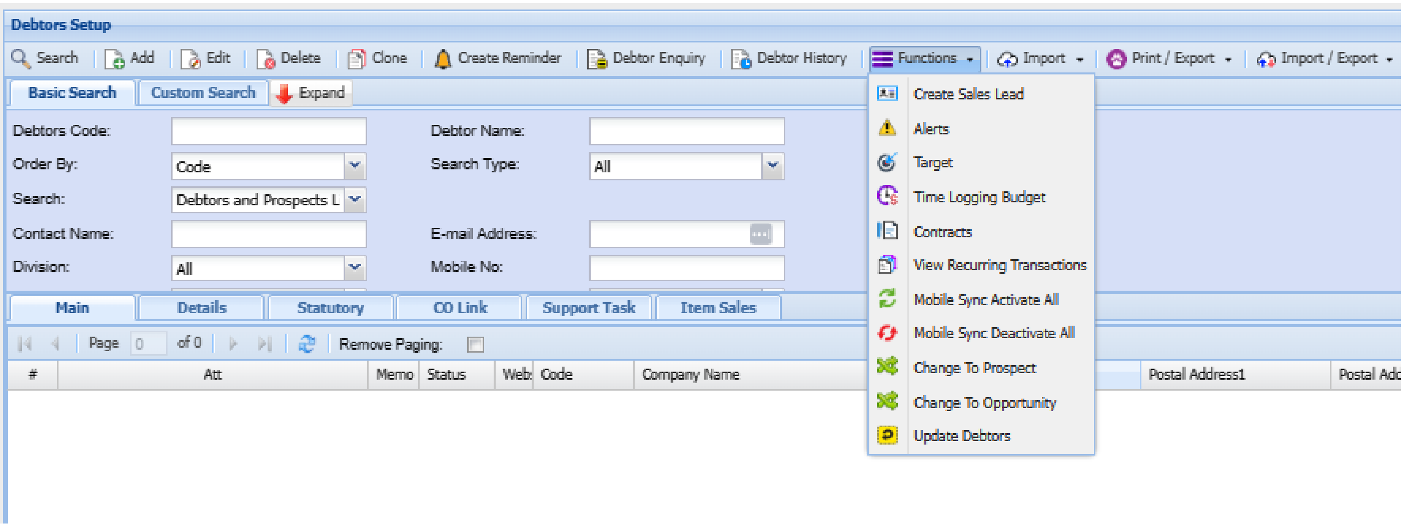
Debtor Functions

Functions Drop Down

Debtors Module> Configuration> Debtor Setup> Functions Drop Down

This drop down defines actions against a Debtor or Customer



Create Sales Lead	Allows you to easily create a sales lead from a debtor or customer screen if they want more business or services without having to recapture all information that already exists within the system.
Alerts	Set up an alert for a customer in the system
Target	Allows you to set monthly targets for the year
Time Logging Budget	Allows you to setup time logging budget
Contracts	Allows you to view maintenance contracts
View Recurring Transactions	Allows you to set and view recurring transactions
Mobile Sync Activate All	Allows you to activate mobile sync on all debtors
Mobile Sync Deactivate All	Allows you to deactivate mobile sync on all debtors
Change to Prospect	Allows you to change a debtor/ customer to a prospect

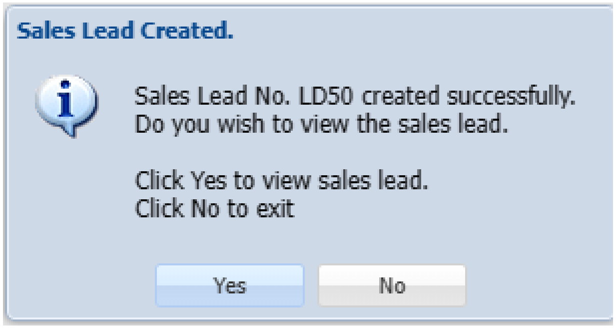
Change to Opportunity	Allows you to change a debtor/ customer to an opportunity
Update Debtors	Allows you to update debtors/ customer properties

