

Quick Tips Guide

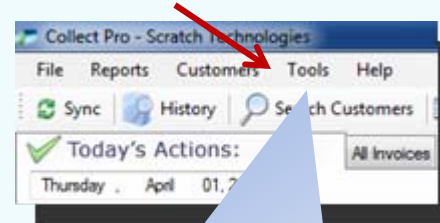
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Managing Invoice Timeline

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

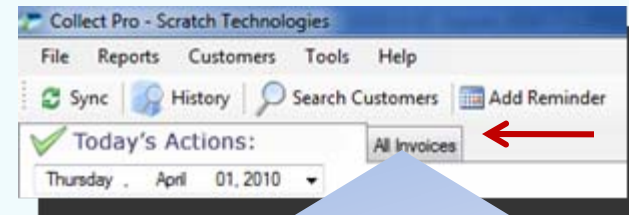
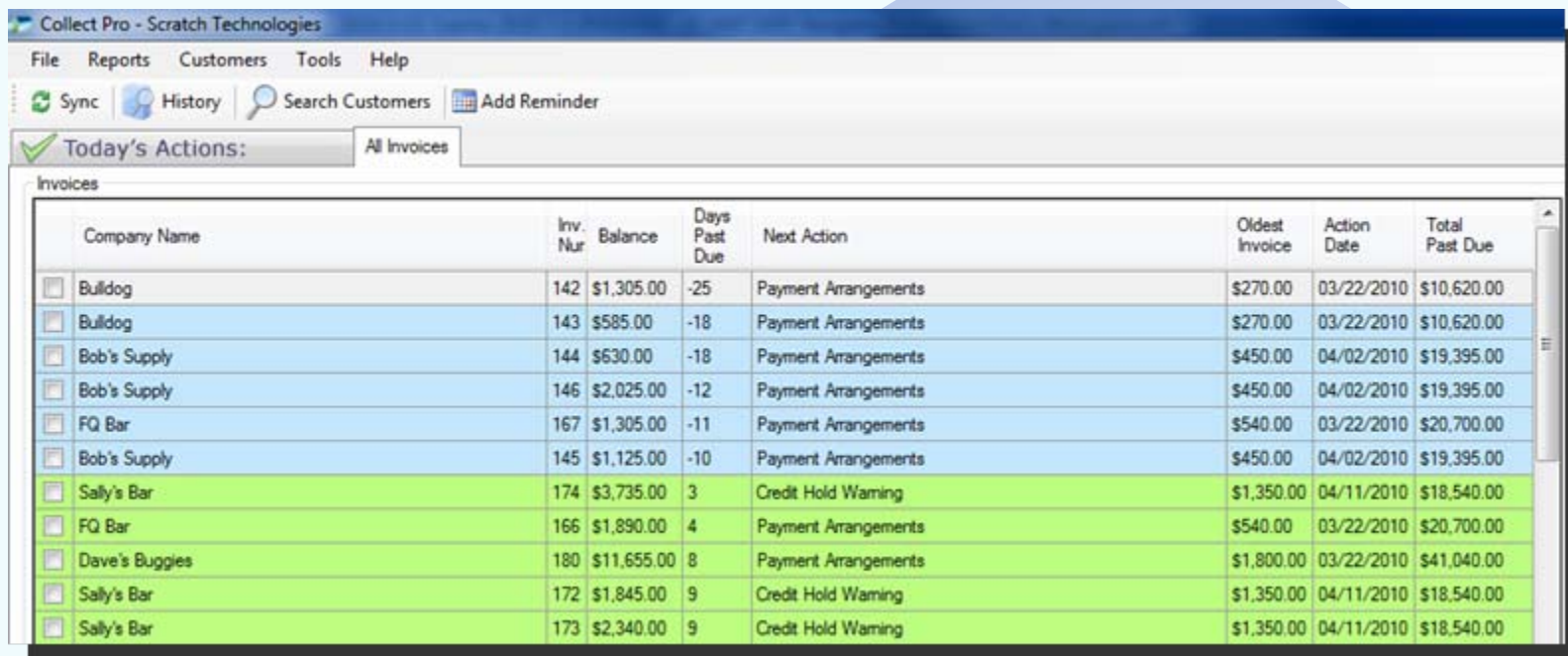
View All Invoices

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

This will show all invoices in the Invoice Action Timeline.

