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Quick Tips Guide

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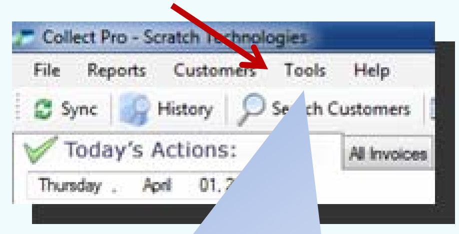
Managing Invoice Timeline

Open 'Manage Timelines'

•From the main Dashboard Select Tools > Manage Collection Policy

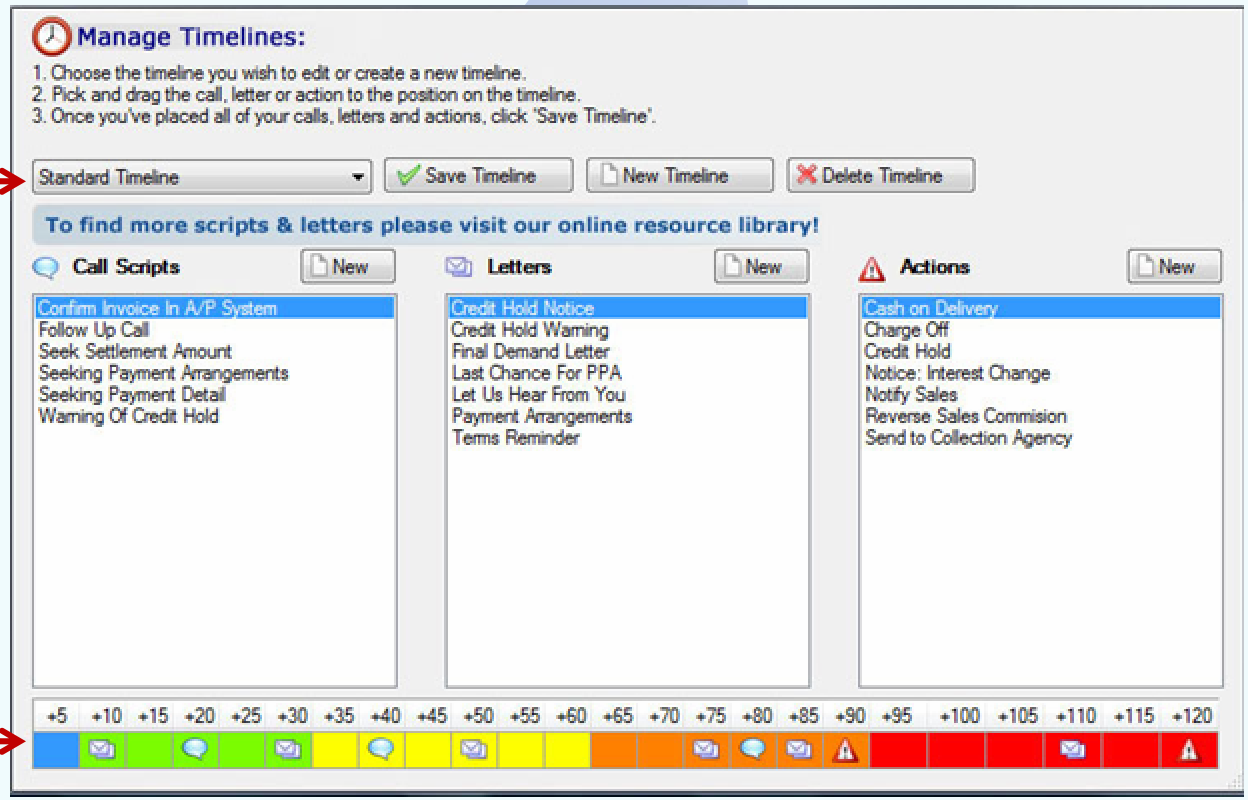
From here you can select one of four default timelines:

