



Collection Software Checklist



- Collection alerts
- Application development studio
- User-definable collector / user interfaces
- User-definable client access interfaces
- Built-in templates
- Integration with Crystal Reports
- User-defined account matching criteria
- User-defined balance buckets
- User-defined payment types
- Configurable account flow
- Ability to extend the account and related tables

Collection Agency Specific Functionality

- Trust accounting
- Complete client activity statement history
- User-defined collection tasks

Third-Party Vendor / Service Integrations

- Automated service requests based on collection strategies
- Interactive service requests initiated at the collector and management levels
- Complete access to data returned from third-party vendors
- Automated collection strategies based on returned data
- Real-time processing of check and credit payments interactively

Legal Collections Functionality

- Integrated with Microsoft Word
- History of legal actions
- Held billings
- Release / Approve billings for invoicing
- View legal documents history
- Individual case party statuses
- Track party garnishments
- Track party judgments
- Case and case party tasks scheduled automatically
- Multiple check requests based on court requirements
- Multiple legal documents based on court requirements
- Customizable reporting

CollectOne | Software

CollectOne | Web Portal

CollectOne | Dialer



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Recovery Specific Functionality

- Pre charge-off collections
- Post charge-off recovery
- Agency / Attorney management
- System of record or non-system of record functionality
- Standard host interface formats
- Standard agency / attorney formats
- Recovery management statistics and reports
- Automated file processing
- Repossession tracking
- Bankruptcy / deceased management

Pre-Charge Off Collections Specific Functionality

- Disputes / deduction codes can be assigned
- Identifies and tracks problem invoices
- Offers customer and invoice level notes
- Electronically reproduces / transmits invoices

Collection Software Pricing & Fee Structure

- Are there additional fees for third-party vendor interfaces? No
- Does all of the software functionality come standard or are there separate fees for modules?
- Do monthly technical support fees include all software upgrades?

Dialer Functionality

- Fully integrated dialer
- Real-time read / write access to the application database
- Unattended messaging
- Call blending
- Automatic remote error reporting
- Automatic software / firmware updates

