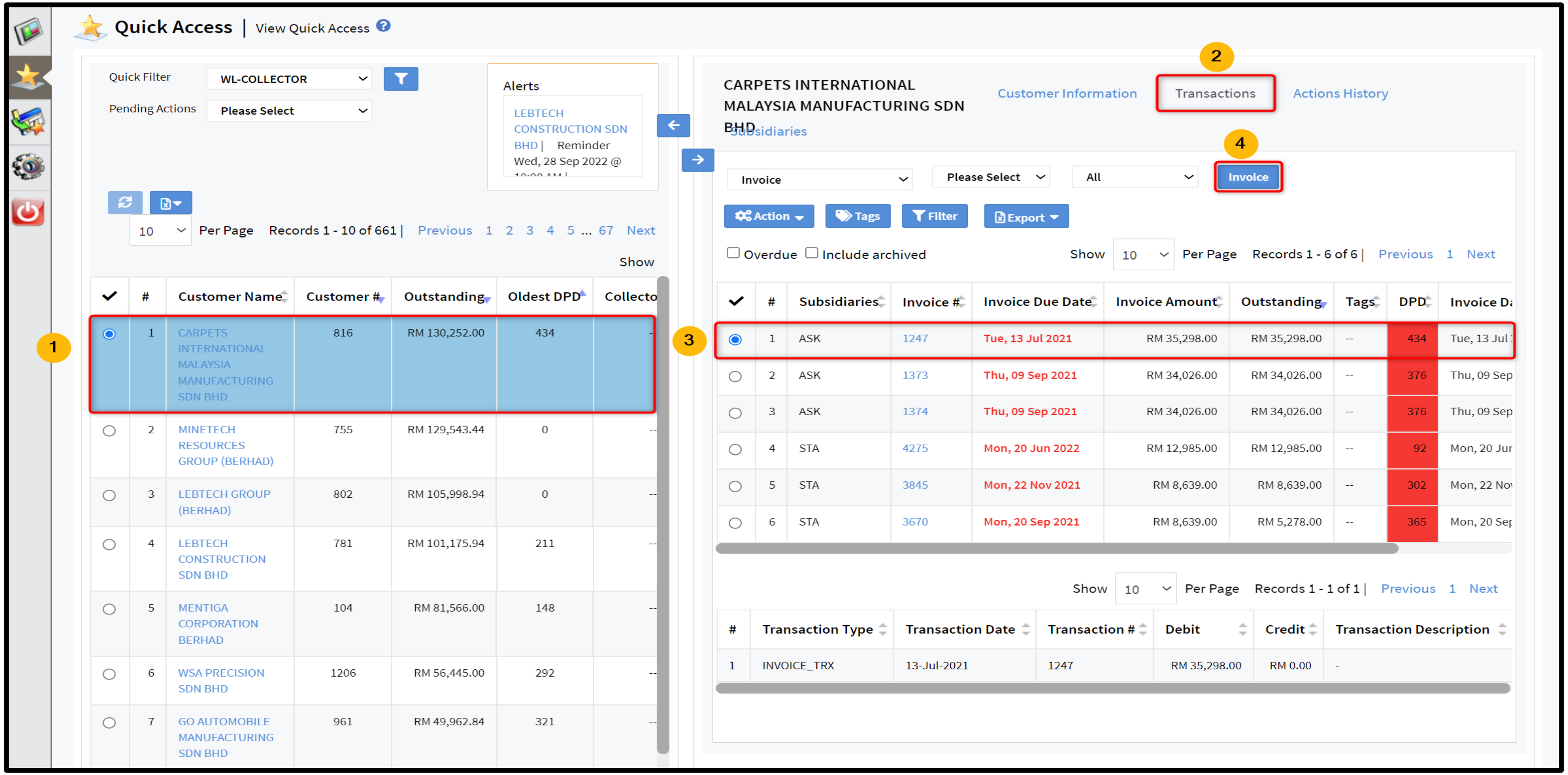
Able to generate/view the Statement of Account (SOA)

Scenario 4: Template - Invoice

Status: Completed

Scenario

1. Select a Customer from Quick Access
2. Select Transactions tab
3. Select one Invoice from the list of transactions
4. Click “Invoice” preview button
5. Invoice will be generated in another tab.



Comments

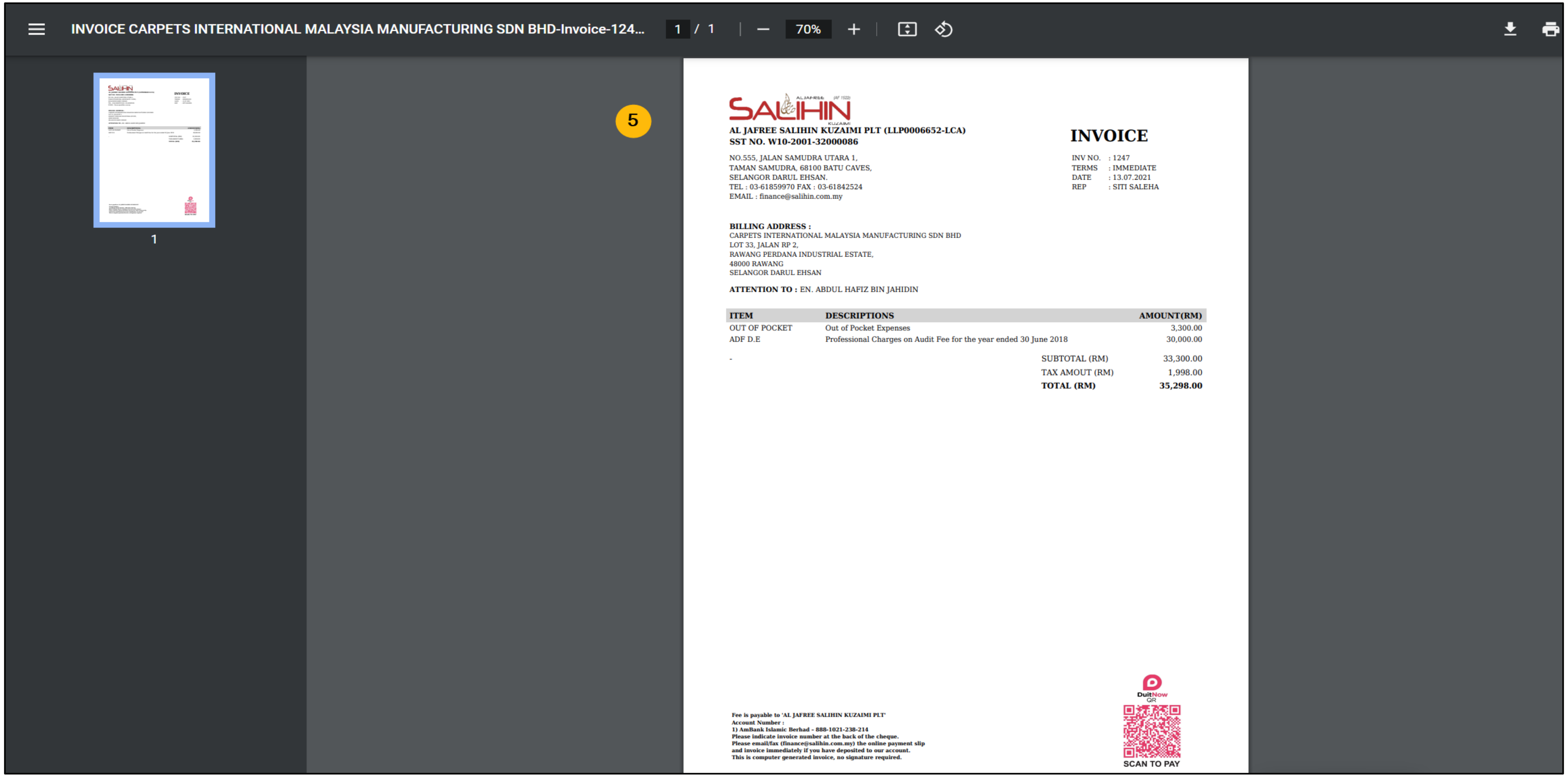
View an Invoice

Scenario 4: Template - Invoice

Status: Completed

Scenario

1. Select a Customer from Quick Access
2. Select Transactions tab
3. Select one Invoice from the list of transactions
4. Click “Invoice” preview button
5. Invoice will be generated in another tab.



SALIHIN

AL JAFREE SALIHIN KUZAIMI PLT (LLP0006652-LCA)
SST NO. W10-2001-32000086

NO.555, JALAN SAMUDRA UTARA 1,
TAMAN SAMUDRA, 68100 BATU CAVES,
SELANGOR DARUL EHSAN.
TEL : 03-61859970 FAX : 03-61842524
EMAIL : finance@salihin.com.my

INVOICE

INV NO. : 1247
TERMS : IMMEDIATE
DATE : 13.07.2021
REP : SITI SALEHA

BILLING ADDRESS :
CARPETS INTERNATIONAL MALAYSIA MANUFACTURING SDN BHD
LOT 33, JALAN RP 2,
RAWANG PERDANA INDUSTRIAL ESTATE,
48000 RAWANG
SELANGOR DARUL EHSAN

ATTENTION TO : EN. ABDUL HAFIZ BIN JAHIDIN

ITEM	DESCRIPTIONS		AMOUNT(RM)
OUT OF POCKET	Out of Pocket Expenses		3,300.00
ADF D.E	Professional Charges on Audit Fee for the year ended 30 June 2018		30,000.00
-		SUBTOTAL (RM)	33,300.00
		TAX AMOUT (RM)	1,998.00
		TOTAL (RM)	**35,298.00**

Fee is payable to 'AL JAFREE SALIHIN KUZAIMI PLT'
Account Number :
1) AmBank Islamic Berhad - 888-1021-238-214
Please indicate invoice number at the back of the cheque.
Please email/fax (finance@salihin.com.my) the online payment slip
and invoice immediately if you have deposited to our account.
This is computer generated invoice, no signature required.

DuitNow QR
SCAN TO PAY

Comments

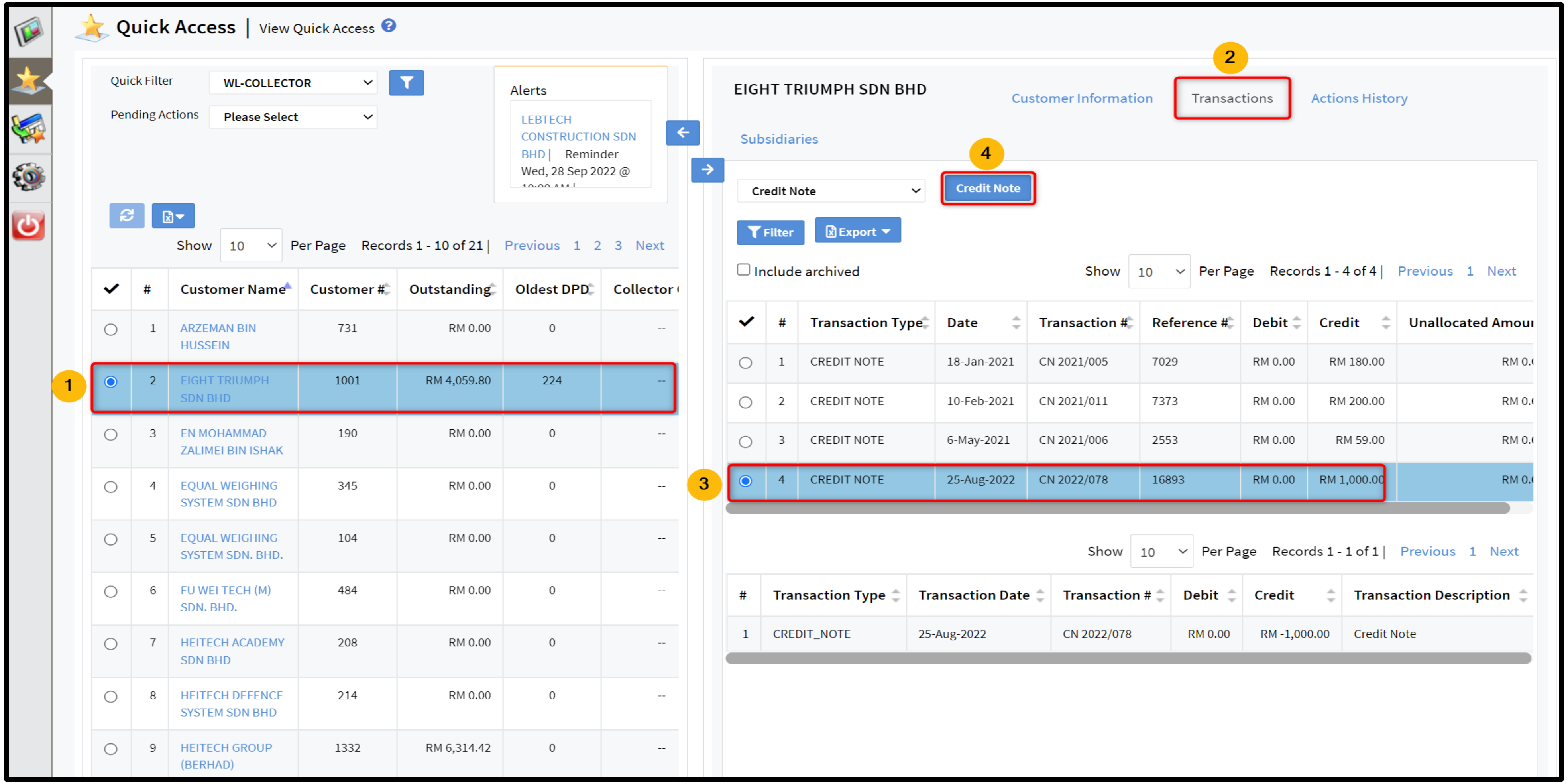
Invoice generated

Scenario 5: Template – Credit Note

Status: Completed

Scenario

1. Select a Customer from Quick Access
2. Select Transactions tab
3. Select one Credit Note from the list of transactions
4. Click “Credit Note” preview button
5. Credit Note will be generated in another tab.



Comments

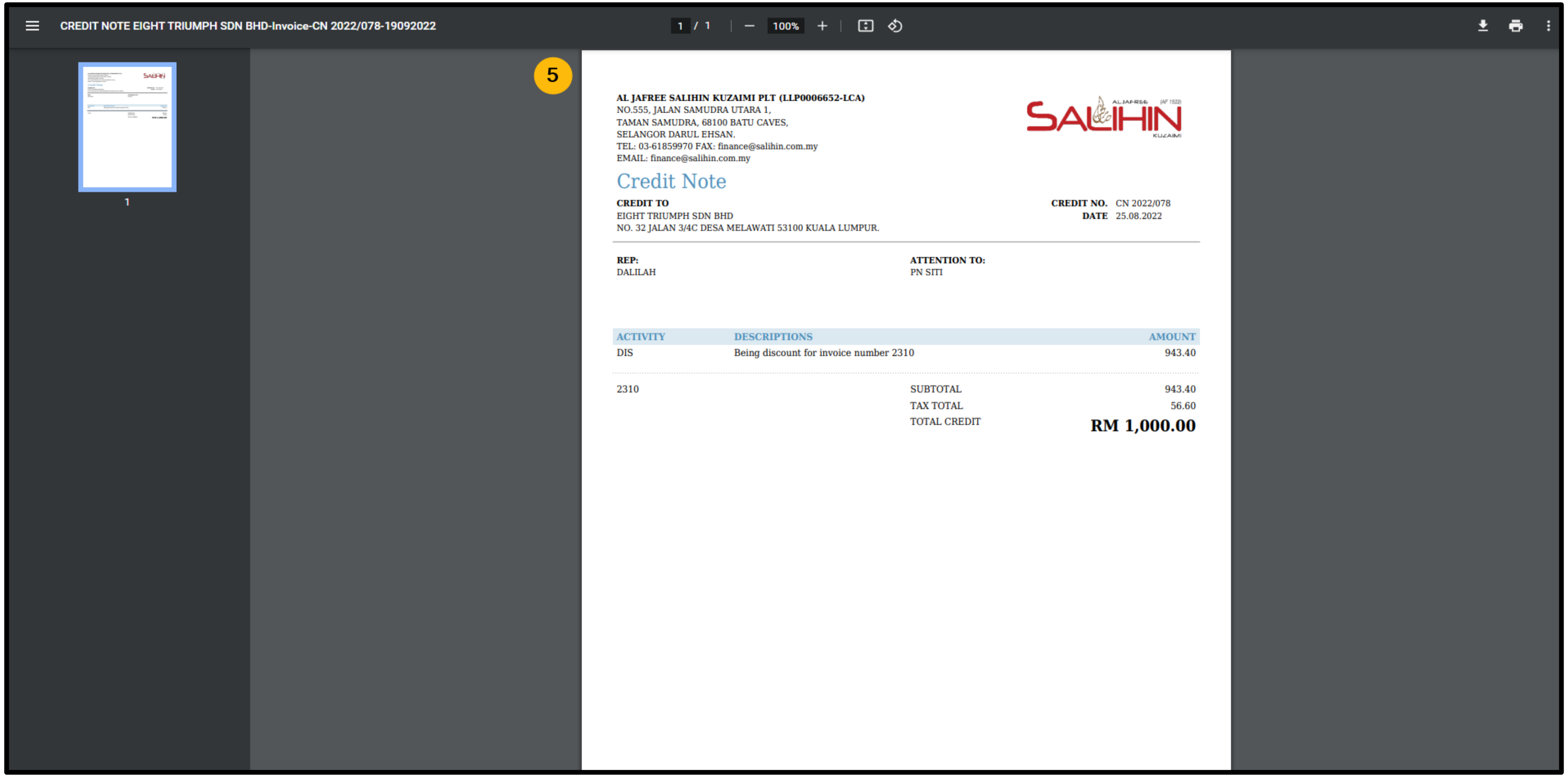
Able to generate/view the Credit Note template

Scenario 5: Template – Credit Note

Status: Completed

Scenario

1. Select a Customer from Quick Access
2. Select Transactions tab
3. Select one Credit Note from the list of transactions
4. Click “Credit Note” preview button
5. Credit Note will be generated in another tab.