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



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



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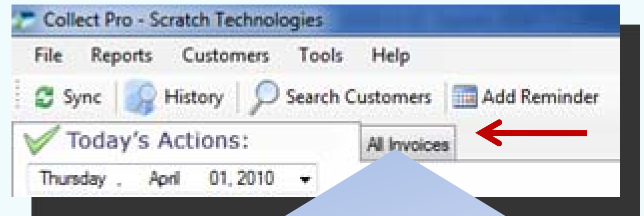
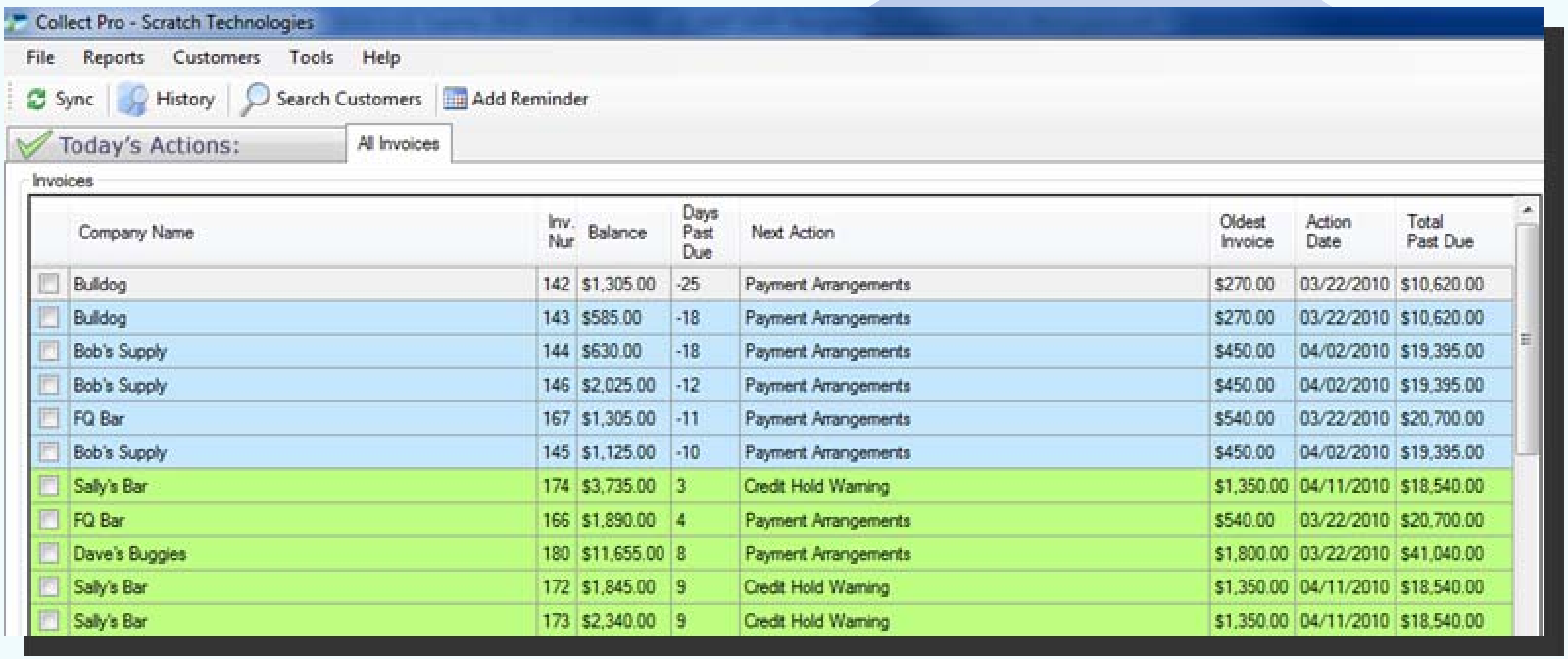
View All Invoices

