

# Quick Tips Guide

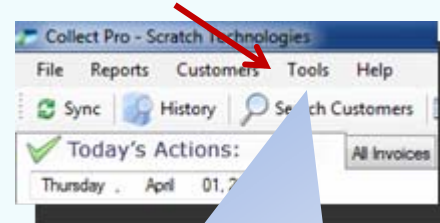
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## Managing Invoice Timeline

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

+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

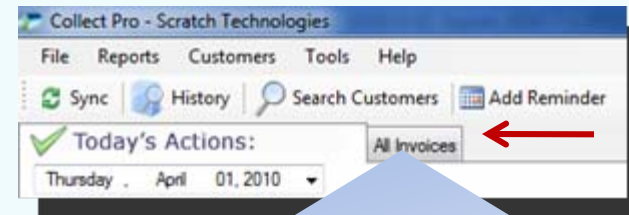
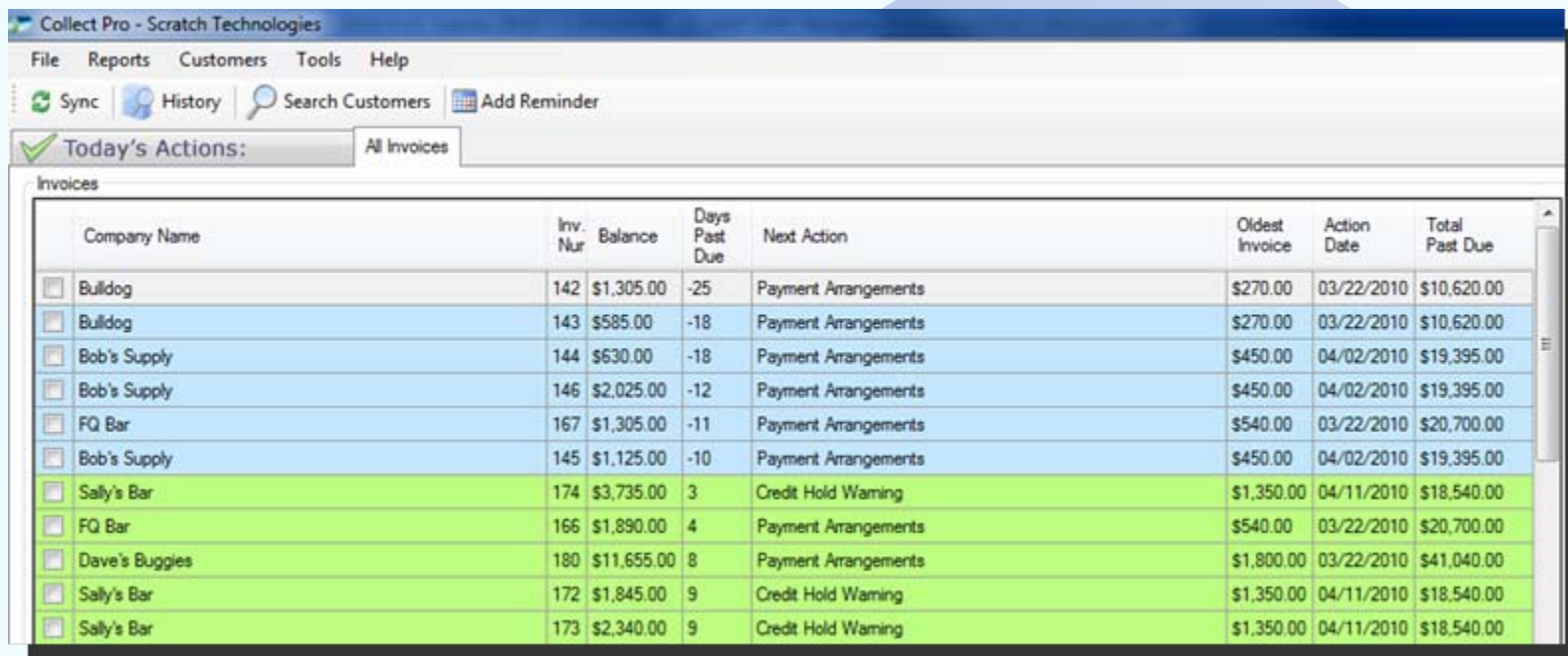
## View All Invoices

From the Main Dashboard click the 'All Invoices' tab.

