

Quick Tips Guide

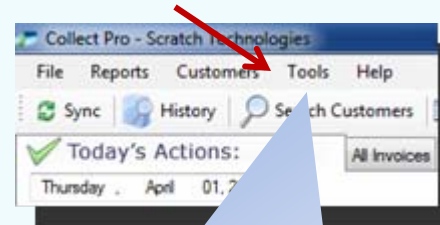
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Managing Invoice Timeline

Open 'Manage Timelines'

• From the main Dashboard Select Tools > Manage Collection Policy



From here you can select one of four default timelines:

1. Standard
2. Light
3. Aggressive
4. Seriously Delinquent

Manage Timelines:

1. Choose the timeline you wish to edit or create a new timeline.
 2. Pick and drag the call, letter or action to the position on the timeline.
 3. Once you've placed all of your calls, letters and actions, click 'Save Timeline'.

Standard Timeline Save Timeline New Timeline Delete Timeline

To find more scripts & letters please visit our online resource library!

Call Scripts	Letters	Actions
<ul style="list-style-type: none"> Confirm Invoice In A/P System Follow Up Call Seek Settlement Amount Seeking Payment Arrangements Seeking Payment Detail Warning Of Credit Hold 	<ul style="list-style-type: none"> Credit Hold Notice Credit Hold Warning Final Demand Letter Last Chance For PPA Let Us Hear From You Payment Arrangements Terms Reminder 	<ul style="list-style-type: none"> Cash on Delivery Charge Off Credit Hold Notice: Interest Change Notify Sales Reverse Sales Commission Send to Collection Agency

+5 +10 +15 +20 +25 +30 +35 +40 +45 +50 +55 +60 +65 +70 +75 +80 +85 +90 +95 +100 +105 +110 +115 +120

You can also customize the timeline.

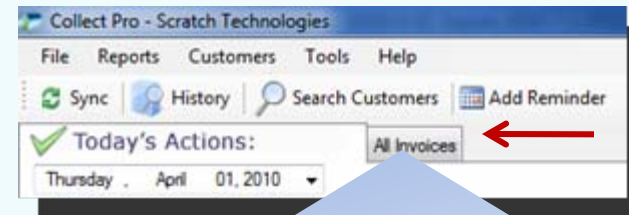
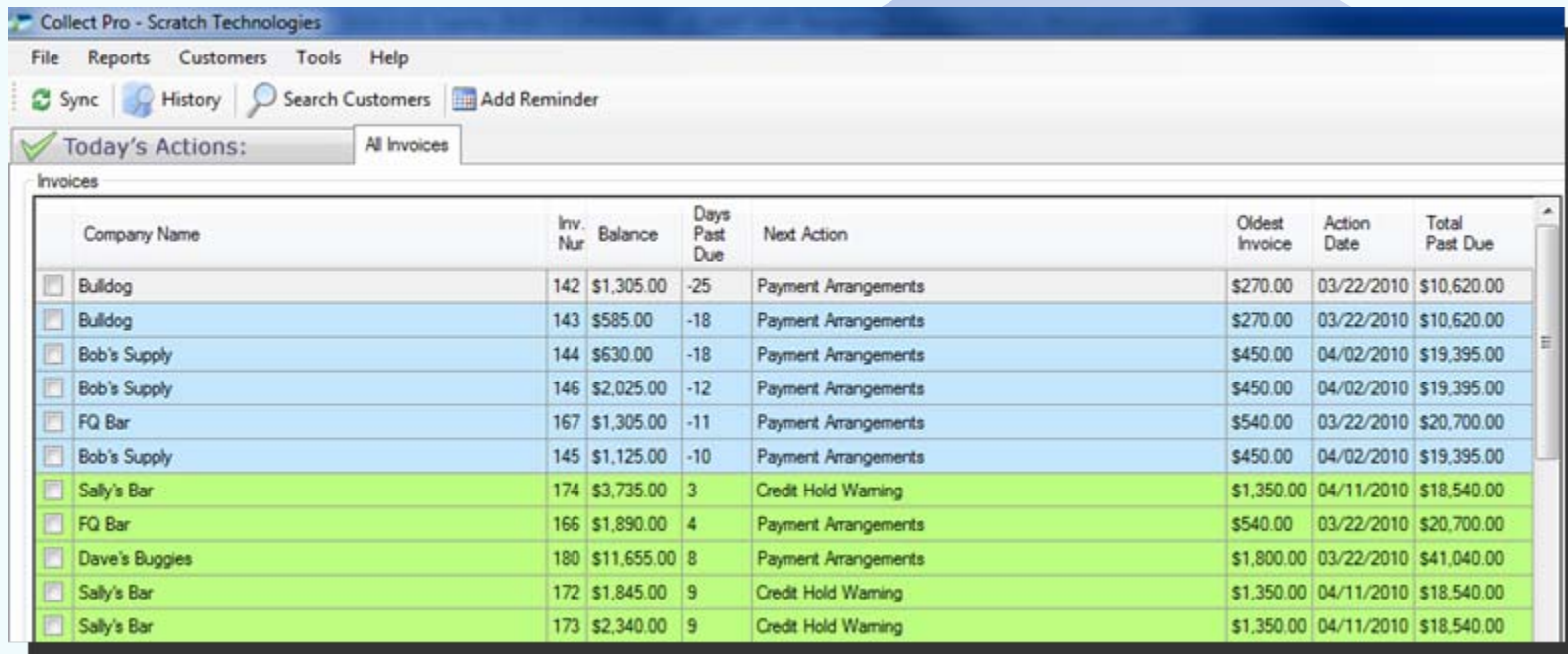
Simply drag the Call Script, Letter or Action from the respective column and drop into the Invoice Action Timeline temperature chart at the bottom.