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





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

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Edit Call Scripts & Letters

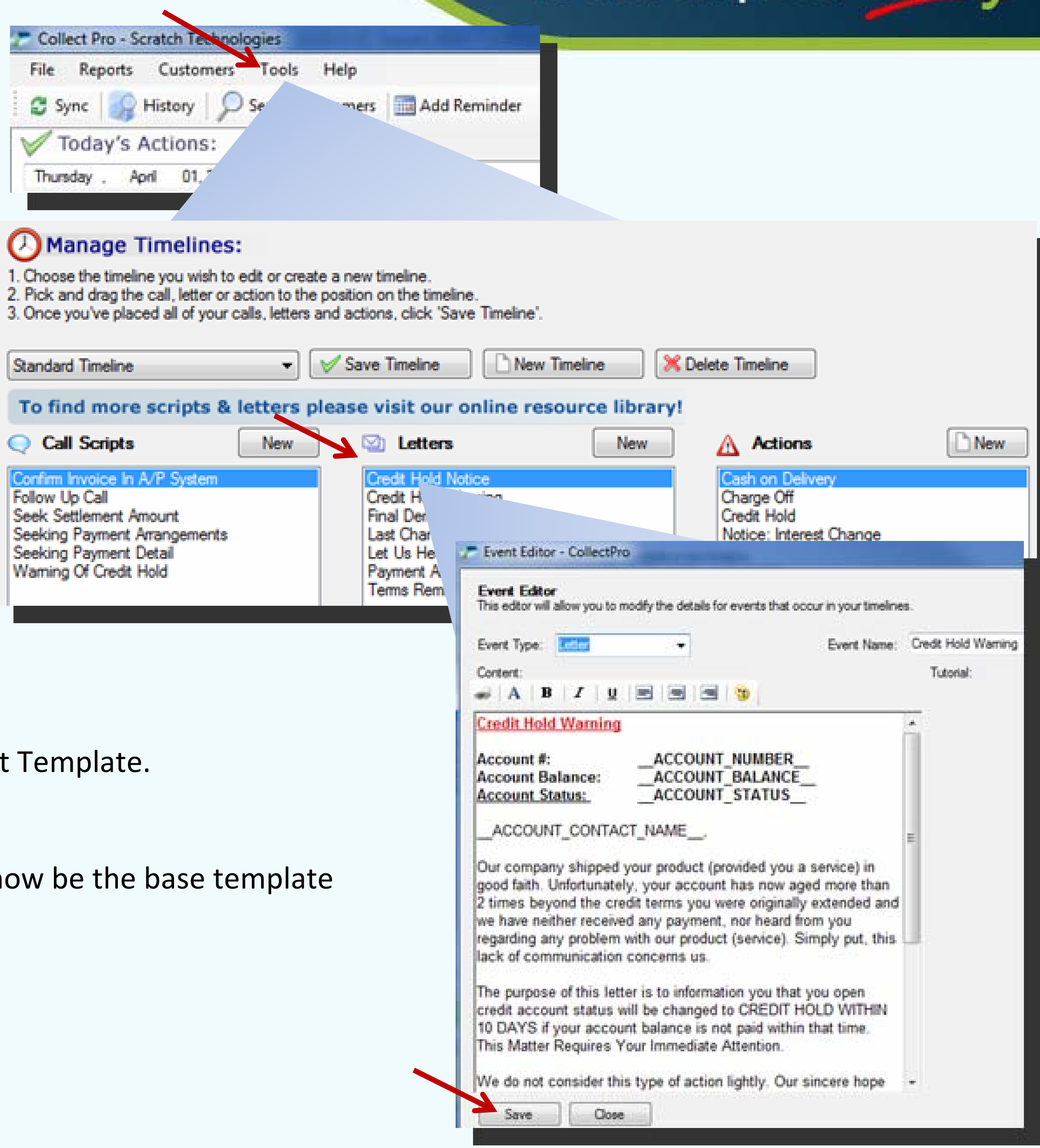
Open ‘Manage Timelines’

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.