This will show all invoices in the Invoice Action Timeline.

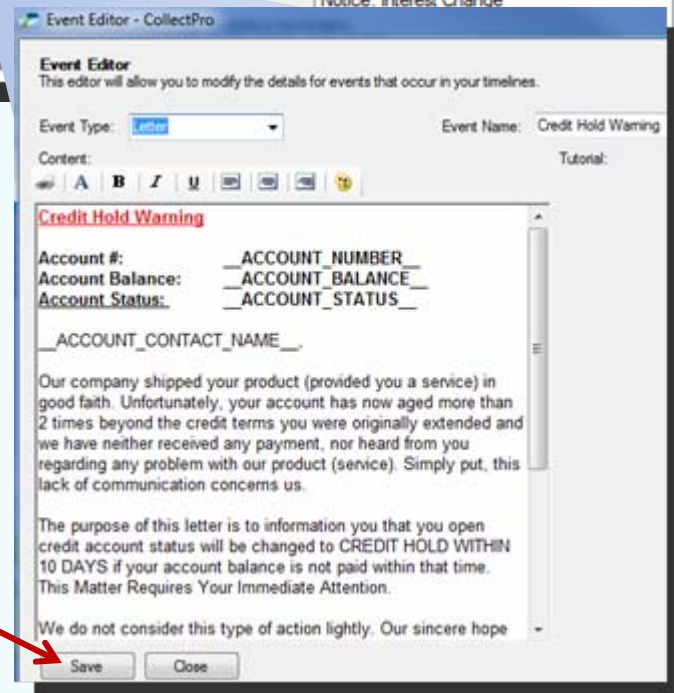
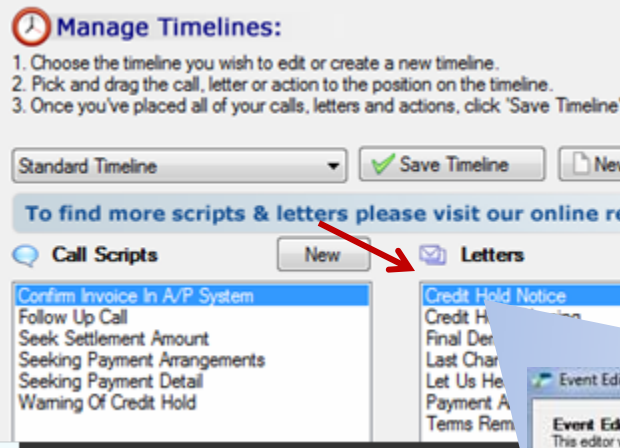
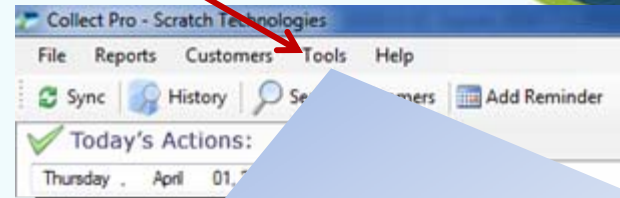
You can sort each column by ascending and descending.

You can also open each Invoice Action

This screenshot shows the 'Invoices' list in the Collect Pro software. The 'All Invoices' tab is selected. The table below lists various invoices with their details.

