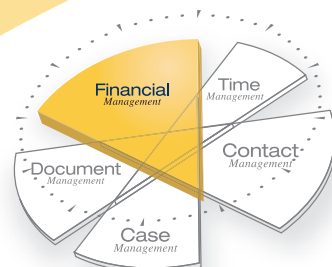




Perceptive Software
Measurable Results

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, when payment is expected (and how much is expected) and instructions pertaining to “doubtful” debtors. When dealing with online e-billing companies, Orion’s AR Collection Manager even offers a solution when needing to track which invoices are being appealed, the date the appeal was filed and the amount in question. 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.

AR Collections Manager									
Detail	Client	Matter	Invoice	Show My Invoices	Filter	Reports	Action	Tools	Refresh
AR Collections Monitor									
Drag a column header here to group by that column									
Client M.	Client Name	Matter Name	Invoice	Invoice Date	Net Due	Status	Expected Pmt Date	Expected Pmt Amount	Follow-Up
001546-000014	The Cookie Factory	1030 Grant Property Purc...	98100274	10/18/2004	\$1,121.30	Write Off		\$0.00	
Spoke with Client and they're unable to pay. NEE has approved W/O.									
001546-000014	The Cookie Factory	1030 Grant Property Purc...	98100598	11/14/2007	\$4,316.40	Write Off		\$0.00	
Spoke with Client and they're unable to pay. NEE has approved W/O.									
002063-000005	Annette M. Kemper	Estate Planning	98060109	8/13/2004	\$114.50	Write Off		\$0.00	
Discovered Client's inability to pay with NEE (bankruptcy). Call in one week to follow-up.									
002177-000001	Betty Lakeland	Estate Planning	98010269	7/28/2004	\$395.25	Doubtful		\$0.00	
NEE states that Client has passed away and there may not be enough money left in the estate to pay debtors. Call in one week to follow-up.									
002177-000001	Betty Lakeland	Estate Planning	98060109	8/13/2004	\$19.00	Doubtful		\$0.00	
NEE states that Client has passed away and there may not be enough money left in the estate to pay debtors. Call in one week to follow-up.									
005663-000001	Glynn Gishman	General Representation	98100888	10/13/2004	\$160.00			\$0.00	
005901-000001	Laurent Jacquemin	General Representation	95000071	1/26/2001	\$4,203.23		11/3/2014	\$4,203.23	
007070-000001	James Pritchard	General Representation	98100102	10/13/2004	\$22.50			\$0.00	
007102-000001	Neta Adams	General Representation	94000097	1/6/2001	\$2,411.45			\$0.00	
007178-000001	Cheri & Mark Brown	General Representation	98100270	10/19/2004	\$44.00			\$0.00	
007200-000001	Sally & Spot Bagwell	General Representation	97050068	5/13/2003	\$172.95			\$0.00	
007200-000001	Sally & Spot Bagwell	General Representation	97060038	6/13/2003	\$110.00			\$0.00	
007200-000001	Sally & Spot Bagwell	General Representation	97070091	7/14/2003	\$500.51			\$0.00	
007200-000001	Sally & Spot Bagwell	General Representation	97080068	8/14/2003	\$17.00			\$0.00	
007200-000001	Sally & Spot Bagwell	General Representation	97090061	9/15/2003	\$20.05			\$0.00	
007238-000001	Tony Perkins	Civil Rights v. Warner Br.	95000036	5/2/2001	\$4,741.10		11/3/2014	\$4,741.10	
007540-000001	James Joyce	General Representation	98100186	10/13/2004	\$1,312.05			\$0.00	
007728-000001	James A. Garfield	General Representation	98100072	10/13/2004	\$1,590.05	Doubtful		\$0.00	
007844-000001	Hai Directors	General Representation	98100054	10/13/2004	\$725.65			\$0.00	
007862-000002	Hai Today Gone Tomorrow	Appeal Post Judgment...	98100081	10/13/2004	\$49.00			\$0.00	
007863-000001	Country Garden Forest	General Representation	98100051	10/13/2004	\$8.00	Doubtful		\$0.00	
007975-000001	Capital Variety Store	Thomas v. Jerr...	98100077	10/13/2004	\$213.89			\$0.00	
008067-000001	Supreme Florida Sales	General Representation	98070114	7/14/2004	\$12.39	Doubtful	11/3/2014	\$12.39	
008067-000001	Southern Consulting Servi.	General Representation	98080073	9/14/2004	\$1,394.15			\$0.00	
008067-000001	Southern Consulting Servi.	General Representation	98100176	10/13/2004	\$323.29			\$0.00	
008174-000001	Nick G. Larson, Esq.	General Representation	98060195	6/11/2004	\$720.00		11/2/2014	\$720.00	
008174-000001	Nick G. Larson, Esq.	General Representation	98070114	7/14/2004	\$660.00		11/2/2014	\$660.00	
008203-000001	Phil Moolay, Esquire	General Representation	98100084	10/13/2004	\$881.05			\$0.00	
008207-000001	Ten Salesbury Milton	Custody Modification Adj.	98100071	10/13/2004	\$60.00			\$0.00	
008259-000001	Bessie Gooding	General Representation	98100086	10/13/2004	\$550.00			\$0.00	
					\$28,963.05			\$10,337.72	
RECIPIENTS RELATED [EVENTS] JOURNALS EMAILS									
Name	Relationship	Notes	Primary	Mobile	Email	Main Address			
1030 Grant Property Purchase	Client								
COOKIE FACTORY									
ADAMS, GERRY	Judge		(770) 454-9357		info@cookiefactory.com	46 Peachtree Street, Suite 220, Atlanta, GA 30308			
BENNETT, JESSIE	Corporate Officer	President	(770) 957-1442			1624 Elbert Road, McDonough, GA 30253			
CAWSON, ANDREW	Employee	President	(770) 454-9358	(404) 123-6543	khani@orionlaw.com	46 Peachtree Street, Suite 220, Atlanta, GA 30308			
DEFOE, WILLIAM	Board Member	Chairman	(770) 454-9357		adewon@cookiefactory.com	46 Peachtree Street, Suite 220, Atlanta, GA 30308			
EDWARDS, NANCY E.	Firm Attorney		(404) 635-1161		cmh@orionlaw.com	46 Peachtree Street, Suite 220, Atlanta, GA 30308			
HARRIS, KATHRYN	Board Member	CEO	(770) 454-9357	(988) 765-4321	nancy@cookie.com	46 Peachtree Street, Suite 220, Atlanta, GA 30308			
HARRIS, KAYLA	Corporate Officer	Vice President	(770) 454-9357		khani@orionlaw.com	46 Peachtree Street, Suite 220, Atlanta, GA 30308			