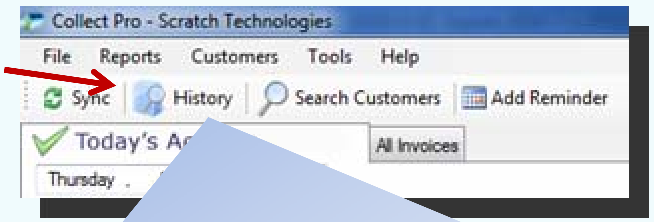
View Invoice Action History

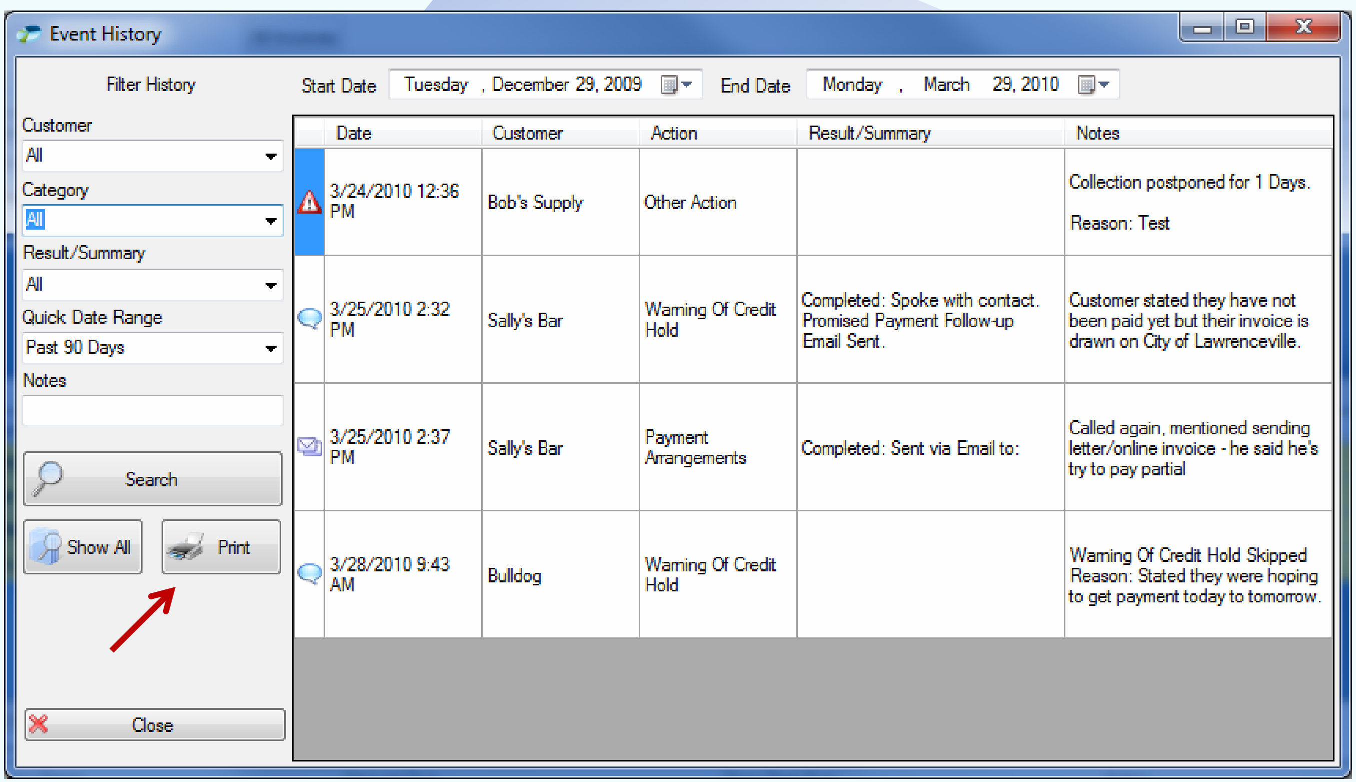
- From the main Dashboard Select "History"

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 reports are easy to generate and print