1. Select
2. Drag & Drop
3. Save

View All Invoices

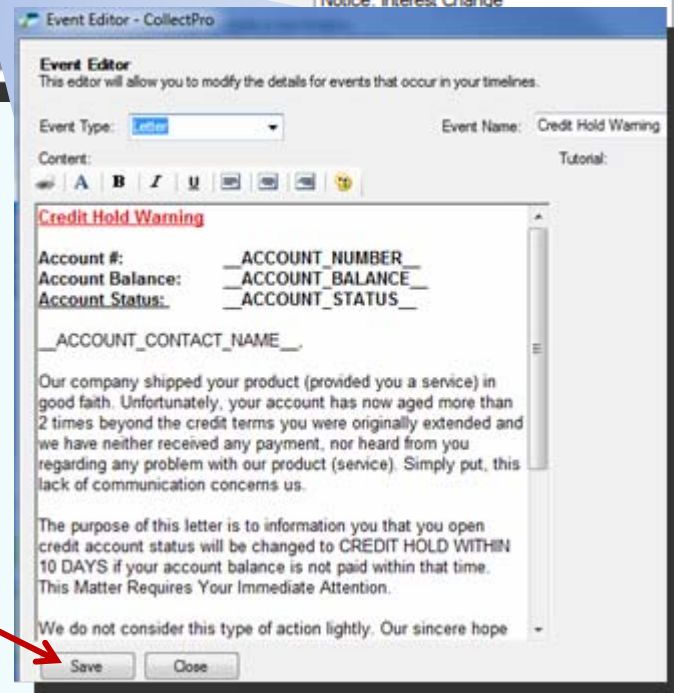
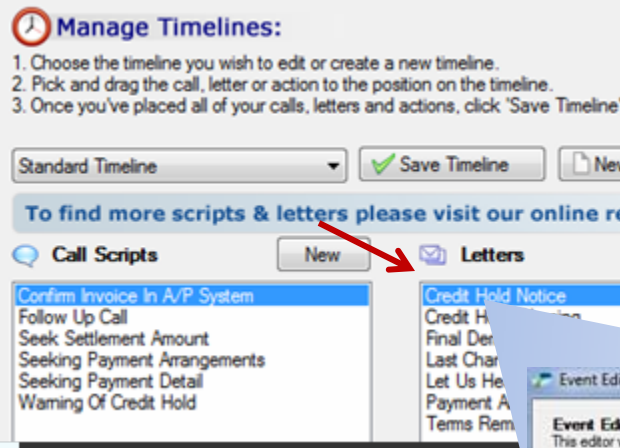
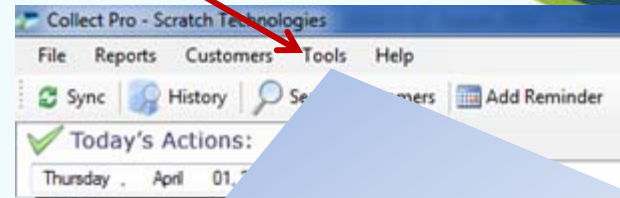
From the Main Dashboard click the 'All Invoices' tab.
 This will show all invoices in the Invoice Action Timeline.
 You can sort each column by ascending and descending.

