Introductory Training Seminar Schedule

CollectionPartner®

DAY 1

Introduction and Overview

You will be introduced to the Collection Partner system and become familiar with standard terminology. The first session serves as a prerequisite for the remainder of the week.

Code Set Up and Maintenance

Each law firm has the ability to customize Collection Partner to its own specifications. This flexibility is provided through the use of "codes". There are codes for counties, courts, clients, documents, etc. which must be added before you can use the system. You will also learn to add client codes (including a large number of accounting parameters) as well as numerous miscellaneous codes. This session is very important for your firm's decision-maker. Emphasis is placed on an explanation of Collection Partner's use of the codes.

DAY 2

Code Set Up and Maintenance - continued

Adding Files and Related Programs

In this class you will add actual debtor files to the Collection Partner system. You will learn to create and print client acknowledgments and file labels. The conversion of existing files to Collection Partner is reviewed.

DAY 3

S1 Program Features

Collection Partner's S1 program allows you to comprehensively work a debtor file. During this segment, you will learn how to find files, update basic information, view and update the history of a matter, and make entries for follow-up. You will also learn some of the more advanced options, including code look-ups, alternative searches, special diary - and many more.

Document Generation

Collection Partner's document generation programs are easy to use and maintain. To prepare to use the programs, codes must be created and form documents designed in word processing. The steps involved in preparing for daily document generation are fully explained.

Technical Management Programs

During this segment, an overview of Collection Partner setup options will be discussed. You will learn to add users to the system and define printer setups.

DAY 4

Accounting Class

An overview of Collection Partner's comprehensive accounting programs is provided. A detailed review of the cash receipts program, the cash disbursements program, the client remittance cycle and trust account reconciliation programs is presented.

Reports & Utilities

During this session, you will receive sample reports and accompanying documentation for the basic reports that are provided in Collection Partner. Also, the various program utilities available will be covered. Advanced statistical and special purpose utilities will be discussed.

Collection Manager Programs

You will receive sample reports and accompanying documentation for these management programs.

DAY 5 (OPTIONAL)

Partner-to-Partner Training

This session will provide all Partner-to-Partner users with a basic overview of the file transfer programs. Topics covered will include setup, business relationships, sending and receiving claims, accounting and reporting. The Partner-to-Partner User's Guide will be used as the text for this session. If you are interested in staying for this session please contact us.