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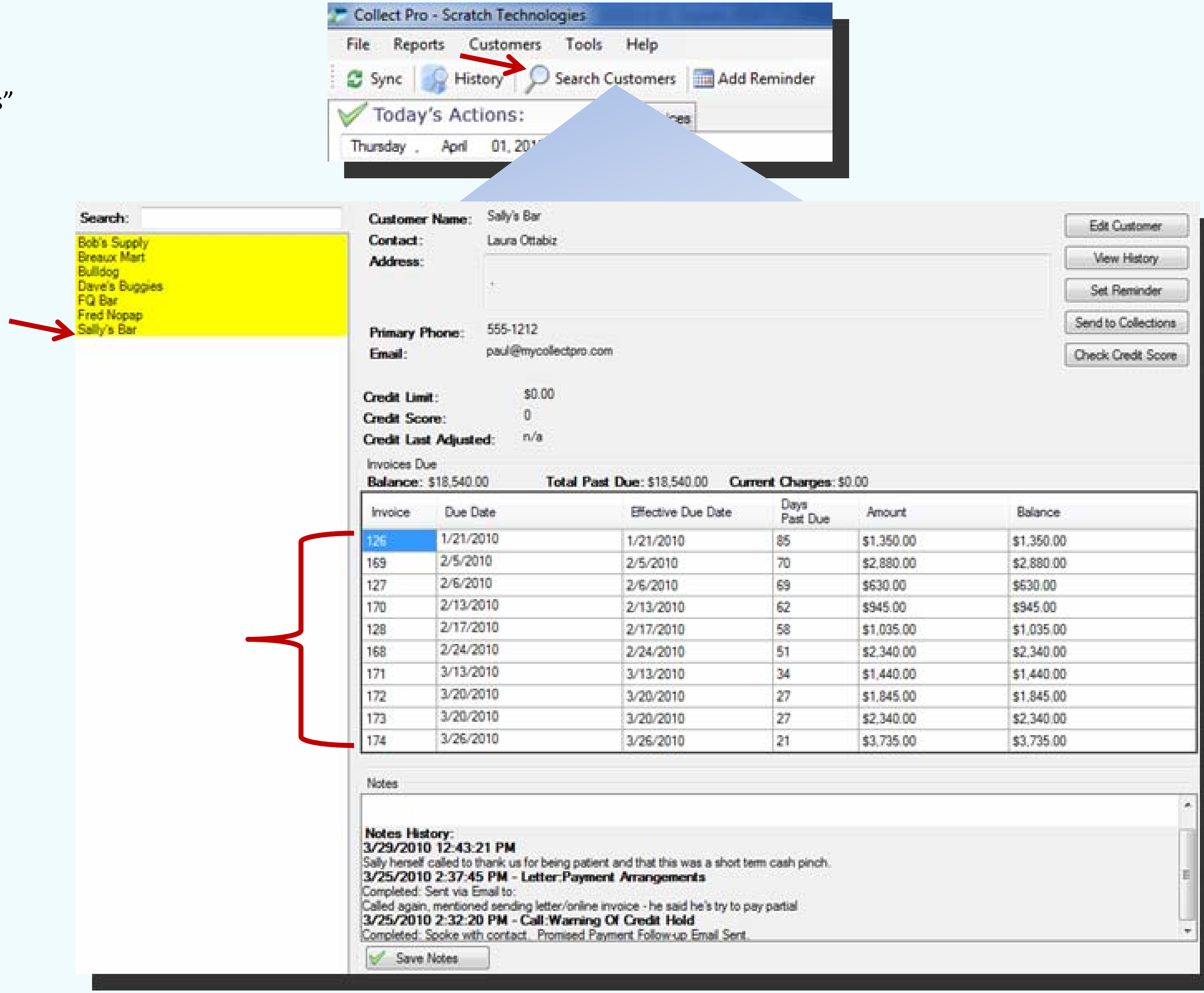
View all Invoices

