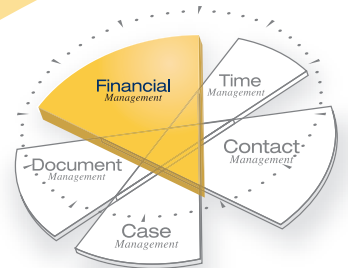




Perceptive Software  
Measurable Results

## AR Collection Manager Module



Dramatically  
increase  
cash flow and  
decrease collection  
time and cost!

### Effectively managing accounts receivable (AR)

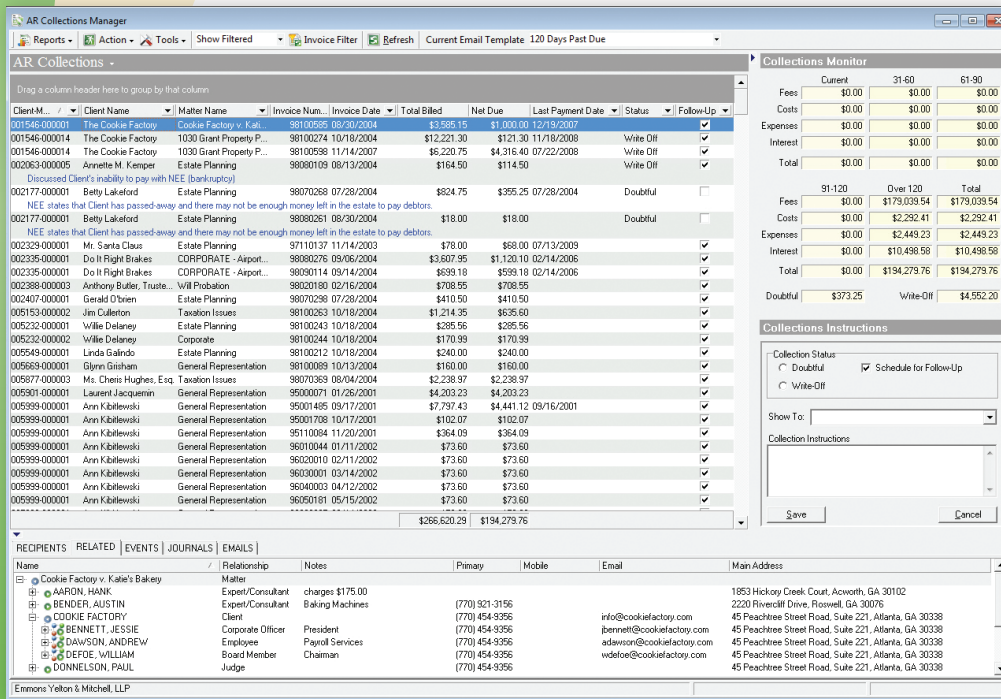
is crucial for maintaining the financial health of a law firm. Firms need to easily identify “at risk” clients and invoices, which are reaching the point of diminishing returns in a systematic, efficient, user-friendly way. Orion’s AR Collection Manager does just that.

### AR Collection Manager

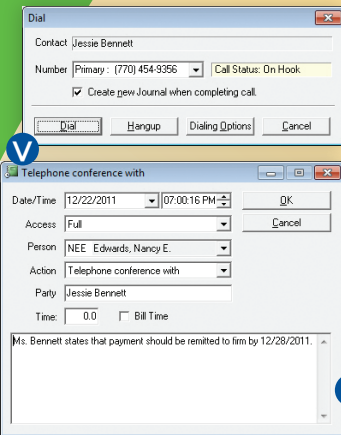
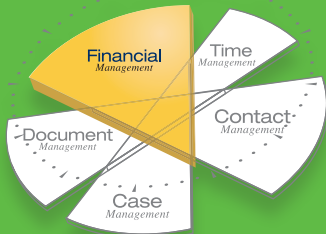
Orion’s AR Collection Manager dramatically streamlines collection efforts by providing both the billing attorney and accounting staff or collection manager with an instant, updated snapshot of open invoices, steps taken to collect on those invoices, and instructions pertaining to “doubtful” debtors. Law firms can increase their bottom-line by initiating, tracking and viewing collection efforts such as emails, notes about phone calls or follow-up reminders. All efforts are then linked to the invoice itself for complete collections management.

“We recently installed Orion’s AR Collection Manager at our firm and it has already saved us a lot of time. Our entire collection ledger is now maintained and updated electronically, and everyone at the firm can view collections status in real-time. We especially like that the Collection Manager can generate collections notices in either email or letter format, and that we can efficiently mark write-offs in the system. For anyone that currently uses a handwritten Collection ledger, Orion’s system is a tremendous timesaver that keeps excellent track of what actions have been taken on collection, for the benefit of everyone at the firm.”

