



# Getting Paid Without Getting Mean, In-house Collections

# Getting Paid Without Getting Mean, In-house Collections



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# Agenda

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- Why you should have a collection plan
- Setting up your collections plan
- Setting up the software
- Statements - Full review of the entire module
- Call Logs
- Collection Letters

# Why you need a Collection Plan

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- The sooner you communicate to a customer the better you can solve any issues and ultimately improving customer satisfaction.
- Keeping a plan will 'train' your customers on what to expect.
- When you stick to a plan, you decrease the amount of time you spent 'catching up'.
- Keeping customers off credit hold and treatments on schedule.

# Coming up with a Collection Plan

- What can you do before a balance becomes past due?
- When do you send statements?
- When do you want to start calling?
  - Are there different types or levels of calls being made
  - How often do you want to call
- Do you send letters?
- When do you bad debt?
- Do you send to collections agency

# Setup

# What Can You Proactively Do?

The image displays two screenshots of a customer management system. The top screenshot shows the 'Customer Details' page for Mr. Emory Beals, account # 18231. Key information includes: Residential Address (6078 Bentwood Cir E, White Lake, MI 48383), Home phone number (248) 887-5066, and email address ama2dev@realgreen.com. A 'Bill To' dropdown is set to 'Service Address'. The 'Customer Details' table lists: Customer Type (Residential), Default Billing Type (Regular / Invoice), Branch (2222 - SuperGreen), Call Ahead, Source (Referral), Print Invoices (Customer Copy (With Pricing)), Customer Since (2/16/1995), Tax Codes (1 - MI State Tax (6%)), and Value (\$577.32). The bottom screenshot shows the 'Preferences' dialog box for the same customer. The 'Preferences' section has 'Email Statements' checked. Under 'Restrictions', 'Don't Text' is checked, while 'Don't Direct Mail', 'Don't Knock', 'Don't Email Invoice', 'Email Pre-Notify', 'Don't Email Market', 'Don't Email Followup', and 'Text Pre-Notify' are unchecked.

Accurately set phone type, confirm who is responsible for getting the bills, address, email and invoice type and what's allowed.

# Customer – Financial Tab

Specifically for the customer, there are a couple of financial related options.

1. Is the customer set to not charge interest?
2. Is the customer never going to be put on credit hold?
3. Do they get statements when they reach a specific aging, every time you pull statements, never or the next time you send?

The screenshot shows the 'Financial' tab for a customer named Bryson Braggon. The account number is 10. The interface includes a navigation bar with tabs for Customer Details, Documents (2), History, Contact, Financial (selected), Installments (0), and Stations (0). Below the navigation bar, there are sections for 'Balance Details' and 'Collections'. The 'Balance Details' section shows: Net Balance: \$3.04, Prepay/Applied Balance: \$0.00, Remit Balance: \$3.04, Last Pmt Date: 1/23/2026, Last Pmt Amt: \$79.00, and Credit Limit: \$99,999.00. The 'Collections' section has several fields: 'Do NOT Charge Interest' (checkbox), 'Do NOT Put on Credit Hold' (checkbox), 'Collection Date', 'Agency Export Date', 'Collection Status' (dropdown menu), 'Reason' (text input), and 'Send Statements' (dropdown menu). A 'Debit Aging Balance' table is also visible, showing aging periods from 1-15 days to Over 180 days, with the last aging date being 1/23/2026. A dropdown menu is open for the 'Send Statements' field, showing options: 'For Remit Balance', 'Never', 'Always', and 'Include In Next Batch'.

Debit Aging Balance	
1 - 15 Days:	\$0.00
16 - 30 Days:	\$0.00
31 - 60 Days:	\$0.00
61 - 90 Days:	\$3.04
91 - 120 Days:	\$0.00
121 - 180 Days:	\$0.00
Over 180 Days:	\$0.00
Last Aging Date:	1/23/2026

# General Setup - Financial

Impacts entire database, not branch specific

- Default Credit Limit
- Aging Categories - used for everything - calls, statements, letters etc. *Can be changed on the fly and Aging will update all customer balances.*
- Interest & Statement Fees
- Past Due Messages
- Statement Only Billing services - when do you start aging?

