



The Basics of AR Sequencing

Benefits, examples and best practices for collecting cash.

AR Sequencing is the process of automatically coordinating communications to customers and tasks of accounts receivable staff to reduce DSO, increase working capital, and free up staff time.

Benefits of AR Sequencing

Timely Information



Deliver the right information exactly when your customers need it. Sequences deliver customized accounting information based on where your customers are in the collections process.

Be Engaging



Sequences recognize how and when your customers interact with your contact, allowing you to reach customers when and where they are most likely to respond.

Easy Automation



Automate the most tedious part of the collections process by allowing sequences to touch your customers for you. Spend less time on the phone and more time collecting cash

Types of AR Sequencing



Onboarding

Onboarding sequences introduce your new customer to your accounting process and ensures they have completed all the right steps to start making payments.



Disputes

Dispute sequences notify your team immediately to find a resolution quickly and automatically escalate the dispute, if needed.



Invoicing

Invoicing sequences take the manual work out of day-to-day invoicing tasks. As soon, or before, an invoice is due the sequence will reach out to customers and continually remind them until a payment is made.



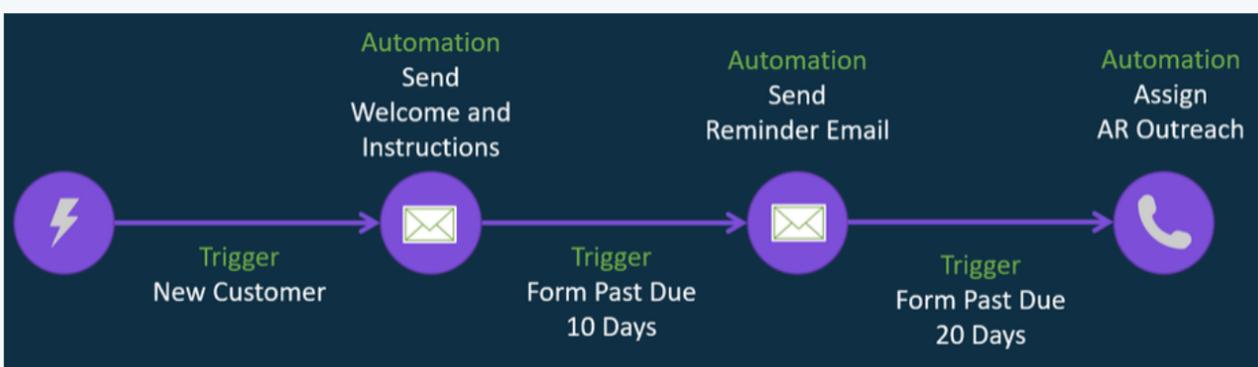
Past Due

Past Due sequences give gentle, or firm, reminders to customers every few days until they have taken an action on their past due account.

Sequences can be customized and tailored to an infinite number of different uses. Collectors are only limited by their creativity!

Example AR Sequence

Below is what an AR Sequence would look like to on-board a customer.



There are many different types of sequences. The example above merely illustrates one way in which a sequences can be used to collect cash. Sequences can be easily customized for any purpose.

Best Practices



Target Your Sequences

Tailor your sequences so that they target your customers with precise, personal messages - like using invoice and account numbers.



Design for your audience

Make it easy and painless for your customers to make a payment by using click-to-pay and adjusting the frequency of your reminders.



Test, test, and test again

Test your sequences' effectiveness and continually evaluate which aspects are working best.



Report regularly

Pay attention to your KPIs and use them as a benchmark to determine where your team can improve, whether this is with your collections tools or in the behavior of your team.