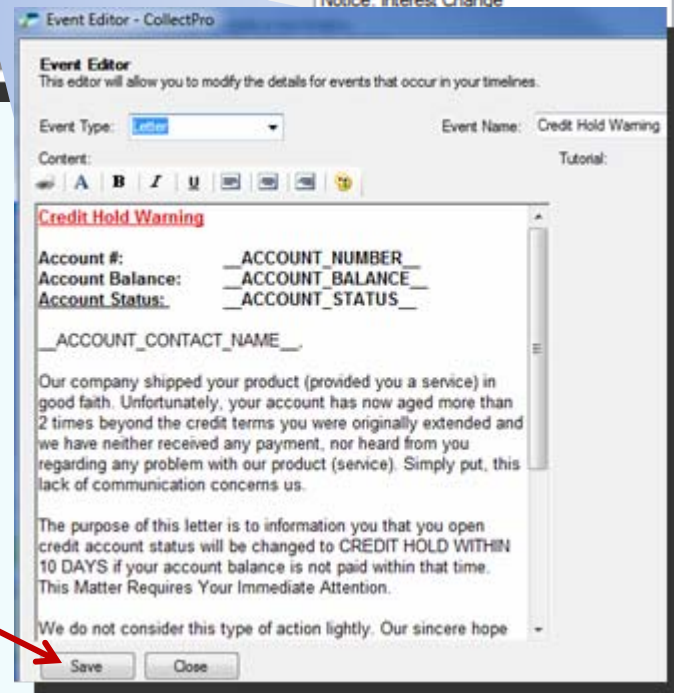
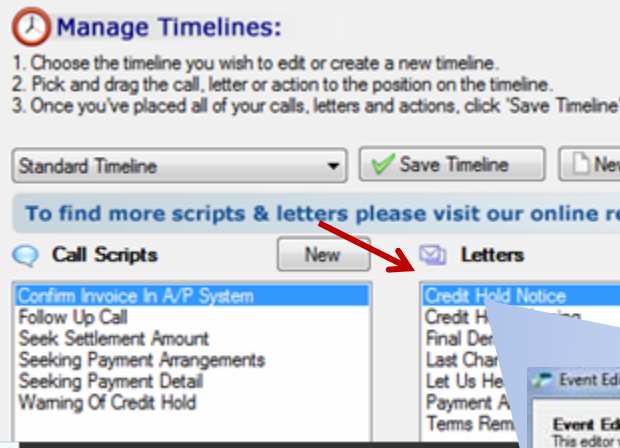
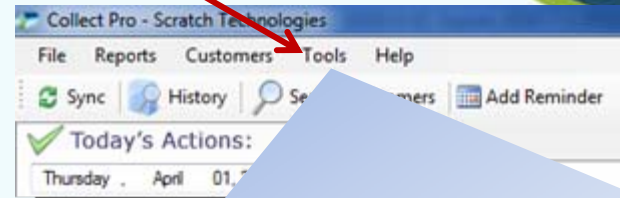
You can sort each column by ascending and descending.