Settings > General Setup - Financial

### General Setup - Financial

**Default Credit Limit:**   Disable Installment Billing

**1st Month of Fiscal Year:**   Post Installments During Aging

**Prepay Discount Cutoff:**   Non-Autopay Installment Next Statement

Don't Auto Post CAW/ML Payments

Show Credit Card Security Code

Limit Adjustment Codes

**Round Calculated Prices:**

Do Not Interpolate Prices

Automatic Prepay Management

#### Limit Journal Entry

**Days Early:**  **Days Late:**

Production  Payments

Adjustments

### Aging Categories

**Charge:**

**Charge if calculated interest is at least:**  **Minimum interest charge:**

**Percent of interest to charge:**  **Amount of statement fee:**

Use done date instead of invoice print date to age statement only billing services

Aging Category	Residential	Commercial
15	<input type="checkbox"/>	<input type="checkbox"/>
30	<input checked="" type="checkbox"/>	<input type="checkbox"/>
60	<input checked="" type="checkbox"/>	<input type="checkbox"/>
90	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
120	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
180	<input type="checkbox"/>	<input type="checkbox"/>

### Past Due Messages

English

**Due 16 to 30 Days Message**

Your balance is over 30 days old. Please remit. Thank you. lets see how much room i really truely have. i bet that i'm already out of room.

**Due 31 to 60 Days Message**

Your balance is over 30 days old. Please remit ASAP. Thank you. lets see how much room i really truely have. i bet that i'm already out of room.

**Due 61 to 90 Days Message**

Your balance is over 60 days old. Please remit IMMEDIATELY. Thank you. lets see how much room i really truely have. i bet that i'm already out of room.

**Due 91 to 120 Days Message**

Your balance is over 90 days old. Please remit IMMEDIATELY to prevent further collections lets see how much room i really truely have. i bet that i'm already out

**Due 121 to 180 Days Message**

Your balance is over 120 days old. REMIT TODAY TO PROTECT YOUR CREDIT. lets see how much room i really truely have. i bet that i'm already out of room.

**Over 180 Days Message**

wowers you are SO SO SO OLD

# General Setup - Documents/Letters

Settings > General Setup - Documents/Letters

Disable Override

Disable Association

Include Service Feedback on Reprints

**Print Company Info**

- Logo
- URL
- Name
- Phone
- Address

**Print Remit Barcode**

- Print Remit Barcode
- Print Credit Card Panel
- Print Overdue Message
- Print Property Dimensions
- Print Customer Signature
- Print DRIVER INITIALS: \_\_\_
- Print Payment Request Message

**Print Continuous Service Message**

- Print Continuous Service Message
- Hide Payment, NPS, and Adjustments
- Print "Please have technician call me"
- No Reverse Print
- Assign To Technician
- NPS
- Print Email

History Cutoff: 01/01/1901

Print Products: Both Copies

Do not print remit amount unless it is at least: 5.00

Previous Balance: Net Balance(Except 0 Price Services)

Days Until Due: [input field]

Do Not Print Invoice if Balance Older Than: Residential (30 Days), Commercial (30 Days)

Print Anyway if Account Owes Not More Than: Residential (30.00), Commercial (30.00)

Do not print remit amount unless it is at least: 5.00

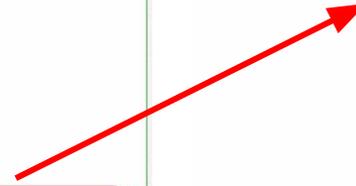
Previous Balance: Net Balance (except 0 price serv)

History Cutoff: [input field]

Print Products: Net Balance (except 0 price serv)

Days Until Due: Remit Balance, Remit Balance (except 0 price serv)

Printer Offset: Remit or Credit Balance, Remit or Credit Balance (except 0 price serv), No Previous Balance