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



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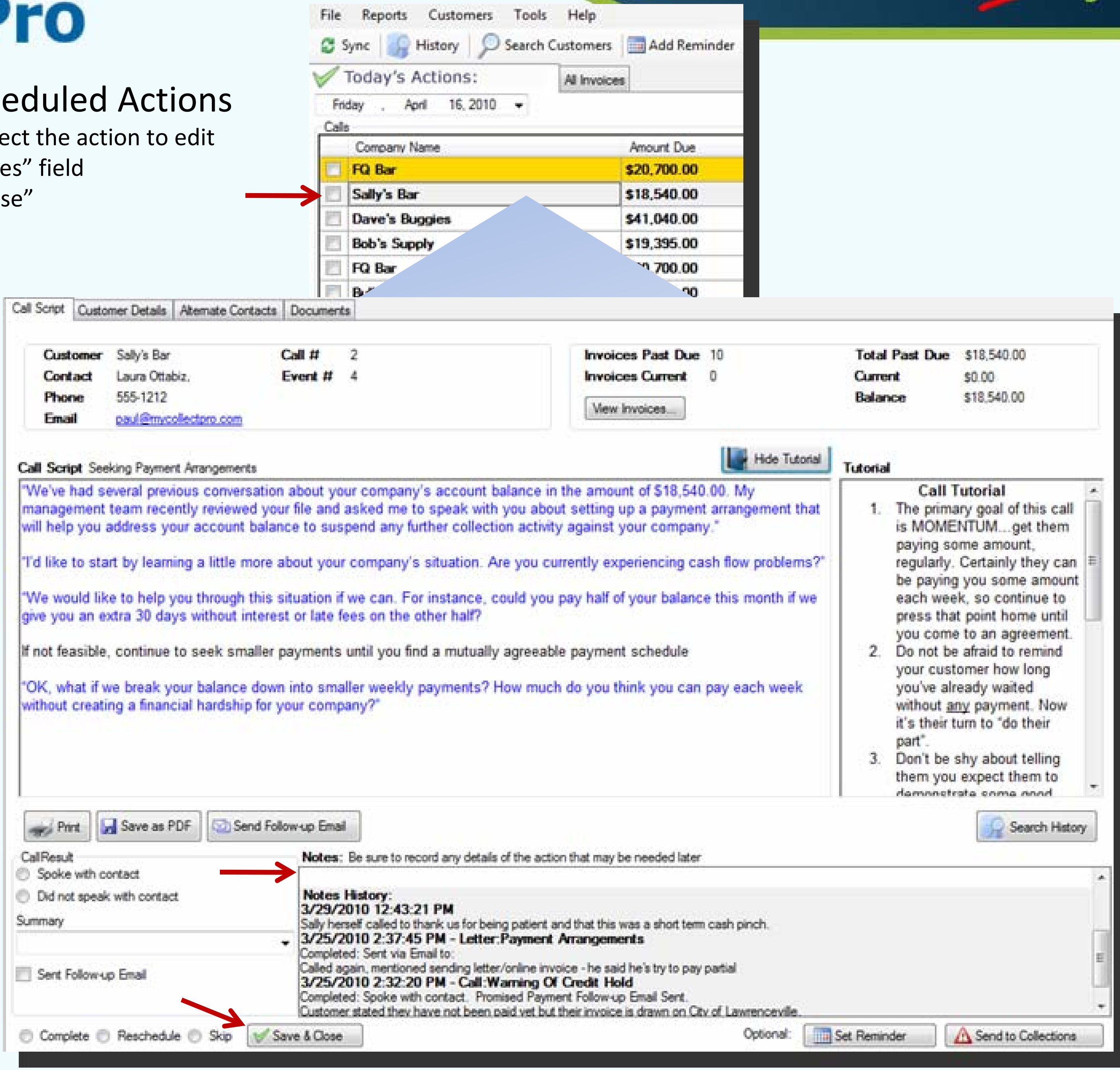
Adding Notes to Scheduled Actions

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”