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. Nur, 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 four rows highlighted in green.

| Company Name | Inv. Nur | 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

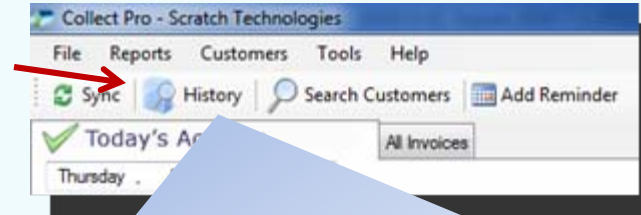
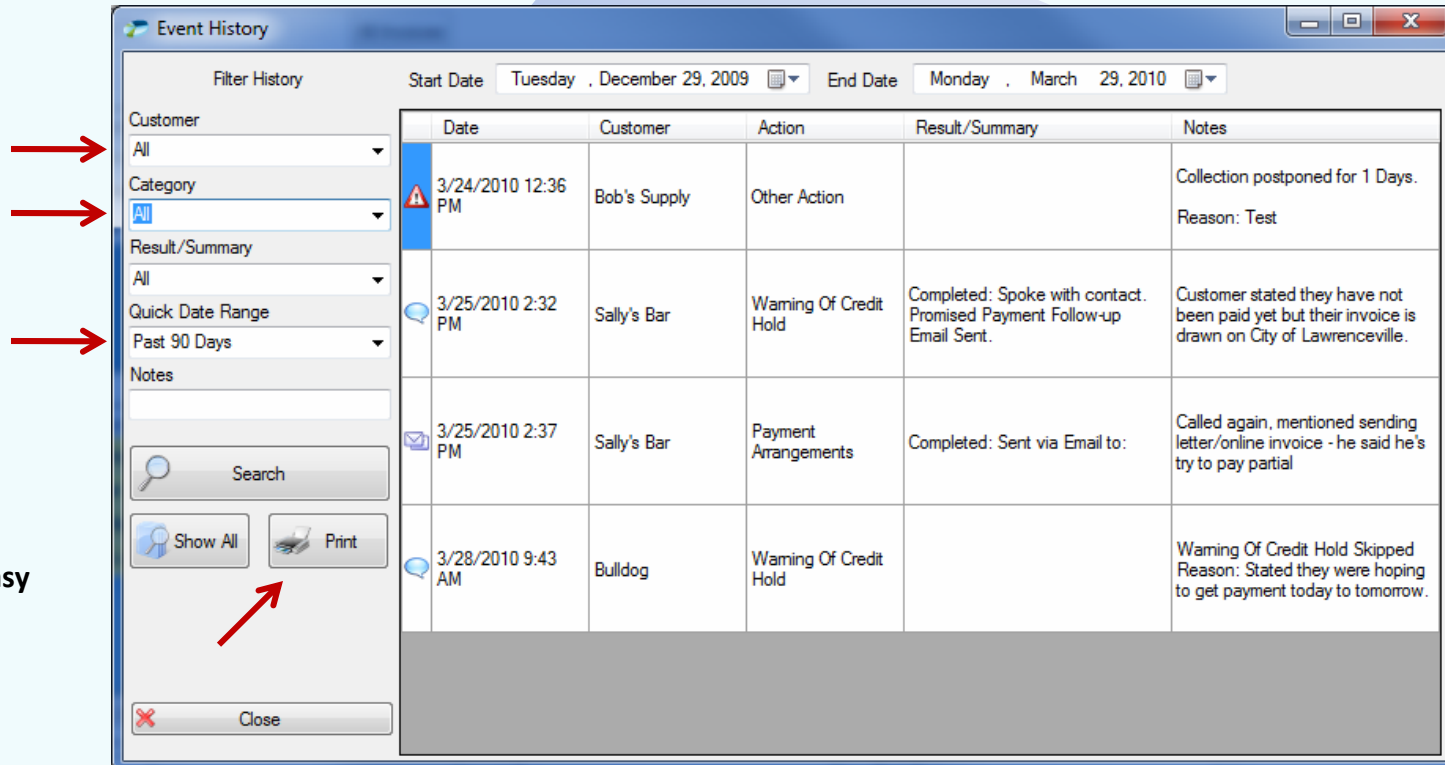
- From the main Dashboard Select “History”