**Statement Options**

Disable Override

**Print Company Info**

- Logo
- URL
- Name
- Phone
- Address

**Print Remit Barcode**

- Print Remit Barcode
- Print Credit Card Panel
- Print Overdue Message
- Print Payment Request Message
- NPS
- Print Continuous Service Message
- Exclude Prepayment Information

Days Until Due: [input field]

Service Assistant > Settings > Program / Job Type

**Program / Job Type** + Add

- A - Irrigation
- B - Septic
- C - Service Calls
- D - Plumbing
- E - Sewer
- H - Landscape
- L - Lawn
- M - Maintenance

**Details**

Type: C

Description: Service Calls

French Description: French Description

Spanish Description: Spanish Description

Credit Hold By: Customer Balance

Property Category: Customer Balance, Service Balance, None

Reset Changes

# General Setup - Program / Job

> Settings > General Setup - Program/Job

**Messages**

English

Remit None Text

Continuous Service Message

Payment Request Message

Proposal Acceptance

**WE CAN HELP!!!**

Please Remit **\$120.94**  
 Please pay within 10 days. Net 30 days 1.5% thereafter. Please call with any questions about your lawn. how much more can i get in this field? should be getting pretty close. maybe now, maybe now, how about now? la dee da, dee da

For your convenience; service will continue for season-to-season. For a change in service, please call our office.

PLEASE RETURN THIS PORTION WITH PAYMENT TO INSURE PROPER CREDIT. THANK YOU.

AMOUNT	CHECK NO.
Today's Invoice Charge	59.25
7% Tax	3.32
Invoice Total	62.57
Prev Bal as of 1/20/2025	58.37
<b>Please Remit</b>	<b>\$120.94</b>

Customer # 262  
 Invoice # 1

Due Date 2/4/2025

For your convenience; service will continue for season-to-season. For a change in service, please call our office.

PLEASE RETURN THIS PORTION WITH PAYMENT TO INSURE PROPER CREDIT. THANK YOU.

AMOUNT	CHECK NO.
Today's Invoice Charge	59.25
7% Tax	3.32
Invoice Total	62.57
Prev Bal as of 1/20/2025	58.37
<b>Please Remit</b>	<b>\$120.94</b>

Customer # 262  
 Invoice # 1

Due Date 2/4/2025

# Call Log Setup

Settings > Call Log Status Setup

The screenshot shows the 'Call Log Status Setup' form with fields for Code, Status Description, Resolved, Default, Mobile Device, Text Color, Background Color, French Description, and Spanish Description. Below the form is a table with 25 results.

Code	Status	Resolved	Default	Mobile Device	Text Color	Background Color
V	blah			<input checked="" type="checkbox"/>		
B	Busy			<input checked="" type="checkbox"/>		
A	Call Back			<input checked="" type="checkbox"/>		
C	Call Back - Appointment			<input checked="" type="checkbox"/>		
O	Collection Call - soft call			<input checked="" type="checkbox"/>		
X	Collection Call - hard call			<input checked="" type="checkbox"/>		
Y	Collection Call - PTP			<input checked="" type="checkbox"/>		
W	Collection Call - Resolved	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		

Think of Call Log Status as ‘What would I be creating a call for?’  
Also would be what would be the end result - how do I want that call to be classified.

Think of the Call Log Outcomes as ‘What are the possible outcomes of a call?’

A call log outcome can change the status automatically OR it can keep the status originally given.

Not shown, but you can also create call log topics to help ‘group’ or report if you don’t have specialized statuses and outcomes

The screenshot shows the 'Call Log Outcome Setup' form with fields for Description, Attempt/Contact, Status, Mobile Device, Block Lead, Send AMA Letter, and Include Note in AMA. Below the form is a table with 25 results.