Create Sales Lead

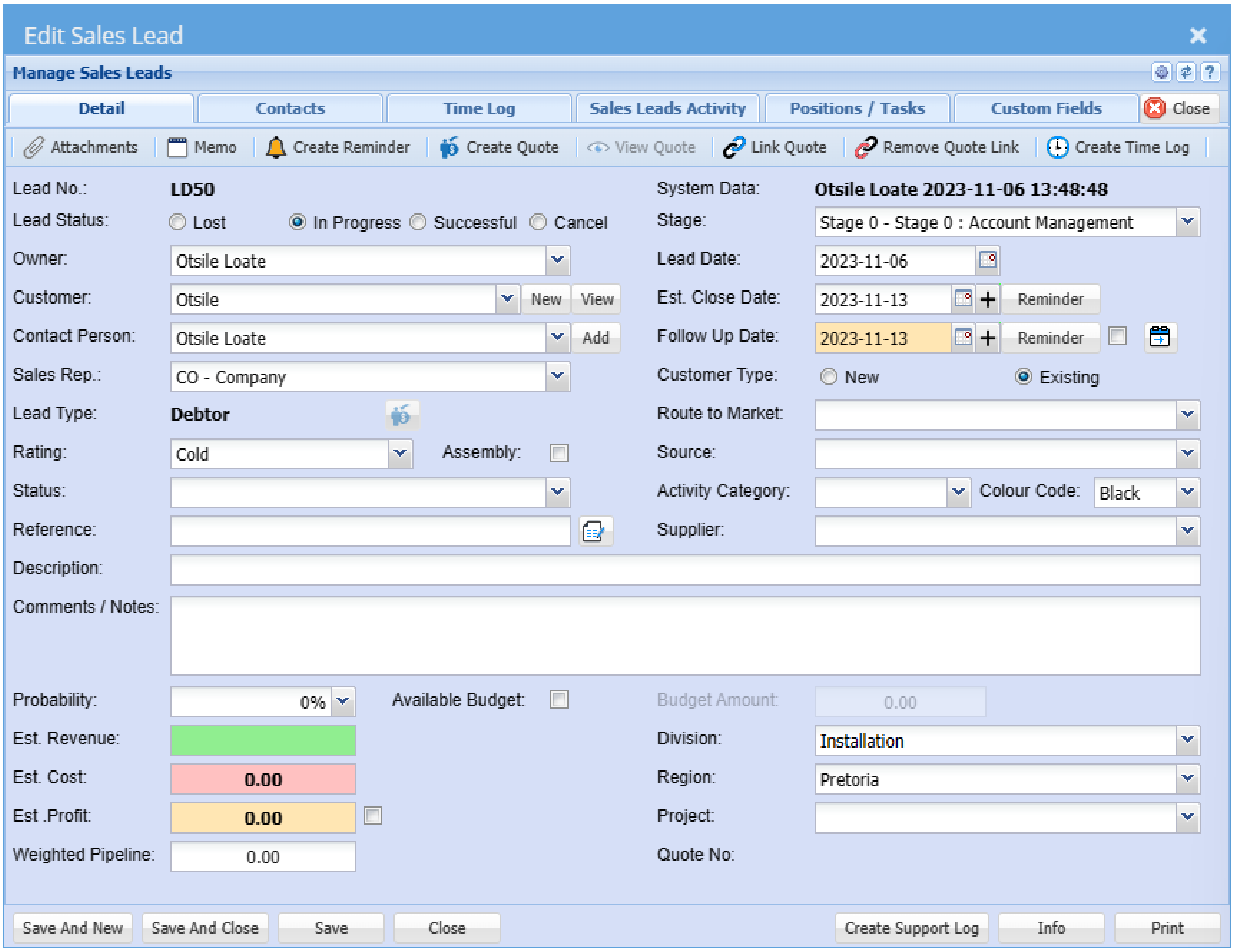
Sometimes your debtors or customers switch to sales leads when there is a change in their interest or want more business from you. The button helps with easily changing the debtor/ customer to a sales lead without having to recapture information that already exists within the system. Creating a sales lead also helps with marketing and sales efforts effectively to maximise revenue and maintain a well-organised debtor/ customer database.

When the sales lead button is selected from the functions drop down the create sales lead screen will pop-up

