productsheet

Wise Recovery

Receivables

Benefit from a Cloud solution for tracking and reminding invoices, 100% dedicated to SMEs and integrated with Sage 100

October 2021

With Sage Recouvrement Créances, your SME relies on a unique customer debt collection system that allows you to improve your cash flow and reduce your customer outstandings by 50%.

Securing and reducing its level of outstandings

Thanks to our innovative Cloud solution, based on the three levers, Visibility, Communication and Collaboration, you reduce your outstanding debt by acting on your customers

Save time in customer reminders

To get paid you have to chase up most of your customers. The challenge is to devote less time to it with greater efficiency. Sage Recouvrement Créances allows you to structure your customer reminders by defining customizable scenarios by type of customer. In just a few clicks, you follow up with dozens of customers by adapting the communication channel and the customer discourse, and you save up to 50% of the time spent on follow-ups while being more efficient.

Improve your image

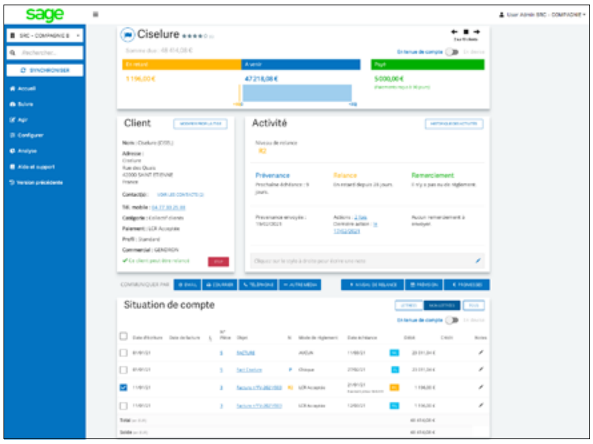
Thanks to actions of thoughtfulness, reminders and thanks, you will improve the quality of your customer relations by establishing a positive and trusting relationship.

Have perfect visibility on who owes you what

Sage Recouvrement Créances retrieves accounting entries and customer records from Sage 100. Thanks to our dashboards with a simple and intuitive design, you know who owes you what, the actions to carry out, disputes, promises of payment in 1 click. The Top 10 and deadbeat scoring immediately show you which customers you need to act on.

Gain in serenity

You control your level of cash serenely thanks to the cash reporting that you receive daily by email on your smartphone or tablet. All of your employees involved in the customer follow-up process, accountants, DAF, sales administration or sales representatives, are informed through personalized access.



Customer card

Trust

> Manage your customer outstandings and your cash flow serenely thanks to our local support in handling and daily use. Sage Recouvrement Créances meets all legal requirements including the GDPR.

Collaborative

> Sage Recouvrement Créances optimizes internal and external collaboration by centralizing and dematerializing, in a shared and secure workspace, your information exchanges between your customers and all your employees involved in customer reminders.

Communication

> Communicate in an exhaustive, varied and qualitative way according to the profile of your customers (automation, scenario, thoughtfulness)

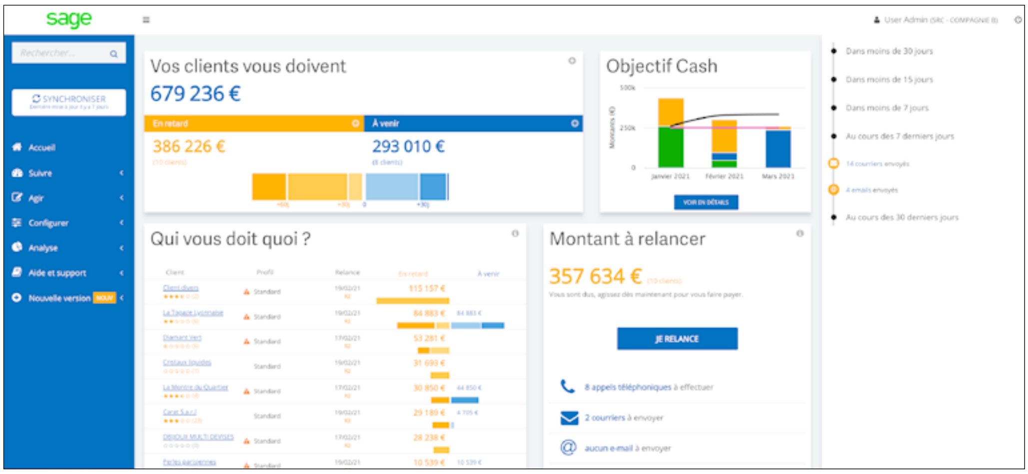
Complete

> Sage Recouvrement Créances is a complete solution for managing customer follow-up and reminders with à la carte options. The solution gives you the flexibility you need to deal with the business and structural challenges of your company.

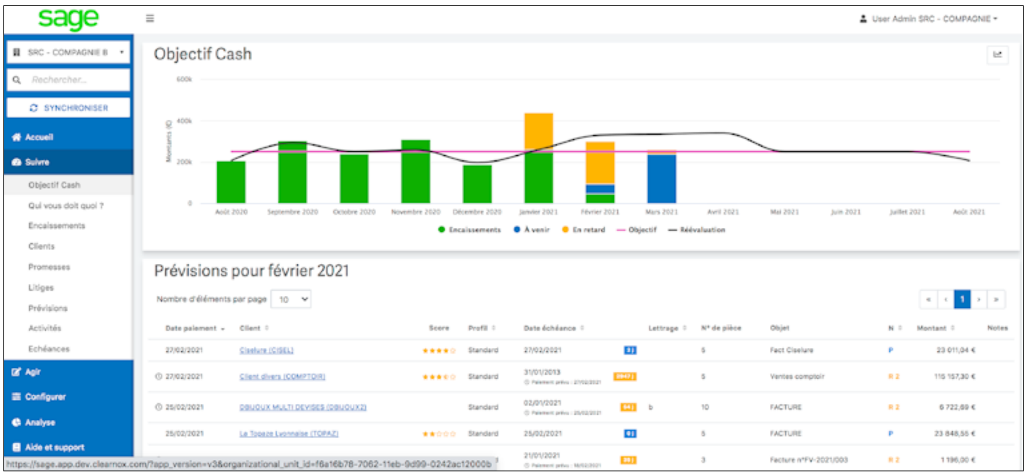
Sage Debt Collection and options

A la carte options to adapt to your activity:

- Several reporting entities
- Additional users
- Premium features to collaborate with your salespeople and departments involved in the dunning process
- Gold features to automate and personalize your reminders in your different structures



Dashboard



Cash Goal

Fonctionnalities

Standard
The fundamental functions to follow up and relaunch your customers.

Premium
Automate your reminders and collaborate with your sales representatives.

Gold
Personalize your reminders and follow your customer deadlines.

Features	Details	Standard	Premium	Gold
Visibility				
Dynamic monitoring of customer outstandings	Real-time visibility of customer outstandings	and	and	and
Dynamic invoice tracking	Real-time visibility of invoices to be revived			and
Dashboards	Home page with the main indicators for monitoring customer reminders	and	and	and
Detailed customer view	Detailed customer file with all the information to carry out reminders	and	and	and
Global multi-company consolidated vision*	Sum of amounts due and not due by company	and	and	and
Multi-company consolidated vision by client*	Consolidated view of outstandings for each of your customers across all your companies	and	and	and
Litigation management	Identification of customers in dispute	and	and	and
piecemeal dispute	Identification of disputed invoices	and	and	and
Payment promises	Registration of payment promises		and	and
Cash forecast	Recording cash forecasts	and	and	and
Scoring Bad Payers	Identification of bad paying customers thanks to an analysis of payment behavior		and	and
Flag customers and timeline	Tracking the activity of specific or at-risk customers		and	and
Cash objective	Forecast management of receipts according to objectives	and	and	and
Analysis	Analysis of dunning activity and performance			and
Communication				
Multi-channel follow-up	Programming and sending of reminders according to the desired channel: email, mail, telephone, other media	**and**	and	and
Consideration / Follow-up / Thanks	Sequence of reminders in 3 times and 5 levels R1 to R5	and	and	and
Customer profile management	Follow-up and follow-up according to customer typologies		and	and
List of actions to take	List of follow-up tasks to be performed by user	and	and	and
Mass relaunch per scenario	Mass follow-up by successive stages of communication	and	and	and
Individual follow-up	Individual reminder by customer or by due date	and	and	and
Piece management	Reminder by accounting document	and	and	and
Reminder management by account status	Centralized customer follow-up per account (1 follow-up on the highest level on an account with several invoices to follow up)			and
Multi-contact management	Association of several contacts to a customer file to relaunch an invoice with several contacts			and
Multi-currency dunning	Reminder of invoices whatever the currency (accounting must however be kept in euros)			and
Mass reminder by criteria	Use of specific criteria to personalize reminders		**and**	and
Multilingual management	Possibility for the user to define his language: French - English	and	and	and

* For optimal use of the solution, it is recommended to configure 1 to 5 bases per connector. The maximum number of configurable bases per connector is 10.

Features	Details	Standard	Premium	Gold
Communication				
Custom dunning template	Customization of reminder templates with specific text and selection of reminder tables	and	**and**	and
Logo in mail dunning template	Inserting a logo in the dunning mail	and	**and**	and
Reminder alerts	Alerts on reminders (email in error, late action, absence of contact details, customer not to be revived)	and	**and**	and
Selecting parts in scenarios	Personalization of reminders by selecting the accounting documents to be reminded	and	**and**	and
Stop Restart	Management of a customer on a case-by-case basis (eg customer in dispute) by stopping the follow-up of all the invoices of a customer or an invoice	and	**and**	and
Dunning activity history	Traceability of all the history of exchanges with a customer, including the visualization of letters and emails addressed	and	**and**	and
Comments by customer	Comment by customer on follow-ups	and	**and**	**and**
Commentary to the piece	Piecemeal commentary on raises	and	**and**	**and**
Customizing Dunning Levels	Ability to change the default next retry step		**and**	**and**
Grouped PDF reminder	Generation of a single PDF of reminders to be sent by post to facilitate printing			**and**
Customization of reminders from additional fields	Customization of reminders from additional fields from Sage 100			**and**
Ability to include unmatured credit notes	Ability to include unmatured credit notes in follow-up and dunning			**and**
Collaboration				
Reporting by email / Cash Reporting	Daily receipt by email of key indicators and actions taken and to be taken	and	**and**	**and**
Access rights management	Personalized access by type of user (administrator, user and consultation)		**and**	**and**
Portfolio Management / Collection Team	Segmentation of commercial portfolios and actions by debt collector		**and**	**and**
Reporting and filtering by sales reps	Personalized reporting by user according to his client portfolio		**and**	**and**
Export of tables (Excel/csv)	Excel export of different tracking tables		**and**	**and**
Scheduled export	For integration in CRM and BI: • list of accounting entries • customer list • users list • list of payment promises • who owes you what? • list of actions carried out			**and**
Productivity				
Online access	Access via browser from PC, tablet and smartphone	**and**	**and**	**and**
Multicurrency	Defining an account currency different from the euro	**and**	**and**	**and**

For more information and to be put in touch with an expert:

01 41 66 25 91

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