

OneCollect Manual

This manual is designed to help you and your team with our advanced accounts rendered management module OneCollect



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Administration settings

AR Statuses

Set up and edit AR Statuses in the Administration Tab under “Manage Codes.” Click the green plus to add new or the grey cog to edit existing. See Figure 1 below.

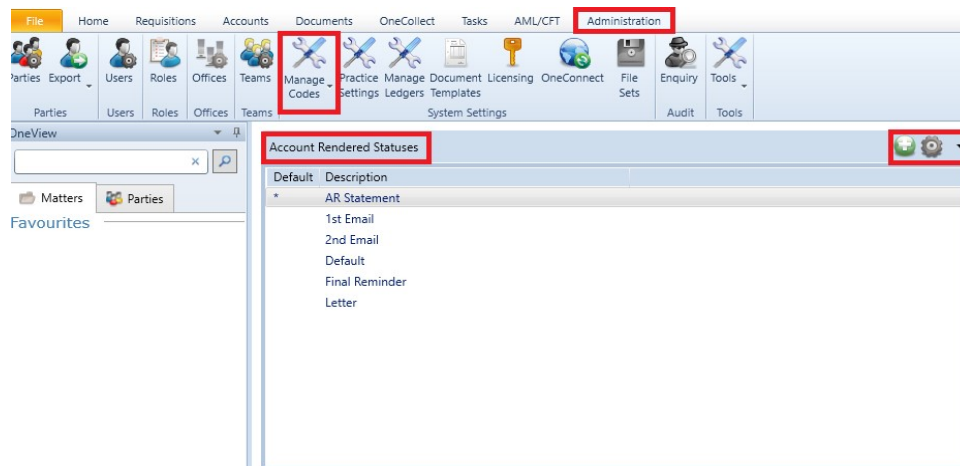


Figure 1.

Document Templates

Set up and edit document templates in the Administration tab under Document Templates. Three groups of templates - documents, email and text messaging (SMS) can be set up. Click the green plus to add new templates or the grey cog to edit existing ones. See Figure 2 below.

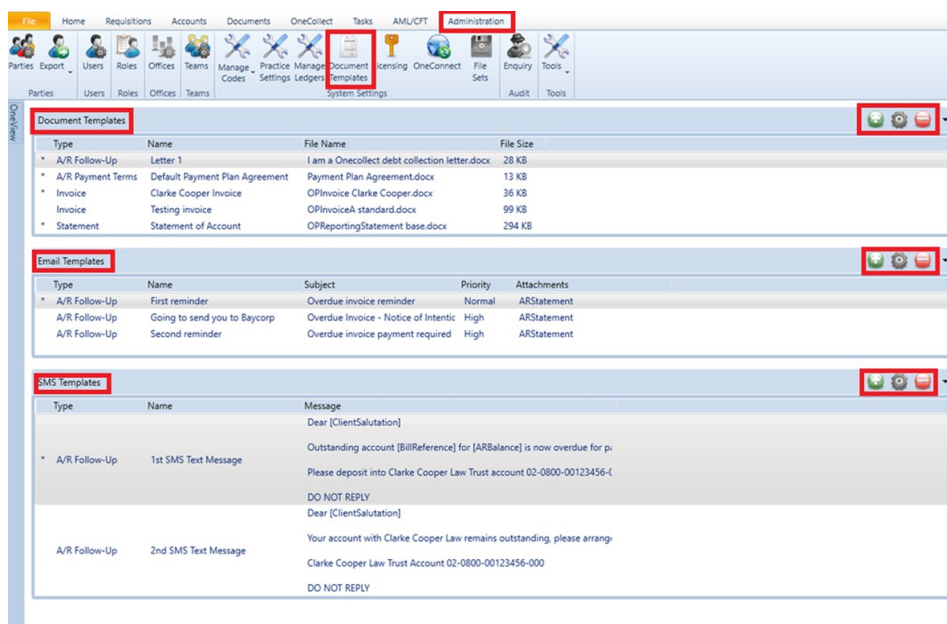


Figure 2.