You need to click yes to create a sales lead



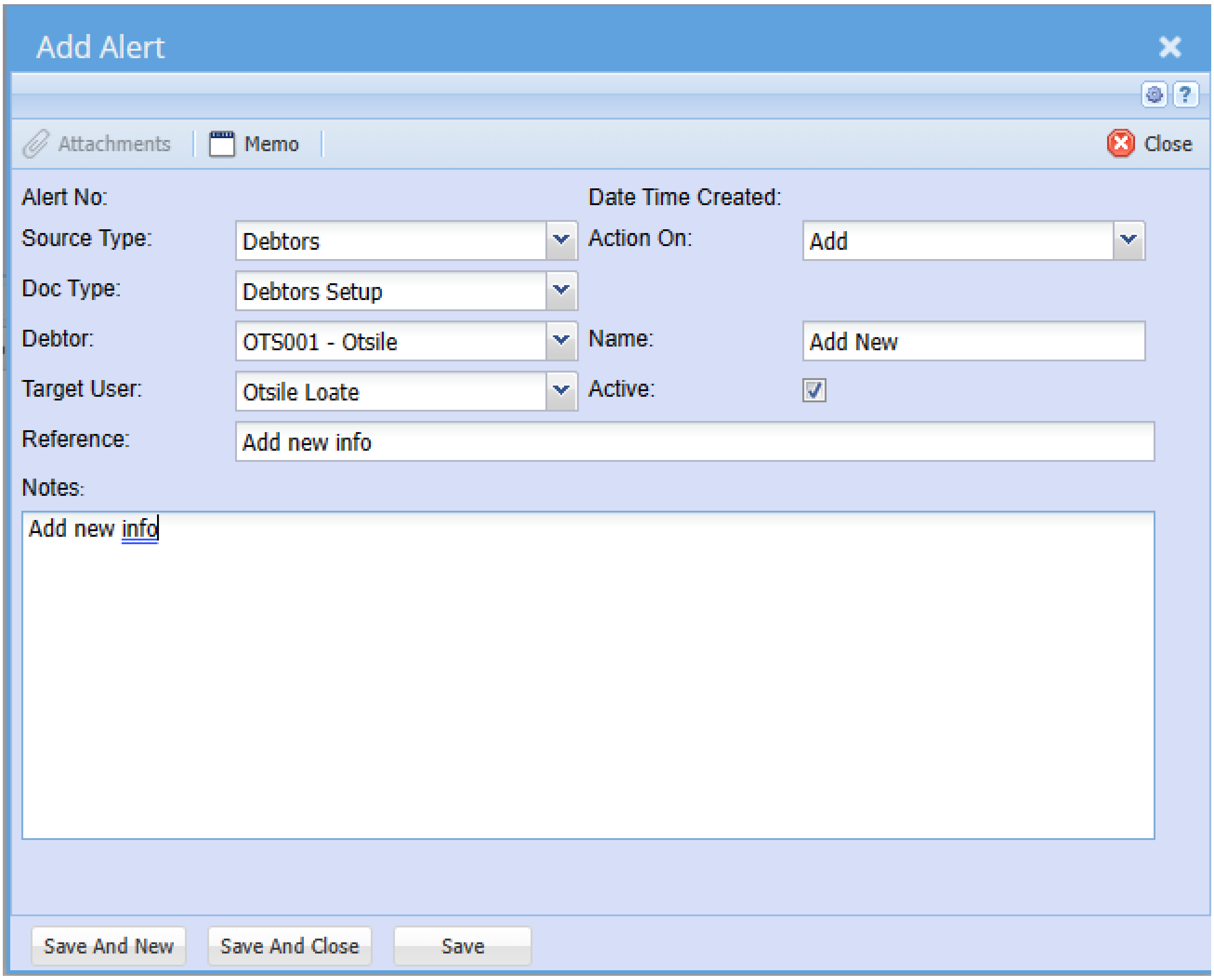
When you click yes it will take you directly to the created sales Lead



Should you want to capture other details on the sales lead screen go to [Sales Lead Process]

Alert

You can create alerts on the system that will notify you when a new client is adding a new document or editing a document for a debtor/ customer.