You can also open each Invoice Action

This screenshot shows the 'Invoices' section of the software. It displays a table with the following columns: Company Name, Inv. Num, Balance, Days Past Due, Next Action, Oldest Invoice, Action Date, and Total Past Due. The table contains 13 rows of invoice data, with the last five rows highlighted in green.

Company Name	Inv. Num	Balance	Days Past Due	Next Action	Oldest Invoice	Action Date	Total Past Due
<input type="checkbox"/> Bulldog	142	\$1,305.00	-25	Payment Arrangements	\$270.00	03/22/2010	\$10,620.00
<input type="checkbox"/> Bulldog	143	\$585.00	-18	Payment Arrangements	\$270.00	03/22/2010	\$10,620.00
<input type="checkbox"/> Bob's Supply	144	\$630.00	-18	Payment Arrangements	\$450.00	04/02/2010	\$19,395.00
<input type="checkbox"/> Bob's Supply	146	\$2,025.00	-12	Payment Arrangements	\$450.00	04/02/2010	\$19,395.00
<input type="checkbox"/> FQ Bar	167	\$1,305.00	-11	Payment Arrangements	\$540.00	03/22/2010	\$20,700.00
<input type="checkbox"/> Bob's Supply	145	\$1,125.00	-10	Payment Arrangements	\$450.00	04/02/2010	\$19,395.00
<input type="checkbox"/> Sally's Bar	174	\$3,735.00	3	Credit Hold Warning	\$1,350.00	04/11/2010	\$18,540.00
<input type="checkbox"/> FQ Bar	166	\$1,890.00	4	Payment Arrangements	\$540.00	03/22/2010	\$20,700.00
<input type="checkbox"/> Dave's Buggies	180	\$11,655.00	8	Payment Arrangements	\$1,800.00	03/22/2010	\$41,040.00
<input type="checkbox"/> Sally's Bar	172	\$1,845.00	9	Credit Hold Warning	\$1,350.00	04/11/2010	\$18,540.00
<input type="checkbox"/> Sally's Bar	173	\$2,340.00	9	Credit Hold Warning	\$1,350.00	04/11/2010	\$18,540.00



Edit Call Scripts & Letters

Open 'Manage Timelines'

1. From the main Dashboard Select "Tools"
2. Select 'Manage Collection Policy'
3. Double click the Call Script or Letter you wish to Edit.

This will open the 'Event Editor'

Event Editor

Make the edits you want to the Event Template.
Be sure to click 'Save'.

Your edited Call Script or Letter will now be the base template for that event.