Outcome	Contact Attempt	Status	Mobile	Block Lead	Send AMA Letter	Include Note in AMA
1234567890123456789012345678901234567890123456789012345678901234567891	Contact		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Call Back	Contact	Call Back	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Call Back - Appointment	Contact	Call Back - Appointment	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Called - Busy	Attempt		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Called - No Answer	Attempt		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Collection Call - New	Attempt		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Collection Call - Sent to Agency	Attempt	Collection Call - Resolved	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Collection Call - Soft call 1	Contact	Collection Call - soft call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Collection Call - soft call 2	Attempt	Collection Call - soft call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Collection Call - soft call 3	Attempt	Collection Call - soft call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Collections - hard call 1	Attempt	Collection Call - hard call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Collections - hard call 2	Attempt	Collection Call - hard call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Collections - hard call 3	Attempt	Collection Call - hard call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

# Collection Codes / Letter Setup

Review the existing collection codes, if you don't have a collection agency, you want to be sure there are codes for all your needs.

Ice Assistant > Settings > Collections Setup

Code	Description	Available	Financial Hold	Don't Send	Tier	Collection Agency Status	Expire After
\$\$	Collection code	✓	✓		1		
\$\$\$	Another collection	✓	✓		1		
ACH	Automatic Debit Customer	✓			1		
CH	Credit Hold	✓	✓		1		
SP	Slow Payer	✓			1		
ACT	Active Tier I (Active)	✓	✓		1	ACT	

Ice Assistant > Settings > Document Templates

Document Templates (168)

collection

Showing: 25 Results

Description	Template Type	Category	Available	Branches	System Template
Automatic Collection 31-60	Letter	Collection	✓	5	
Automatic Collection 61-90	Letter	Collection	✓	All	
Automatic Collection 91-120	Letter	Collection	✓	All	
Automatic Collection Over 120	Letter	Collection	✓	0	
Collection letter - level 5	Letter	Collection	✓	All	
Collection letter level 3 with logo	Letter	Collection	✓	All	
Collection letter level 4, no header	Letter	Collection	✓	All	
collection way way past due	Letter	Collection	✓	All	
Collections 31-60 with logo	Letter	Collection	✓	All	
RGS_Letter_Collection_Basic_Aging_2_Logo_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_2_NoHeader_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_2_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_3_Logo_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_3_NoHeader_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_3_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_4_Logo_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_4_NoHeader_V1	Letter	Collection	✓	All	✓
RGS_Letter_Collection_Basic_Aging_4_V1	Letter	Collection	✓	All	✓

There can be multiple collection letters, different ones for different collection categories. You can create your own or you can use a system template to get started.

# Tools to Use

## Mobile/CAW/AMA-CNA

### Statement

### Call Logs

### Letters

# Tools to help collect before going past due

Promote Auto-Payment for new clients.

If you use the **mobile** application, you can auto-post jobs when completed. If you also use **Automated Marketing Assistant** or **Customer Notification** and setup after service emails, customers can see their invoice, products and recommendations right away.

If you use Customer Assistant Website then customers can review the service history and pay their bill.

Note that now both AMA and CN have payment reminders available for automated notification.

# Aging - Charge Interest/Statement Fee

Aging happens nightly, however if there is a desire to charge interest or statement fee, 'Age Accounts' needs to be run manually first.

The option to charge interest must be selected, it will not default.

The details are set within the general setup - financial page.

Service Assistant > Utilities > Age Accounts

### Age Accounts Utility

Branch: 2002 - MY OTHER COMPANY NAME GOES HERE

Aging Category	Amount	Count	Charge Interest
1 - 30 Days	\$719.20	4	
31 - 45 Days	\$0.00	0	
46 - 60 Days	\$0.00	0	Residential
61 - 90 Days	\$0.00	0	Residential
91 - 120 Days	\$0.00	0	Residential/Commercial
121 - 180 Days	\$107.16	3	Residential/Commercial
Over 180 Days	\$332.66	3	

Total Amount: \$1,159.02      Total Count: 10      Unique Customers: 9

Charge Interest

Last Aging Date: 8/31/2022      Charge if calculated interest is at least: \$0.40

Charge if last interest before: 11/29/2022      Minimum interest charge: \$1.00

Age date/charge interest on: 12/29/2022      Percent of interest to charge: 5.00%

# Aging - Charge Interest/Statement Fee

Once Aging has finished, if any customer records meet the requirements, the count will be shown. Their will be a new button to go to Adjustments. YOU MUST post the adjustments in order to apply the interest/fee to the customers accounts.