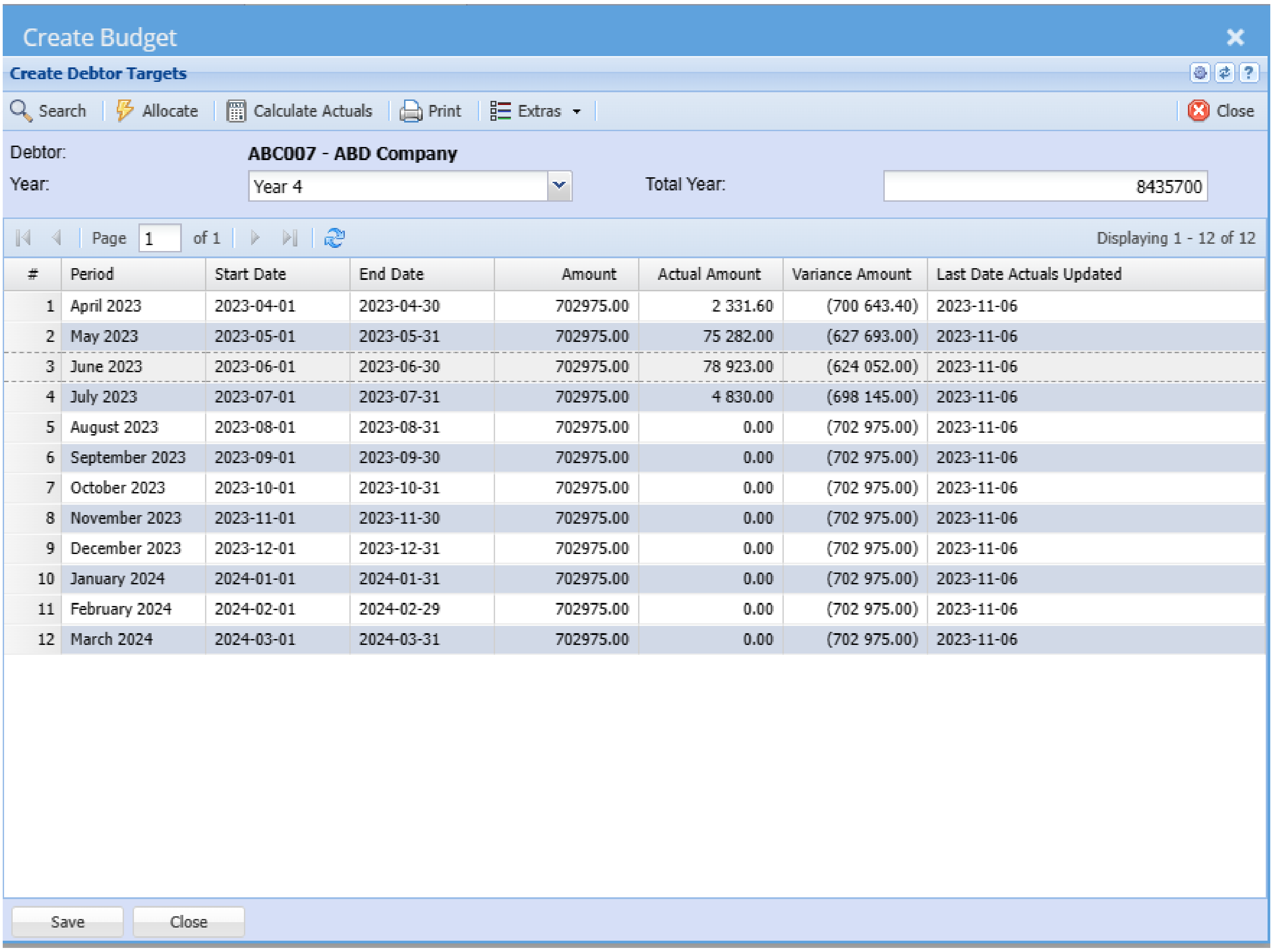


Alert Number	After clicking save the alert number will be generated by the system
Source Type	Select a debtor/ customer type on the drop down
Document Type	Select the document type on the drop down This is where you indicate where you want the alert to be
Debtor	Select debtor/ customer on the drop down
Target User	Enter the user that should receive the alert when adding or editing a debtor/ customer document
Reference	A note that will assist you to recall what the alert
Notes	A detailed note to remind you why you put the alert
Date Time Created	Date and time will be generated by the system after you click save

Action On	This is when should the system send you and alert. When adding or deleting something on the selected source and document type
Name	The name of the person adding the alert
Active	Put a tick on if alert is active and do not put tick if the alert is not active

Targets

Managing debtor/ customer budgets within Huge ERP system is crucial for maintaining healthy cash flow, reducing the risk of bad debt and ensuring that the debtor/customer credit policies are consistently enforced. It allows you to strike a balance between extending credit to debtors/ customers and minimising financial risk.



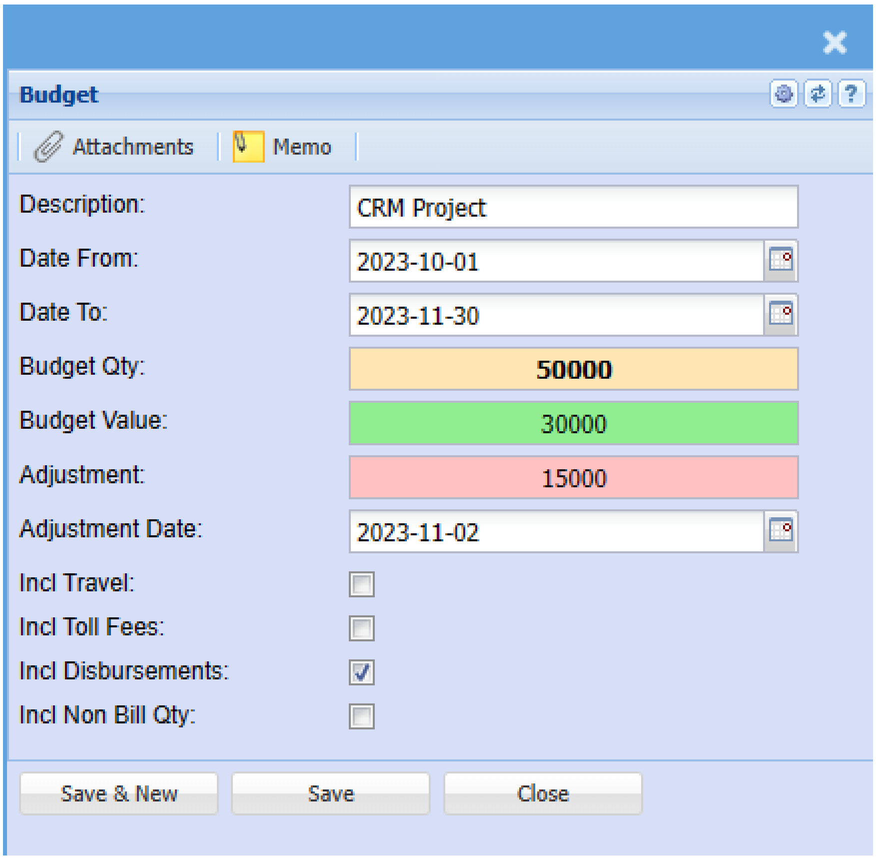
#	Period	Start Date	End Date	Amount	Actual Amount	Variance Amount	Last Date Actuals Updated
1	April 2023	2023-04-01	2023-04-30	702975.00	2 331.60	(700 643.40)	2023-11-06
2	May 2023	2023-05-01	2023-05-31	702975.00	75 282.00	(627 693.00)	2023-11-06
3	June 2023	2023-06-01	2023-06-30	702975.00	78 923.00	(624 052.00)	2023-11-06
4	July 2023	2023-07-01	2023-07-31	702975.00	4 830.00	(698 145.00)	2023-11-06
5	August 2023	2023-08-01	2023-08-31	702975.00	0.00	(702 975.00)	2023-11-06
6	September 2023	2023-09-01	2023-09-30	702975.00	0.00	(702 975.00)	2023-11-06
7	October 2023	2023-10-01	2023-10-31	702975.00	0.00	(702 975.00)	2023-11-06
8	November 2023	2023-11-01	2023-11-30	702975.00	0.00	(702 975.00)	2023-11-06
9	December 2023	2023-12-01	2023-12-31	702975.00	0.00	(702 975.00)	2023-11-06
10	January 2024	2024-01-01	2024-01-31	702975.00	0.00	(702 975.00)	2023-11-06
11	February 2024	2024-02-01	2024-02-29	702975.00	0.00	(702 975.00)	2023-11-06
12	March 2024	2024-03-01	2024-03-31	702975.00	0.00	(702 975.00)	2023-11-06