When creating a template for an email or text (SMS) message, you can use merge fields (field names) to bring client data into the body of your message (see Figures 3 & 4 below).

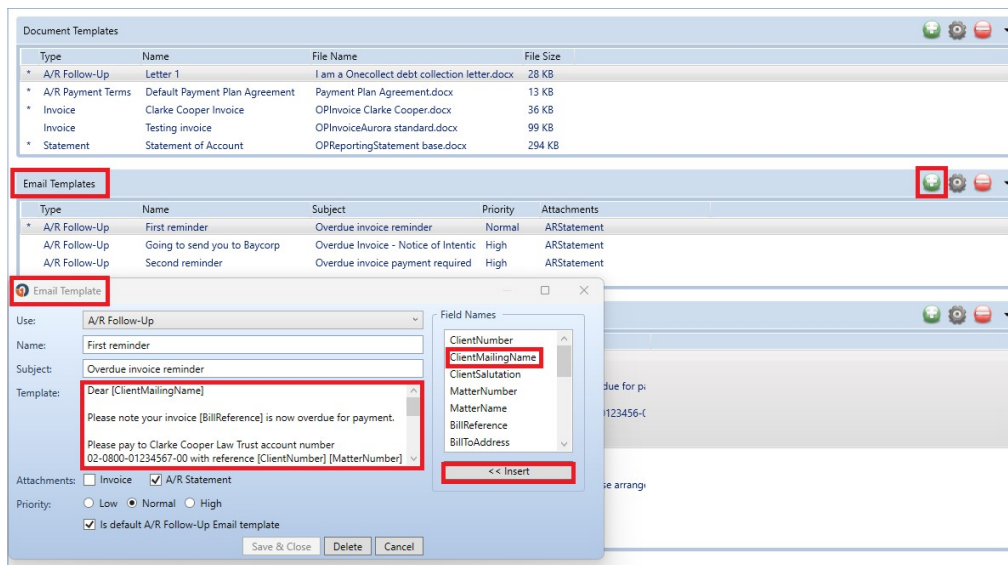


Figure 3.

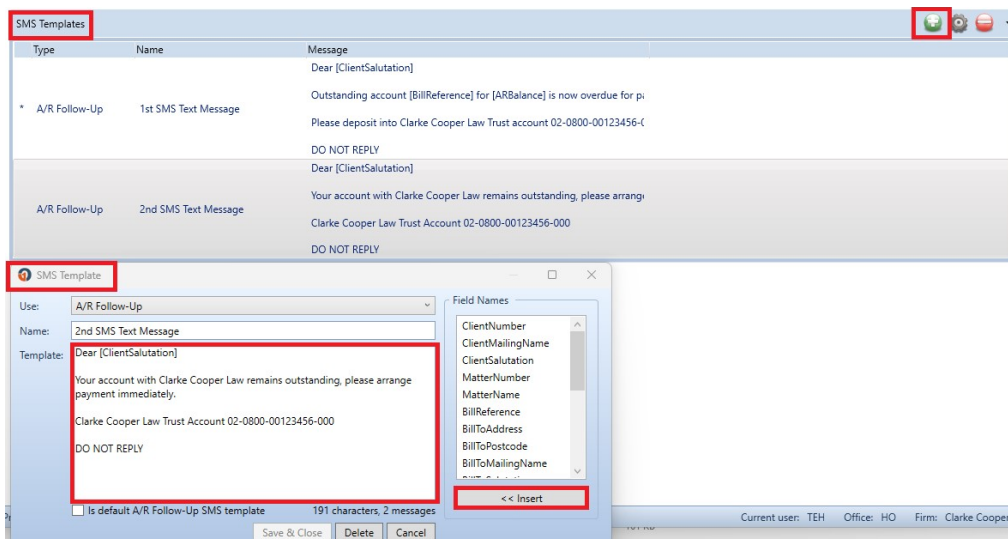


Figure 4.