View Invoice Action History

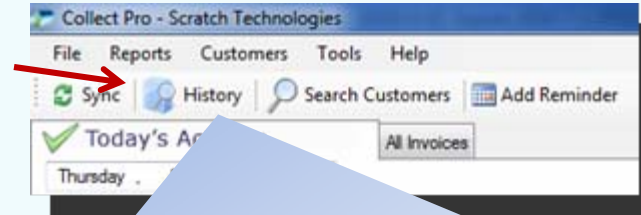
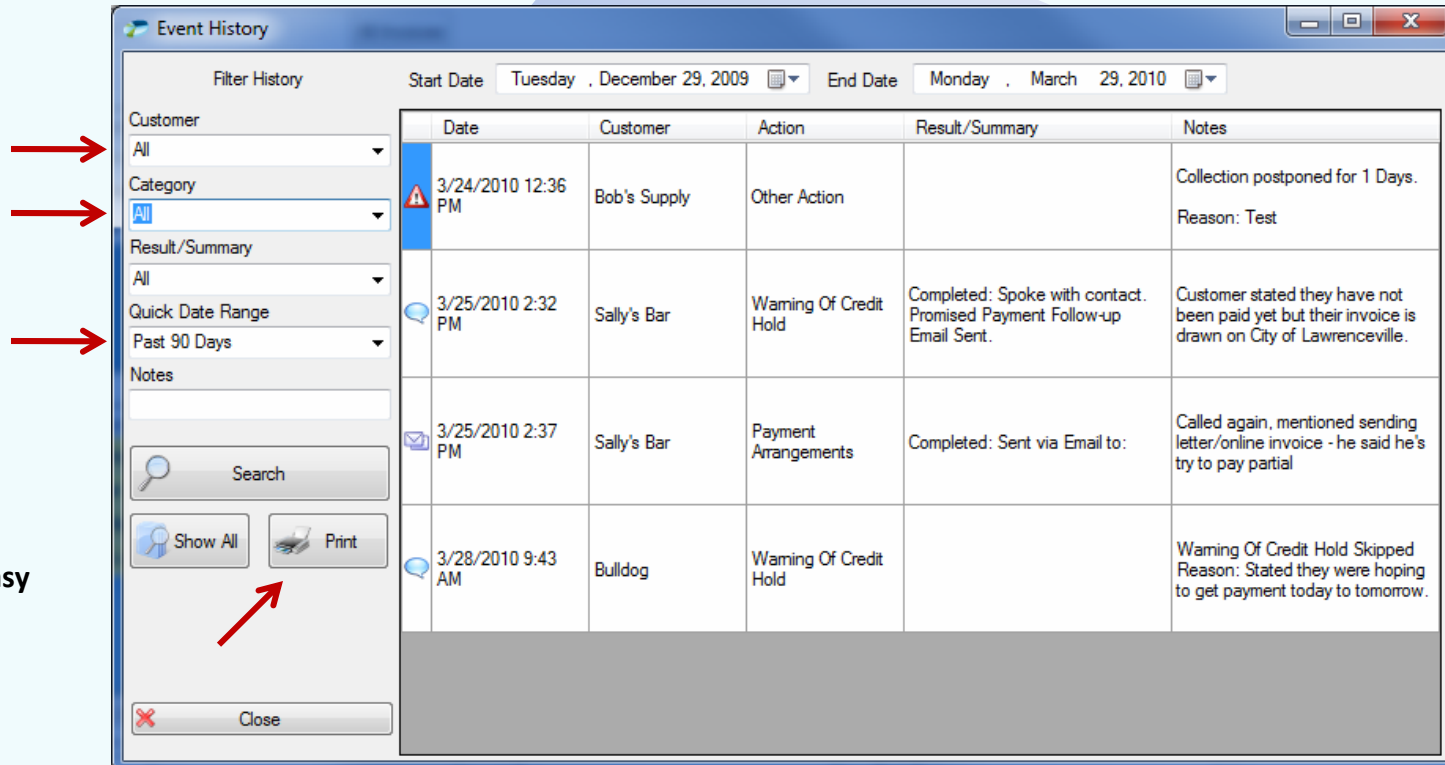
- From the main Dashboard Select “History”

This opens the Event History screen.

From here you can see all Invoice Actions.

You can also filter actions by:

- Customer
- Result/Summary
- Date

Event History

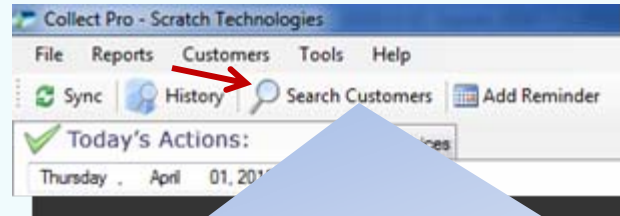
Filter History Start Date Tuesday, December 29, 2009 End Date Monday, March 29, 2010

Customer	Date	Customer	Action	Result/Summary	Notes
All	3/24/2010 12:36 PM	Bob's Supply	Other Action		Collection postponed for 1 Days. Reason: Test
All	3/25/2010 2:32 PM	Sally's Bar	Warning Of Credit Hold	Completed: Spoke with contact. Promised Payment Follow-up Email Sent.	Customer stated they have not been paid yet but their invoice is drawn on City of Lawrenceville.
All	3/25/2010 2:37 PM	Sally's Bar	Payment Arrangements	Completed: Sent via Email to:	Called again, mentioned sending letter/online invoice - he said he's try to pay partial
All	3/28/2010 9:43 AM	Bulldog	Warning Of Credit Hold		Warning Of Credit Hold Skipped Reason: Stated they were hoping to get payment today to tomorrow.

