

Intacct Collections Management Extension

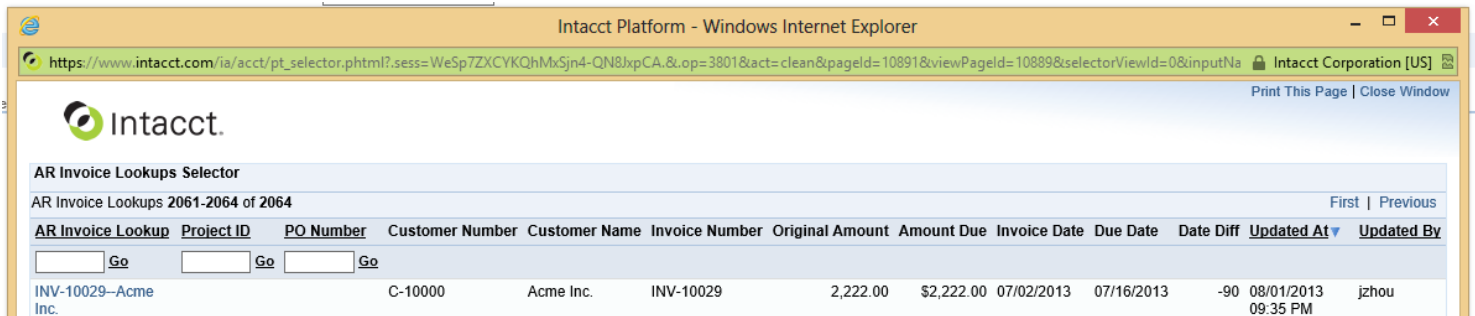
Situation

Intacct asked CodePartners to sub-contract a special set of extended Intacct Accounts Receivable capabilities to provide a basic Collections Management System. A client wanted more capabilities than the standard system provides, such as the ability to list and sort unpaid invoices by client, project, and PO number, and to see specific invoice attributes.

What we did

CodePartners developed an Intacct Platform application enabling the customer to view invoices and then associate the invoice and/or customer with certain collection activities:

- Attach emails
- Log phone calls and collection notes
- View this information from the related customer and invoice records in the system



The screenshot shows a web browser window titled "Intacct Platform - Windows Internet Explorer". The address bar contains a URL from intacct.com. The page header includes the Intacct logo and navigation links like "Print This Page" and "Close Window". The main content area is titled "AR Invoice Lookups Selector" and displays a table of invoice lookups. The table has columns for AR Invoice Lookup, Project ID, PO Number, Customer Number, Customer Name, Invoice Number, Original Amount, Amount Due, Invoice Date, Due Date, Date Diff, Updated At, and Updated By. A single row of data is visible, representing an invoice for Acme Inc.

AR Invoice Lookup	Project ID	PO Number	Customer Number	Customer Name	Invoice Number	Original Amount	Amount Due	Invoice Date	Due Date	Date Diff	Updated At	Updated By
INV-10029-Acme Inc.			C-10000	Acme Inc.	INV-10029	2,222.00	\$2,222.00	07/02/2013	07/16/2013	-90	08/01/2013 09:35 PM	jzhou

The Results

The client manages its accounts receivables in Intacct more effectively.



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