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. |

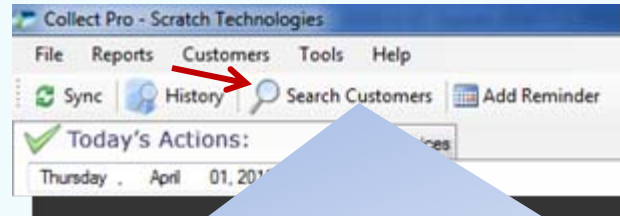
Customer: All, Category: All, Result/Summary: All, Quick Date Range: Past 90 Days

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

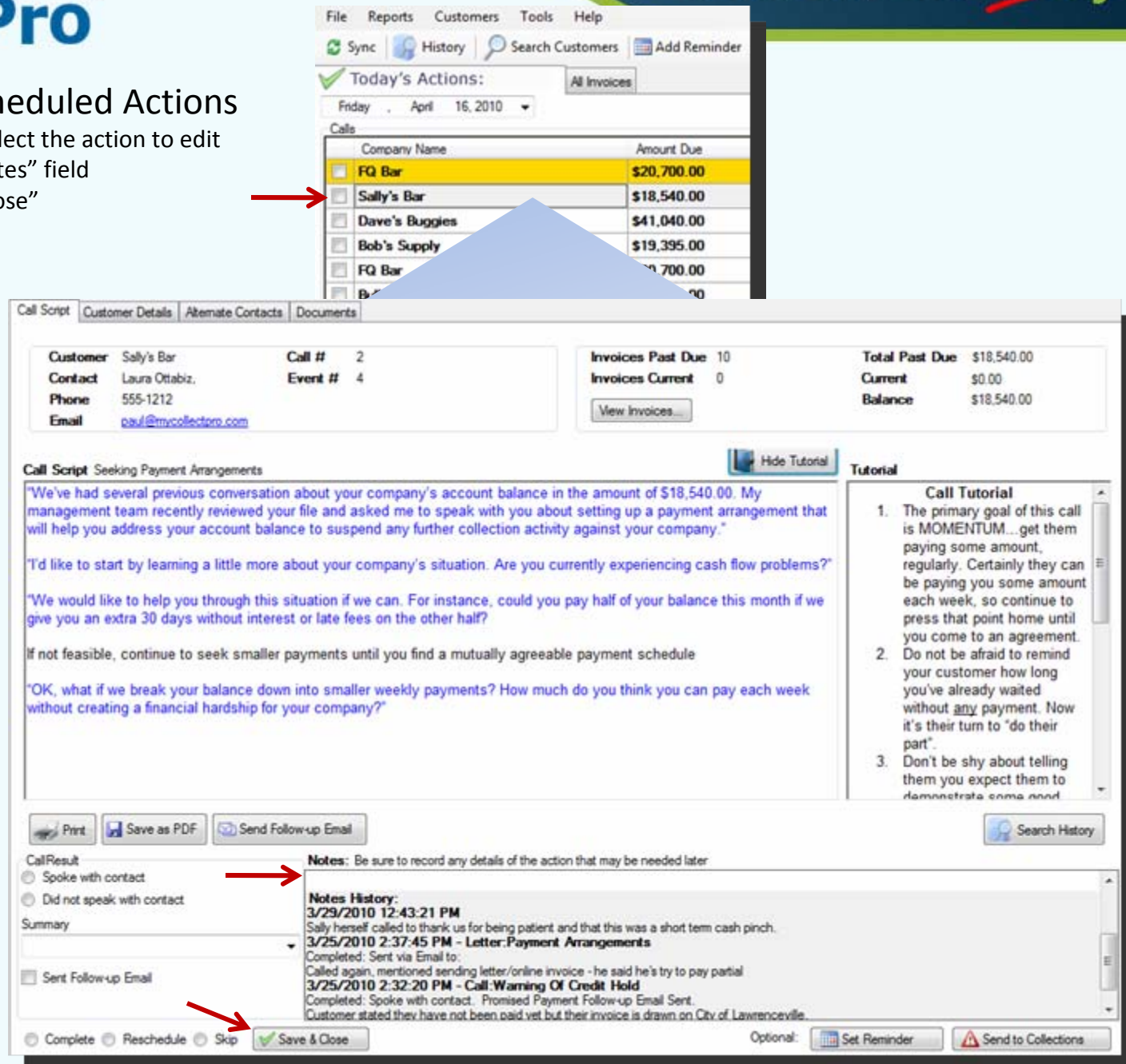
| Invoice | Due Date | Effective Due Date | Days Past Due | Amount | Balance |
|---------|-----------|--------------------|---------------|------------|------------|
| 126 | 1/21/2010 | 1/21/2010 | 85 | \$1,350.00 | \$1,350.00 |
| 169 | 2/5/2010 | 2/5/2010 | 70 | \$2,880.00 | \$2,880.00 |
| 127 | 2/6/2010 | 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

