

PeopleSoft Training: Collections Release 9.0

Course (1 Day)

This one-day course will focus on the Collections functionality within Student Financials. It is assumed that class participants have familiarity with Student Financials structure. Exposure to the 3Cs would be helpful as well. Beginning by setting up your aging rules, you will be able to define separate collection criteria for both students and organizations. Collectors will be created. Customers will be assigned to collectors based on criteria of your choice. If desired, you can add workflow to notify collectors when they have new customers with which to work. Using the collection effort pages, you can assign any or all of the 3Cs to students or organizations to assist in managing this process. You can create a “promise to pay” checklist, which can show in self-service. Additionally you can assign a letter code reminding them of their obligation. Collection agreements are a form of payment plans that are assigned to individual students. Finally, if all efforts fail, you will see how to write off a customer account.

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- Running Credit History (Aging Accounts)
 - Setting up Aging Sets
 - Creating Collections Criteria
 - Defining Collectors
 - Put Customers in Collections
 - Assigning Customers to Collectors Using Workflow
 - Managing the Collection Effort
 - Using the 3Cs to Facilitate Collection Activities
 - Creating Collection Agreements
 - Write-offs

Excerpts from Student Evaluations

The instructor was the best instructor I have ever had. Thank you for a great class!

The documentation is fantastic!

Excellent!! Loved those cheat sheets.

Excellent course. It was definitely more meaningful to work with our own system and data.

Excellent learning experience (the best among all PeopleTools classes that I have taken)!

The training material was extremely helpful. It was easy to follow and was a great tool in the learning process. I can see using it on a regular basis until I feel confident that I fully understand the process.

You have been doing a wonderful job with these courses. Thank you for your knowledge, patience & flexibility.

He is an excellent teacher, very knowledgeable about the course and material. He even keeps the class interested in the subject.

Very responsive to questions; good, relaxed teaching style.

The book is awesome – the class was very valuable! Thanks.

Very good class...materials are well prepared and class is very organized and planned out.

Very effective instructing style. Made class fun and interesting.

Great presentation style. Responsive to student questions. Thanks.

Good class. Very helpful and effective. This is one of the best instructors that I had.

Excellent teacher and well-organized class. I really enjoyed the class and look forward to the next class.

Course was great, reinforced things I kind of know but was not sure about. Speed of course was good.

About Io Consulting

Io has an extensive record of accomplishment and a full range of services available to support Higher Education institutions. Expert level offerings include:

- Strategic Planning
- Project Management
- Business Process Reengineering
- Software Consulting
- Fusion Middleware Services
- Technical and Functional Training
- Quality Assurance Program

Io Consulting's expert level trainers and consultants have first-hand experience with Higher Education and IT business practices as well as in-depth knowledge of the Oracle|PeopleSoft applications and Fusion Middleware technologies.

An Oracle Certified Partner, Io Consulting has successfully led a variety of projects and trainings for both private and public institutions as well as for statewide system efforts. Io's customer list includes The Ohio State University, Duke University, The California State University System, Pepperdine University, and the University System of Maryland.

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