CREDIT NOTE EIGHT TRIUMPH SDN BHD-Invoice-CN 2022/078-19092022

5

AL JAFREE SALIHIN KUZAIMI PLT (LLP0006652-LCA)
NO.555, JALAN SAMUDRA UTARA 1,
TAMAN SAMUDRA, 68100 BATU CAVES,
SELANGOR DARUL EHSAN.
TEL: 03-61859970 FAX: finance@salihin.com.my
EMAIL: finance@salihin.com.my

Credit Note

CREDIT TO
EIGHT TRIUMPH SDN BHD
NO. 32 JALAN 3/4C DESA MELAWATI 53100 KUALA LUMPUR.

CREDIT NO. CN 2022/078
DATE 25.08.2022

REP:
DALILAH

ATTENTION TO:
PN SITI

ACTIVITY	DESCRIPTIONS	AMOUNT
DIS	Being discount for invoice number 2310	943.40

2310

SUBTOTAL	943.40
TAX TOTAL	56.60
TOTAL CREDIT	RM 1,000.00

Comments

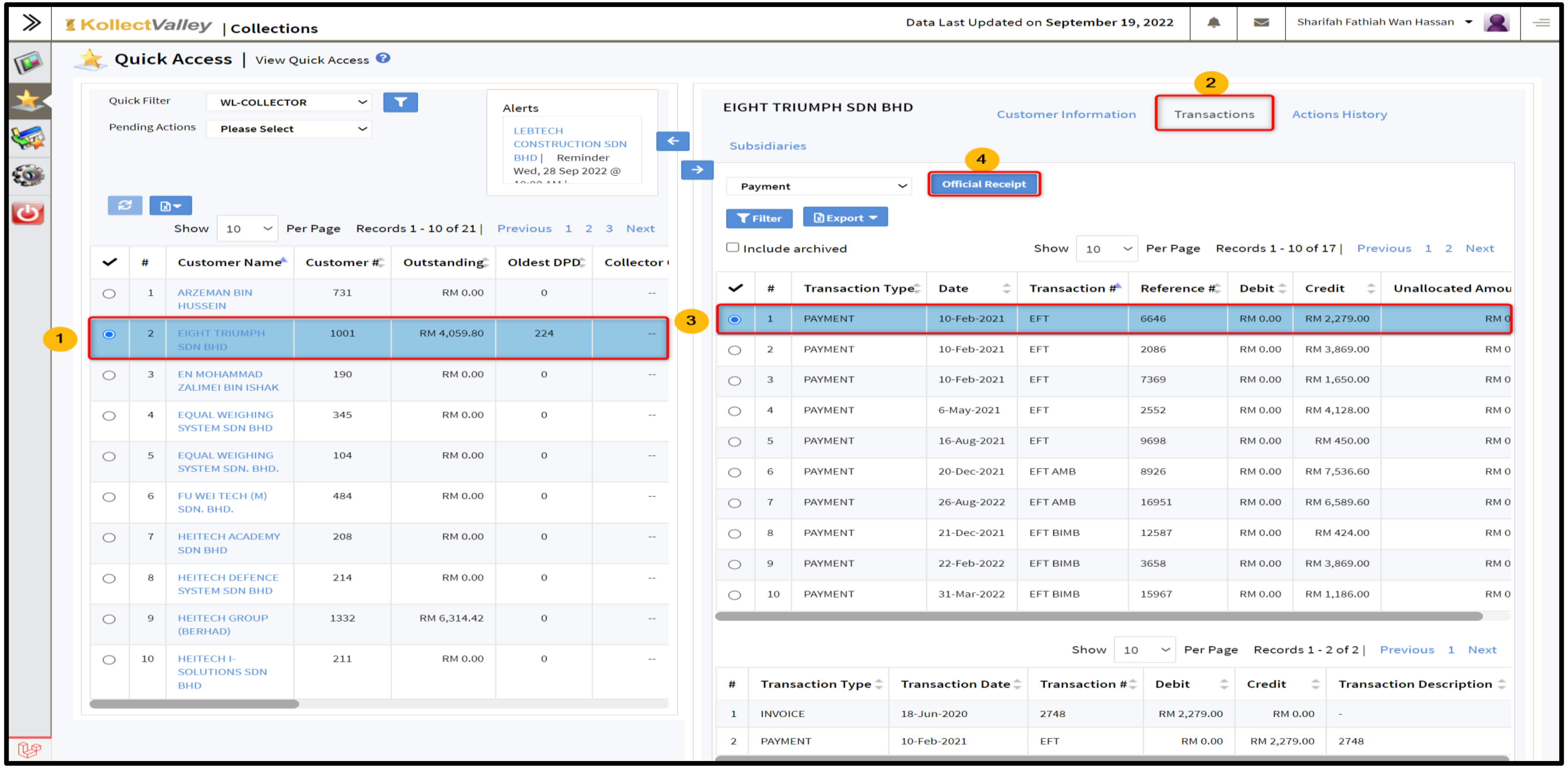
Credit Note generated

Scenario 6: Template – Official Receipt

Status: Completed

Scenario

1. Select a Customer from Quick Access
2. Select Transactions tab
3. Select one Payment from the list of transactions
4. Click “Official Receipt” preview button
5. Official Receipt will be generated in another tab.



Comments

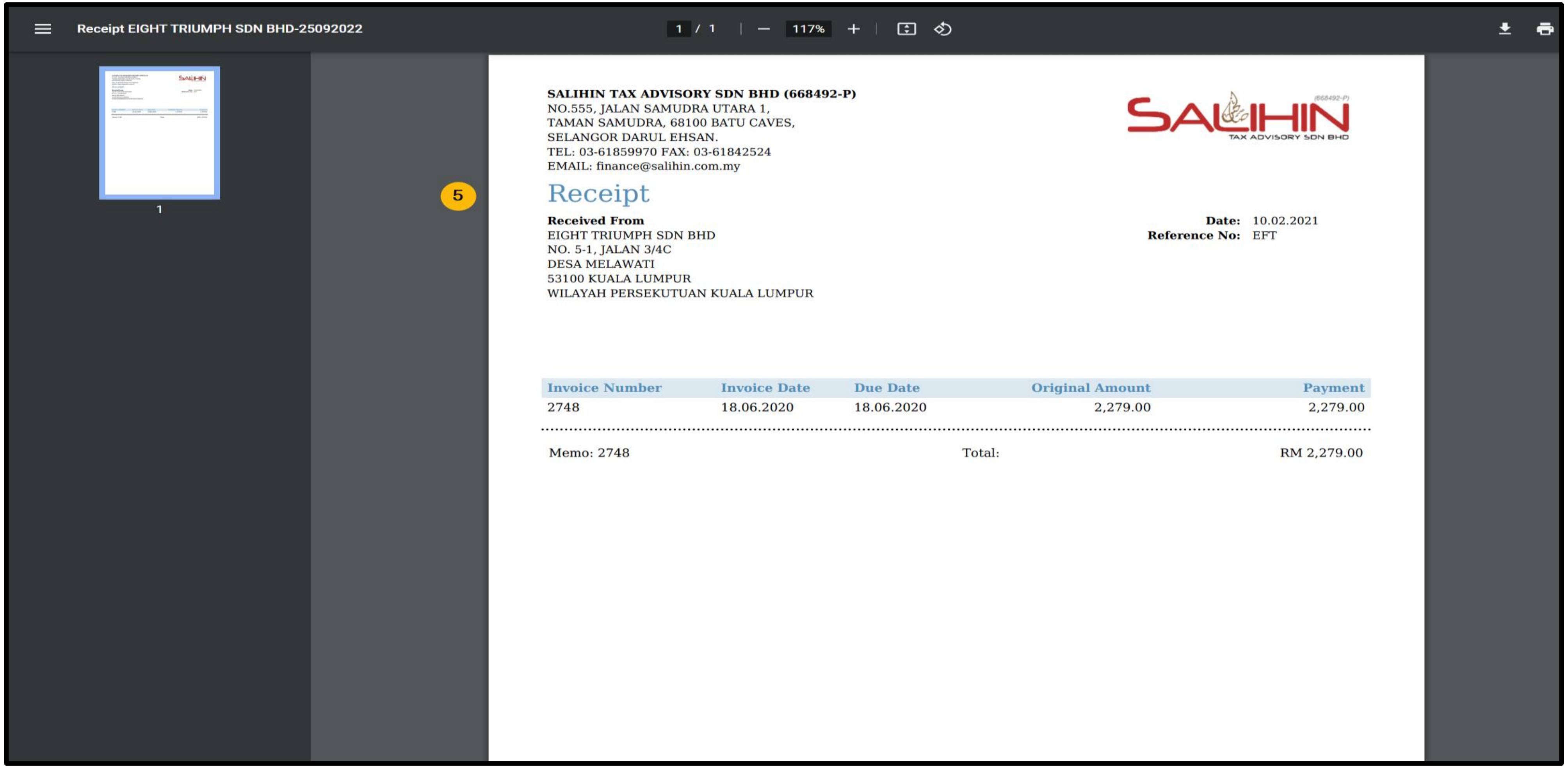
View Payments and Generate Official Receipts

Scenario 6: Template – Official Receipt

Status: Completed

Scenario

1. Select a Customer from Quick Access
2. Select Transactions tab
3. Select one Payment from the list of transactions
4. Click “Official Receipt” preview button
5. Official Receipt will be generated in another tab.



SALIHIN TAX ADVISORY SDN BHD (668492-P)
NO.555, JALAN SAMUDRA UTARA 1,
TAMAN SAMUDRA, 68100 BATU CAVES,
SELANGOR DARUL EHSAN.
TEL: 03-61859970 FAX: 03-61842524
EMAIL: finance@salihin.com.my

Receipt

Received From
EIGHT TRIUMPH SDN BHD
NO. 5-1, JALAN 3/4C
DESA MELAWATI
53100 KUALA LUMPUR
WILAYAH PERSEKUTUAN KUALA LUMPUR

Date: 10.02.2021
Reference No: EFT

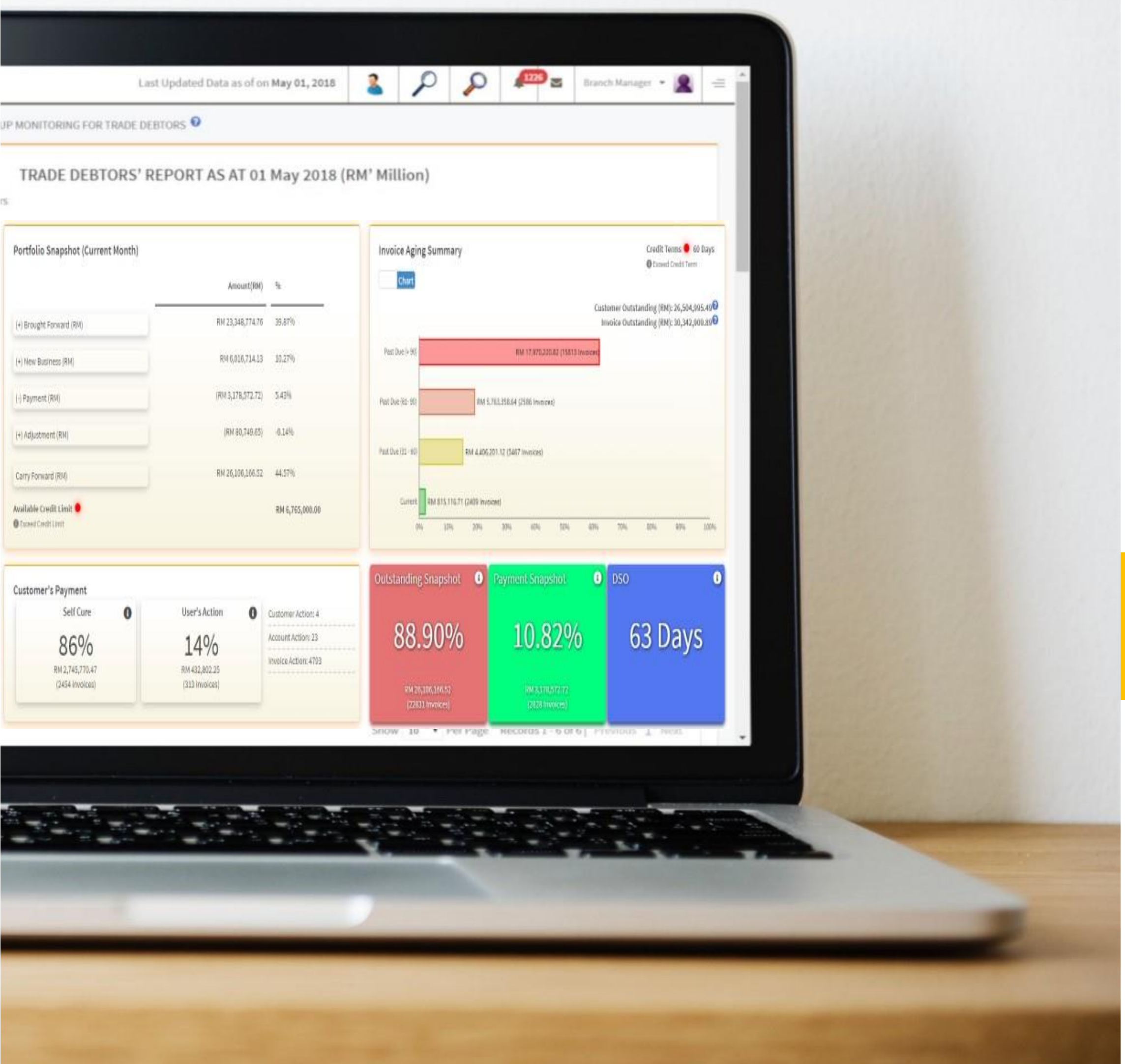
Invoice Number	Invoice Date	Due Date	Original Amount	Payment
2748	18.06.2020	18.06.2020	2,279.00	2,279.00