Event History reports are easy to generate and print

View all Invoices

1. Select "Search Customers"
2. Select Customer
3. View Invoices



Search:

- Bob's Supply
- Breaux Mart
- Bulldog
- Dave's Buggies
- FQ Bar
- Fred Nopap
- Sally's Bar

Customer Name: Sally's Bar

Contact: Laura Ottabiz

Address:

Primary Phone: 555-1212

Email: paul@mycollectpro.com

Credit Limit: \$0.00

Credit Score: 0

Credit Last Adjusted: n/a

Invoices Due
Balance: \$18,540.00 **Total Past Due:** \$18,540.00 **Current Charges:** \$0.00

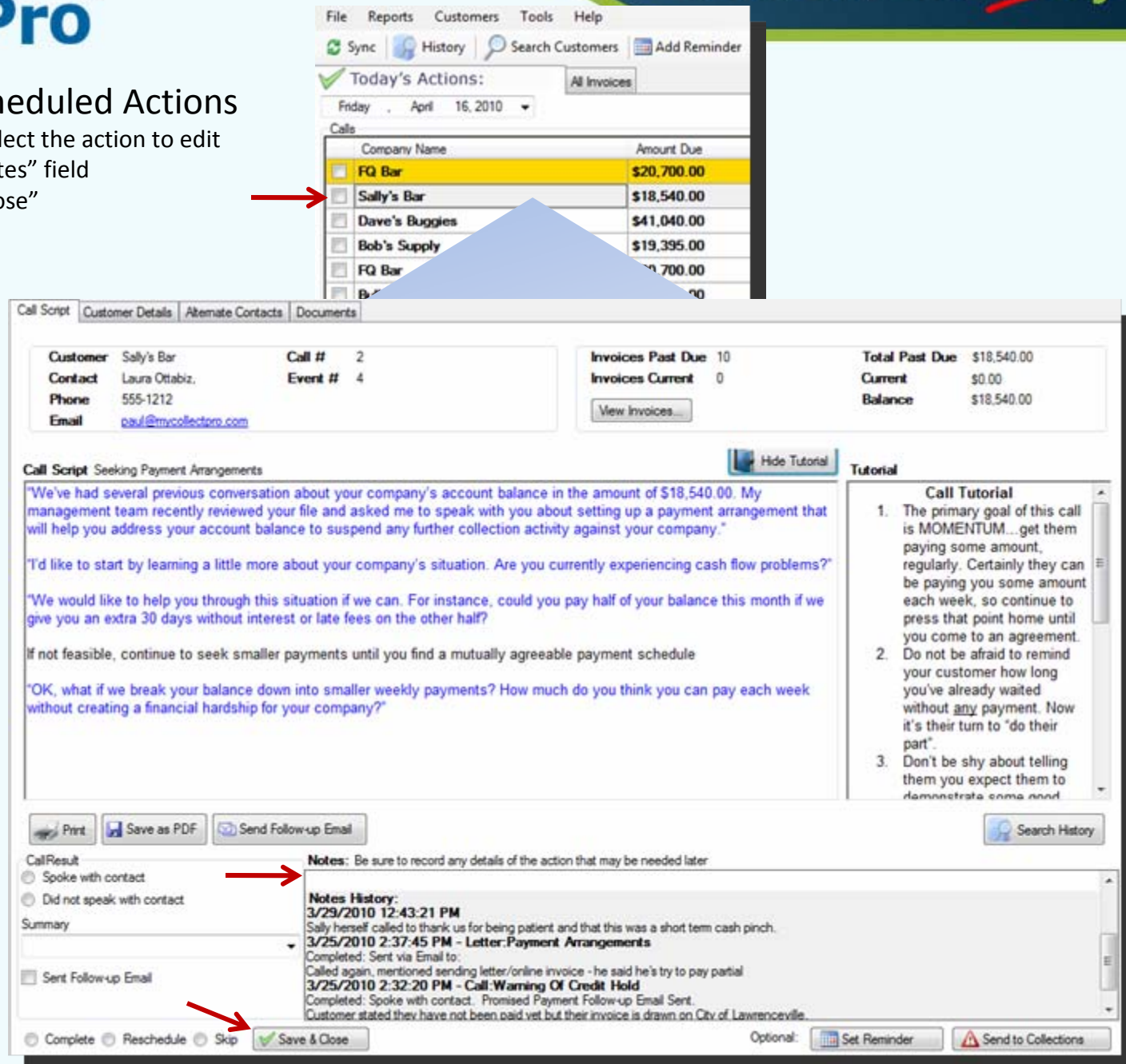
Invoice	Due Date	Effective Due Date	Days Past Due	Amount	Balance
126	1/21/2010	1/21/2010	85	\$1,350.00	\$1,350.00
169	2/5/2010	2/5/2010	70	\$2,880.00	\$2,880.00
127	2/6/2010	2/6/2010	69	\$630.00	\$630.00
170	2/13/2010	2/13/2010	62	\$945.00	\$945.00
128	2/17/2010	2/17/2010	58	\$1,035.00	\$1,035.00
168	2/24/2010	2/24/2010	51	\$2,340.00	\$2,340.00
171	3/13/2010	3/13/2010	34	\$1,440.00	\$1,440.00
172	3/20/2010	3/20/2010	27	\$1,845.00	\$1,845.00
173	3/20/2010	3/20/2010	27	\$2,340.00	\$2,340.00
174	3/26/2010	3/26/2010	21	\$3,735.00	\$3,735.00