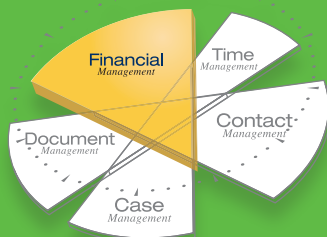
“We recently installed Orion’s AR Collection Manager at our firm and it has already saved us a lot of time. Our entire collection ledger is now maintained and updated electronically, and everyone at the firm can view collections status in real-time. We especially like that the Collection Manager can 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.”

Kari Frerk

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.

RECIPIENTS	RELATED	EVENTS	JOURNALS	EMAILS
Date	Person	Action	Party	Notes
12/22/2011 7:00:16 PM	Edwards, Nancy E.	Telephone conference with Jessie Bennett		Ms. Bennett states that payment should be remitted to firm by Full 12/28/2011.
12/08/2011 2:43:24 PM	Edwards, Nancy E.	Telephone conference with Jessie Bennett		Spoke with Ms. Bennett regarding past due balances. Payment is due next week.

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

- Manage AR Collection Activity at the Client, Matter or Invoice level
- 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
- Track expected payment dates, amounts as well as information related to the appeal process when coordinating payment with online legal e-billing companies
- Create reminders for follow-up

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.

RECIPIENTS	RELATED	EVENTS	JOURNALS	EMAILS
Date	Person	Action	Party	Notes
12/22/2011 7:00:16 PM	Edwards, Nancy E.	AR Collection Activity	Jessie Bennett	Telephone conference with Jessie Bennett regarding payment of invoice. Ms. Bennett states that payment should be remitted to firm by 10/25/2011.
12/08/2011 2:43:24 PM	Edwards, Nancy E.	Telephone conference with Jessie Bennett		Spoke with Client regarding past due balances. Payment is due next week.

RECIPIENTS	RELATED	EVENTS	JOURNALS	EMAILS
Start Date	Due/End Date	Subject	Status	Reminder
12/22/2011	12/22/2011	AR Collection Status - If Payment is NOT received by 12/15/2011 followup by phone	Not Started	12/22/2011 8:00:00 AM
12/15/2011	12/15/2011	AR Collection Status - Client states payment should be made by this date	Not Started	12/15/2011 8:00:00 AM

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.

- 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