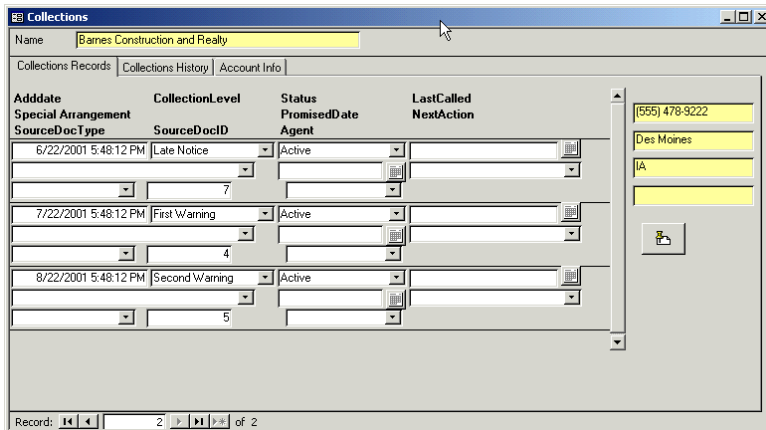




The AdvanTec Collections Feature Pak is designed to historically track problematic accounts, keep a chronological history by account number, and produce the many letters and reports necessary to successful collections management



Adddate	Special Arrangement	CollectionLevel	Status	PromisedDate	LastCalled	NextAction
SourceDocType	SourceDocID	Agent				
6/22/2001 5:48:12 PM		Late Notice	Active			
	7					
7/22/2001 5:48:12 PM		First Warning	Active			
	4					
8/22/2001 5:48:12 PM		Second Warning	Active			
	5					

- Enables user definition of multiple collection levels
- Allows the specification of criteria for each collection level
- Creates user customizable dunning letters
- Allows the user to create hierarchal dunning letters for each collection level
- **Description:** Name of the dunning letter
- **Days Out:** Numeric number of days that the collectible item is overdue in order to qualify at this level.
- **Dun:** check box to determine if a dunning letter is to be sent.
- **Call:** determines if an account at this level will show up on the call list
- Notes fields are capable of holding 65,000 characters and can be pasted from Microsoft Word
- Can automatically include Account AR Statement information in the body of the dunning letter

- Accounts are automatically added to collections based on predefined rules
- Tracks and manages customer information, history, and account transactions for all active accounts
- Customer accounts display only so long as the collection account remains active
- Reactivated accounts display with all prior history
- Unlimited accounts and unlimited locations
- Display collection level for the account, promised action dates and the next action level
- Organizes contact information, credit information, status, finance charges and the sales person assigned to the account
- Stores collection notes with customer historical records
- Manages multiple invoices and delinquencies on a case by case and/or account basis



Collection Levels

Description: **First Warning**

Days Out: Dun Call

Dunning letter body content before outstanding invoices tableau.

This letter is being sent because our records indicate that you are late with your payment(s) as indicated below.

Dunning letter body content after outstanding invoices tableau.

Payment is currently at least 10 days over due and should be submitted immediately to our billing address above.

Please disregard this notice if the payment has already been submitted.

Sincerely:
M. Weber
Collections Manager
XYZ Corp.

Either type the letter content directly into the provided areas above or cut and paste from word documents. Each field can hold 64,000 characters.
When typing directly be sure to use ctrl return to signify new line.

Tech Specs

- Easily Maintained
- ODBC Compliant
- Installs works and requires UA to operate
- Easy to Use
- Customizable

- Reports can be displayed or printed through Microsoft Access
- They can also be generated into a Microsoft Word file so that they are editable
- The Word files can be consolidated by person, so that account transactions can be stored as a group

COX, RONNIE & MARIE	4/25/2001 11:07:27 AM			First Warning
	4/25/2001 11:07:26 AM			
	8126896939		JERRY Marks	
COX, RONNIE & MARIE	Run over dog	4/25/2001 1:35:23 PM	Run over dog	First Warning
		4/25/2001 1:35:22 PM		
	8126896939		JOE JONES	
COX, RONNIE & MARIE		5/2/2001	Send Guido with baseball bat	Turn over to collection service
		4/25/2001 11:07:39 AM		Second Warning
	40 A		JERRY Marks	
bed	4/25/2001 1:35:42 PM	Put horse head in bed	Check Back Later	Second Warning
	4/25/2001 1:35:41 PM			
	8 PM		JOE JONES	
	4/25/2001 10:58:36 AM	Send Guido with baseball bat		Final Warning
	4/25/2001 10:58:35 AM			
	86 A		JERRY Marks	

Output Format

Access Report

MS Word

Cancel

Report3 : Report

Collection Letters Sent: 6/22/2001

WESSINGER, EARLINE
243 BH TIMBER DR
LEXINGTON, SC 29073

6/22/2001
WESSINGER, EARLINE

Invoice#	Date	Ref#	Orig. Amount	Balance
3	3/29/2001	0	\$523.00	\$523.00
			Amount to be Paid	\$523.00

HALL, MURIEL
9949 NORRIS RD
AUTRYVILLE, NC 28318

6/22/2001
HALL, MURIEL

Invoice#	Date	Ref#	Orig. Amount	Balance
4	2/15/2001	123	\$4,849.00	\$4,849.00

- Generate letters for multiple accounts and multiple collection levels and any number of different letters at a single printing
- Draws information from UA A/R
- Includes customer statement information on dunning letters
- Reports:
- Call list: Contains contact information, dates, responsible agent and the collection level of each customer
- Collection Letters Sent: printable collection invoice that was sent to the customer

- Specify generic procedures for each collection level
- Specify late fees, service fees, and penalty fees for each collection level
- Set up various letters and finance charges by date
- Next collection action can be overridden when special arrangements have been made
- The Collection Levels form contains the penalties and fees that can impact an account at each collection level
- The Collection Status form contains the list of possible account standings, whether the account is active, on hold or has been cleared
- The Collection Actions form contains the various actions that can be taken against an account by the company
- The Collections Special Arrangements form records a list of acceptable company procedures for payment
- Collection levels, Actions and Special Arrangements are editable
- The AdvanTec Collections Feature Pak is easy to use. The source code is modifiable and can be customized according to company specifications

CollectionLevels

Description: Late Notice

LateChargeFee: \$5.00

LateChargeRate: []

LateChargeGLID: 56

CollectibleType: 1

DunDoc: c:\doc\ltnr1.doc

Dun Call

Record: 1 of 5

CollectionStatus

Description

Active

Hold

Cleared

CollectionActions

Description

Late Notice

First Warning

Second Warning

Notification of Impending Legal Action

Legal Notification

Record: 1 of 5

CollectionsSpecialArrangements

Description	Days
Extention	5
Extra Payment	15
Master Card	3
Phone Call	2
Repossession	15
*	

For more information contact Advantec at 336-275-2832, email us at Advantec@advantecis.com or visit our website www.advantecis.com.