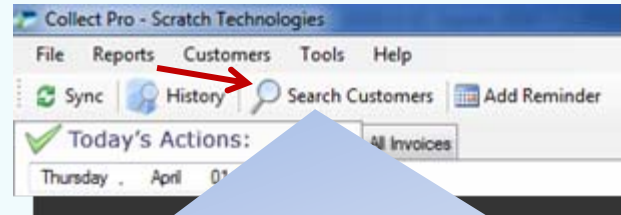
1. From "Today's Actions" Select the action to edit
2. Add your notes to the "Notes" field
3. Be sure to click "Save & Close"



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 bar, there are buttons for 'Sync', 'History', 'Search Customers', and 'Add Reminder'. A 'Today's Actions' section shows a date of 'Friday, April 16, 2010' and a dropdown for 'All Invoices'. A table of 'Calls' is displayed with columns for 'Company Name' and 'Amount Due'. The table lists several companies, with 'FQ Bar' highlighted in yellow and 'Sally's Bar' selected. A red arrow points to the 'Sally's Bar' row. Below the table, there are tabs for 'Call Script', 'Customer Details', 'Alternate Contacts', and 'Documents'. The 'Customer Details' tab is active, showing information for 'Sally's Bar' including 'Call # 2', 'Event # 4', 'Contact Laura Ottabiz', 'Phone 555-1212', and 'Email paul@mycollectpro.com'. To the right, there is a summary of 'Invoices Past Due' (10), 'Invoices Current' (0), 'Total Past Due' (\$18,540.00), 'Current' (\$0.00), and 'Balance' (\$18,540.00). Below this, there is a 'Call Script' section with the text: 'Seeking Payment Arrangements'. A 'Tutorial' section is also visible on the right. At the bottom, there is a 'Call Result' section with radio buttons for 'Spoke with contact', 'Did not speak with contact', and 'Sent Follow-up Email'. A red arrow points to the 'Spoke with contact' option. Below this, there is a 'Notes' field with the text: 'Be sure to record any details of the action that may be needed later'. A 'Notes History' section shows a list of previous notes with dates and times. At the bottom right, there is a 'Save & Close' button with a green checkmark, which is highlighted by a red arrow. Other buttons include 'Print', 'Save as PDF', 'Send Follow-up Email', 'Search History', 'Set Reminder', and 'Send to Collections'.