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

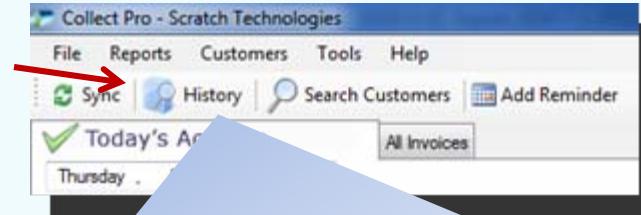
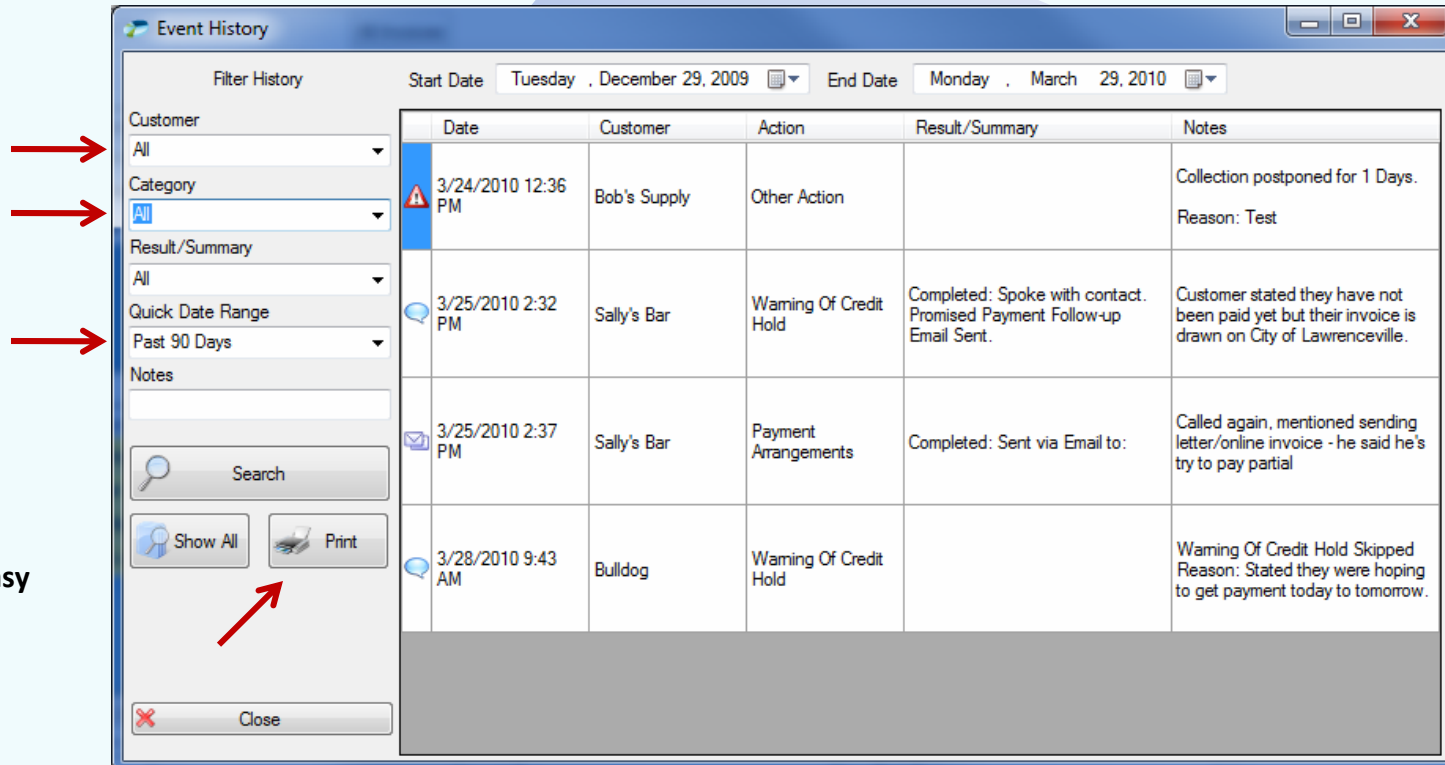
- From the main Dashboard Select "History"