Once adjustments are posted, continue to Statements.

Charge Interest

Last Aging Date: 12/29/2022      Charge if calculated interest is at least: \$0.40

Charge if last interest before: 11/29/2022       Minimum interest charge: \$1.00

Age date/charge interest on: 12/29/2022       Percent of interest to charge: 5.00%

Number of customers charged interest: 3      Amount of interest charged: \$28.20

Service Assistant > Adjustments > Adjustments

Add New Adjustment: Account # [Search]

Adjustment Journals

The following adjustment(s) are ready to be posted.

Showing: 25 Results [Search]

<input checked="" type="checkbox"/>	Account #	Code	Date	Amount	CR/DB	Company/Name	Address	Prepay Balance	Balance	<input type="checkbox"/>
<input checked="" type="checkbox"/>	106	II	12/29/2022	\$7.31	Debit	Green Ghost	486 E Walnut St Martinsville, IN 46151	\$0.00	\$146.23	<input type="checkbox"/>
<input checked="" type="checkbox"/>	113	II	12/29/2022	\$15.82	Debit	Samantha Smith	79851 Runner Spg Martinsville, IN 46151	(\$370.90)	\$858.34	<input type="checkbox"/>
<input checked="" type="checkbox"/>	117	II	12/29/2022	\$5.07	Debit	Mr. Gill Razor	605 Shaver Cres Martinsville, IN 46151	\$0.00	\$101.38	<input type="checkbox"/>

10 25 50      Page 1 of 1 (3 items) < 1 >

Number of Adjustments: 3      Credit Total: \$0.00      Debit Total: \$28.20

Linked Documents

Save Linked Documents       Email Documents

# Statements

Service Assistant ▾

- Home
- Customer Search
- Add Customer
- Estimates
- Invoices
- Production
- Payments
- Adjustments
- Statements ▾
  - Statement Printing
  - Group Billing
  - Undo Statements
- Letters
- Reports
- Call log
- Time Clock
- Scheduler
- Tech Tracking
- Utilities
- Settings
- Application Extensions

Statements > Statements

1 Step 1  
Select Customers

2 Step 2  
Customer List

### Select Customers

Account #:  All

Branch: \*

Route: \*

Billing Type: \*

Days Since Last Service:

Days Since Last Statement:

Aging Category: \*

Customer Type:

Customer Status: \*

Collection Status:

All Customers Regardless of Balance

Minimum Balance: \$

Include Prepay Customers

More filters

- + Flag Codes
- + Advanced Options

# Statement Details

- Step 1 is primarily to find the customers that should get a statement based on the selections. *(If printing directly from a customer account, step 1 is ignored)*
- All settings are 'sticky' for the user so the next time the page is accessed, the settings should be the same.
- Days Since Last Service is useful if Invoices include previous balance.
- Days Since Last Statement is almost always set at 30 days
- Include Prepay Customers will pull in any prepay customer that has a balance due, even if not aged.
- Each customer record has a 'Send Statement' setting under the financial tab. This also affects the customers that will be pulled in.

The screenshot displays the 'Select Customers' interface, which is part of a two-step process. Step 1, 'Select Customers', is currently active, while Step 2, 'Customer List', is shown as a secondary option. The interface includes several filter fields: 'Account #' with a dropdown set to 'All' and a text input for 'Enter Account Number...'; 'Branch: \*' set to '1001 - Your Company Name'; 'Route: \*' set to '7 items selected'; 'Billing Type: \*' set to '5 items selected'; 'Days Since Last Service' set to '10'; 'Days Since Last Statement' set to '30'; and 'Aging Category: \*' set to '5 items selected'. On the right side, there are dropdowns for 'Customer Type' (set to 'Both'), 'Customer Status: \*' (set to '2 items selected'), and 'Collection Status' (set to 'Ignore'). Below these are two checkboxes: 'All Customers Regardless of Balance' (unchecked) and 'Include Prepay Customers' (unchecked). At the bottom, there is a 'More filters' section with expandable options: '+ Flag Codes', '+ Advanced Options', and 'Send To Mapping Filter' (unchecked).