Period	This reflects the month of budget
Start Date	The start date of the targeted budget

End Date	The end date of the targeted budget
Amount	The budgeted Amount
Actual Amount	The actual amount made in that period
Variance Amount	The budget amount minus the actual amount equals to variance amount (Difference between amount and actual amount)
Last Date Actuals Updated	This shows the last date the budget was updated.

Time Logging Budget

Time log budgets within Huge ERP allow you to effectively manage time-related resources, control costs, and achieve operational excellence. Time logging budgets are designed to enhance your efficiency and profitability through smart time management.

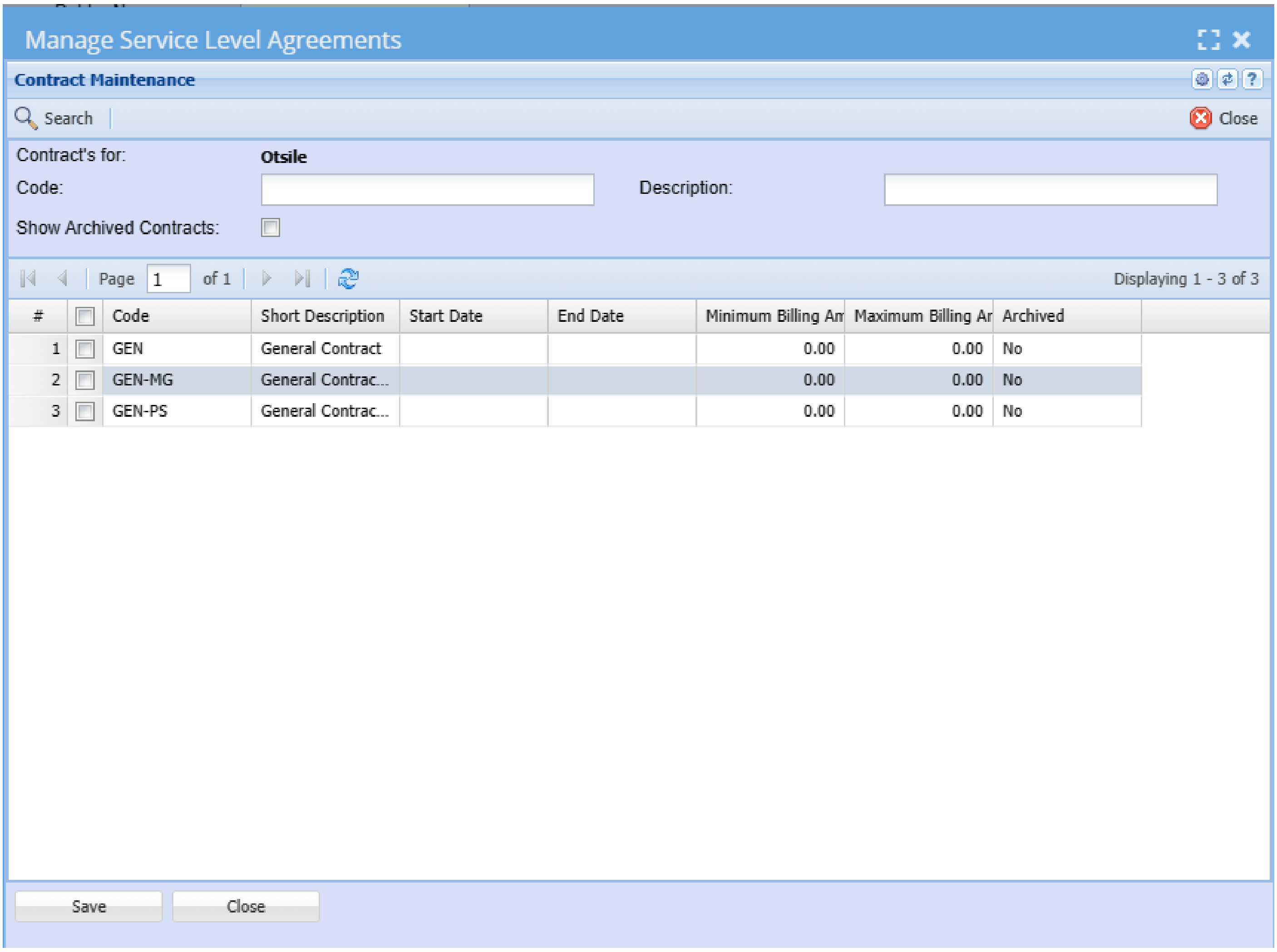


Description	Add a short heading describing the why you are creating a time logging budget
Date From	Add the start date of the project