**Allison Renaud**  
Director of Finance  
**Dickinson,  
Mackaman, Tyler  
& Hagen, P.C.**

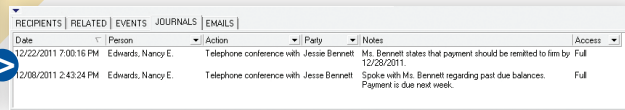


Simple, user-friendly interface provides attorneys and accounting managers with accurate, real-time information about unpaid invoices.



## Easily Communicate and Record Collection Activities

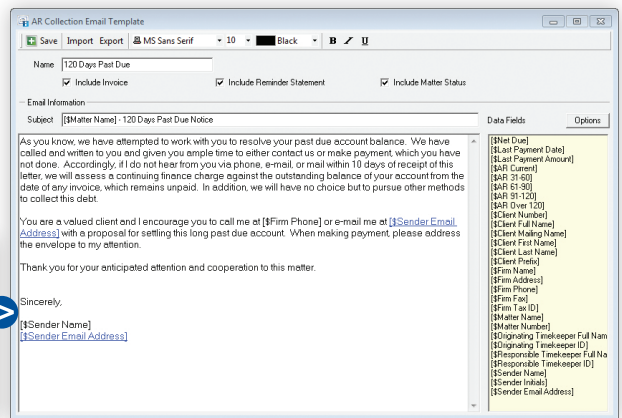
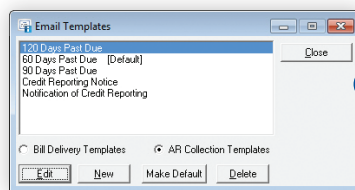
Telephone calls to those responsible for coordinating payment are made effortless with Orion's **Smart Dialer**. Upon completing the phone call, the user is prompted to store a record that the call took place using Orion's "Journal" tool. Collection status meeting notes, as well as most any other activity, can also be related to invoices, viewable at the Client, Matter or invoice level.



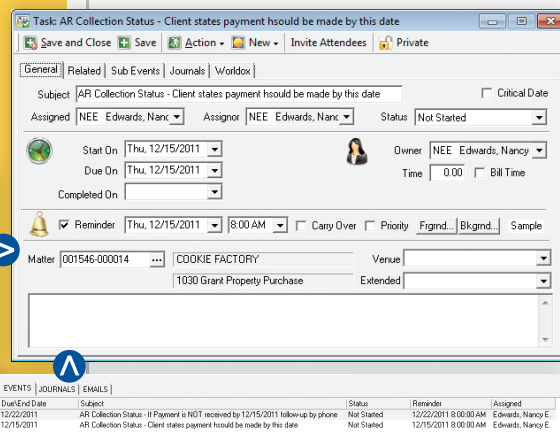
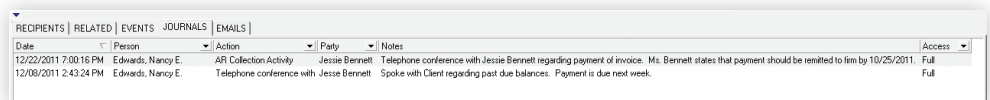
## Orion's AR Collection Manager's Robust Features Include:

- View key statistical AR information in summary and invoice level simultaneously
- Forward "collection instructions" to management for review
- Identify "doubtful" invoices (and include or exclude them from an aged accounts receivable report)
- Tag invoices to be "written-off" for the accounts receivable clerk
- Easily identify collection contacts for various communications
- Record actions taken to collect using Orion's "Journal" tool
- Create reminders for follow-up
- Customizable email templates for collection communications
- Block new matter opening for clients in collections
- Print and distribute accounts receivable reports including collection status and notes

The AR Collection **Email Template Generator** allows your firm to create custom collection email templates in Microsoft® Outlook for the collections process; ensuring that emails are consistent in appearance and content so the firm gets paid on-time. With straightforward, easy-to-use drag and drop object control, create unlimited number of email templates. Open invoices, reminder statements or portions of Orion's Matter Status® report can be attached to emails in PDF format, maintaining all formatting, using Orion's built-in PDF generator.



As with other collection activities, these emails are automatically stored and related to each invoice viewable at the Client, Matter or invoice level.



## Collection Follow-Up Reminders

Upon completing a phone call or receiving a reply from an email promising payment by a specific date, follow-up reminders can be created. Billing attorneys, their staff and accounting managers alike can view the status of these reminders from the Client or Matter views of the AR Collection Manager by identifying the related invoice, or by Orion's AR Collection Manager's Event Viewer.

For more information about Orion's AR Collection Manager or other products visit [www.orionlaw.com](http://www.orionlaw.com) or email [info@orionlaw.com](mailto:info@orionlaw.com).