Memo: 2748 Total: RM 2,279.00

Comments

Official Receipt generated

Actions



Perform Actions

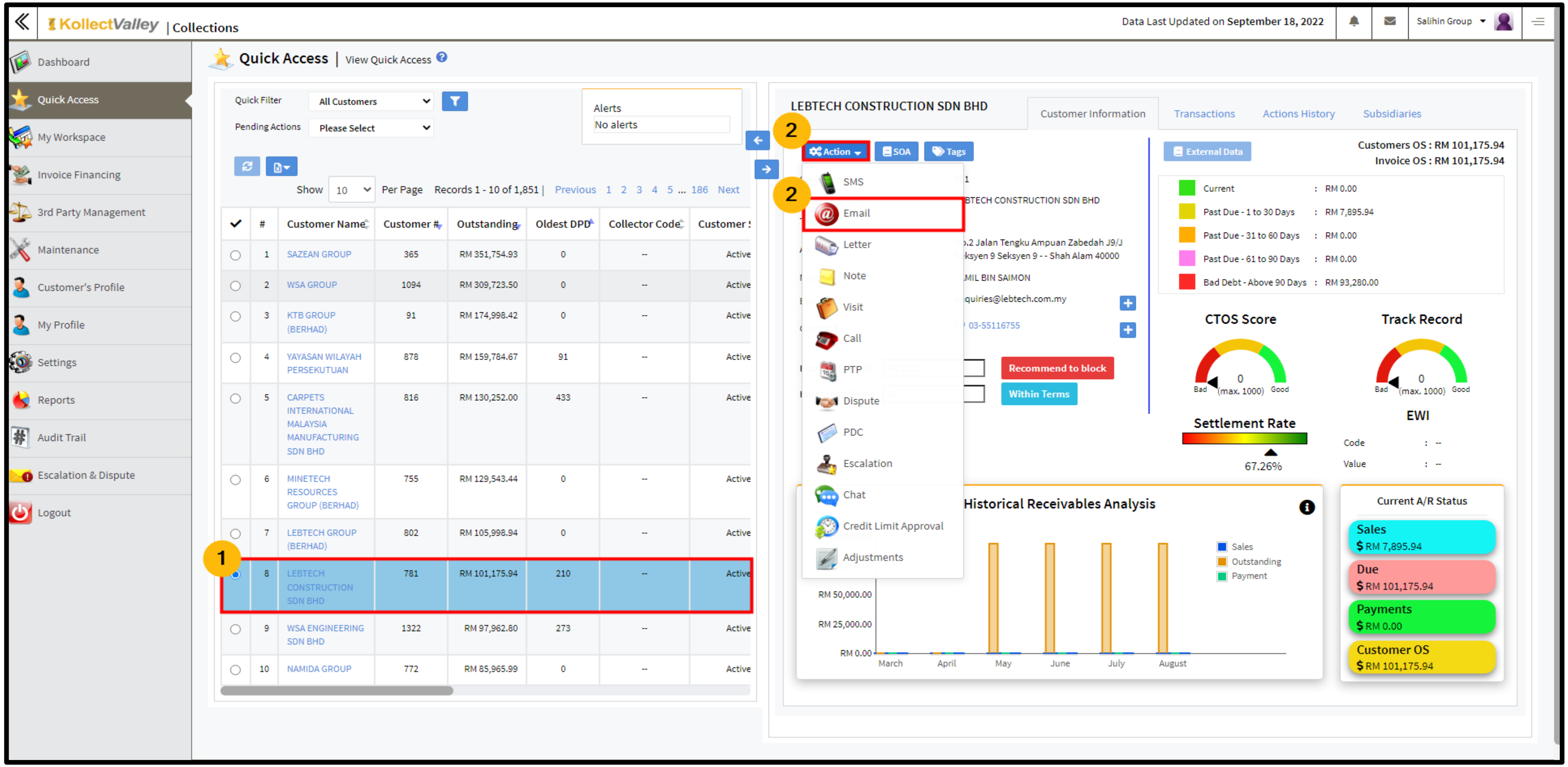
Perform Email, Letter, Note, Visit, Call, PTP, Dispute, PDC, Escalation

Scenario 1: Email Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Email action.
3. Add details such as email, BCC and select template.
4. Click Preview.
5. Click ‘Save’ button



Comments

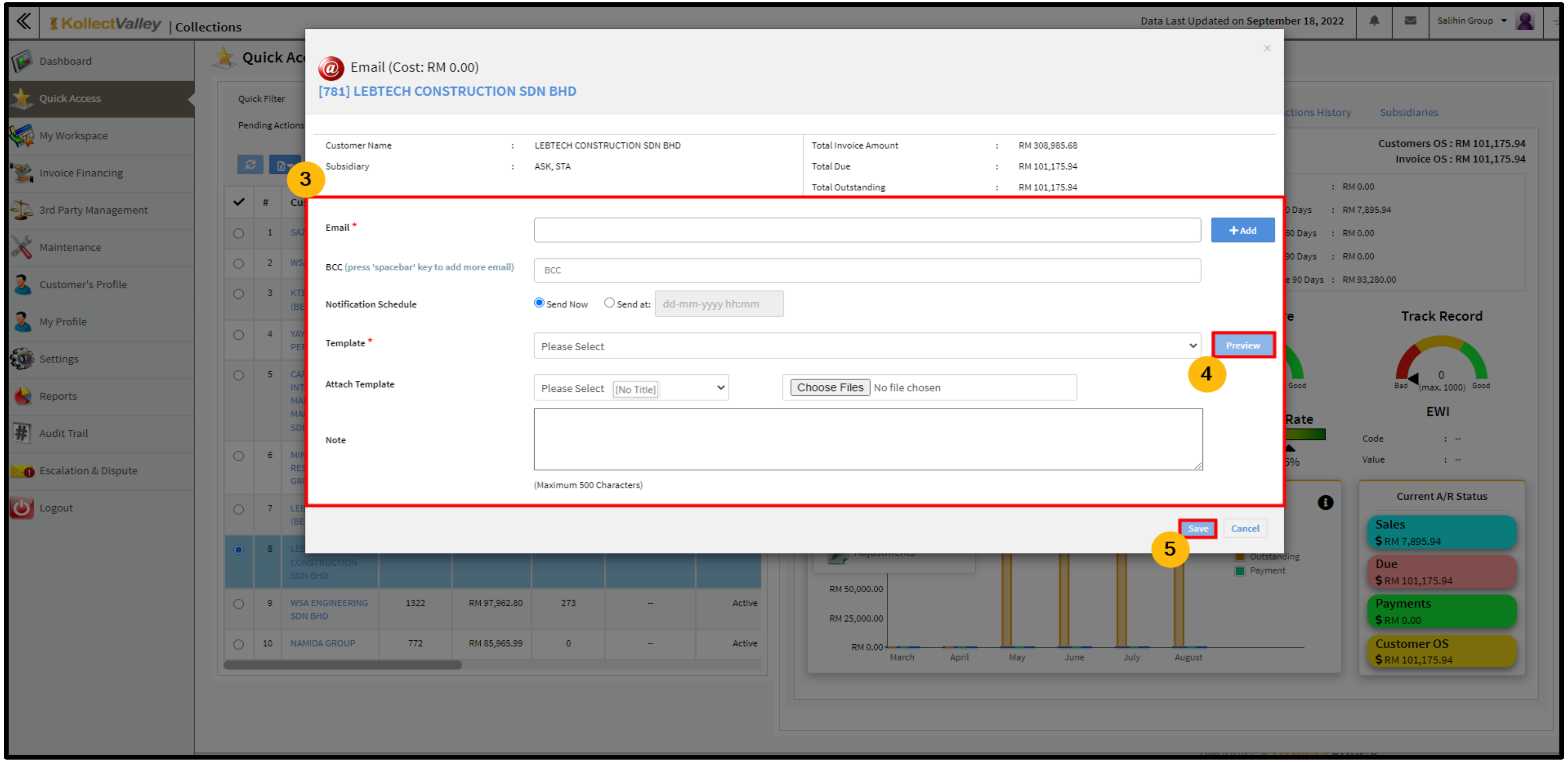
Able to perform Email action

Scenario 1: Email Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Email action.
3. Add details such as email, BCC and select template.
4. Click Preview.
5. Click ‘Save’ button



Comments

Able to perform Email action

Scenario 1: Email Template Preview

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Email action.
3. Add details such as email, BCC and select template.
4. Click Preview.
5. Click ‘Save’ button

SALIHIN

Assalamualaikum wbt.

Dear Sir/Madam,

May this email reach you while you are in the best of health and Iman by the grace of Allah Subhanahu Wata'ala. We hope your business is doing well in this new norm era.

This email is to gently remind you that the payment you owe amounting to {Total Due Amount} is overdue. We would appreciate it if you could arrange for settlement immediately. You may see the enclosed statement of account for your reference.

Should you need further explanation or discussion on the payment arrangement, please do no hesitate to contact us.

Your prompt attention to this matter is highly appreciated.

Thank you and best regards,

Comments

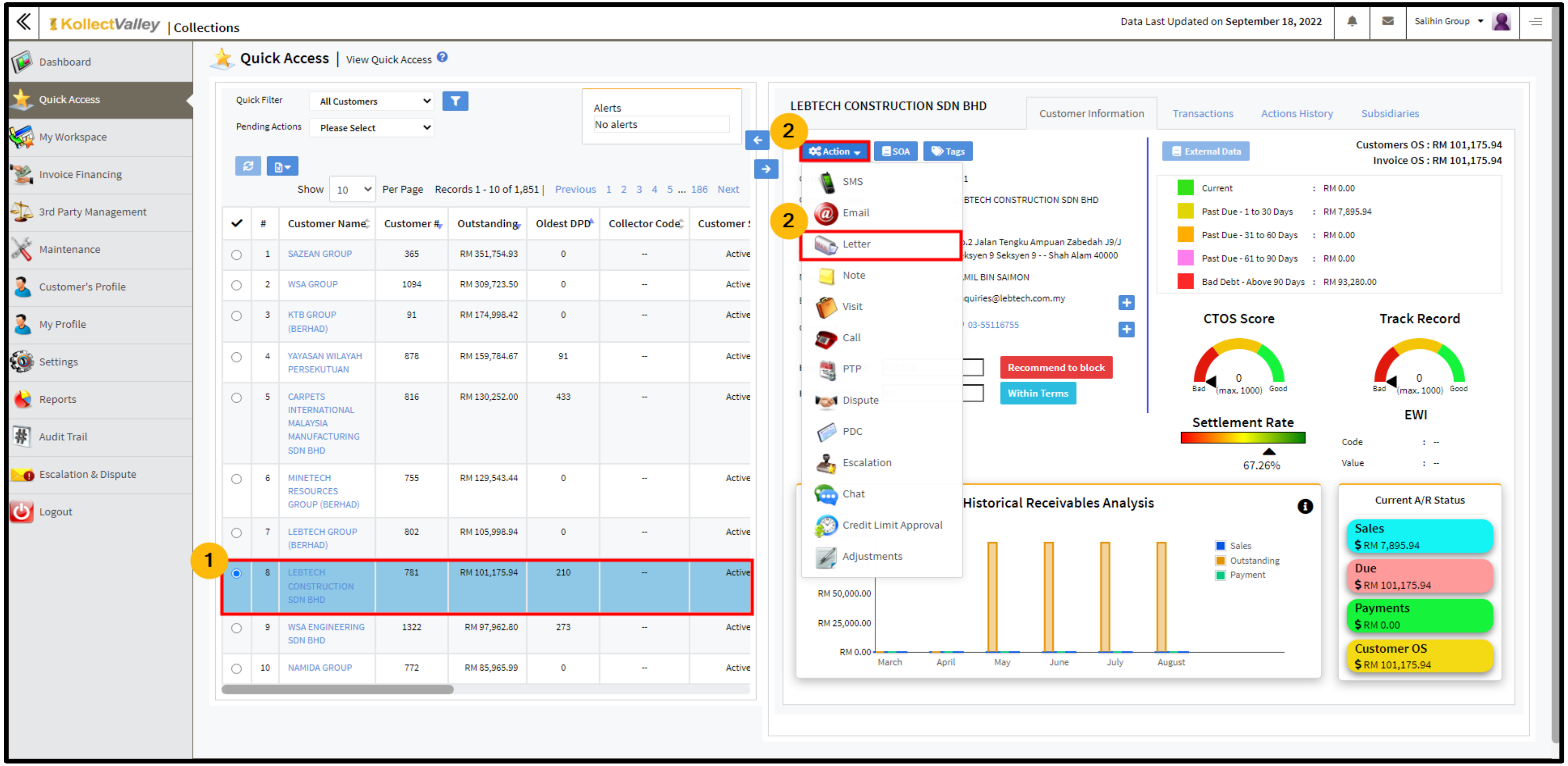
Able to perform Email action

Scenario 2: Letter Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Letter action.
3. Select Template.
4. Click Preview.
5. Click ‘Save’ button



Comments

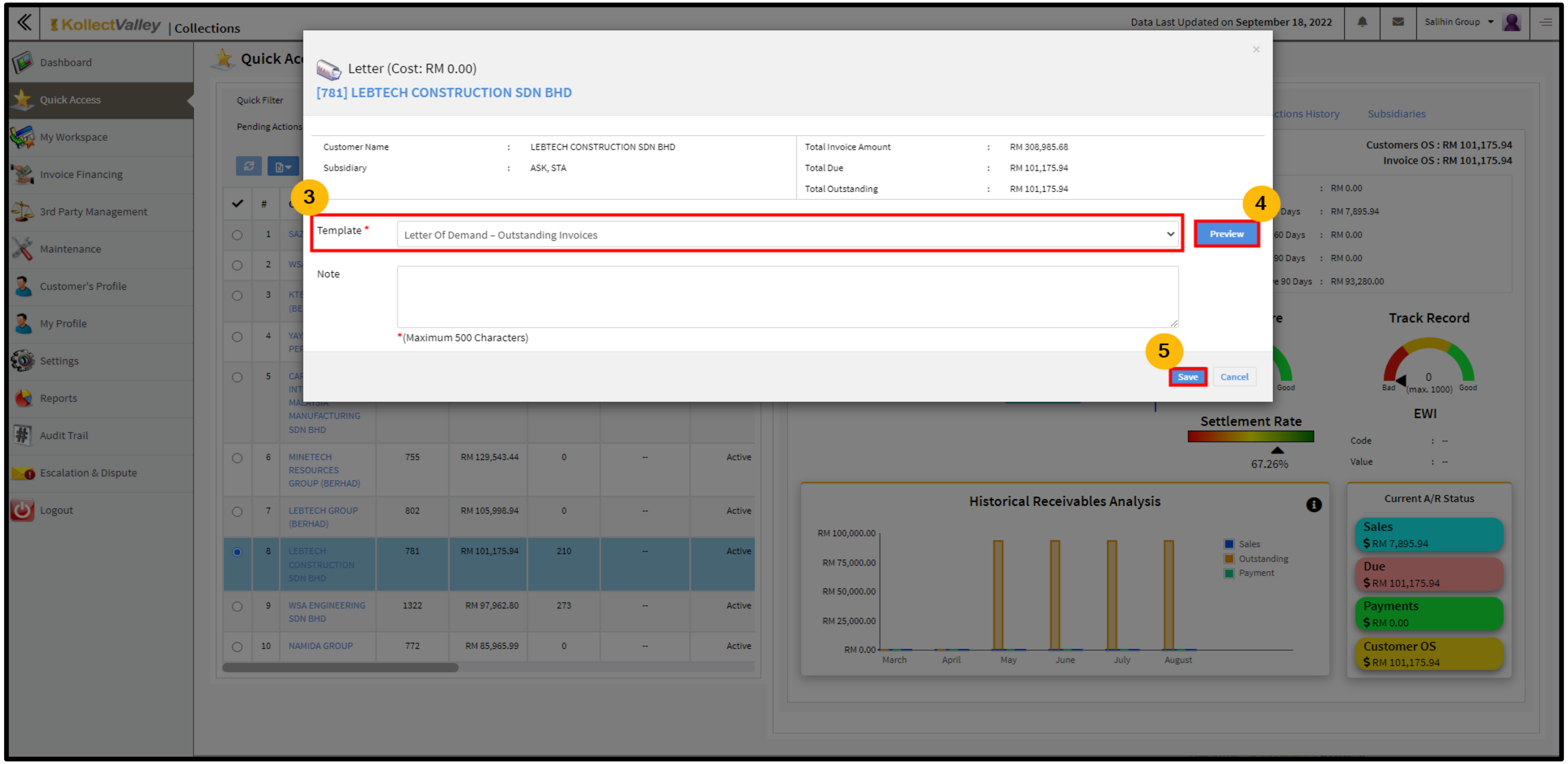
Able to perform Letter action

Scenario 2: Letter Action

Status: Completed

Scenario

1. Select customer
2. Click 'Action' dropdown menu and Create Letter action.
3. Select Template.
4. Click Preview.
5. Click 'Save' button



Comments

Able to perform Letter action

Scenario 2: Letter Template Preview

Status: Completed

Scenario

1. Select customer
2. Click 'Action' dropdown menu and Create Letter action.
3. Select Template.
4. Click Preview.
5. Click 'Save' button

{Current Date}

{Customer Name}

{Customer Address}

LETTER OF DEMAND – OUTSTANDING INVOICES

This letter will serve as formal notice to you that you are in default of your obligation to pay us the sum of {Total Invoices Outstanding} for our professional services rendered to you despite several reminder by us.

You are hereby given **14 days from date of this letter** to arrange for settlement of the outstanding amount failing which we may proceed with recovery action that may include legal action.

You may contact our finance office at 03-61859970 for detail and payment arrangement.

Thank you.

Yours truly,

SALIHIN

Comments

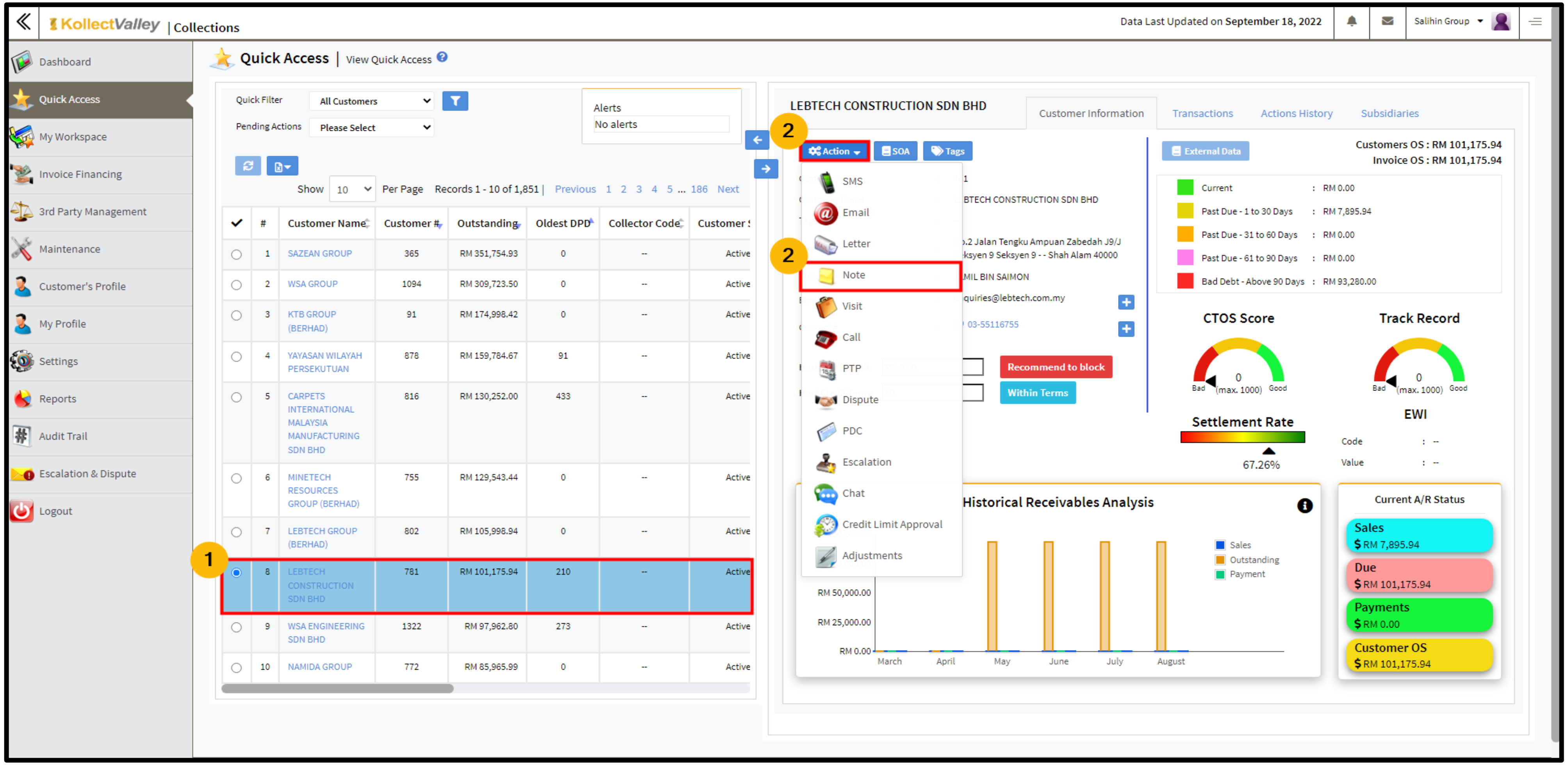
Able to perform Letter action

Scenario 3: Note Action - With Reminder

Status: Completed

Scenario

1. Select customer
2. Click 'Action' dropdown menu and Create Note action.
3. Select the Reminder option
4. Fill up required fields.
5. Click 'Save' button. Note is saved.



Comments

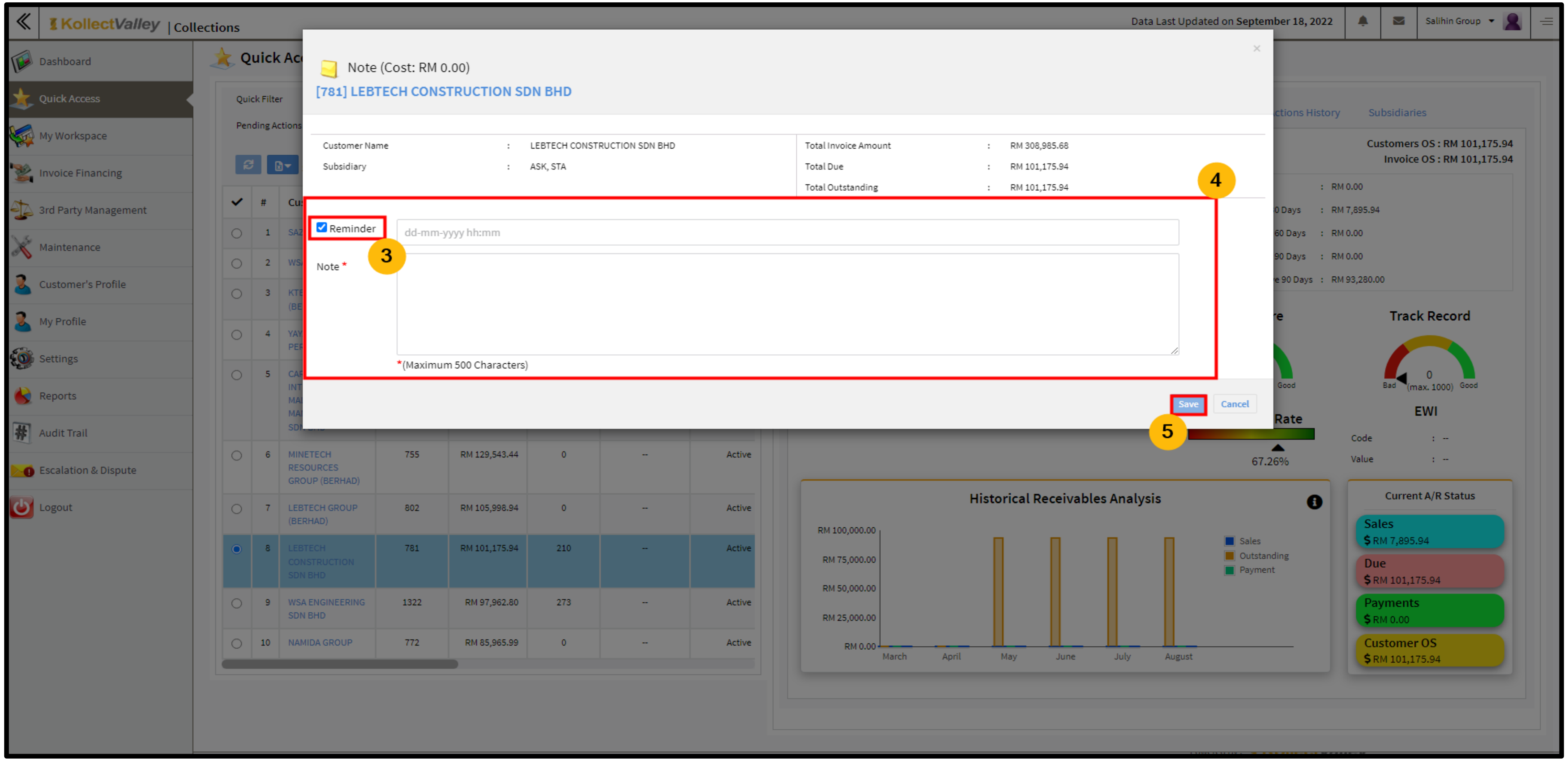
Able to perform Note with reminder action

Scenario 3: Note Action - With Reminder

Status: Completed

Scenario

1. Select customer
2. Click 'Action' dropdown menu and Create Note action.
3. Select the Reminder option
4. Fill up required fields.
5. Click 'Save' button. Note is saved.



Comments

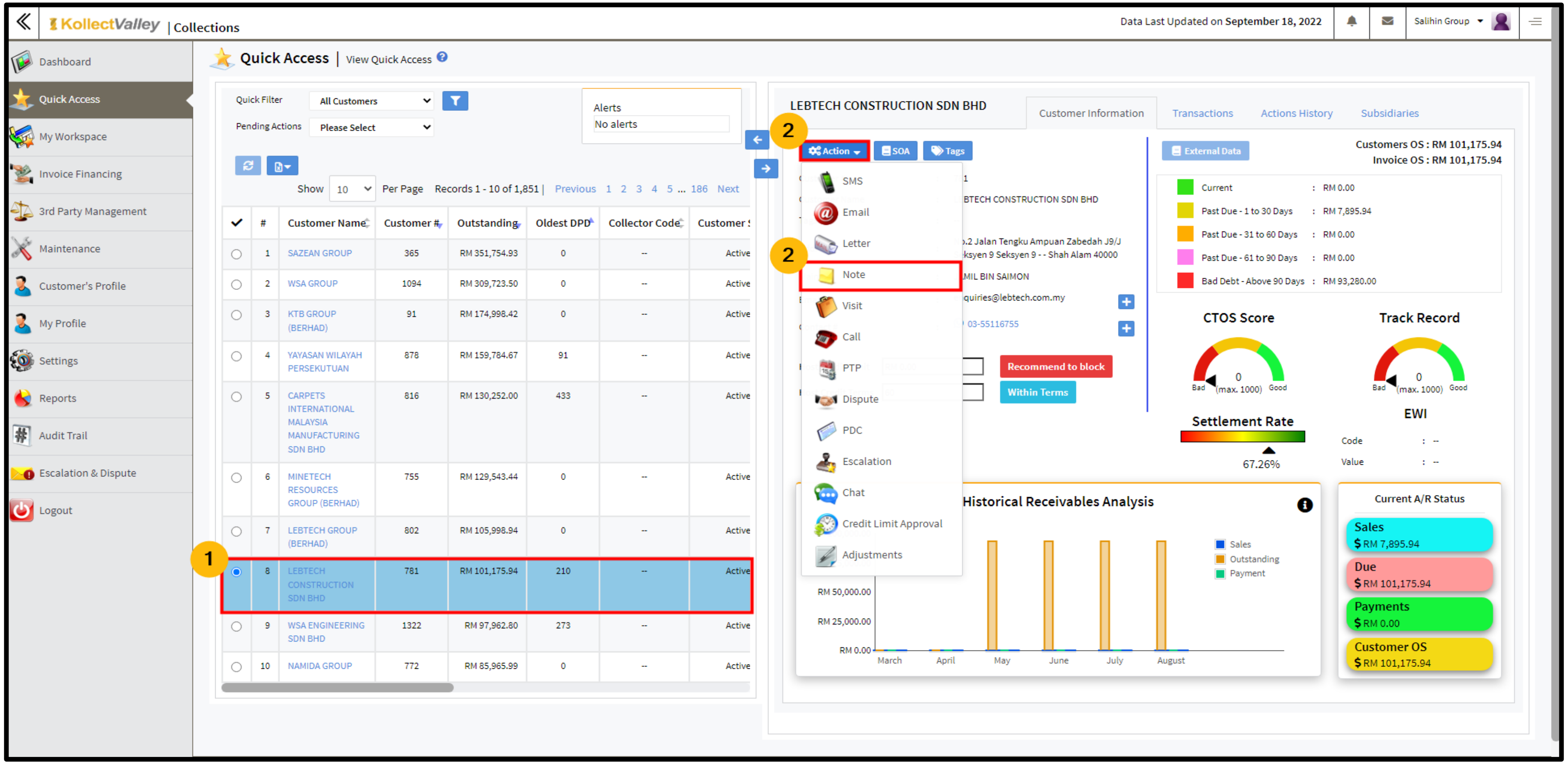
Able to perform Note with reminder action

Scenario 4: Note Action - Without Reminder

Status: Completed

Scenario

1. Select customer
2. Click 'Action' dropdown menu and Create Note action.
3. Unselect the Reminder
4. Fill up required fields.
5. Click 'Save' button. Note is saved.



Comments

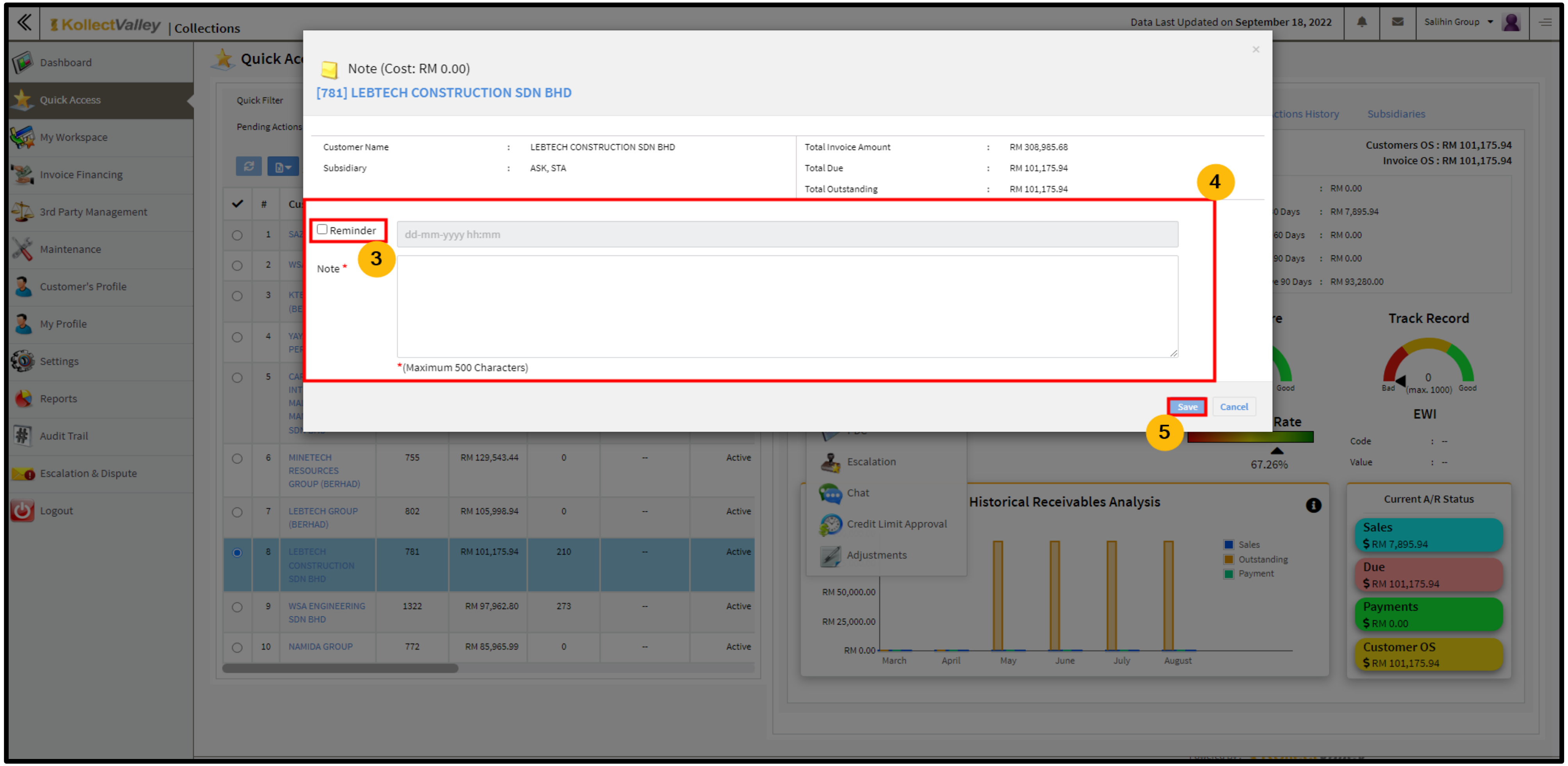
Able to perform Note without reminder action

Scenario 4: Note Action - Without Reminder

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Note action.
3. Unselect the Reminder
4. Fill up required fields.
5. Click ‘Save’ button. Note is saved.



