AR Collection Manager

Enhance Financial Performance with Smarter AR Management

Effective accounts receivable management is the mark of a financially stable law firm. Maintaining a comprehensive view of account status while identifying at-risk invoices and clients allows firms to improve cash flow and streamline collections.

Orion's AR Collection Manager module equips your firm with a suite of practical tools designed to bring order, accountability, and strategic foresight to the collections process. AR Collection Manager provides a real-time snapshot of open invoices, collection actions, and doubtful account designations for complete, centralized oversight.

Firms can initiate, track, and review all collection efforts tied to an invoice, including emails, phone call notes, and reminders. With a smart, structured solution to AR management, law firms can increase their bottom line and reduce collection time and cost.

AR Collection Manager Features:

- **Complete AR Visibility:** Examine both high-level receivables data and invoice-specific details without toggling between screens.

- **Collection Instruction Routing:** Forward collection recommendations to firm leadership for timely review and approval.

- **Doubtful Invoice Designation:** Flag questionable invoices and include or exclude them from aged accounts receivables reporting.

- **Write-Off Tagging:** Tag invoices for write-off, enabling staff to easily update AR records accordingly.

- **Collection Contact ID:** Identify and manage collection contacts for targeted outreach on every account.

- **Action Logging via Journal:** Record all collection activities in Orion's centralized "Journal" tool for continuity and compliance.

- **Follow-Up Reminders:** Create and track follow-up reminders based on the most recent collection activity.

- **Custom Email Templates:** Maintain professional, consistent collections with firm-branded templates.

- **Client Hold:** Easily restrict the creation of new matters for clients with outstanding balances.

- **Comprehensive Report Generation:** Generate and distribute AR reports with the level of detail your firm requires.

Professional Outreach. Precise Documentation.

Orion's dialing function makes telephone outreach as effortless as a few clicks. Use the built-in email template and PDF generators to streamline collections communications and ensure every interaction is logged with precision.

- Find collection contacts quickly and log actions with the Journal tool.
- Record and attach collection notes to relevant invoices or matters.
- Create custom collection emails with intuitive drag-and-drop templates.
- Attach invoices, reminders, or Matter Status excerpts as PDFs.
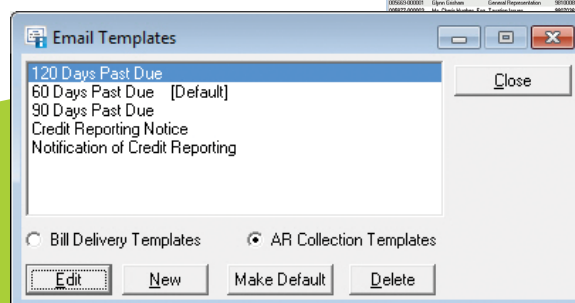
All communications are automatically stored and linked to the appropriate invoice for easy access at the client, matter, or invoice level.

Prompt Reminders. Timely Results.

When clients commit to payment by phone or in writing, Orion's AR Collections Manager enables you to create follow-up reminders tied to the relevant invoices. These reminders ensure timely follow-up by keeping everyone aligned.

- Set reminders linked to specific invoices after payment commitments.
- Keep attorneys, staff, and accounting managers informed on follow-up status.

With consistent follow up and complete visibility across roles within the firm, collections efforts stay on schedule and focused.

Experience the Benefits of AR Collection Manager:

- ✅ **Accelerated Cash Flow:** Collect sooner with centralized, trackable outreach and full visibility at every level.

- ✅ **Centralized Oversight:** View invoice status, actions taken, and doubtful accounts in one location.

- ✅ **Prompt Follow-Ups:** Automate follow-up reminders to reduce aging receivables and ensure timely collection.

- ✅ **Consistent Outreach:** Use firm-branded email templates for professional communications.

- ✅ **Accurate Records:** Log calls, emails, and notes tied directly to the invoice for a complete history.

- ✅ **Enhanced Accountability:** Monitor activity across billing attorneys and staff with full visibility.

- ✅ **Reduced Administrative Burden:** Eliminate manual tracking with built-in automation and reporting.

Orion's AR Collection Manager

Bring clarity and control to every stage of collections. When preserving cash flow is critical, Orion moves you forward.