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

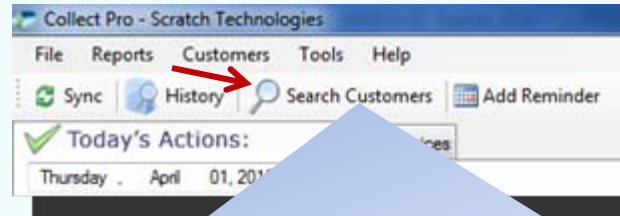
Customer	Date	Customer	Action	Result/Summary	Notes
All	3/24/2010 12:36 PM	Bob's Supply	Other Action		Collection postponed for 1 Days. Reason: Test
All	3/25/2010 2:32 PM	Sally's Bar	Warning Of Credit Hold	Completed: Spoke with contact. Promised Payment Follow-up Email Sent.	Customer stated they have not 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.

Customer: All  
 Category: All  
 Result/Summary: All  
 Quick Date Range: Past 90 Days  
 Notes: [Search]  
 [Show All] [Print] [Close]

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

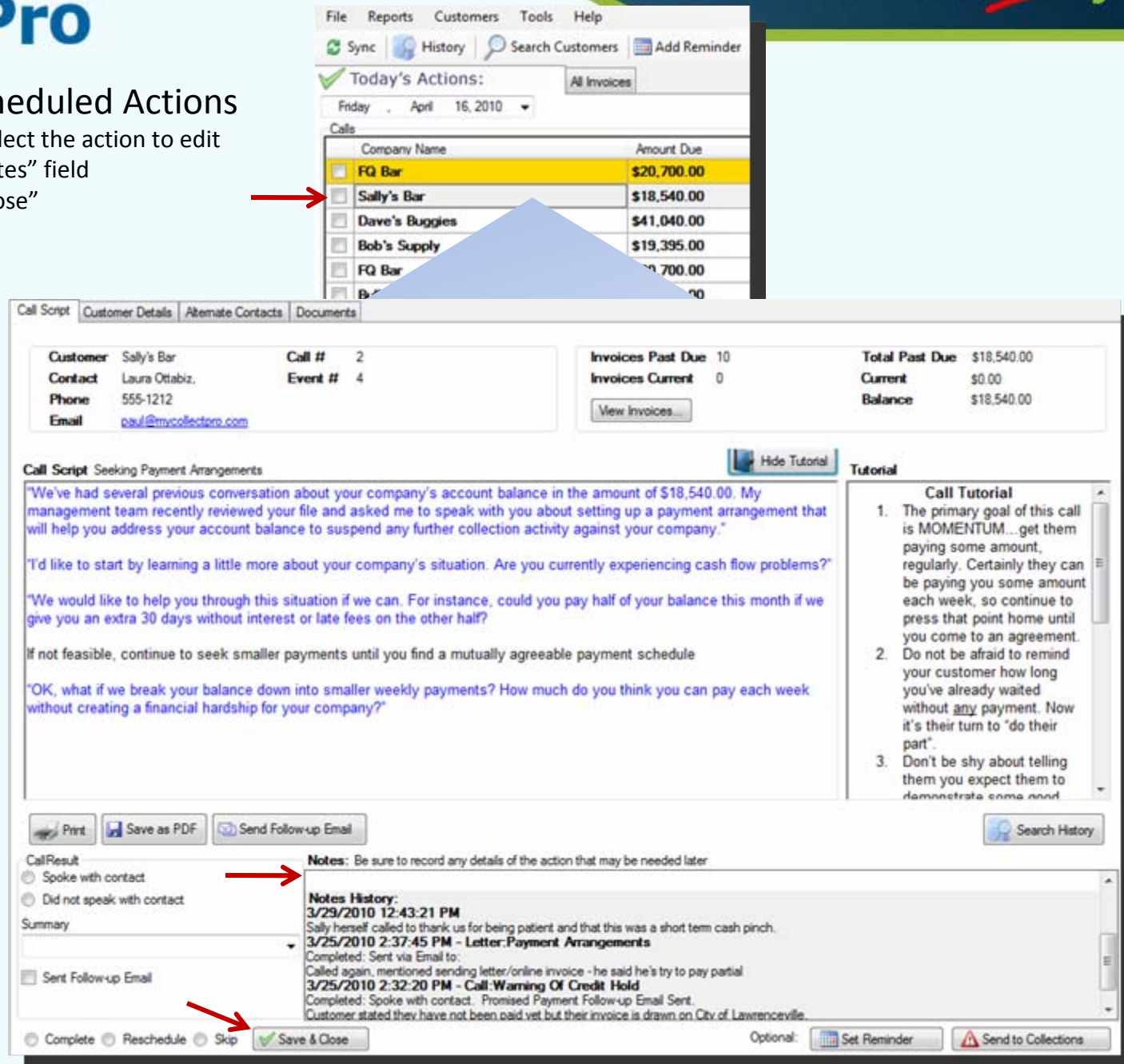
Invoice	Due Date	Effective Due Date	Days Past Due	Amount	Balance
126	1/21/2010	1/21/2010	85	\$1,350.00	\$1,350.00
169	2/5/2010	2/5/2010	70	\$2,880.00	\$2,880.00
127	2/6/2010	2/6/2010	69	\$630.00	\$630.00
170	2/13/2010	2/13/2010	62	\$945.00	\$945.00
128	2/17/2010	2/17/2010	58	\$1,035.00	\$1,035.00
168	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 is a 'Today's Actions' section with a date dropdown set to 'Friday, April 16, 2010'. A table lists several customers with their 'Amount Due':

