

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.

Detait C Clie	nt C Matter @ Invoice	Show My Invoices 🔹 🏠	Filter 🚡 Reports •	🖸 Action 🔹 🔀 Tools •	E Befresh Email	Template 60 Days Past Du	e				
AR Collec	tions -							Collectio	ons Monitor		
								7	Current	31-60	61-90
								Fees	\$0.00	\$0.00	\$0.0
lient-M / 💌	Client Name	Matter Name 💌	Invoice Invoice Date	▼ Net Due Status ▼	Expected Prot Date	Expected Pmt Amount Foll	ow-Un ▼	Costs	\$0.00	\$0.00	\$0.0
1546-000014	The Cookie Factory	1830 Grant Property Purc	98100274 10/18/2004	\$1.121.30 Write Off		\$0.00	~	Expenses	\$0.00	\$0.00	\$0.0
Spoke with (	lient and they're unable to pa	v. NEE has approved W/D.						Interest	\$0.00	\$0.00	\$0.0
1546-000014	The Cookie Factory	1030 Grant Property Purc	98100598 11/14/2007	\$4,316.40 Write Off		\$0.00					
Spoke with 0	Jient and they're unable to pa	y. NEE has approved W/D.						Total	\$0.00	\$0.00	\$0.0
2063-000005	Annette M. Kemper	Estate Planning	98080109 8/13/2004	\$114.50 Write Off		\$0.00	~				
		(bankruptcy); Call in one wer							91-120	Over 120	Total
2177-000001	Betty Lakeford	Estate Planning	98070268 7/28/2004	\$355.25 Doubtful		\$0.00	~	Fees	\$0.00	\$27,959.47	\$27,959.4
		nd there may not be enough n			to followup			Costs	\$0.00	\$665.71	\$665.7
2177-000001	Betty Lakeford	Estate Planning	98080261 8/30/2004	\$18.00 Doubtful		\$0.00	~	Expenses	\$0.00	\$325.18	\$325.1
		nd there may not be enough n			to followup			Interest	\$0.00	\$32.69	\$32.6
5669-000001	Glynn Grisham	General Representation	98100089 10/13/2004	\$160.00		\$0.00					
6901-000001	Laurent Jacquemin	General Representation	95000071 1/26/2001	\$4,203.23	11/3/2014	\$4,203.23	1	Total	\$0.00	\$28,983.05	\$28,983.0
7070-000001	James Pritchard	General Representation	98100103 10/13/2004	\$22.50		\$0.00		Doubtful	\$2,724,69	140 - OF	\$5.552.
7102-000001	Neta Adams	General Representation	94000067 1/6/2001	\$2,411.45		\$0.00		Doubdui	\$2,724.63	Write-Off	\$0,002.
7178-000001	Cheri & Mark Brown	General Representation	98100270 10/19/2004	\$44.00		\$0.00					
7200-000001	Sally & Spot Bagwell	General Representation	97050068 5/13/2003	\$372.55		\$0.00		Collectio	ons Instructio		
7200-000001	Sally & Spot Bagwell	General Representation	97060039 6/13/2003	\$110.00		\$0.00					
7200-000001	Sally & Spot Bagwell	General Representation	97070091 7/14/2003	\$500.51		\$0.00		Collectio			
7200-000001	Sally & Spot Bagwell	General Representation	97090068 8/14/2003	\$17.00		\$0.00		C Dou	btful 🔽	Schedule for Folk	жн-Uр
7200-000001	Sally & Spot Bagwell	General Representation	97090061 9/15/2003	\$20.05		\$0.00		@ Writ	e-Off		
7328-000001	Tony Petkins	Curly Stooge v. Warner Br	95000870 6/12/2001	\$4,741.10	11/3/2014	\$4,741.10					
7540-000001	James Joyce	General Representation	98100186 10/13/2004	\$1,312.05		\$0.00		- Appeal I	niormation		
7729-000001	James A. Garfield	General Representation	98100072 10/13/2004	\$1,910.05 Doubtful		\$0.00		Appeal	0.11	•	Appealed
7844-000001	Hair Directons	General Representation	98100064 10/13/2004	\$755.65		\$0.00	_	Appeal	Date		wbbealed
7860-000002	Hair Today Gone Tomorrow		98100081 10/13/2004	\$49.00		\$0.00		Amount		\$0.00	
7869-000001	Country Garden Forest	General Representation	98100075 10/13/2004	\$8.00 Doubtful		\$0.00					
7875-000001	Crystal Variety Store	Thomas v. Jeny	98100077 10/13/2004	\$213.89		\$0.00					
8067-000001	Superior Rentals & Sales	General Representation	98100076 10/13/2004	\$13.39 Doubtful	11/3/2014	\$13.39	_	Show To:	None		-
8087-000001	Southern Consulting Servi.		98090073 9/14/2004	\$1,394.15		\$0.00	-	Collection	Instructions		
8087-000001	Southern Consulting Servi.		98100176 10/13/2004	\$329.29		\$0.00		Snoke wit	h Client and theu'r	e unable to pay. N	IEE has 🔺
8174-000001	Nick G. Larson, Esq.	General Representation	98060195 6/11/2004	\$720.00	11/3/2014	\$720.00		approved		e cinable to pay.	4LL 1100 -
8174-000001	Nick G. Larson, Esq.	General Representation	98070114 7/14/2004	\$660.00	11/3/2014	\$660.00	_				
3203-000001	Phil Mcelroy, Esquire	General Representation	98100084 10/13/2004	\$881.05		\$0.00					
8207-000001	Terri Salisbury Milton	Custody Modification Adju	98100071 10/13/2004	\$60.00		\$0.00					
3255-000001	Beatrice Gooding	General Representation	98100088 10/13/2004	\$556.00		\$0.00	~	Save			Cancel
				\$28,983.05		\$10,337.72				_	
	RELATED   EVENTS   JOU										
ome		/ Relationship	Notes	Primary	Mobile	Email	Main	Address			
E 31030 Grant Property Purchase		Primary		17700 45 4 0057		100000000000000000000000000000000000000			3		
COOKIE FACTORY		Client Judge		(770) 454-9357 (770) 957-1442				achtree Street, S Elliott Road, Mcd			
B CADAMS, GERRY B BENNETT, JESSIE		Judge Corporate Officer	President	(770) 454-9		khamis@orionlaw.com		Elliott Hoad, Mod sachtree Street, Sr			
		Employee	Pavol Services			adawson@cookiefactory.com		sachtree Street, Si sachtree Street, Si			
DAWSUN, ANDHEW Employee     DEFDE, WILLIAM Board Member		Chairman	(770) 454-9357 (770) 454-9357				sachtree Street, St				
		Firm Attorney	Containing (	(404) 635-1		comthi@ononlaw.com 46 Meac nancy@cookie.com		Active Steel, St	and 220, Mildind, 1	an 30300	
	ARRIS, KATHRYN	Board Member	CEO	(404) 635-1161 (770) 454-9357 (098) 765-4321				achtree Street, St	ute 220 Atlanta I	54.30338	
	ARRIS, KAYLA	Corporate Officer	Vice President	(770) 454-9		khamis@cookiefactory.cor		achtree Street, St			

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

"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 realtime. 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.



Dial	×
Contact Jessie Bennett	
Number Primary : (770) 454-9356 - Call Status: On Ho	ok
Create new Journal when completing call.	
Dialing Options Ca	ancel
Telephone conference with	• 🗙
Date/Time 12/22/2011 • 07:00:16 PM ÷	
Access Full	cel
Person NEE Edwards, Nancy E.	
Action Telephone conference with	
Party Jessie Bennett	
Time: 0.0 F Bill Time	
Ms. Bernett states that payment should be remitted to firm by 12/28/	2011.

### **Easily Communicate and Record Collection Activities**

Telephone calls to those responsible for coordinating payment are made effortless with Orion's Smart Dialer<sup>®</sup>. 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		-	Notes	Access	•
5	12/22/2011 7:00:16 PM	Edwards, Nancy E.	Telephone conference v	with Jessie Benn		Ms. Bennett states that payment should be remitted to firm by 12/28/2011.	Full	
	12/08/2011 2:43:24 PM	Edwards, Nancy E.	Telephone conference v	with Jesse Benn		Spoke with Ms. Bennett regarding past due balances. Payment is due next week.	Full	

## **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



- Customizable email templates for collection communications Start Date 2 12/22/2011 3 12/15/2011
- 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<sup>®</sup> 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<sup>®</sup> report can be attached to emails in PDF format, maintaining all formatting, using Orion's built-in PDF generator.

🖷 Email Templates

120 Days Past Due 60 Days Past Due [Default] 90 Days Past Due Credit Reporting Notice Notification of Credit Reportin

Bill Delivery Templates



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
12222/0117 20016 FW Edwards, Nancy E
1645 Collection Activity Jessie Bernett Tageforine conference with Jessie Bernett sparding payment of invoice. Ms. Bernett states that pay
1202/0117 2424 PM Edwards, Nancy E
1645 Deprine conference with Jessie Bernett States with Client regarding past due balances. Payment is due net week. ted to firm by 10/25/2011. Full

#### Task: AR Collection Status - Client states payment hsould be made by this date 🚯 Save and Close 🚯 Save 📓 Action 🗸 🥃 New 🖌 Invite Attendees 🔐 Private General Related Sub Events Journals Worldox Subject AR Collection Status - Client states payment hsould be made by this date Critical Date Assigned NEE Edwards, Nanc Assignor NEE Edwards, Nanc Status Not Started -Start On Thu, 12/15/2011 💌 🔒 Owner NEE Edwards, Nancy 💌 Due On Thu, 12/15/2011 -Time 0.00 🖂 Bill Time -Completed On 🛕 🔽 Reminder | Thu, 12/15/2011 🗨 (8:00 AM 💌 🥅 Carry Over 🦳 Priority \_ Frgmd... | Bkgmd... | Sample Matter 001546-000014 ... COOKIE FACTORY • Venue 1030 Grant Property Purchase Extended • $(\Lambda)$ RECIPIENTS RELATED EVENTS JD EMAILS | Due\End Date 12/22/2011 12/15/2011 Subject Status AR Collection Status - If Payment is NOT received by 12/15/2011 follow-up by phone Not Stated AB Collection Status - Direct status assessed level for more the file data. Not Stated Internet Assigned 12/22/2011 8:00:00 AM Edwards, Nancy E. 12/15/2011 8:00:00 AM Edwards, Nancy E.

#### **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 or email info@orionlaw.com.