Notes History:
3/29/2010 12:43:21 PM
 Sally herself called to thank us for being patient and that this was a short term cash pinch.
3/25/2010 2:37:45 PM - Letter: Payment Arrangements
 Completed. Sent via Email to:
 Called again, mentioned sending letter/online invoice - he said he's try to pay partial
3/25/2010 2:32:20 PM - Call: Warning Of Credit Hold
 Completed. Spoke with contact. Promised Payment Follow-up Email Sent.

Save Notes

Adding Notes to Scheduled Actions

1. From "Today's Actions" Select the action to edit
2. Add your notes to the "Notes" field
3. Be sure to click "Save & Close"



The screenshot shows the CollectPro software interface. At the top, there is a menu bar with 'File', 'Reports', 'Customers', 'Tools', and 'Help'. Below the menu bar, there are buttons for 'Sync', 'History', 'Search Customers', and 'Add Reminder'. A 'Today's Actions' section is visible, showing a date of 'Friday, April 16, 2010'. A table lists several companies with their amounts due:

Company Name	Amount Due
<input checked="" type="checkbox"/> FQ Bar	\$20,700.00
<input type="checkbox"/> Sally's Bar	\$18,540.00
<input type="checkbox"/> Dave's Buggies	\$41,040.00
<input type="checkbox"/> Bob's Supply	\$19,395.00
<input type="checkbox"/> FQ Bar	\$20,700.00
<input type="checkbox"/> B...	\$...

A red arrow points to the 'Sally's Bar' row. Below this, a larger window displays customer details for 'Sally's Bar'. The 'Call Script' tab is active, showing a script for 'Seeking Payment Arrangements'. The script text includes:

"We've had several previous conversation about your company's account balance in the amount of \$18,540.00. My management team recently reviewed your file and asked me to speak with you about setting up a payment arrangement that will help you address your account balance to suspend any further collection activity against your company."

"I'd like to start by learning a little more about your company's situation. Are you currently experiencing cash flow problems?"

"We would like to help you through this situation if we can. For instance, could you pay half of your balance this month if we give you an extra 30 days without interest or late fees on the other half?"

If not feasible, continue to seek smaller payments until you find a mutually agreeable payment schedule

"OK, what if we break your balance down into smaller weekly payments? How much do you think you can pay each week without creating a financial hardship for your company?"

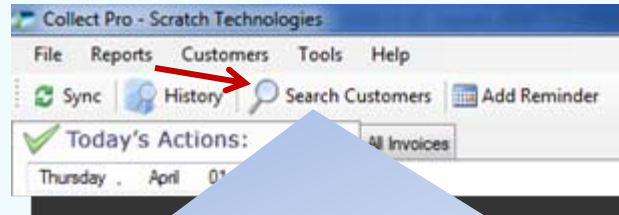
At the bottom of the window, there is a 'Notes' field with the text: "Notes: Be sure to record any details of the action that may be needed later". A red arrow points to this field. Below the notes field is a 'Notes History' section with the following entries:

- 3/29/2010 12:43:21 PM: Sally herself called to thank us for being patient and that this was a short term cash pinch.
- 3/25/2010 2:37:45 PM - Letter: Payment Arrangements: Completed: Sent via Email to: Called again, mentioned sending letter/online invoice - he said he's try to pay partial
- 3/25/2010 2:32:20 PM - Call: Warning Of Credit Hold: Completed: Spoke with contact. Promised Payment Follow-up Email Sent. Customer stated they have not been paid yet but their invoice is drawn on City of Lawrenceville.