Date To	Add the end date of the project
Budget Qty	Add the budget amount agreed on with the debtor/ customer
Budget Value	Add budget value agreed on with the debtor/ customer
Adjustments	If there are any adjustments to the budget add them here
Adjustment Date	This is the date when the adjustments were made between the two parties
Incl Travel	Put a tick on if the budget amount or value includes traveling
Incl Toll Fees	Put a tick on if the budget amount or value includes Toll fees
Incl Disbursements	Put a tick on if the budget amount or value includes disbursements
Incl Non-Bill Qty	Put a tick on if the budget amount or value includes Non-Bill Qty

Contracts

You can view all service-level agreements or contract maintenance for a debtor/ customer.

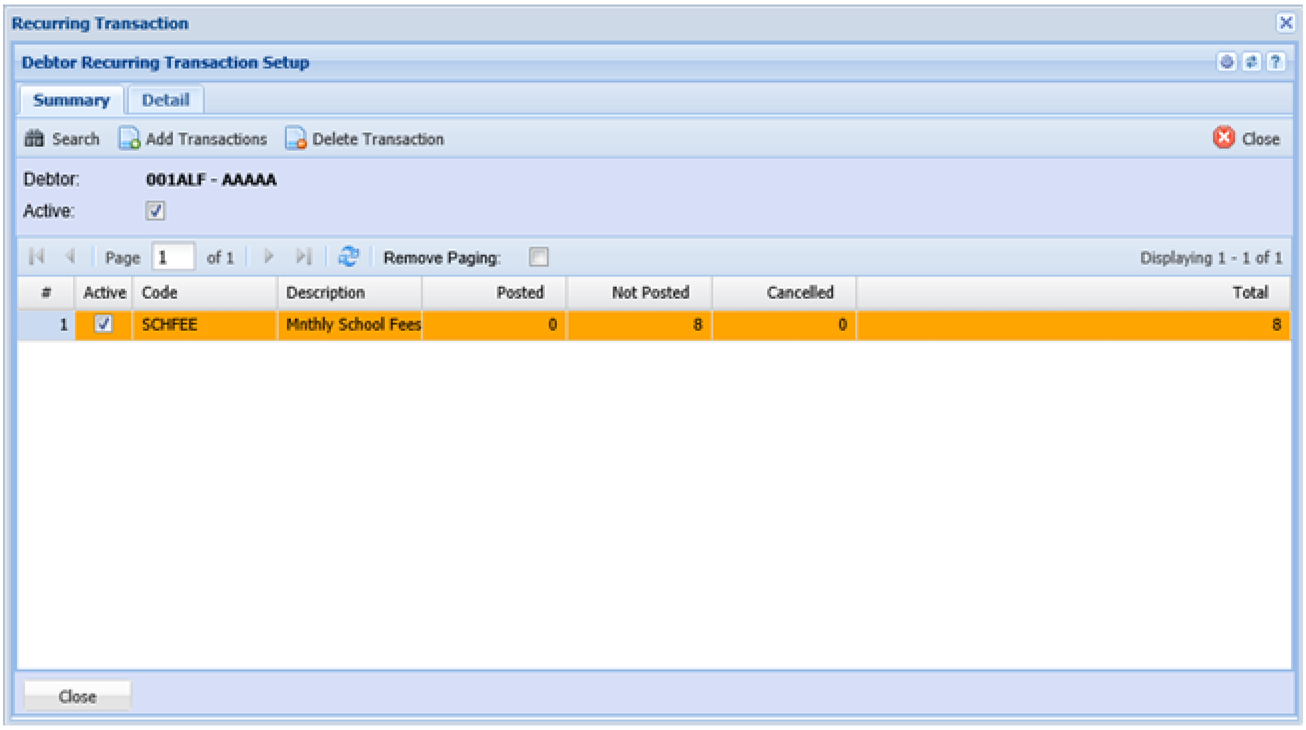


View Recurring Transactions

Debtors module> Configuration>Debtors Setup > View Recurring Transactions

Recurring transactions provide convenience and predictability, reducing the need for manual financial management.