# Statement Details

- Step 2 has all the customers identified from step 1.
- Selections on step 2 affect how the statement is sent, what will be included and how it will be displayed.

<input checked="" type="checkbox"/>	256	Beth, Kitchen	207 Utensil Dr	66	0	66	4/12/2022	121 - 180	R2	46151
<input checked="" type="checkbox"/>	259	Pinatta, Abole	108 Harrison St	-1430.42	-1489.29	58.87	4/12/2022	121 - 180	R2	45042

Total Statements: 38      Total Balance: \$7713.80      Total Prepay Balance: \$-4010.20      Total Remit Balance: \$11724.00

Options

Form Options

Select forms to include:

Statements Regular  
(selected items will be marked as printed and removed from the list)

Summary Report

Show History: Earliest to date

Print only transactions since last statement date

Show History since last Zero balance:

Linked Documents

Save Linked Documents       Email Documents

+ Show More

- History date range should include current date to be the most accurate.
- If emailing; email first then print remaining.

# Statement Details

'Statement Options' defines what is printed on the statement and also the main layout.

A regular statement shows all history in order of the transaction date

Open invoice will only show services with an amount due or payments/adjustments unapplied. (History date range is ignored)

Open invoice with paid services will list all history but grouped by the service transaction.

— Show More

Statement Options

<input checked="" type="checkbox"/> Logo	<input checked="" type="checkbox"/> Print Remit Barcode	<input checked="" type="checkbox"/> Exclude Installment Services
<input checked="" type="checkbox"/> URL	<input checked="" type="checkbox"/> Print Credit Card Panel	<input checked="" type="checkbox"/> One Page Statement
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Print Overdue Message	<input type="checkbox"/> Print Service Feedback
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Print Payment Request Message	<input checked="" type="checkbox"/> Show Aging Information
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> NPS	<input checked="" type="checkbox"/> Show Discount Amount
Days Until Due: <input type="text"/> Days	<input checked="" type="checkbox"/> Print Continuous Service Message	<input type="checkbox"/> Open Invoice
Printer Offset: <input type="text" value="0"/> Inches	<input type="checkbox"/> Exclude Prepayment Information	<input type="checkbox"/> Show Paid Services

# Using Call Logs

Service Assistant > Reports > Aging Report

**Send To**

Targets: Send to Call Log

Call Status: 0 - Collection Call - soft call

Assigned To: PP - Polly Pocket

Outcome: Collection Call - Soft call 1

Assigned Date: 11/08/2021

Subject: collections

Exclude Customers with a Call Status of: 4 Statuses Selected 10 Days

Branch: 5 of 8 Branches Selected

Bill To: All

Customer Type: Both

Show (Prepaid): - All -

Age as of different Date: 11/05/2021

Due Balance: For Due 61 + Days

Only Show Information in Oldest Category

Sort By: Customer Number

Maximum Balance: 30

Group by Route New page per Route

Preview Send to Call Log

Selecting the correct report to get the results you want and then using that report to create the call logs is the best way to start in-house collections calls

# Call Log

Calls can be filtered to just collection calls.  
Update the call with the defined outcomes & statuses.  
If a return call is needed, update the due date.

Service Assistant

Filter

Hide Call Due After: Hours

Date Entered: This year

Date Completed: All

Due Date: All

Call Status: Nothing selected

Search: coll

- Select All
- Deselect All

Unresolved

- Collection Call - soft call
- Collection Call - hard call
- Collection Call - PTP
- GC - Collection Call

11 items selected

Popup Notification Employee Filter: 3 of 9 Employees Selected

Notify Me When These Employees Get a New Call

Save as default settings

Service Assistant

Summary

2 of 9 Employees Selected

Filter Results

Showing 10 calls (6 unread)

Refresh

Collection Call - soft call

This call is currently in use by EBETH (EH).