Roles and Permissions

Set up permissions for OneCollect user/s by going into the Administration tab and clicking “Roles” (See Figure 5 below). Create a new role or add to an existing role.

Select “Choose Permissions” and select “Use OneCollect – Allows user to access the OneCollect ribbon tab.”

Select “Choose Reports” and select “OneCollect AR Action List.”

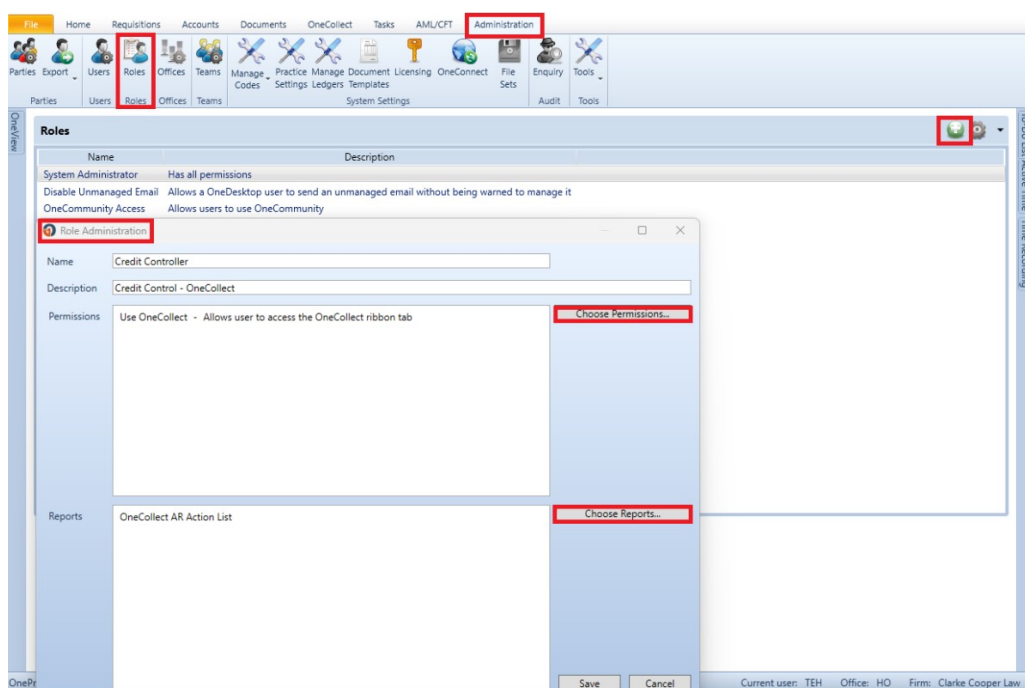


Figure 5.

OneCollect Search

In the OneCollect tab use the search filters to run an A/R search to bring up A/R records (see Figure 6 below).

You can search on:

- + Action date due
- + A/Rs older than a certain amount of days
- + Amounts over
- + Status
- + Within a date range
- + All A/Rs
- + All A/Rs excluded from statements

You can further define the search by:

- + Authors – by client or matter author
- + Teams

Click the “Search” button to return your selected results.

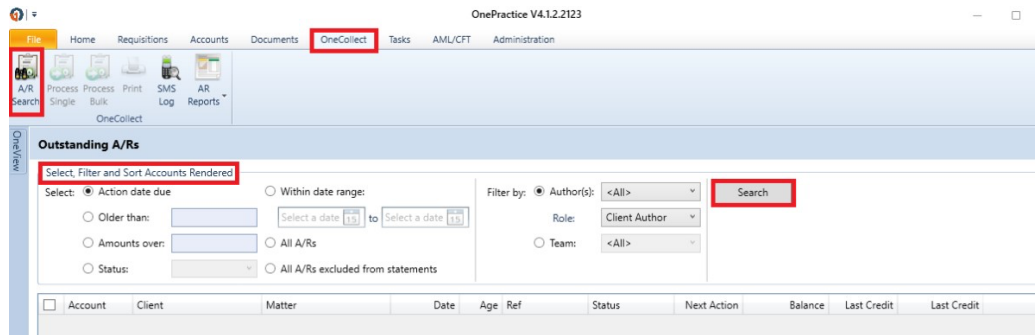


Figure 6.

Report Printing

Place a tick in the box at the top of the column to select all clients or manually select which records you want to report on by ticking only that record in the list – the print button will become live (as per Figure 7 below).

The print button will print the information as you see it on the screen. You can re-sort the information on the screen by clicking the header fields (i.e. click “Client” to sort by client, click “Age” to sort by age etc.).

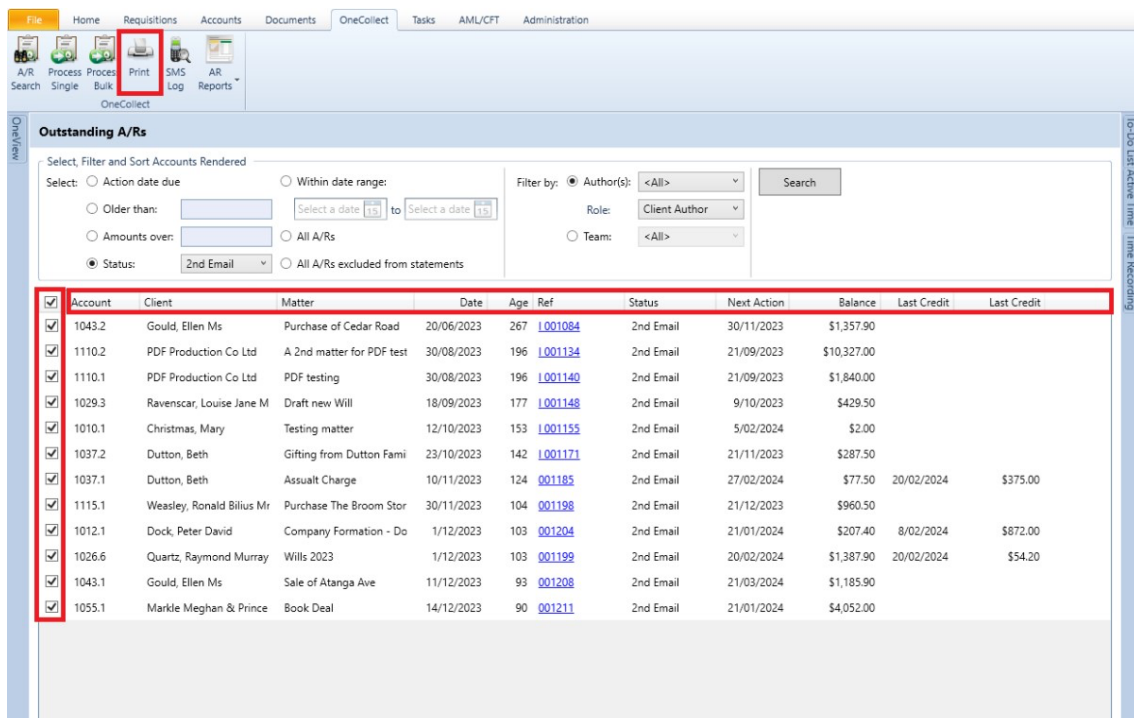


Figure 7.

Account Rendered Processing

Process Single

Process single allows you to select a few transactions for processing with the flexibility to add specific dates and notes in relation to that account rendered record as you process it. See Figure 8 below.

1. Run your account rendered search and select records for single processing
2. Click “Process Single” button. This will open the A/R processing screen
3. Clicking the blue invoice number hyperlink will open the Account Rendered Maintenance screen
4. Add debt collection notes by clicking on the A/R notes tab and the green plus. This will open the “Add new note” screen
5. Add note and click “Save & Close”

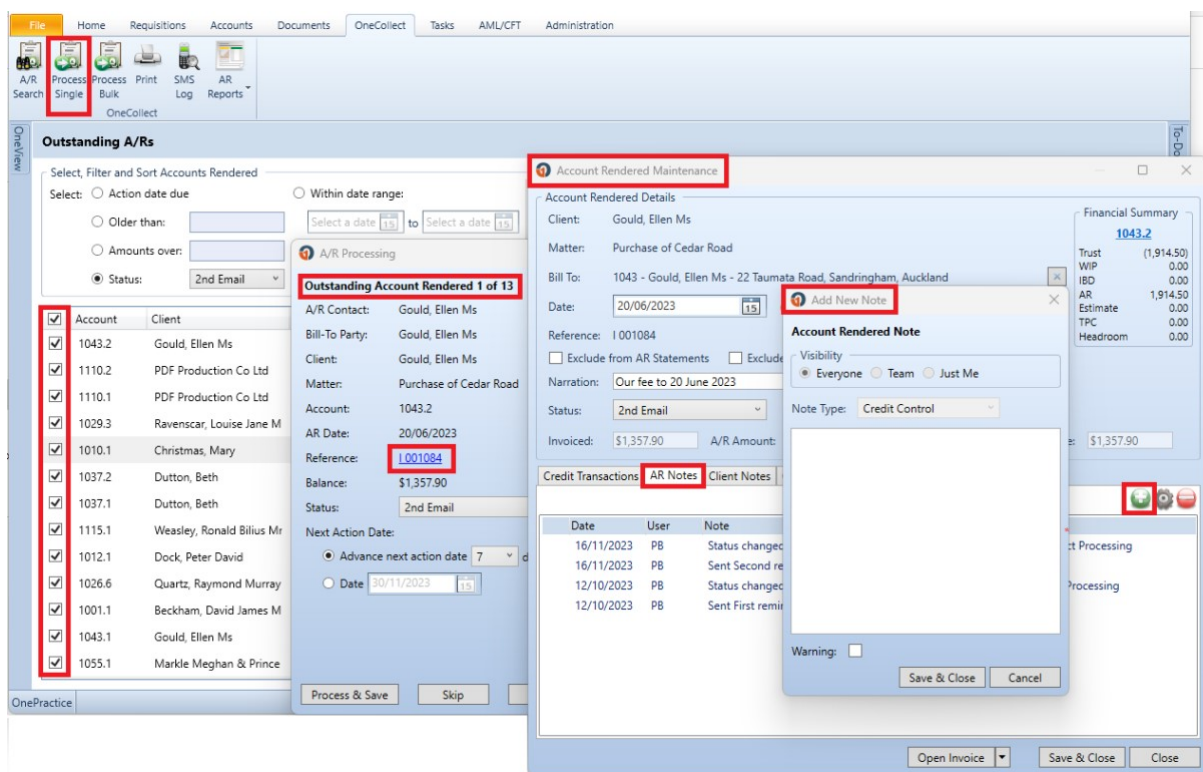


Figure 8.

In the Account Rendered Maintenance screen, you can also produce a Payment Agreement Document and record payment terms (See Figure 9 below).

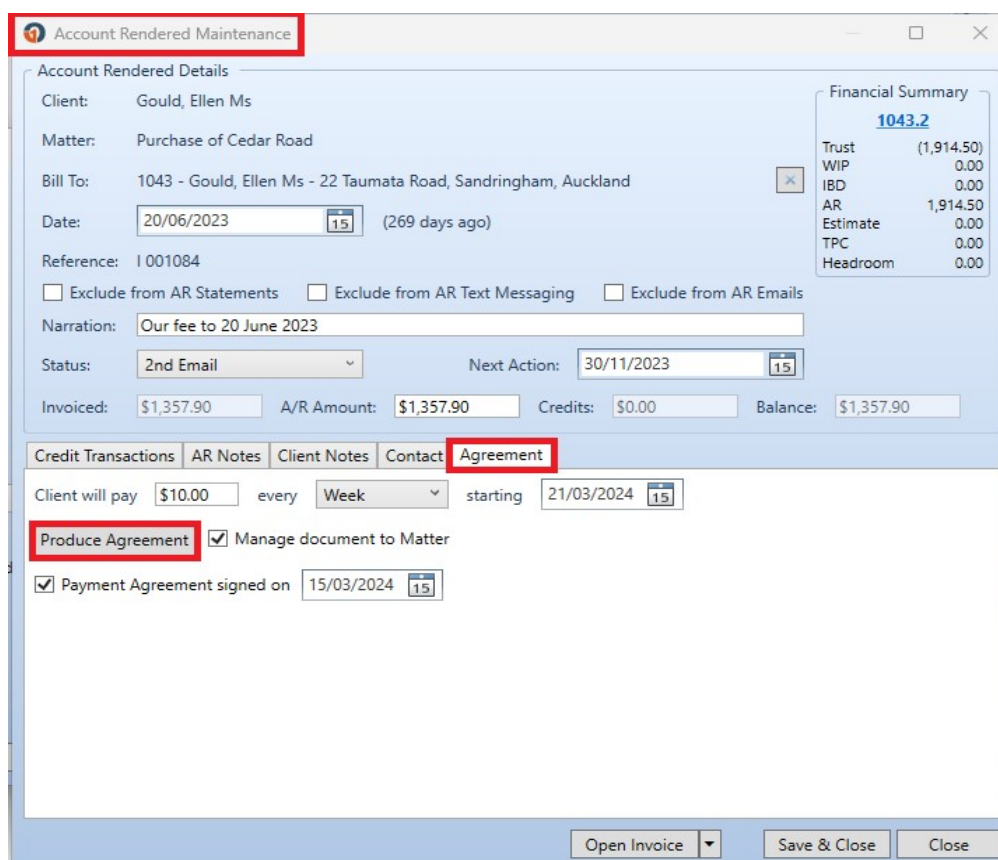


Figure 9.

Example of Payment Agreement Document:

Acknowledgement of Debt and Payment plan agreement

Dear Gould, Ellen Ms,

Regarding **Purchase of Cedar Road**, I acknowledge an outstanding debt amount of \$1357.90.

I agree to repay this starting on 21/03/2024 with an amount of \$10.00 and a Weekly payment frequency.

Signed: _____

Date: _____

Client Name: Gould, Ellen Ms
 Matter Name: Purchase of Cedar Road
 AR Date: 20/06/2023
 Reference: I 001084
 AR Balance: \$1357.90
 Fee Narration: Our fee to 20 June 2023
 Payment: \$10.00
 Period: Week
 Start Date: 21/03/2024

Figure 10.

Complete the required fields in the A/R Processing screen shown in Figure 11 below.

- + Status - use the dropdown menu to move the A/R to the next status, if desired
- + Next Action Date – either advance the next action date a certain number of days or pick a date using the date picker
- + If processing an email, SMS (text message) or a document ensure you select a template from the dropdown menu. (See administration settings for template maintenance)
- + Click “Create” to generate an email and/or a document
- + Click “Send Now” to send SMS

NOTE: If the email address or phone number information is missing, this can be filled in if available at this stage and ticking the “Save changes to contact details” box will save this information back to the client profile.

- + Click “A/R statement” to produce an account rendered in PDF form
- + When finished updating details on the A/R processing screen click “Process & Save” - this will then move to the next record
- + Click “Skip” to move forward to the next record if the current record on the screen needs no changes/actions or maintenance (via the hyperlink)
- + Click “Close” to shut down the A/R processing screen – ending your process single session

Figure 11.

Process bulk

“Process Bulk” allows you to process a large number of accounts rendered records at one time. Run your account rendered search and select records for processing. Click the “Process Bulk” button to open the OneCollect – Follow-up Actions screen.

In the following example, we are going to process an email batch.

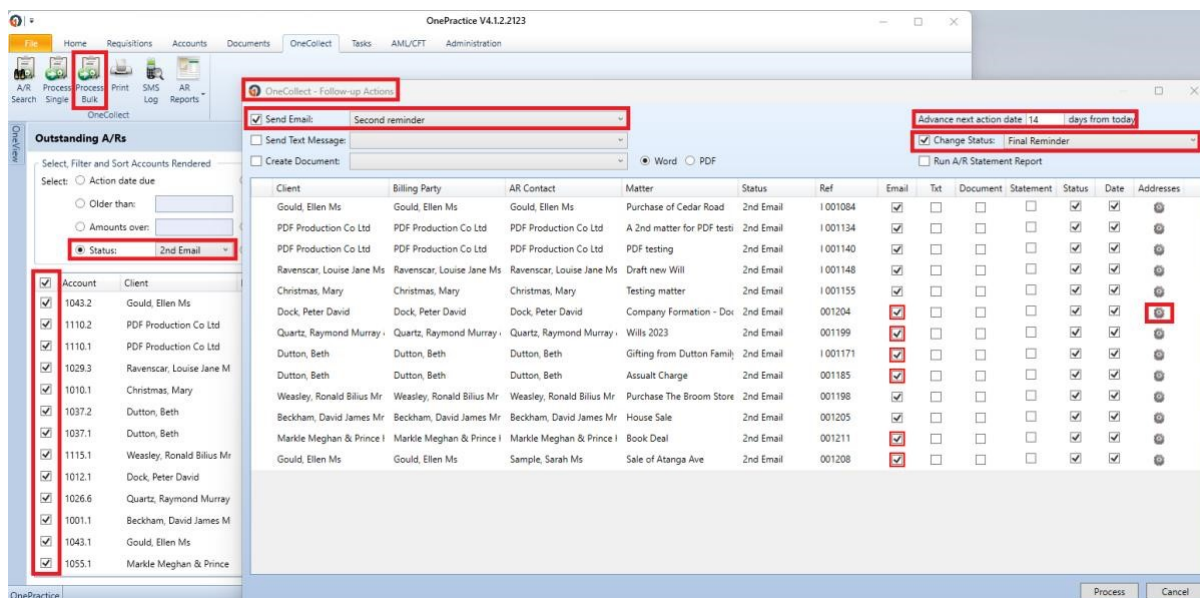


Figure 12.

As shown in Figure 12 above, I have put a tick in the send email box and selected my email template from the dropdown menu. This will auto-tick the email field of all the records.

I have chosen my advance next action date of 14 days. The selected records will then not appear in the list for another 14 days. Running an “All” account rendered search will still find these records if amendments or actions are required sooner.

I have ticked my “change status” box to move my “batch” to the next processing stage. In this case my Final Reminder stage.

Some of my records show a red box around the email field for that record. This indicates there is no email address set for this client/account rendered contact. The grey cog to the right allows you to edit the client details and add an email address without needing to exit this screen. Click the grey cog to open the Primary A/R Addresses screen. Add in details and “Save & Close” (as per Figure 13 below).

Primary A/R Addresses

A/R contact email:

Exclude contact from A/R Emails
 Exclude this A/R from A/R Emails

A/R contact SMS number:

Exclude contact from A/R Text Messages
 Exclude this A/R from A/R Text Messages

Bill-to postal address:

Bill-to postcode:

Figure 13.

The Process Bulk screen will not process if any records show a red box. If you don't have the details (email address, phone number or address) to add then you will need to deselect the record before processing. You can still advance and change the status of a record if you choose – by leaving the ticks in the “Status” and “Date” fields. Clicking “Process” will automatically generate and send emails. See Figure 14 below.

OneCollect - Follow-up Actions

Send Email:

Send Text Message:

Create Document:

Word PDF

Advance next action date days from today

Change Status:

Run A/R Statement Report

Client	Billing Party	AR Contact	Matter	Status	Ref	Email	Txt	Document	Statement	Status	Date	Addresses
Gould, Ellen Ms	Gould, Ellen Ms	Gould, Ellen Ms	Purchase of Cedar Road	2nd Email	1 001084	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PDF Production Co Ltd	PDF Production Co Ltd	PDF Production Co Ltd	A 2nd matter for PDF testi	2nd Email	1 001134	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PDF Production Co Ltd	PDF Production Co Ltd	PDF Production Co Ltd	PDF testing	2nd Email	1 001140	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Ravenscar, Louise Jane Ms	Ravenscar, Louise Jane Ms	Ravenscar, Louise Jane Ms	Draft new Will	2nd Email	1 001148	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Christmas, Mary	Christmas, Mary	Christmas, Mary	Testing matter	2nd Email	1 001155	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Dock, Peter David	Dock, Peter David	Dock, Peter David	Company Formation - Doc	2nd Email	001204	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Quartz, Raymond Murray	Quartz, Raymond Murray	Quartz, Raymond Murray	Wills 2023	2nd Email	001199	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dutton, Beth	Dutton, Beth	Dutton, Beth	Giftng from Dutton Famil	2nd Email	1 001171	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Dutton, Beth	Dutton, Beth	Dutton, Beth	Assualt Charge	2nd Email	001185	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Weasley, Ronald Bilius Mr	Weasley, Ronald Bilius Mr	Weasley, Ronald Bilius Mr	Purchase The Broom Store	2nd Email	001198	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Beckham, David James Mr	Beckham, David James Mr	Beckham, David James Mr	House Sale	2nd Email	001205	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Markle Meghan & Prince I	Markle Meghan & Prince I	Markle Meghan & Prince I	Book Deal	2nd Email	001211	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Gould, Ellen Ms	Gould, Ellen Ms	Sample, Sarah Ms	Sale of Atanga Ave	2nd Email	001208	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 14.

On completion, the following message will display.

A/R Processing

All A/Rs Processed OK

Figure 15.

SMS log

The “SMS Log” button reports on SMS messages sent. This will let you know that SMS messages have been successfully sent and received. Use the green dot to refresh this screen. See Figure 16 below.

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File Home Requisitions Accounts Documents **OneCollect** Tasks AML/CFT Administration

A/R Process Process Print SMS AR
Search Single Bulk Log Reports

Text Message (SMS) Log

Created date: 18/03/2024

From	To	Message	Status	First Created	Sent to Carrier	Delivered to Handset	Last Updated	Details
+61488855247	+64274310520	Dear Mary Outstanding accour Please deposit into DO NOT REPLY	Delivered to Handset	18/03/2024 10:20:40 am	18/03/2024 10:20:40 am	18/03/2024 10:20:43 am	18/03/2024 10:20:43 am	
+61488855247	+64274310520	Dear Jemima Outstanding accour Please deposit into DO NOT REPLY	Delivered to Handset	18/03/2024 10:20:44 am	18/03/2024 10:20:44 am	18/03/2024 10:20:45 am	18/03/2024 10:20:45 am	
+61488855247	+64274310520	Dear Louise Outstanding accour Please deposit into DO NOT REPLY	Delivered to Handset	18/03/2024 10:20:46 am	18/03/2024 10:20:46 am	18/03/2024 10:20:49 am	18/03/2024 10:20:49 am	
+61488855247	+64274310520	Dear Mary Outstanding accour Please deposit into	Delivered to Handset	18/03/2024 10:20:48 am	18/03/2024 10:20:48 am	18/03/2024 10:20:49 am	18/03/2024 10:20:49 am	

Figure 16.