At the bottom of the window, there are several buttons: 'Print', 'Save as PDF', 'Send Follow-up Email', 'Search History', and 'Save & Close'. A red arrow points to the 'Save & Close' button. There are also radio buttons for 'Complete', 'Reschedule', and 'Skip'.

Adding Notes to Customer's Account

1. From Main Dashboard select "Search Customers"
2. Select Account Name
3. Add Notes
4. Be sure to click "Save Notes"



Customer Name: Sally's Bar
 Contact: Laura Ottobiz
 Address:
 Primary Phone: 555-1212
 Email: paul@mycollectpro.com

Credit Limit: \$0.00
 Credit Score: 0
 Credit Last Adjusted: n/a

Invoices Due
 Balance: \$18,540.00 Total Past Due: \$18,540.00 Current Charges: \$0.00

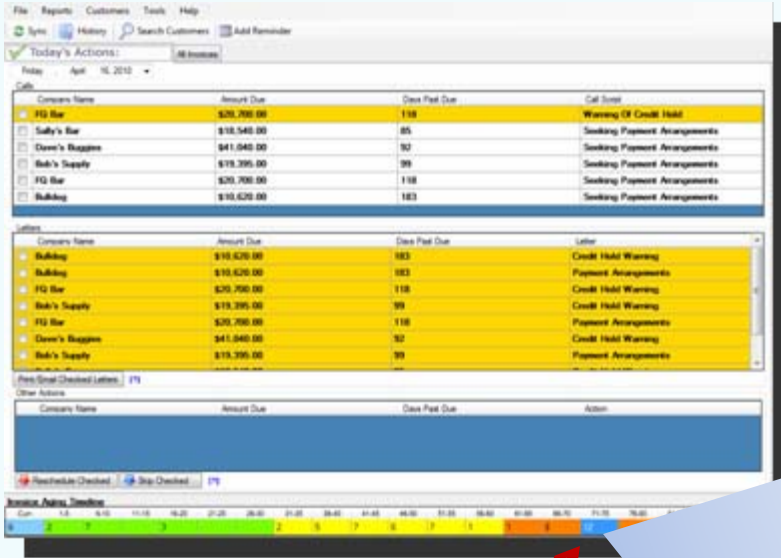
Invoice	Due Date	Effective Due Date	Days Past Due	Amount	Balance
126	1/21/2010	1/21/2010	85	\$1,350.00	\$1,350.00
169	2/5/2010	2/5/2010	70	\$2,880.00	\$2,880.00
127	2/6/2010	2/6/2010	69	\$630.00	\$630.00
170	2/13/2010	2/13/2010	62	\$945.00	\$945.00
128	2/17/2010	2/17/2010	58	\$1,035.00	\$1,035.00
168	2/24/2010	2/24/2010	51	\$2,340.00	\$2,340.00
171	3/13/2010	3/13/2010	34	\$1,440.00	\$1,440.00
172	3/20/2010	3/20/2010	27	\$1,845.00	\$1,845.00
173	3/20/2010	3/20/2010	27	\$2,340.00	\$2,340.00
174	3/26/2010	3/26/2010	21	\$3,735.00	\$3,735.00

Notes

Notes History:
 3/29/2010 12:43:21 PM
 Sally herself called to thank us for being patient and that this was a short term cash pinch.
 3/25/2010 2:37:45 PM - Letter Payment Arrangements
 Completed: Sent via Email to:
 Called again, mentioned sending letter/online invoice - he said he's try to pay partial
 3/25/2010 2:32:20 PM - Call Warning Of Credit Hold
 Completed: Spoke with contact. Promised Payment Follow-up Email Sent.

Save Notes

View Invoices in Each Stage of Timeline



The screenshot shows the 'Today's Actions' window with a table of invoices:

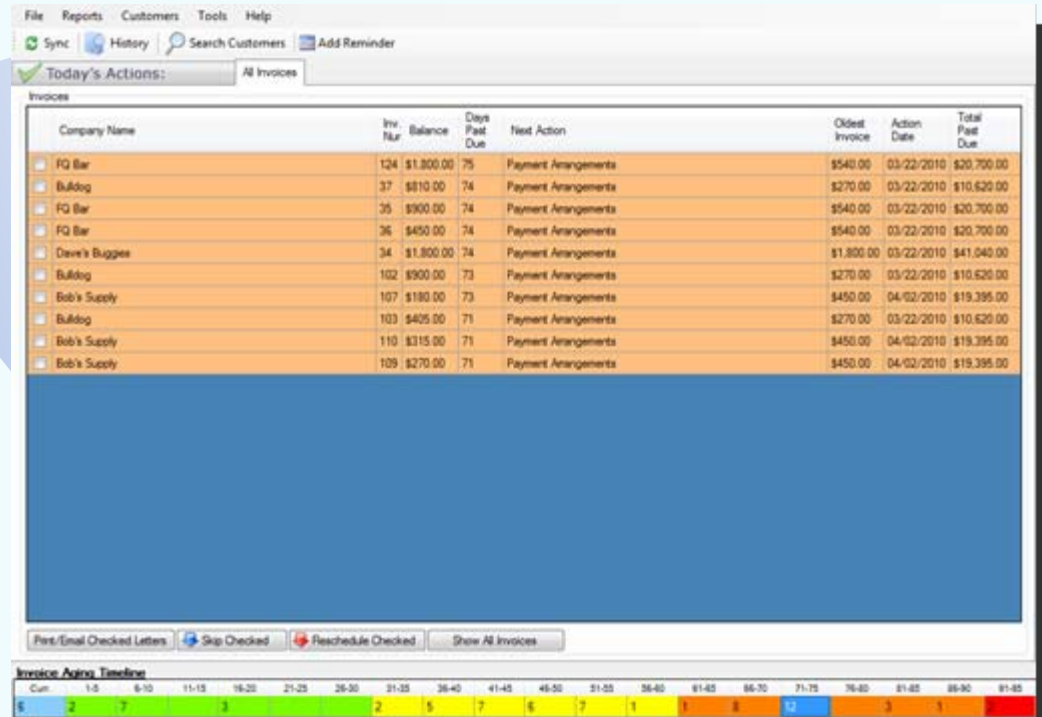
Company Name	Amount Due	Days Past Due	Call To Action
FQ Bar	\$20,700.00	118	Warning Of Credit Hold
Sally's Bar	\$10,540.00	85	Seeking Payment Arrangements
Dave's Buggies	\$41,040.00	92	Seeking Payment Arrangements
Bob's Supply	\$19,395.00	99	Seeking Payment Arrangements
FQ Bar	\$20,700.00	118	Seeking Payment Arrangements
Bulldog	\$10,620.00	103	Seeking Payment Arrangements

Below this is the 'Invoice Aging Timeline' showing a grid of colored boxes representing the number of invoices in various stages over time. A red arrow points to a specific box in the timeline.

- Select the Point on timeline to view
- The number in each box represents the number of open invoices at that point in the timeline .
- Click on the number of invoices to see invoice list detail for stage

From here you can view all the invoices at that stage of The Invoice Action Timeline.

You can also open each pending Invoice Action



The screenshot shows a detailed list of invoices with the following columns:

Company Name	Inv. Num	Balance	Days Past Due	Next Action	Oldest Invoice	Action Date	Total Past Due
FQ Bar	124	\$1,800.00	75	Payment Arrangements	\$540.00	03/22/2010	\$20,700.00
Bulldog	37	\$810.00	74	Payment Arrangements	\$270.00	03/22/2010	\$10,620.00
FQ Bar	35	\$900.00	74	Payment Arrangements	\$540.00	03/22/2010	\$20,700.00
FQ Bar	36	\$450.00	74	Payment Arrangements	\$540.00	03/22/2010	\$20,700.00
Dave's Buggies	34	\$1,800.00	74	Payment Arrangements	\$1,800.00	03/22/2010	\$41,040.00
Bulldog	102	\$900.00	73	Payment Arrangements	\$270.00	03/22/2010	\$10,620.00
Bob's Supply	107	\$180.00	73	Payment Arrangements	\$450.00	04/02/2010	\$19,395.00
Bulldog	103	\$405.00	71	Payment Arrangements	\$270.00	03/22/2010	\$10,620.00
Bob's Supply	110	\$315.00	71	Payment Arrangements	\$450.00	04/02/2010	\$19,395.00
Bob's Supply	109	\$270.00	71	Payment Arrangements	\$450.00	04/02/2010	\$19,395.00

At the bottom, there is an 'Invoice Aging Timeline' similar to the one in the first screenshot, with a red arrow pointing to a specific box.