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

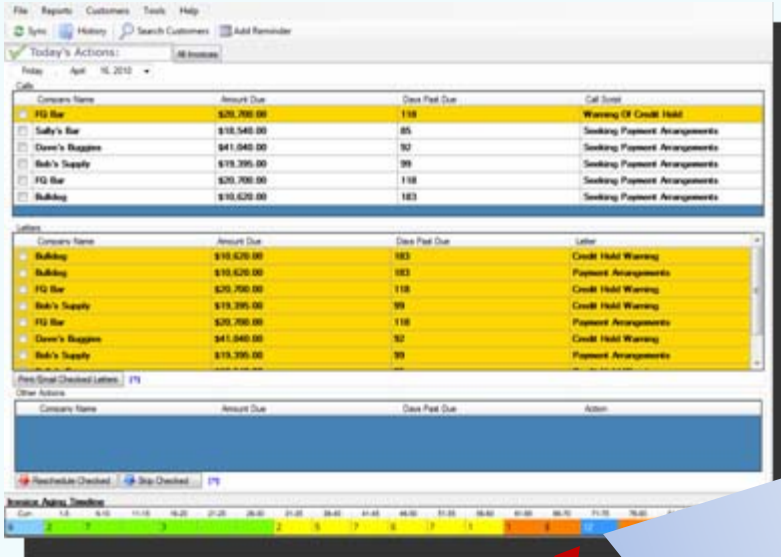
| Invoice | Due Date | Effective Due Date | Days Past Due | Amount | Balance |
|---------|-----------|--------------------|---------------|------------|------------|
| 126 | 1/21/2010 | 1/21/2010 | 85 | \$1,350.00 | \$1,350.00 |
| 169 | 2/5/2010 | 2/5/2010 | 70 | \$2,880.00 | \$2,880.00 |
| 127 | 2/6/2010 | 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:

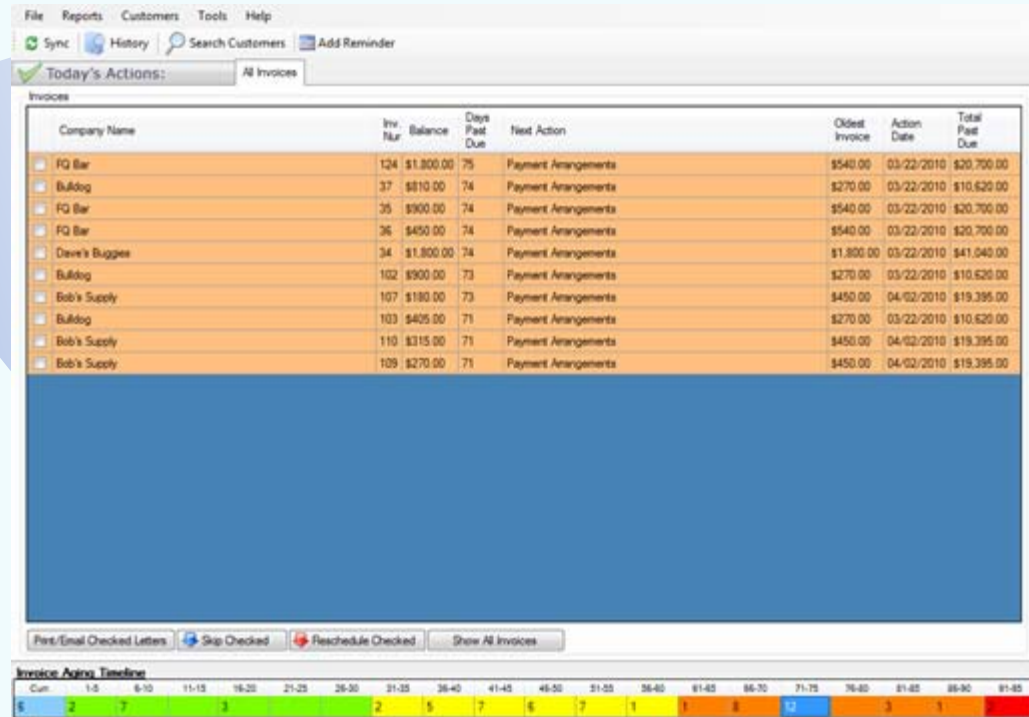
| Company Name | Amount Due | Days Past Due | Call To Action |
|----------------|-------------|---------------|------------------------------|
| FQ Bar | \$20,700.00 | 118 | Warning Of Credit Hold |
| Sally's Bar | \$10,540.00 | 85 | Seeking Payment Arrangements |
| Dave's Buggies | \$41,040.00 | 92 | 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 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.