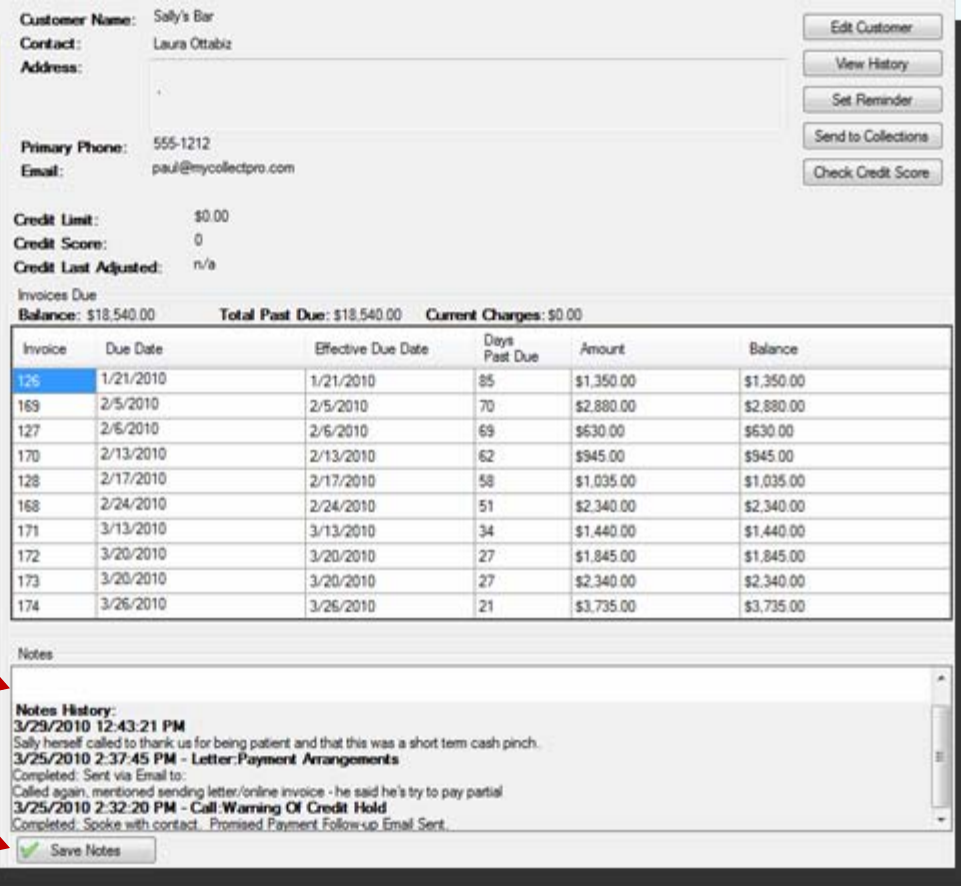
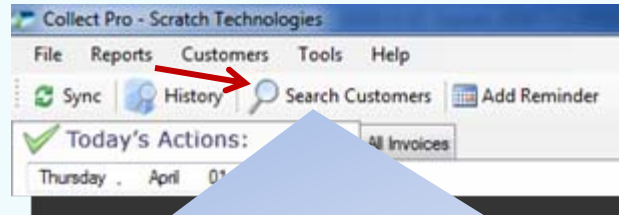
Company Name	Amount Due
<input checked="" type="checkbox"/> FQ Bar	\$20,700.00
<input type="checkbox"/> Sally's Bar	\$18,540.00
<input type="checkbox"/> Dave's Buggies	\$41,040.00
<input type="checkbox"/> Bob's Supply	\$19,395.00
<input type="checkbox"/> FQ Bar	\$20,700.00
<input type="checkbox"/> B...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