Comments

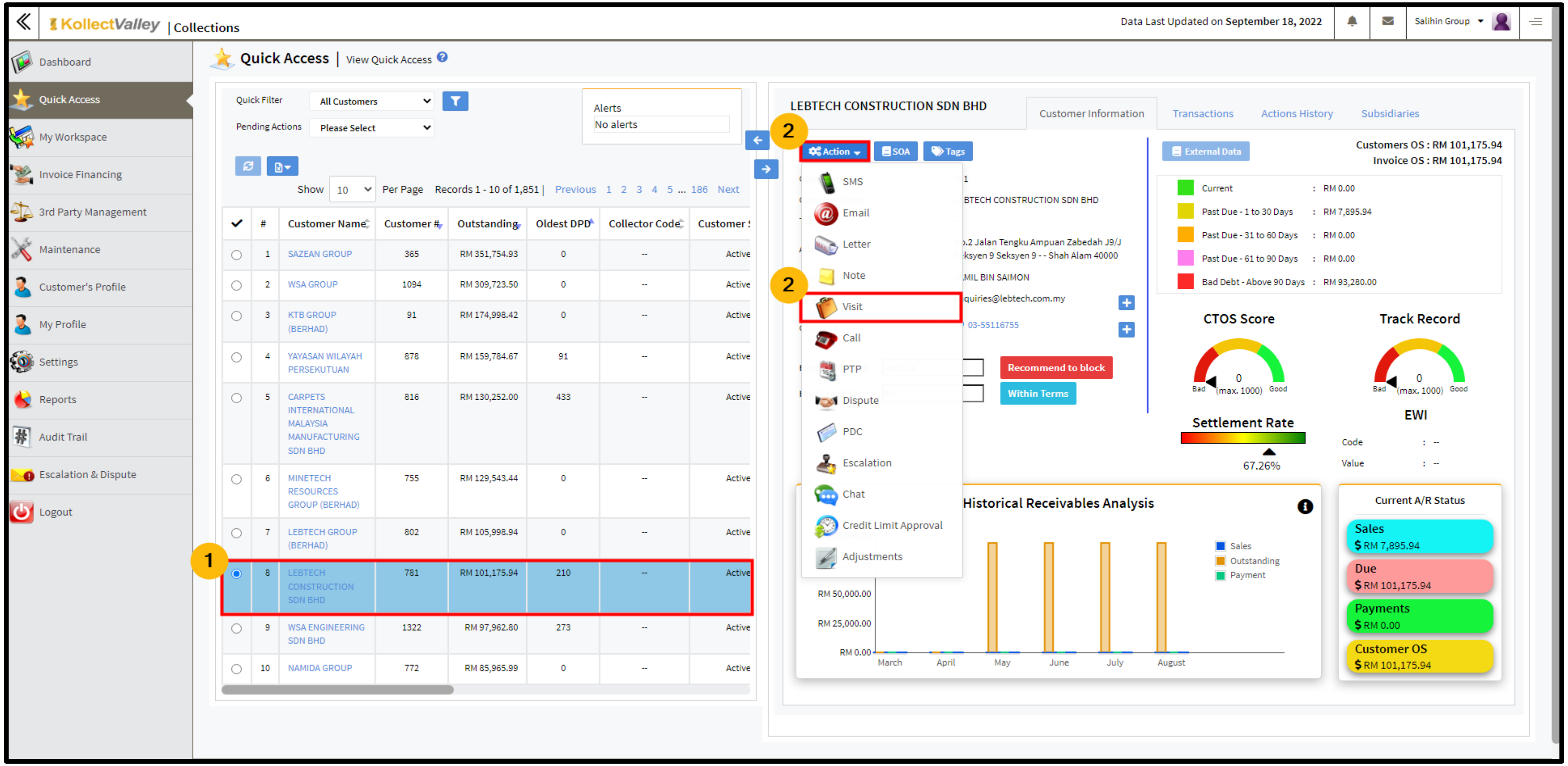
Able to perform Note without reminder action

Scenario 5: Visit Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Visit action.
3. Fill up/Select the required fields.
4. Click ‘Save’ button. Visit action is saved.



Comments

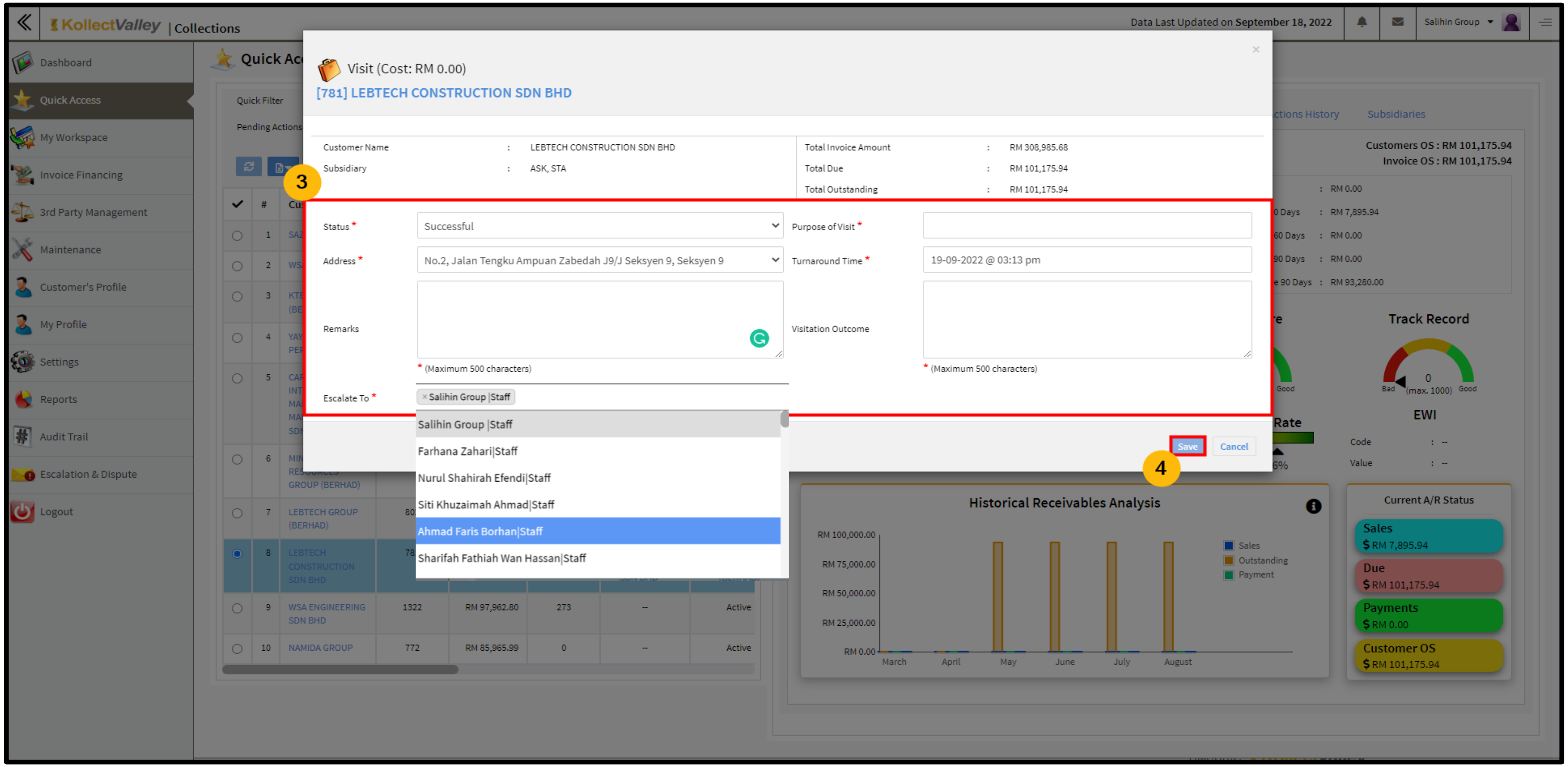
Able to perform Visit action

Scenario 5: Visit Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Visit action.
3. Fill up/Select the required fields.
4. Click ‘Save’ button. Visit action is saved.



Comments

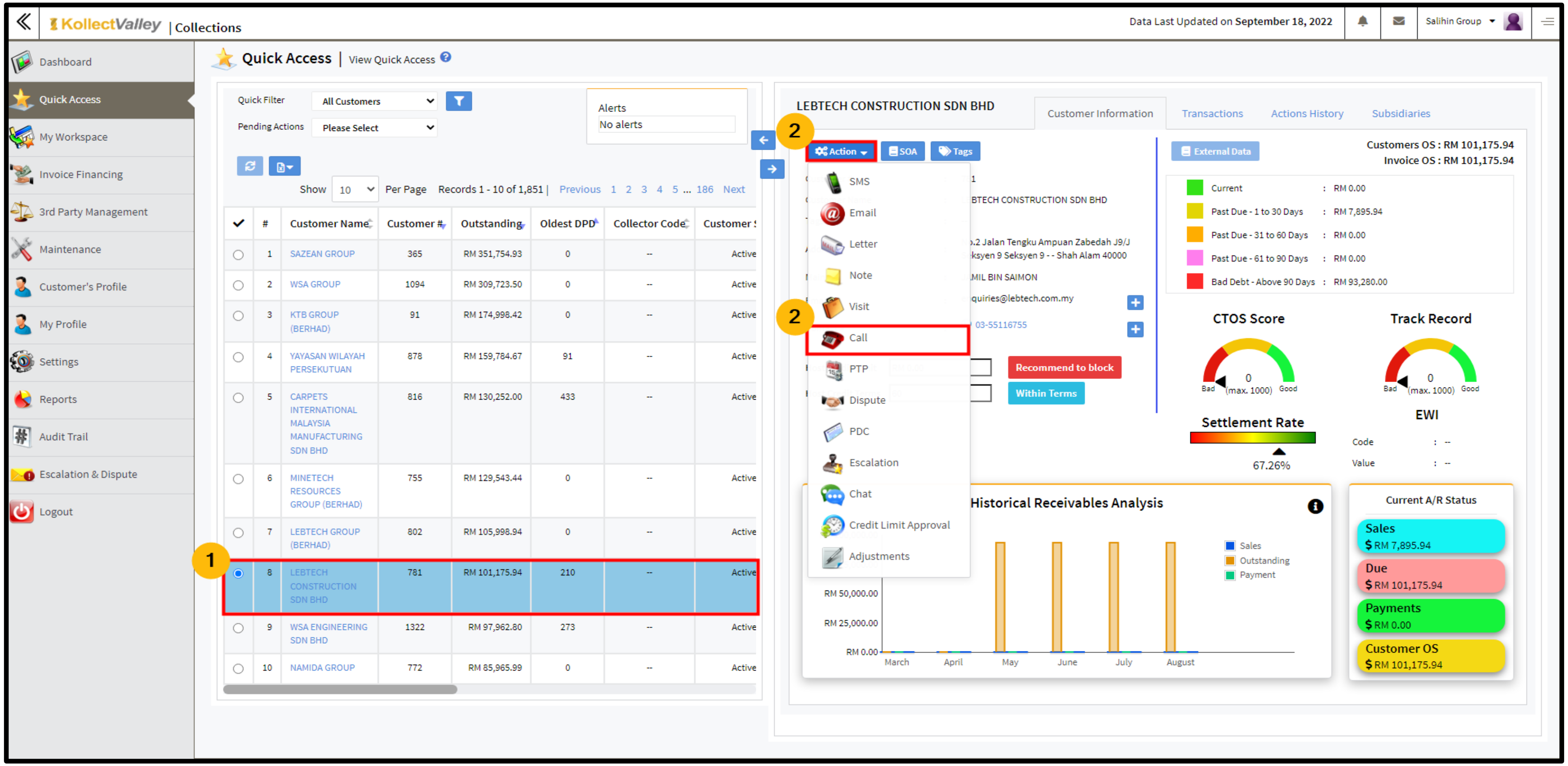
Able to perform Visit action

Scenario 6: Call Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Call action.
3. Add details such as phone no/ Select the required fields.
4. Click ‘Save’ button. Call action is saved.



Comments

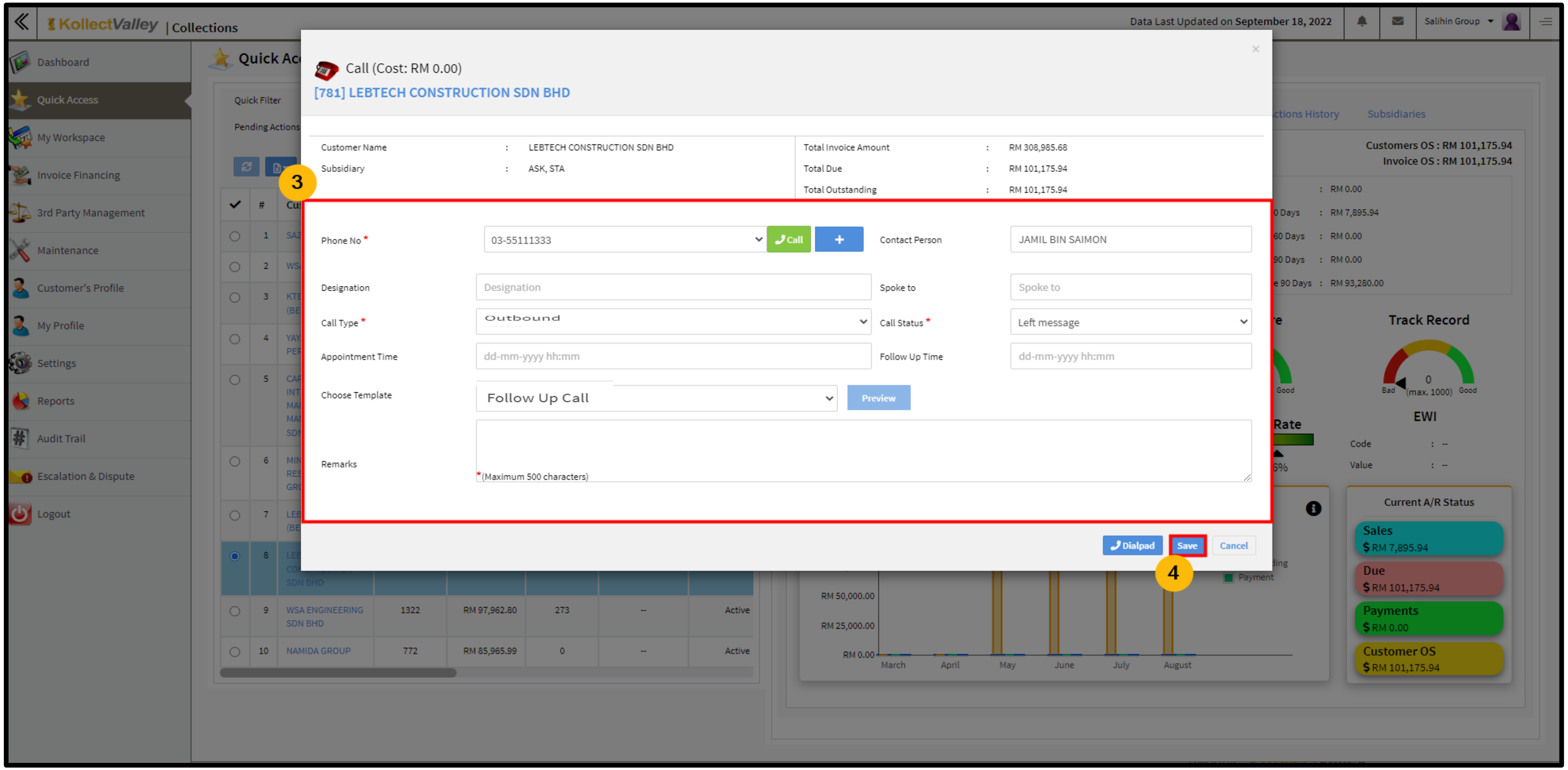
Able to perform Call action

Scenario 6: Call Action

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create Call action.
3. Add details such as phone no/ Select the required fields.
4. Click ‘Save’ button. Call action is saved.



Comments

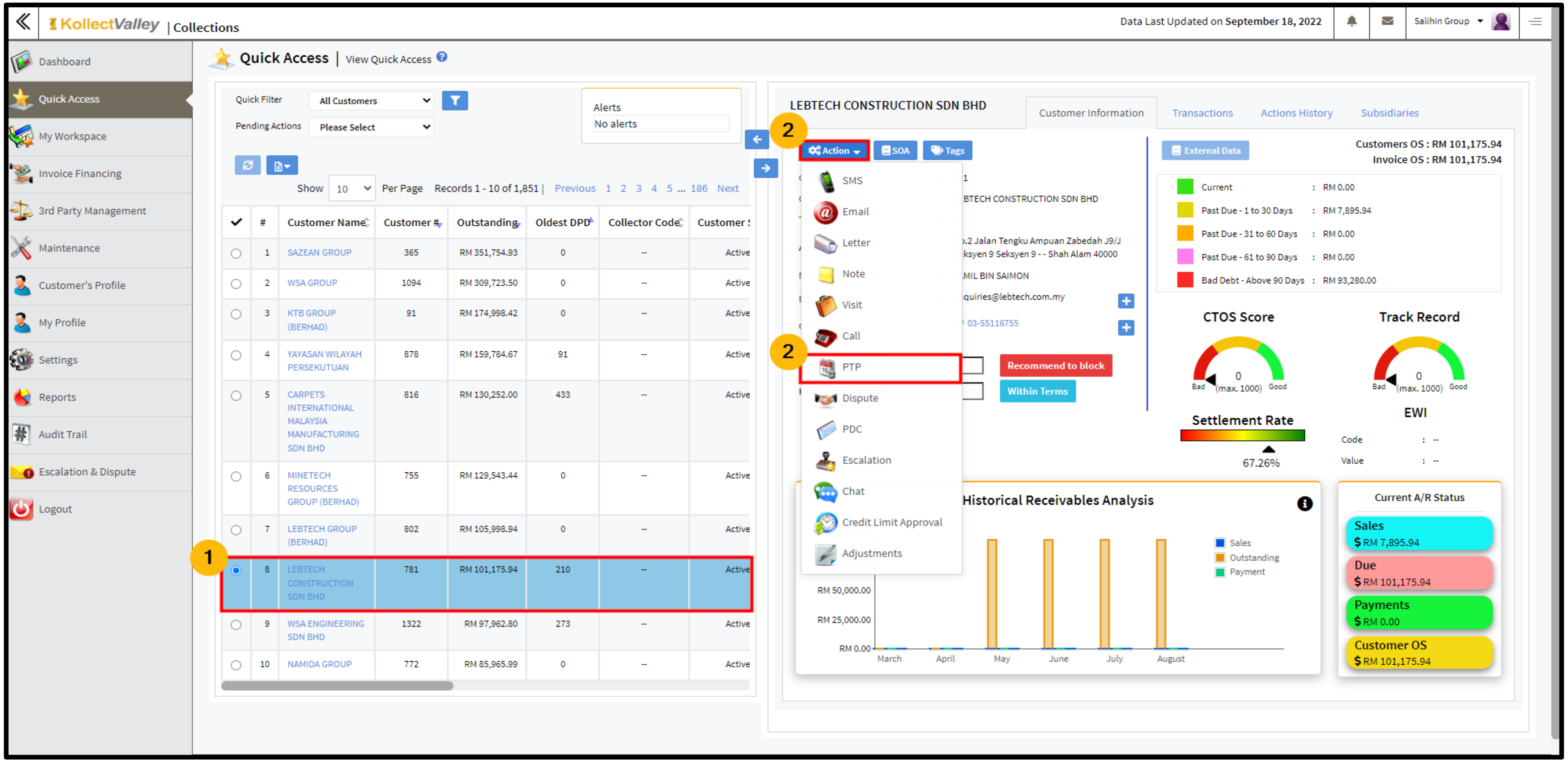
Able to perform Call action

Scenario 7: PTP Action - Oldest Overdue Date

Status: Completed

Scenario

1. Select customer
2. Click 'Action' dropdown menu and Create PTP action.
3. Fill up/Select the required fields. When Apportionment Type = Oldest Overdue Date, the invoice with the oldest overdue date will be shown below.
4. Click 'Save' button. PTP action is saved.



Comments

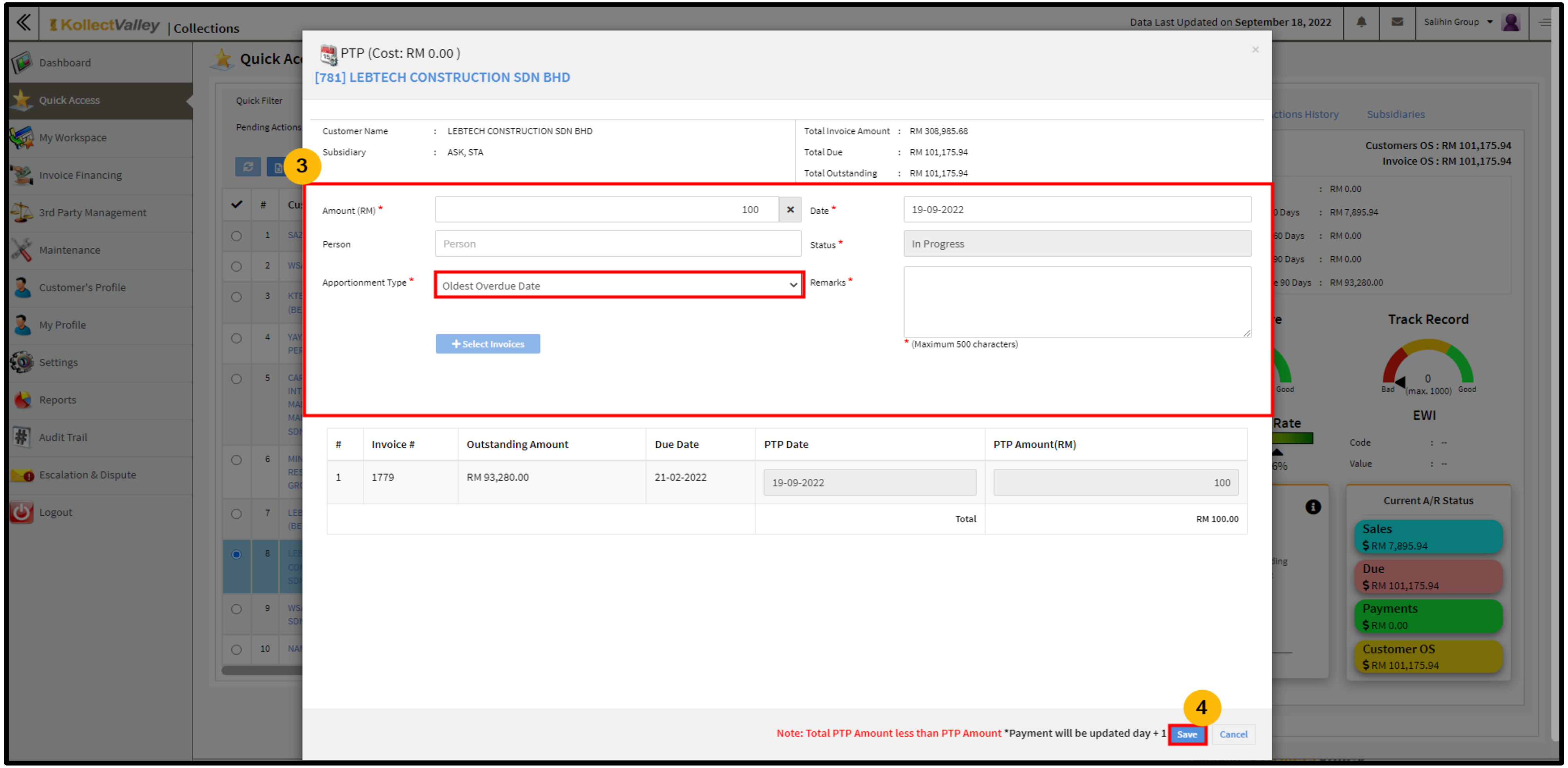
Able to perform PTP with oldest overdue date action

Scenario 7: PTP Action - Oldest Overdue Date

Status: Completed

Scenario

1. Select customer
2. Click ‘Action’ dropdown menu and Create PTP action.
3. Fill up/Select the required fields. When Apportionment Type = Oldest Overdue Date, the invoice with the oldest overdue date will be shown below.
4. Click ‘Save’ button. PTP action is saved.



Comments

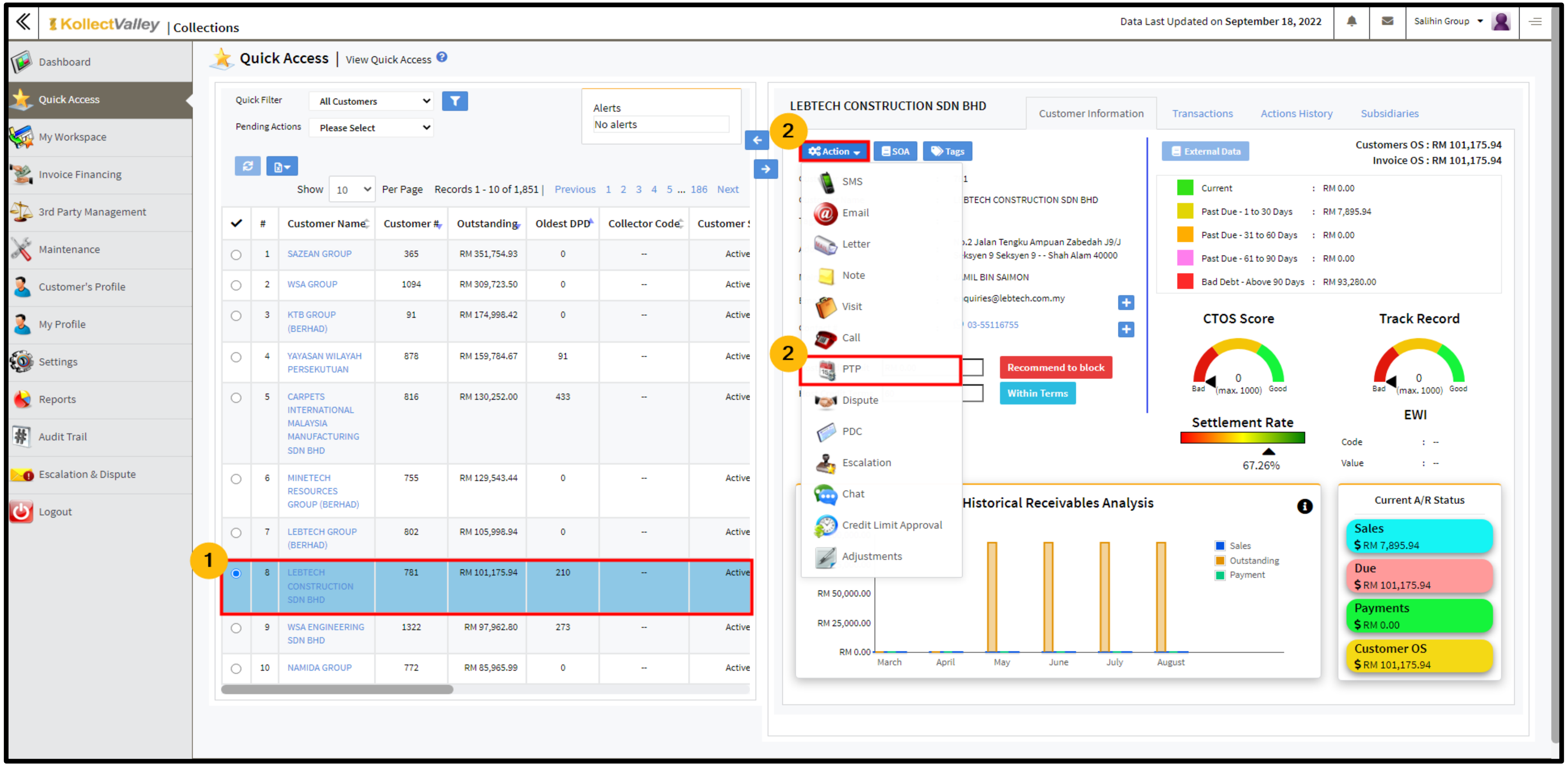
Able to perform PTP with oldest overdue date action

Scenario 8: PTP Action - Per Invoice

Status: Completed

Scenario

1. Select customer.
2. Click 'Action' dropdown menu and Create PTP action.
3. Fill up/Select the required fields.
4. Apportionment Type = Per invoice. Click Select Invoice button.
5. A list of invoices associated with the customer will be shown. Select invoices.
6. Adjust Amount promised to be paid for each invoice.
7. Click Save button. Action saved.



Comments

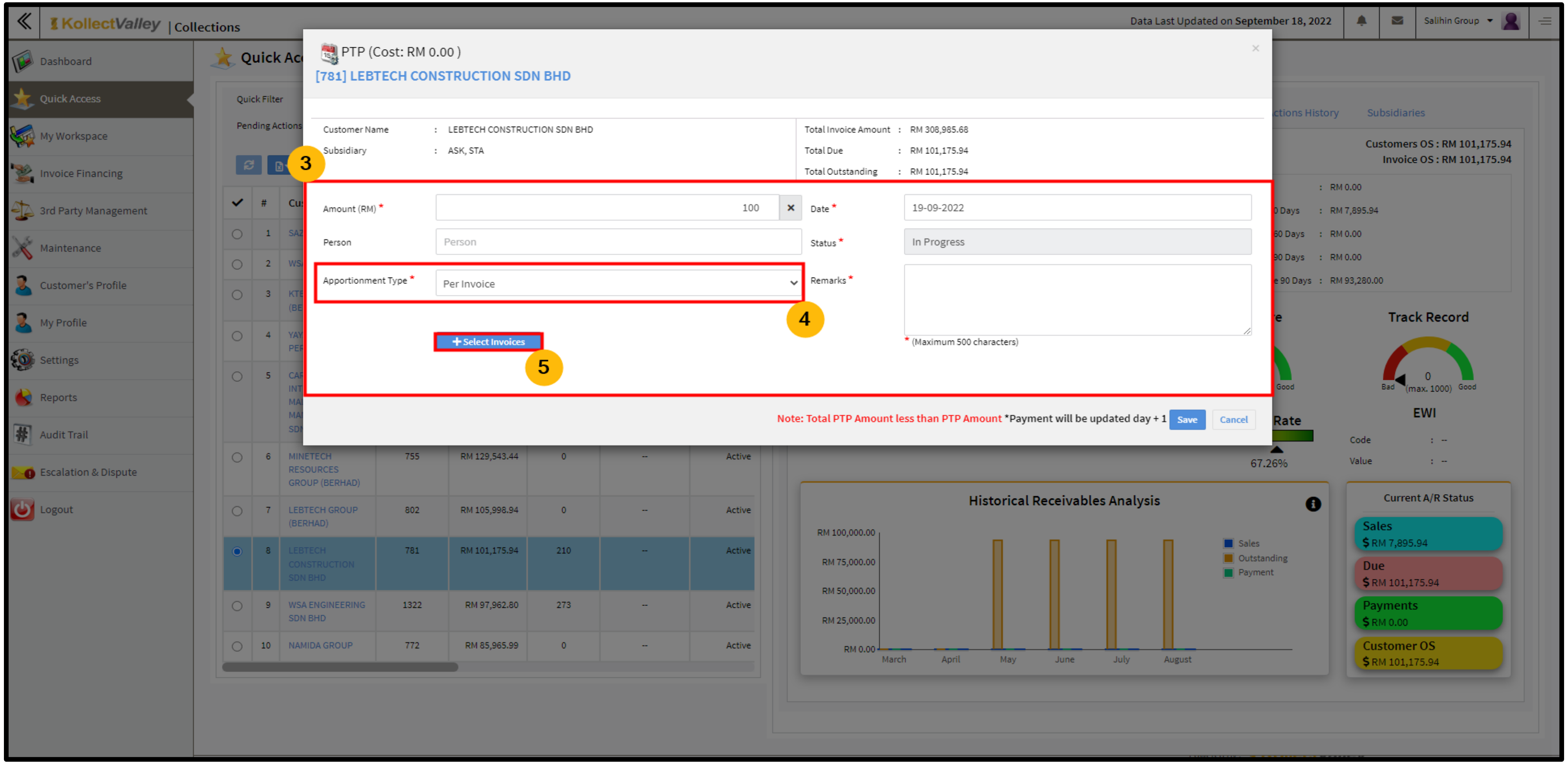
Able to perform PTP with per invoice action

Scenario 8: PTP Action - Per Invoice

Status: Completed

Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create PTP action.
3. Fill up/Select the required fields.
4. Apportionment Type = Per invoice. Click Select Invoice button.
5. A list of invoices associated with the customer will be shown. Select invoices.
6. Adjust Amount promised to be paid for each invoice.
7. Click Save button. Action saved.



Comments

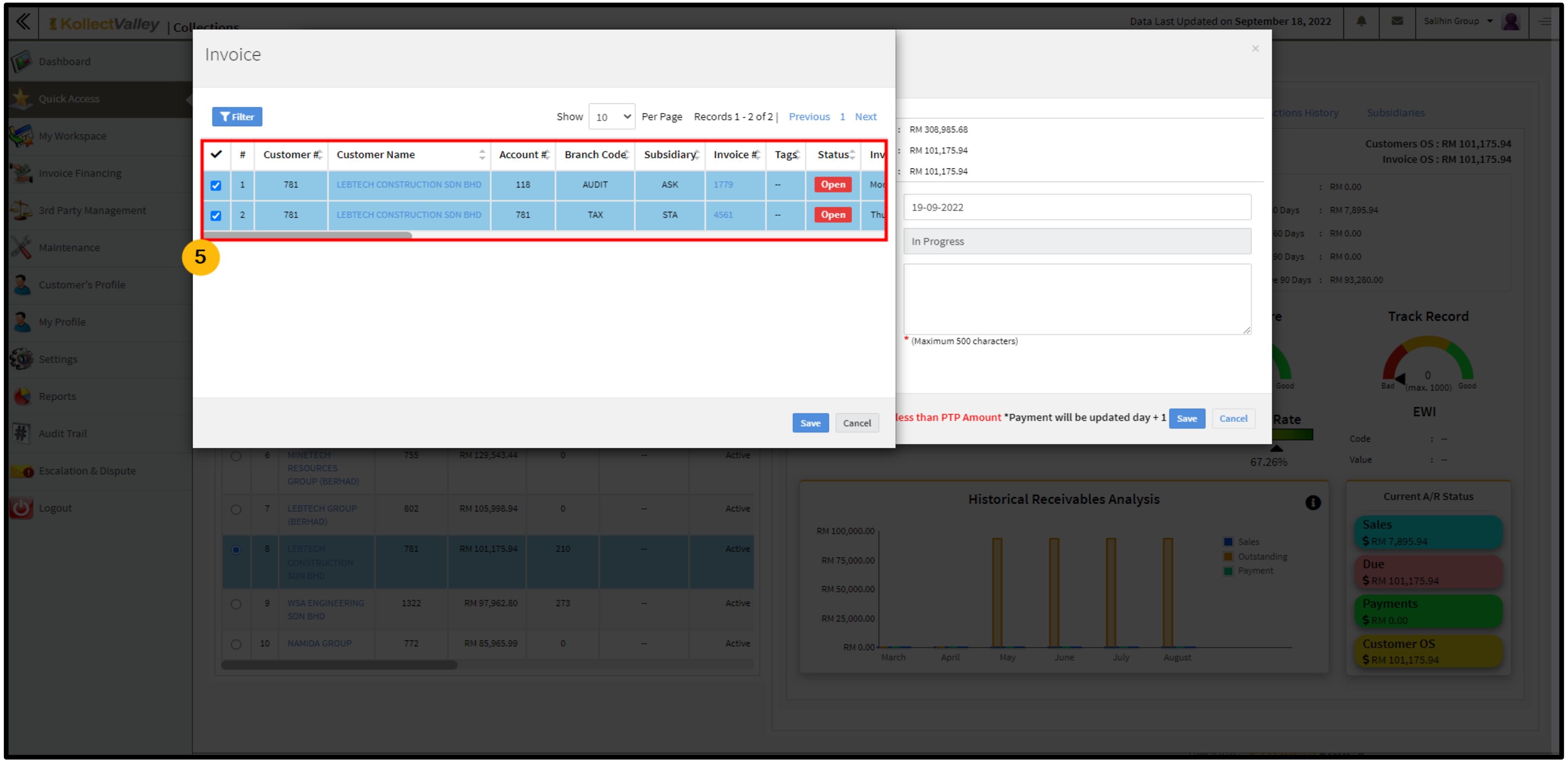
Able to perform PTP with per invoice action

Scenario 8: PTP Action - Per Invoice

Status: Completed

Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create PTP action.
3. Fill up/Select the required fields.
4. Apportionment Type = Per invoice. Click Select Invoice button.
5. A list of invoices associated with the customer will be shown. Select invoices.
6. Adjust Amount promised to be paid for each invoice.
7. Click Save button. Action saved.



Comments

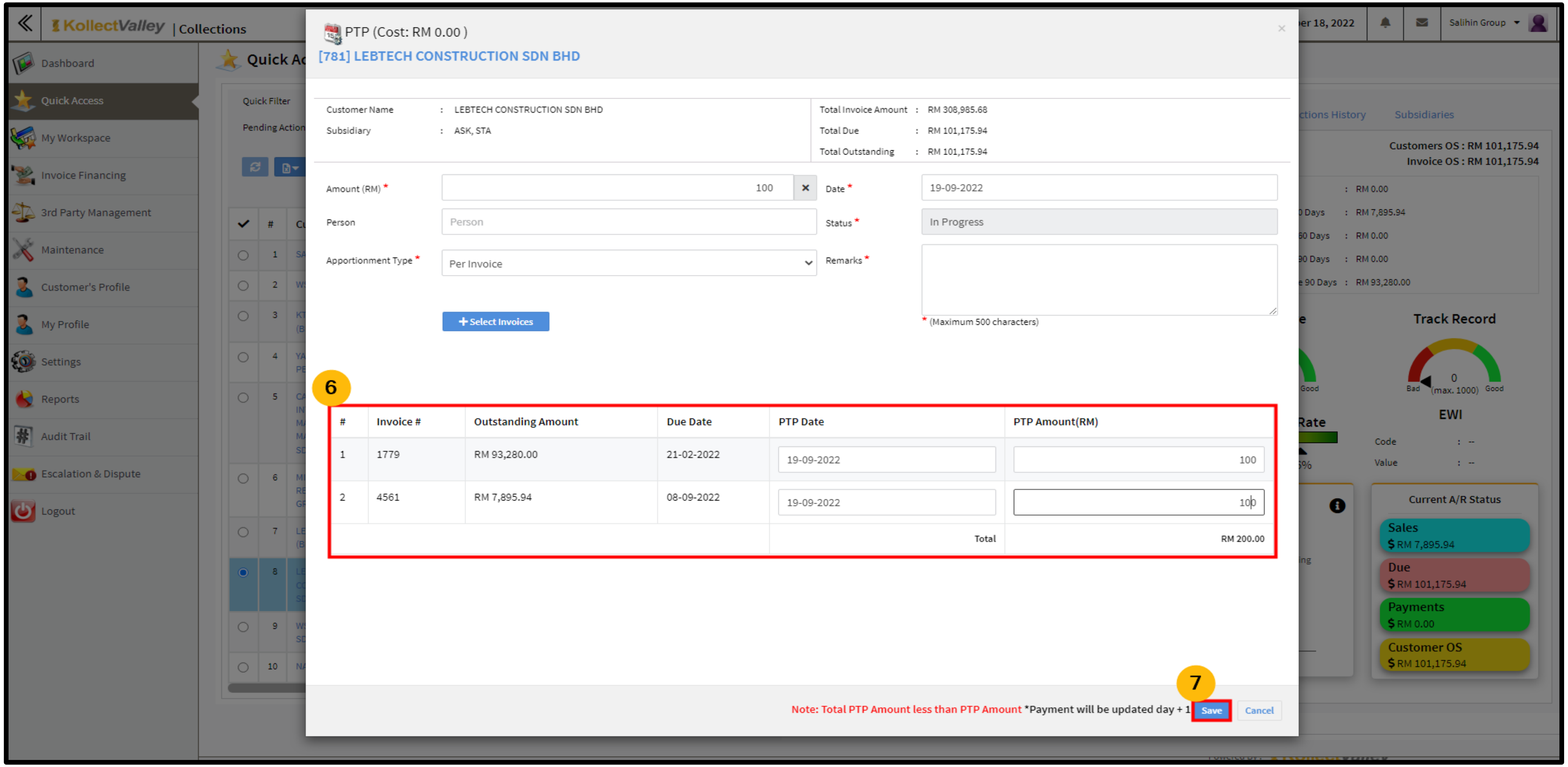
Able to perform PTP with per invoice action

Scenario 8: PTP Action - Per Invoice

Status: Completed

Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create PTP action.
3. Fill up/Select the required fields.
4. Apportionment Type = Per invoice. Click Select Invoice button.
5. A list of invoices associated with the customer will be shown. Select invoices.
6. Adjust Amount promised to be paid for each invoice.
7. Click Save button. Action saved.



Comments

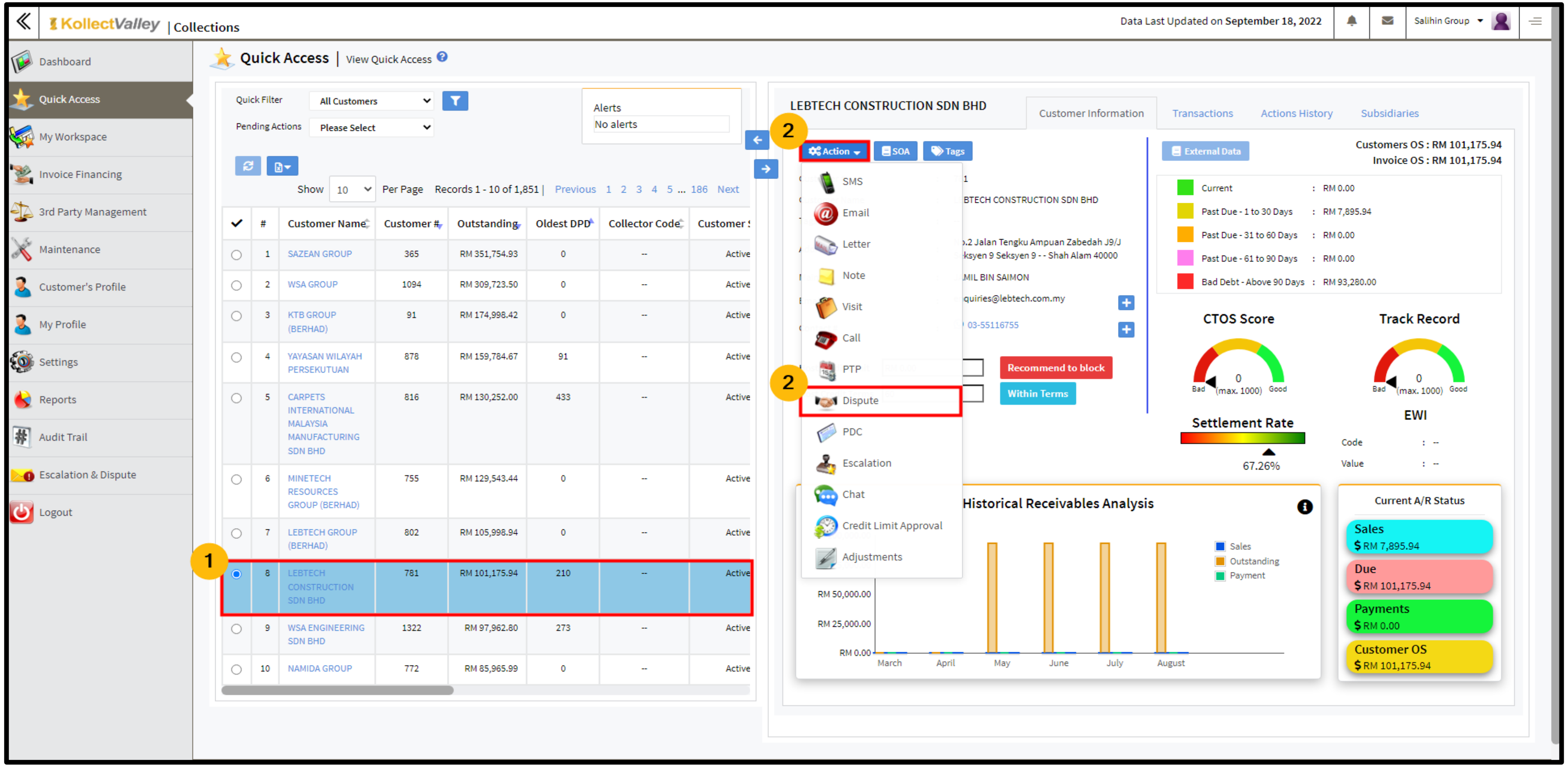
Able to perform PTP with per invoice action

Scenario 9: Dispute Action

Status: Completed

Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create Dispute action.
3. Fill up/Select the required fields.
4. Click Save button. Action saved.



Comments

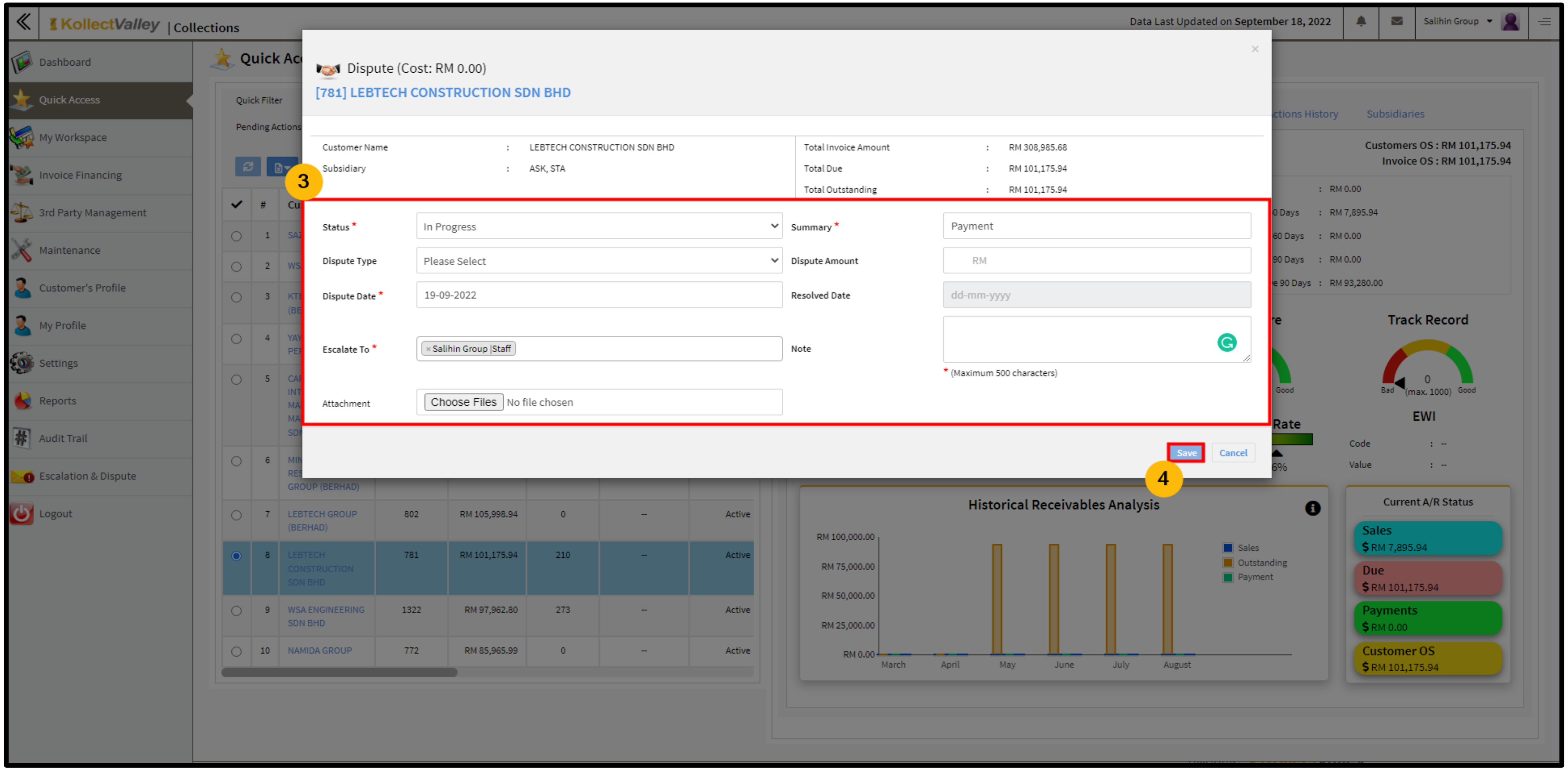
Able to perform Dispute action

Scenario 9: Dispute Action

Status: Completed

Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create Dispute action.
3. Fill up/Select the required fields.
4. Click Save button. Action saved.



Comments

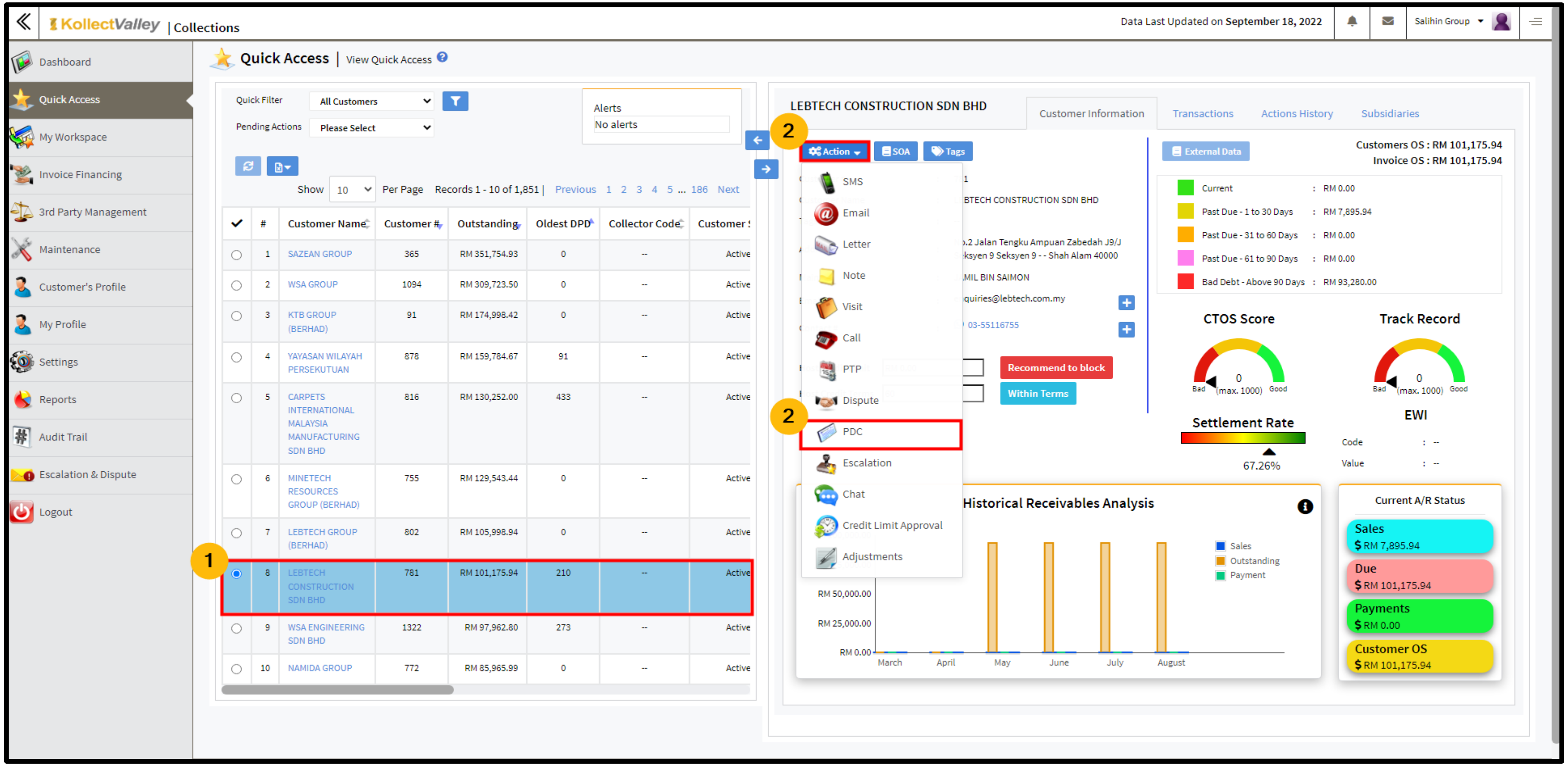
Able to perform Dispute action

Scenario 10: PDC Action

Status: Completed

Scenario

1. Select customer.
2. Click 'Action' dropdown menu and Create PDC action.
3. Fill up/Select the required fields.
4. Click Save button. Action saved.