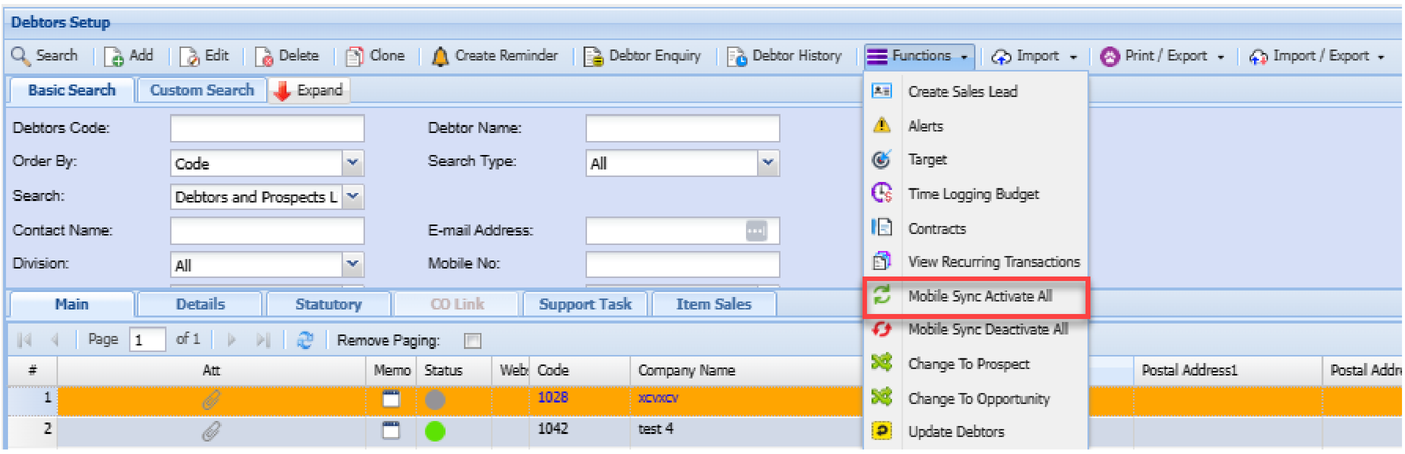
When you click recurring transactions, it will take you to the screen below. To see a list of recurring transactions you need to click on search and the list will appear.



View a detailed manual on recurring transactions [here](#)

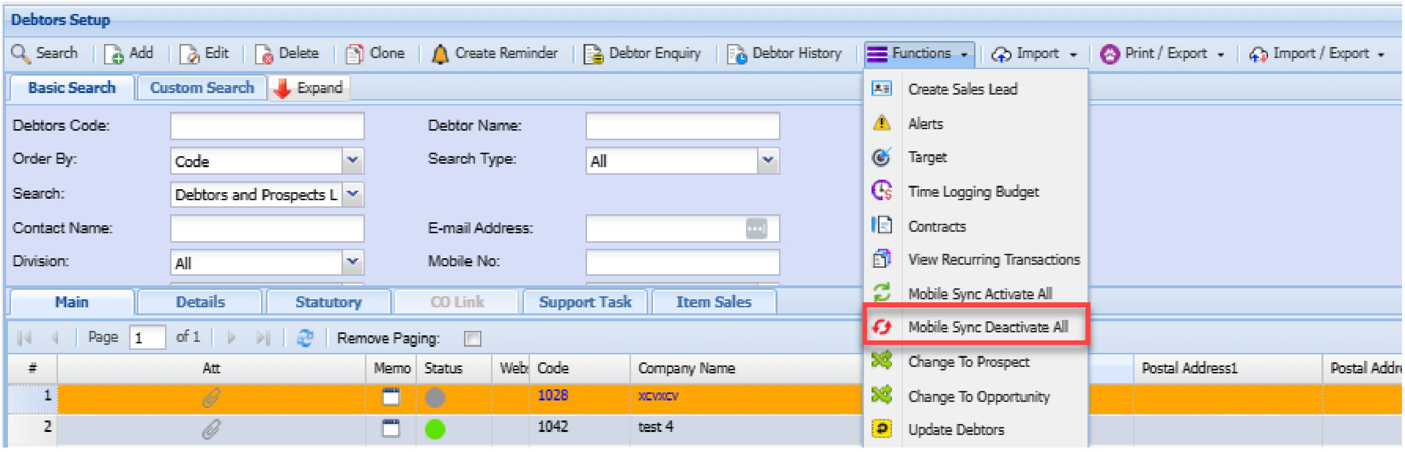
Mobile Sync Activate All

Mobile to sync activate all, adds all debtors/ customers to the webatar mobile application.



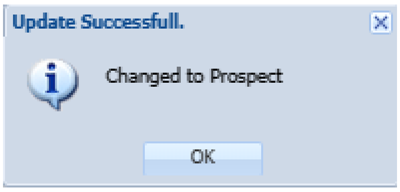
Mobile Sync Deactivate All

Mobile sync deactivates all erases all debtors/ customers from the webatar mobile application



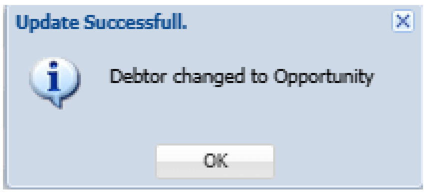
Change to Prospect

Change to Prospect allows you to update a debtor/ customer or opportunity to a prospect



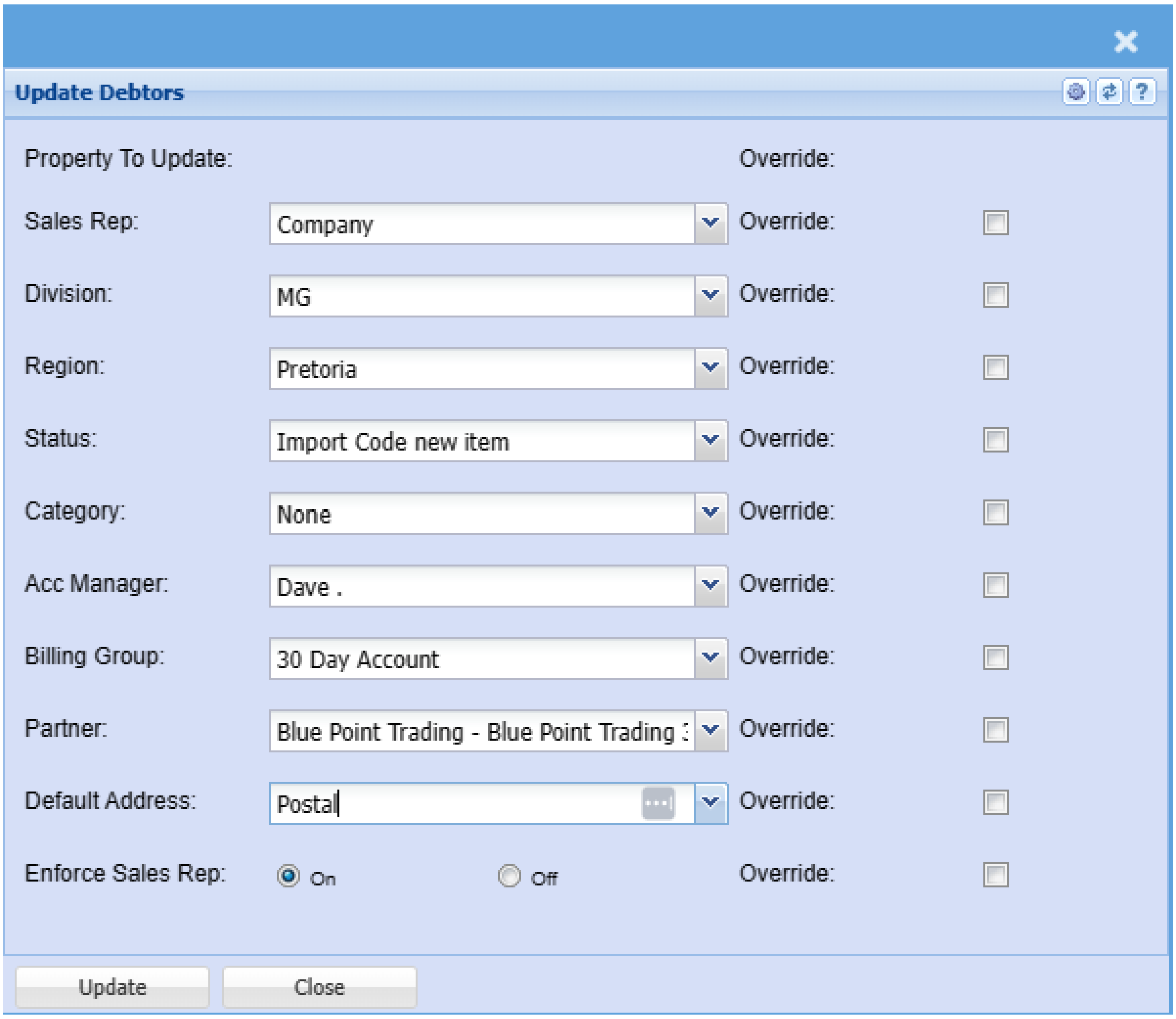
Change To Opportunity

Change to opportunity allows you to change the selected debtor/customer or prospect to opportunity



Update Debtors

You can change debtor/ customer details mentioned below under the functions drop down without having to open up the details screen



Sales Rep	If you want to run a report by a specific sales rep, then you will need to select the sales rep on the drop-down menu. If you leave the sales rep on all the report will run by all sales rep.
Division	If you have set up divisions for your debtors, you can pull the report for all your debtors or you can select a specific Division from the drop-down menu.
Region	You can pull the report for all your debtors, or you can select a specific Region from the drop-down menu if you have set up Regions for your debtors.
Status	If you select all the report will pull all statuses. If you want to view report by status, select the status on the drop-down menu
Category	To generate the report, the user has to select the category from the drop-down menu
Acc Manager	You can pull the report for all your debtors, or you can select a specific Account manager from the drop-down menu if you have set up Account Managers for your debtors.

Billing Group	Select the billing group update on the dropdown
Partner	Select the partner update on the dropdown
Default Address	Select the default address on the dropdown
Enforce Sales Rep	Select Yes to enforce sales rep or select No if you don't want to enforce sales rep
Override	Put a tick on override if you want to override a selection made on the dropdown

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