A red arrow points to the 'Sally's Bar' row. Below this, the 'Customer Details' tab is active, showing information for 'Sally's Bar' (Contact: Laura Ottabiz, Phone: 555-1212, Email: paul@mycollectpro.com). To the right, a summary of 'Invoices Past Due' (10) and 'Total Past Due' (\$18,540.00) is displayed. The main area contains a 'Call Script' titled 'Seeking Payment Arrangements' with several paragraphs of text. A 'Tutorial' panel on the right lists three steps for handling customer calls. At the bottom, there are buttons for 'Print', 'Save as PDF', and 'Send Follow-up Email'. The 'Call Result' section has radio buttons for 'Spoke with contact', 'Did not speak with contact', and 'Sent Follow-up Email'. A 'Notes' field contains the text: 'Notes: Be sure to record any details of the action that may be needed later'. Below this is a 'Notes History' section with a list of previous notes and dates. At the bottom right, there are buttons for 'Complete', 'Reschedule', 'Skip', 'Save & Close', 'Set Reminder', and 'Send to Collections'. A red arrow points to the 'Save & Close' button.



## 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"



A screenshot of the customer account page for 'Sally's Bar'. The page displays contact information, financial summary, and a notes section. A red arrow points to the 'Save Notes' button at the bottom of the notes section.

**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

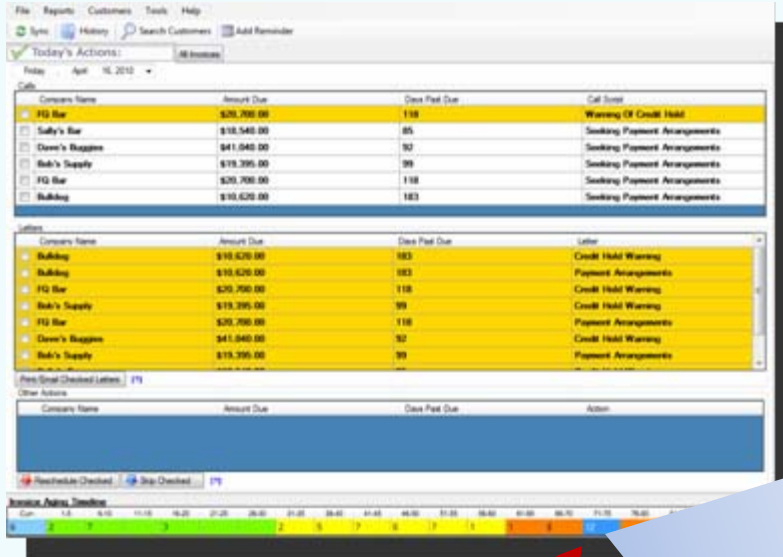
Invoice	Due Date	Effective Due Date	Days Past Due	Amount	Balance
126	1/21/2010	1/21/2010	85	\$1,350.00	\$1,350.00
169	2/5/2010	2/5/2010	70	\$2,880.00	\$2,880.00
127	2/6/2010	2/6/2010	69	\$630.00	\$630.00
170	2/13/2010	2/13/2010	62	\$945.00	\$945.00
128	2/17/2010	2/17/2010	58	\$1,035.00	\$1,035.00
168	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:

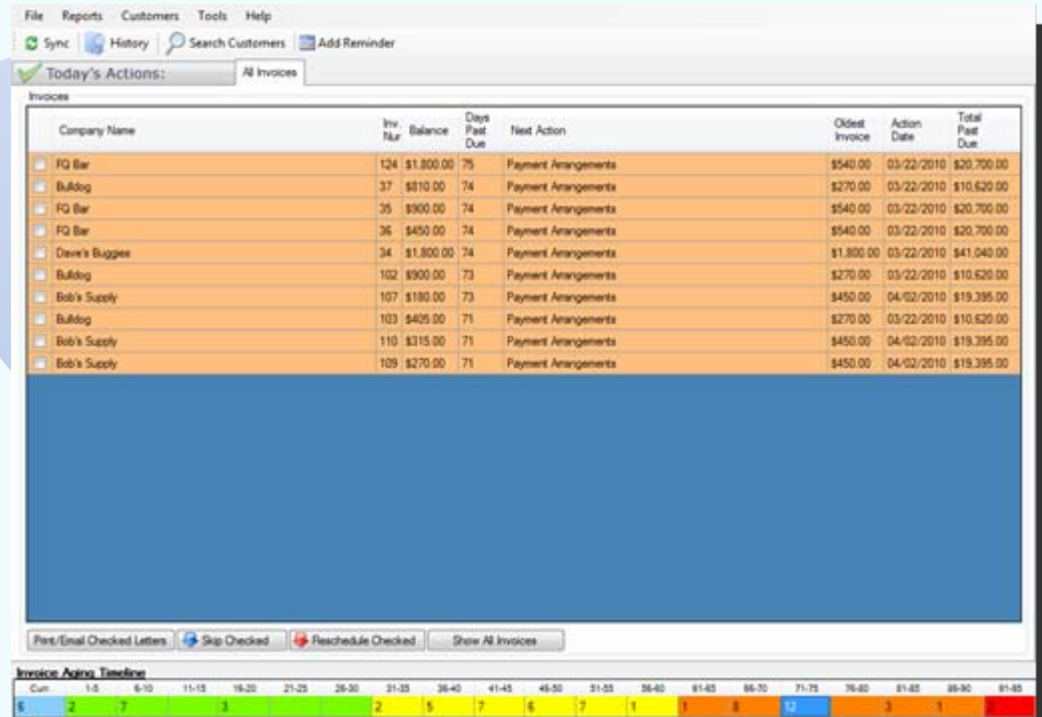
Company Name	Amount Due	Days Past Due	Call Text
FQ Bar	\$20,700.00	118	Warning Of Credit Hold
Sally's Bar	\$10,540.00	85	Seeking Payment Arrangements
Dave's Buggies	\$41,040.00	92	Seeking Payment Arrangements
Bob's Supply	\$19,395.00	99	Seeking Payment Arrangements
FQ Bar	\$20,700.00	118	Seeking Payment Arrangements
Bulldog	\$10,620.00	183	Seeking Payment Arrangements

Below this is the 'Invoice Aging Timeline' showing a bar chart of invoice counts over time. A red arrow points to a specific point on 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 the 'Invoices' window with a detailed list of invoices:

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' bar chart with a red arrow pointing to a specific point on the timeline.