Comments

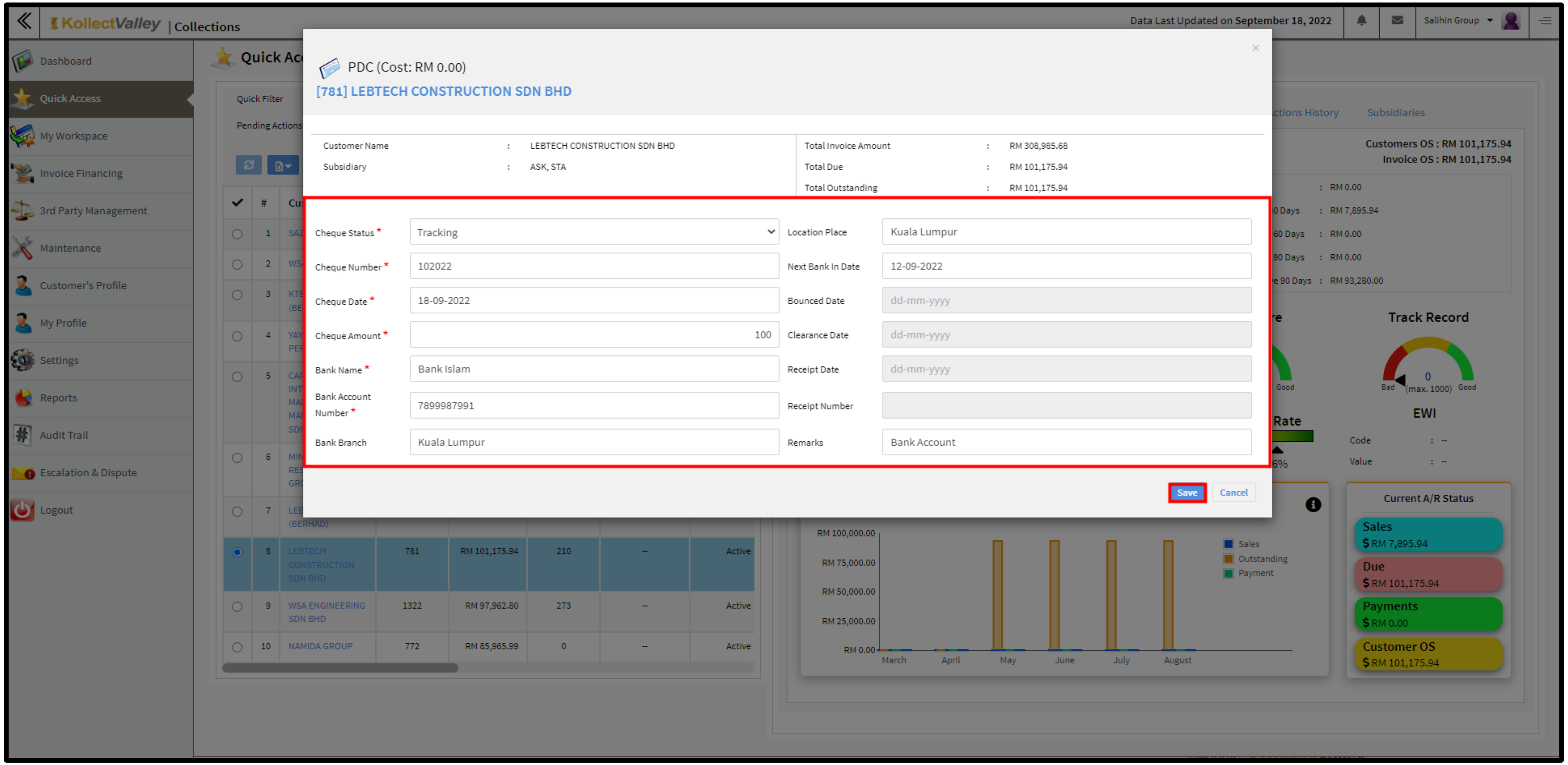
Able to perform PDC action

Scenario 10: PDC Action

Status: Completed

Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create PDC action.
3. Fill up/Select the required fields.
4. Click Save button. Action saved.



Comments

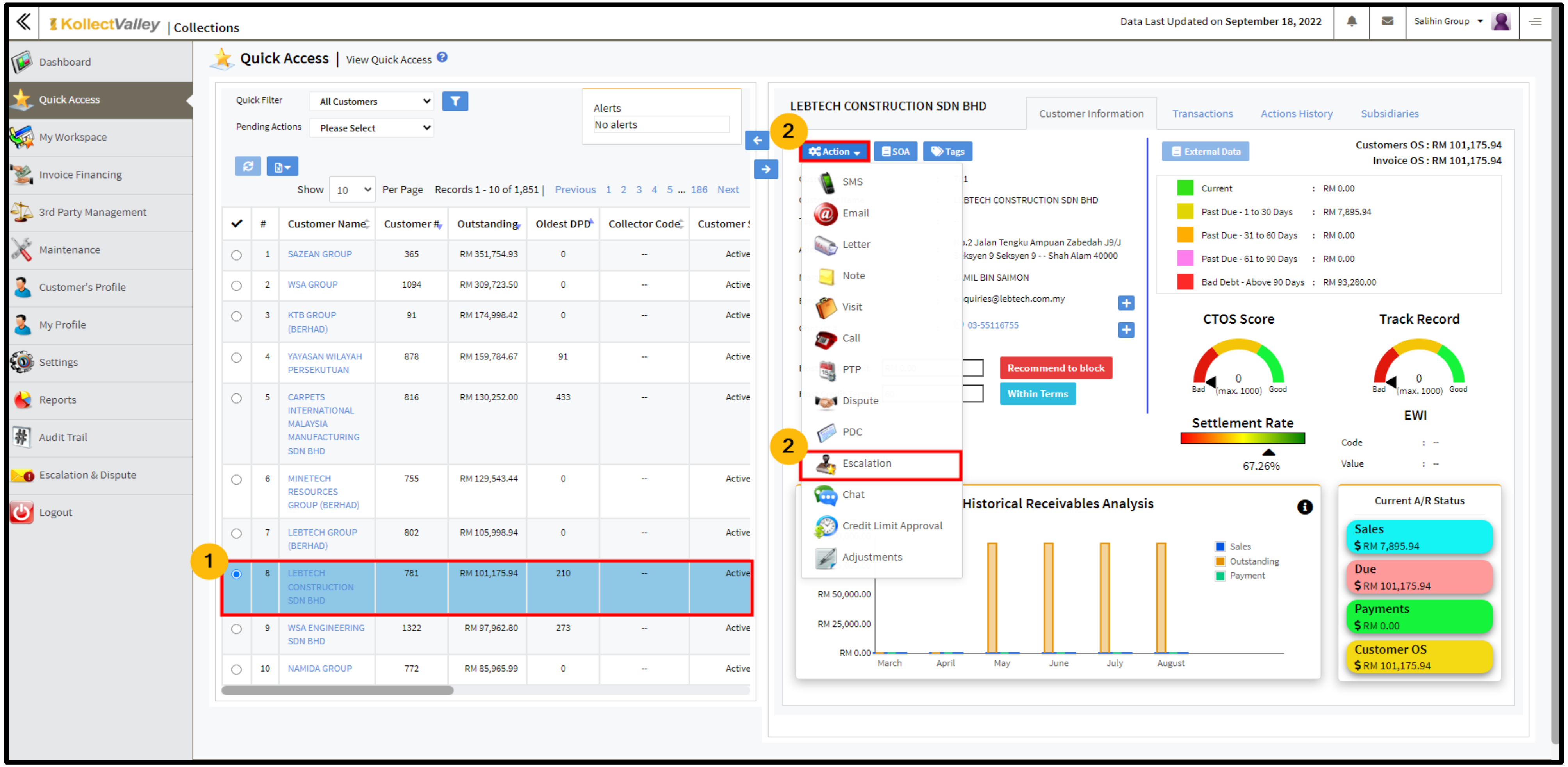
Able to perform PDC action

Scenario 11: Escalation Action

Status: Completed

Scenario

1. Select customer.
2. Click 'Action' dropdown menu and Create Escalation action.
3. Fill up/Select the required fields.
4. Click Save button. Action saved.



Comments

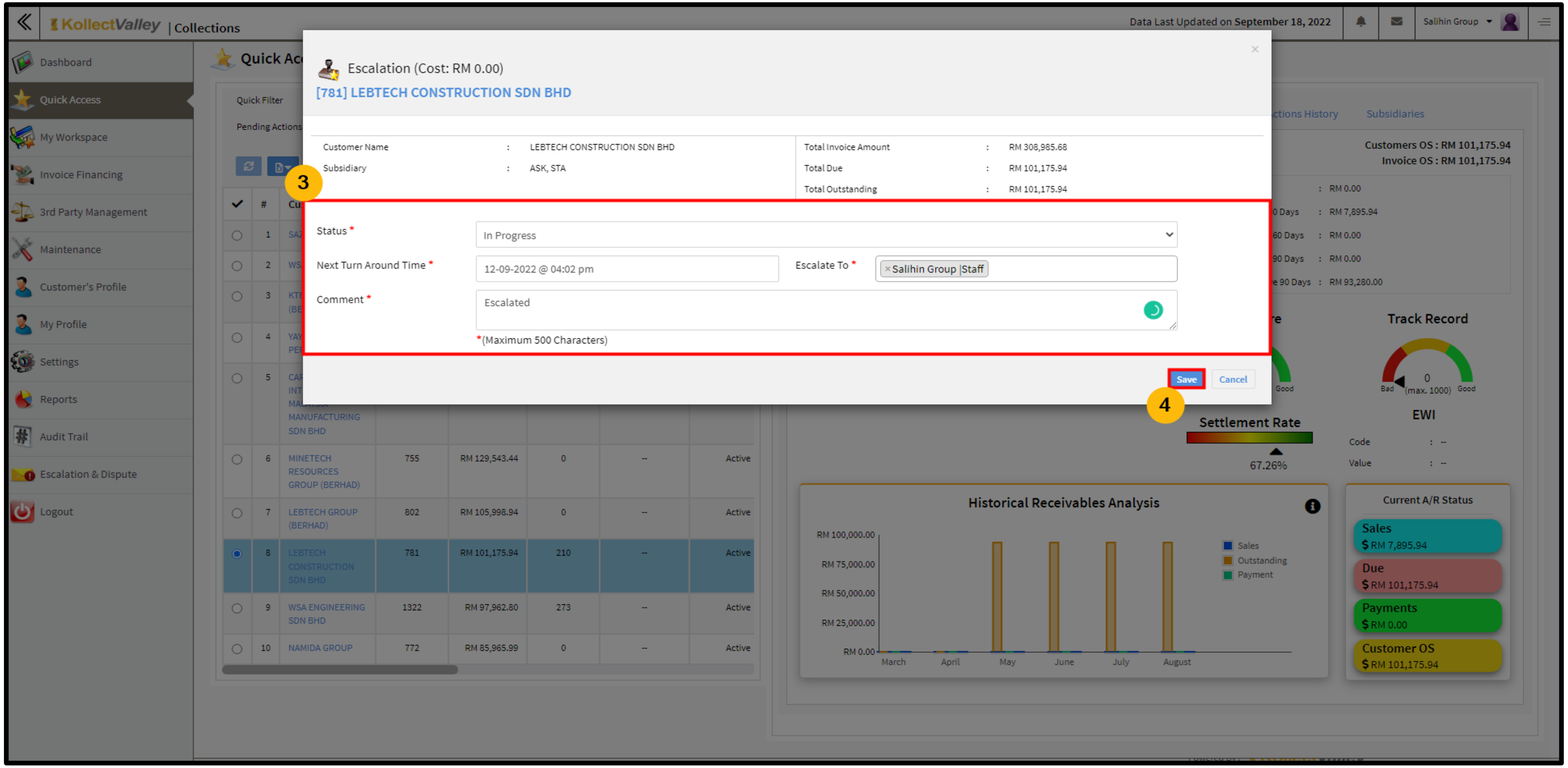
Able to perform Escalation action

Scenario 11: Escalation Action

Status: Completed

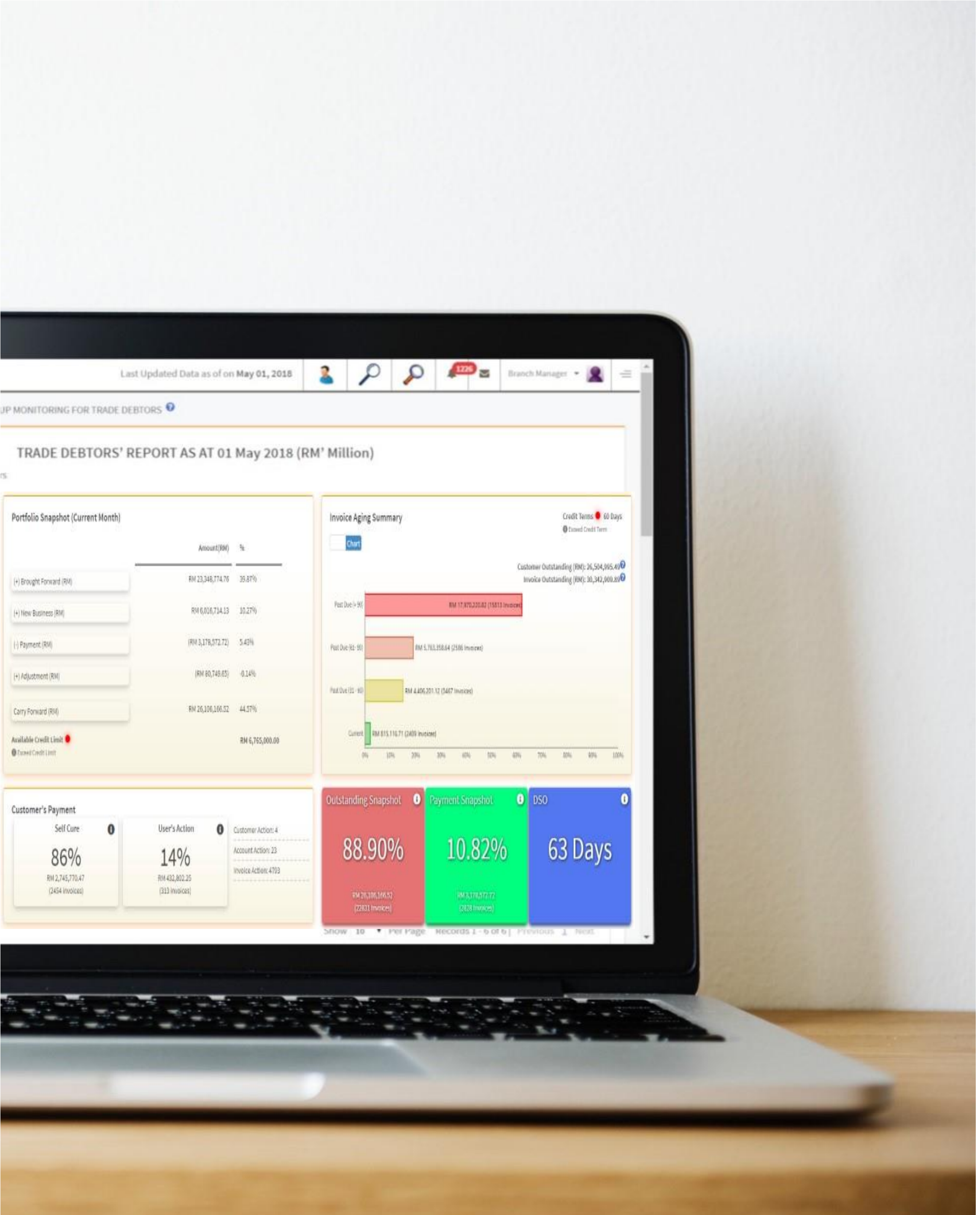
Scenario

1. Select customer.
2. Click ‘Action’ dropdown menu and Create Escalation action.
3. Fill up/Select the required fields.
4. Click Save button. Action saved.



Comments

Able to perform Escalation action



Thank You

Disclaimer: Feature and functions only.