

Portfolio Manager

Portfolio Manager is the most efficient case handler you can imagine

Efficient

The most efficient case handler you can imagine

Activities

Increase your debtor activities

”Resuscitate”

your stock in a moment

Stock Selection

The casehandler has a wide selection of filters that makes it possible to choose the right cases in your stock. All filters in the screen can be combined in your selection.

Selected result is presented according to your settings and can be modified with individual select / de-select option.

Stock management

When your selection is made you have various options to update the cases :

- Start a new workflow at any step in the workflow
- Create a new action in the case (letter, SMS, statuscode)
- Create a new item to the Inbox
- Remove open items in the Inbox
- Close case
- Change the case handler
- Or just extract the cases to Excel

Flexible setup

The setup function allows you to decide how the selected result should be presented in the screen. This also decides what columns that will be exported when extracting to Excel.

- What columns should be shown
- What order from left to right should they be presented
- Make your own column names