9 - Active Account #: 98

Buck Owens - Testing Layout

715 E Pike St  
Martinsville, IN 46151

(245) 888-4145

(245) 888-4145

more...

+Add Service

Assigned To: Apple Pie Add

Dates

Entered: 12/29/2022 2:03 PM

Resolved:

Due: 12/29/2022, 12:00 AM

Alarm is Off

Balance

Aging Balance: \$83.48

Remit Balance: \$83.48

Over 180 Days

CREDIT HOLD

Flags

mail merge renewed

Subject(s): collections

Show System Notes

This call is not assigned to you. Assign To Me

Outcome: Collection Call - Soft call 1

Status: Collection Call - soft call

Note: Customer was unaware of balance, and asked for a new statement to be mailed.

Cancel Save

12/29/2022 2:03 PM

Outcome: Collection Call - New Empty

# Collection Letters

Once your letters are setup, assign the letter to the aging buckets you have setup.

Letters > Collection Letters

Collection Letters

Print: Bulk Letters

Employee: \* EH - EBETH

Print Bulk Letters

Branch: \* 1001 - Your Company Name Customer Status: \* 9 - Active

Customer Type: Both Billing Type: \* Regular / Invoice, Statement Only, Credit Card, ACH, Installment

Don't send letter to customers who owe less than: 30.00  Exclude customers who never get statements

Days since last collection letter: 30 Days since last statement: 15

<input checked="" type="checkbox"/>	Age Bucket	Send Letter
<input type="checkbox"/>	31 - 45 days	(None)
<input checked="" type="checkbox"/>	46 - 60 days	Automatic Collection 31-60
<input checked="" type="checkbox"/>	61 - 90 days	Automatic Collection 61-90
<input checked="" type="checkbox"/>	91 - 120 days	Automatic Collection 91-120
<input checked="" type="checkbox"/>	121 - 180 days	way way past due
<input type="checkbox"/>	Over 180 days	(None)

# Collection Letters Setup Example and Letter Example

Settings > Document Template Detail

The screenshot shows a document editor interface. At the top, there is a breadcrumb trail 'Settings > Document Template Detail' and a refresh icon. Below this is a rich text editor toolbar with various icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, link, unlink, and help. The main editing area contains a template for a collection letter. It features a header section with two columns: the left column contains the date field '[[DATE\_CURRENT]]' and the 'Billing Address:' field with placeholder '[[BILLADDR]]'; the right column contains the 'Account #: [[CUST\_NO]]' and the 'Service Address:' field with placeholder '[[SERVADDR]]'. The body of the letter starts with a salutation 'Dear [[FIRSTNAME]]', followed by a reminder paragraph: 'Just a reminder... Your account with us is past due and we have had no response to our previous notices. We realize how busy we all are these days and most of our customers appreciate a reminder when their account is past due. While it's fresh on your mind, could you please use this opportunity to mail your payment? If a payment has been made within the last few days, please accept our thanks. Sincerely, [[COMPNAME]] [[LETTER\_EMP\_NAME]] [[LETTER\_EMP\_POSITION]]'. At the bottom, there is a 'Please Remit: [[BALANCEDUE]]' field.

1/25/2026

Account #: 11

**Billing Address:**  
Donald Konsisky  
105 Apple Blossum Blvd  
Fictional City, IN 12365

**Service Address:**  
Donald Konsisky  
105 Apple Blossum Blvd  
Fictional City, IN 12365

Dear Donald,

Just a reminder...

Your account with us is past due and we have had no response to our previous notices.

We realize how busy we all are these days and most of our customers appreciate a reminder when their account is past due.

While it's fresh on your mind, could you please use this opportunity to mail your payment?

If a payment has been made within the last few days, please accept our thanks.

Sincerely,

MY OTHER COMPANY NAME GOES HERE  
EBETH  
Princess

Please Remit: \$245.12

# Questions?

# Session Feedback

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- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars