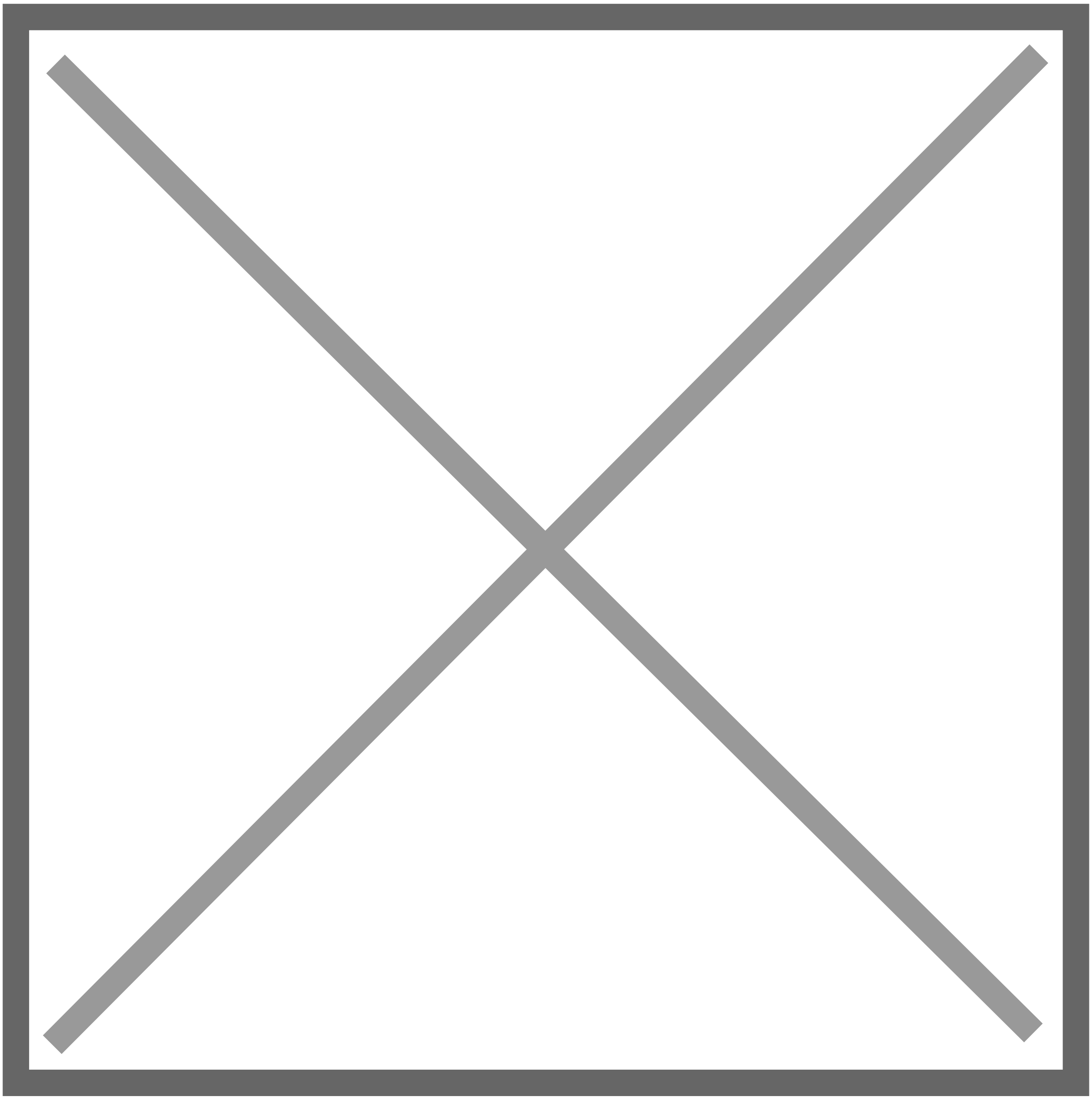
Debtors Setup

This is where the user creates a new Debtor or search for an existing one

System buttons:

Search button allows a user to search using Basic Search Tab and Custom Search Tab

At the top of the screen under the Debtors Setup heading, there are 5 buttons and three drop down lists



Expand button – to shown more search filter criteria or Contract button to show less search filter criteria

Add button– to create a new Debtor.

Edit button –to make changes onto an existing Debtor.

Delete button – to delete an existing Debtor provided the Debtor has no transactions linked to it.

Print Export Drop Down allows one to select from the following options:

Print button - print all the debtors listed in the system sorted alphabetically

Export Debtors button exports debtors list to Excel spread sheet.

Export Contacts button – exports Contacts to an Excel spread sheet

Import Drop Down allows one to select from the following options:

Import Contacts –Import from the Excel sheet to the system

Import Acct Managers – Accounts can be imported onto the system from the excel spread sheet.

Import Legal Hand Over – Legal Hand Over documents can be imported in CSV format

Extras Drop Down allows one to select from the following options:

Service Level Agreements –Link Service Level Agreement to a Debtor

View Reoccurring Transactions – See what Reoccurring Transactions have been linked to the Debtor.

Basic Search tab, if the debtor’s code in the Basic search Tab or debtor’s name is left blank, this will bring back all the debtors listed in the system sorted alphabetically. If the cursor is placed on Name at the column head, this will sort the names A-Z or Z-A as preferred.

Custom Search tab, Custom search searches according to the category selection on the drop down arrow and the system will bring back all that is selected on the category

This functionality is currently not active

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