

BillingPlatform CollectionsCloud Collections Management Made Easy



Ditch the spreadsheet and automate your receivables portfolio

Do you struggle managing unpaid accounts and aging outstanding balances?

CollectionCloud can help with an enterprise-oriented solution to manage collections:

- ✓ Segment accounts based pre-defined parameters
- ✓ Prioritize accounts needing attention
- ✓ Automate tasks when action is needed
- ✓ Analyze performance of past collection scenarios to dynamically deploy the most effective strategies

CollectionsCloud ties collection processes to aging and allows you to tailor strategies with the right mix of manual and automated actions. These actions can be as simple as adding a note on an account, setting a reminder to call a customer, sending an automated email or text, or triggering workflow in the system.

And with the ability to segment customers based on the parameters you define you can fully automate collections activities for low-risk customers and create custom strategies that include a mix of manual and automated actions for high-risk accounts

Promise to Pay Details

PTP ID	35	Collector	Jules Winnfield
Creation	9/20/2019 08:00 MDT	Status	
Account	Comcast	Reason	
Promisor	Kate Roddick, AP Manager		

Payments

One time	Delay Aging	Due on	Received on
\$19 513 983	N	2019-09-30	

Reminders [Schedule/Send email](#) **Confirmations** [Schedule/Send email](#)

Email 10249	2019-09-29	Scheduled	Email 10500	2019-09-20	Sent
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Tolerance

Amount: % \$
Day(s):

Attachments [Browse...](#)

Inv 123456 Statement 123456

[Cancel](#) [Save](#) [Save & Create Follow-up](#)

Collection strategy example:

- Customer account is past due 5 days
→ Trigger email reminder
- Account is past due 15 days
→ Trigger collections agent reminder to call
- Customer agrees to pay in next 5 days
→ Agent enters Promise to Pay details
- Day 21, Promise to Pay is broken
→ Trigger account suspension and email notice
- Customer pays outstanding invoice on day 25
→ Trigger service to resume

With the Collector Dashboard, never lose sight of past-due accounts:

- ✓ Real-time view of the Collector Status
- ✓ Prioritization of accounts requiring action
- ✓ Easy access to customer history

Don't manage collections in-house? No problem, CollectionsCloud can easily share your collections data with the collection agency of choice.

Collector Dashboard

Summary: ACTIONS PAST DUE: 1, ACTIONS DUE TODAY: 15, ACTIONS COMPLETED: 350, BALANCE OUTSTANDING: \$1,189,350, AMOUNT RECOVERED MET: \$1,750, PROMISE TO PAY MET: \$2,523

Charts: Amounts, Open balances, Cases metrics, Average days past due

Actions for today

Action Date	Account	Collector	Day Past Due	Action	Priority	Contact	Template	Attachments	Note	Actions
07/27/2020	Naltron Lead Pipes Inc.	Mark Cullen	149	Call	High	Rita Argente			[07/27/2020 12:27 AM john.smith] Discuss possibility to agree on a Promise to Pay	Edit Del
07/28/2020	Naltron Lead Pipes Inc.	Mark Cullen	149	Text Message	High	John Smith			[07/28/2020 12:14 AM john.smith] Confirm Text	Edit Del
07/28/2020	All Terrain Auto Parts Inc.	Mark Cullen	179	Email	Medium	Michael McCormick	Medium Risk Template (US)	Statement-Invoices		Edit Del
07/28/2020	All Terrain Auto Parts Inc.	Mark Cullen	179	Phone Service	Medium					Edit Del
07/28/2020	Eastball S.A.	Mark Cullen	59	Email	Medium	Maria Dolores	High Risk Template (EU)	Invoices		Edit Del

Accounts List

Collector	Parent Account	Account	In Collections	Due Date	Days Past Due	Balance Outstanding	Past Due Amounts	Currency	Country
Mark Cullen	All Terrain Auto Parts Inc.		Yes	02/01/2020	179	25,000.00	14,245.00	Dollars	United States
Mark Cullen	Naltron Lead Pipes Inc.		Yes	03/01/2020	150	10,000.00	7,500.00	Dollars	United States
Mark Cullen	ABC Conglomerate	ABC Corp	Yes	03/16/2020	135	125,000.00	84,000.00	Dollars	United States
Mark Cullen	SuperBikes & Cars Inc.		Yes	05/20/2020	70	52,000.00	41,000.00	Dollars	United States
Mark Cullen	Eastball S.A.		Yes	05/31/2020	59	5,000.00	2,000.00	Euros	Spain

With billing and collections in a single solution, CollectionsCloud will help eliminate spreadsheets and redundant solutions to streamline debt collections, reduce DSO and improve collector productivity.