

Collections Workflow

	5 Days Prior	Due Date	5 Days Past Due	10 Days Past Due	20 Days Past Due	30 Days Past Due
ConnectWise	Email to billing contact reminding of invoice that will be due soon	Email to billing contact advising that their invoice is due and a late fee may be assessed.	-AR ticket created with status of Account Review - Email sent to Ray to review for approval to proceed to collections FU1: Email sent to client	Status change to Late Fee (10 Days PD) Email sent to client advising late fee assigned and they are at risk for suspension	Status change to Follow Up 2 Email sent to client and Carolina advising services are at risk of suspension	Status change to Suspension Email to billing contact advising services have been suspended and a restoration fee will apply.
	Invoices: Collections Workflow	Invoices: Collections Workflow	Invoices: Ticket Workflow Invoices: Collections Workflow	Invoices: Ticket Workflow	Invoices: Ticket Workflow	Invoices: Ticket Workflow
Michelle			Review for collection process. If approved to proceed, change status to Follow Up 1			
Victoria			Status: Follow Up 1 Call client to follow up on payment. Add late fee of \$25 on product tab and call customer to take payment online. Late fee can be waived if we receive payment today.	Email sent to Carolina Call client to follow up on payment.	Follow up call with client	Change company status to Suspended. If OITVOIP client suspend voice services.



Collections Workflow

	45 Days Past Due	Termination (60 Days PD)	Payment Arrangement	Declined Card/New Card		
ConnectWise	<p>Status changed to Final Review</p> <p>Email Sent to Ray to review for termination.</p>	<p>Status changed to Termination</p>		<p>Email sent to billing contact and Carolina advising that we were unable to process a new card.</p>		
Michelle	<p>Review account. Add any comments and change status if necessary.</p>	<p>Terminate OITVOIP Services. Assign to tech for deletion of NOC and other services.</p> <p>Assign to attorney for collections.</p>				
Victoria		<p>Change company status to Delinquent</p>	<p>Document arrangement made with client. Set reminder to follow up on due date.</p>	<p>Follow up call with customer to get new payment information.</p>		