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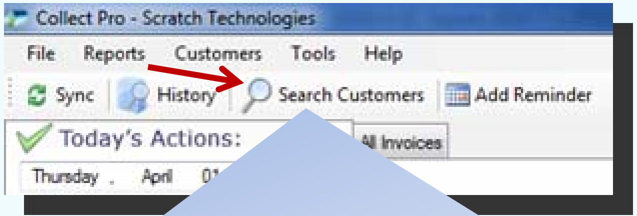
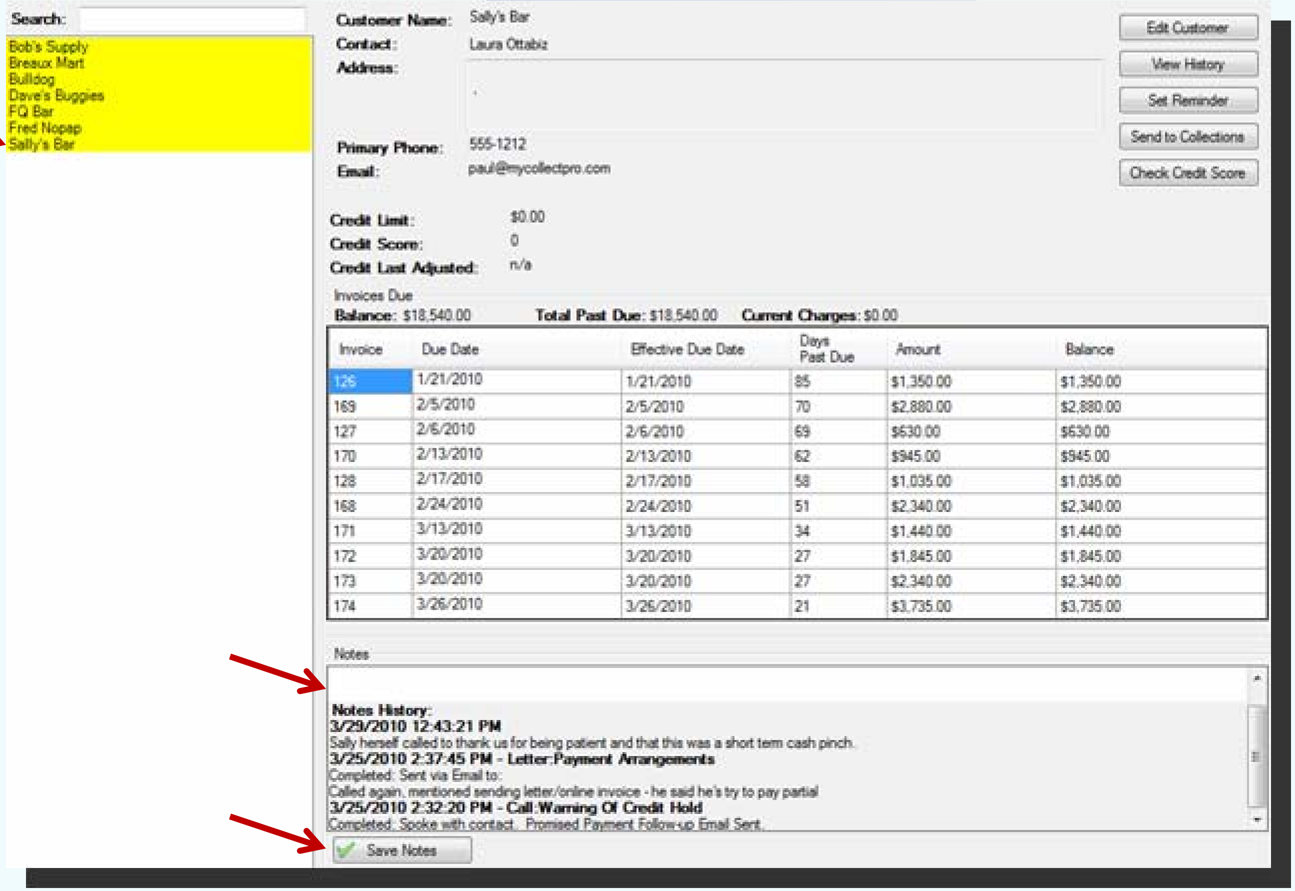
Adding Notes to Customer’s Account

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





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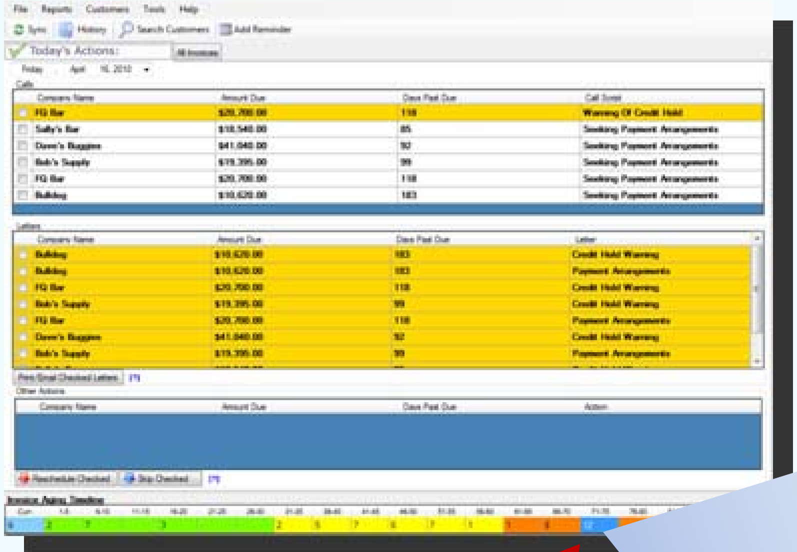
View Invoices in Each Stage of Timeline



- 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