



YOUR GUIDE TO SEAMLESSLY INTEGRATE FOR COLLECTIONS

2024

Overview

All businesses hope for timely, full payment of every customer invoice submitted. But this does not always happen, and additional steps must be taken to secure Payment.

A.R.M. Solutions is an awardwinning, full-service collection agency providing custom debt recovery solutions for companies of all sizes in various markets. The FieldRoutes platform offers integration with A.R.M. services. This provides an inapp solution when overdue accounts must be sent to a proven leader in the debt collection field.

DON'T FORGET

- At 1:30 AM Pacific Time every day, a set of update files are sent to A.R.M. automatically by the system for every office that has the A.R.M. integration enabled.
- These update files contain a complete history of all transactions for all customers that are sent to A.R.M. so that A.R.M. can perform balance reconciliation on their end to make sure that their records are up to date.
- All files are uploaded to Amazon storage and sent to A.R.M., so we have backups to send to A.R.M. if necessary.

GET STARTED

ENABLING A.R.M. INTEGRATION

Current A.R.M. Customer

Contact FieldRoutes Support to have your office(s) set up.

New to A.R.M.

Contact A.R.M. Solutions to establish an account with them. Visit <http://www.armsolutions.com> or Call 888-772-6468 for more information.

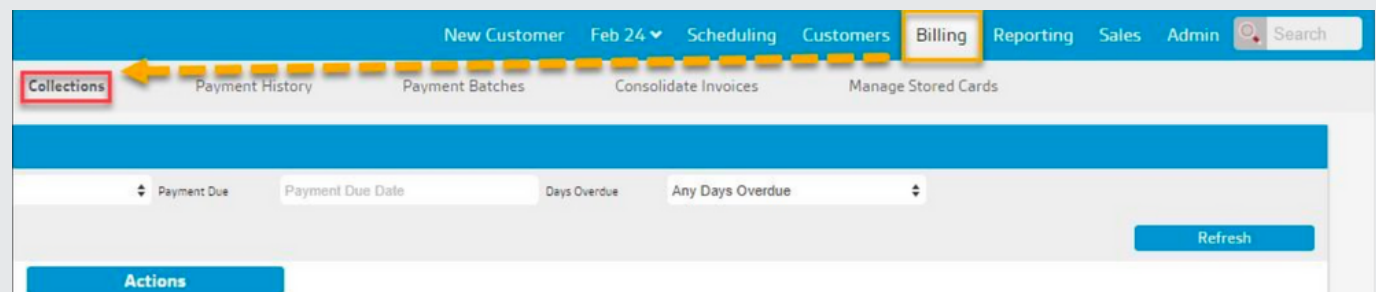
SENDING ACCOUNTS

SEND ACCOUNTS TO A.R.M. IN BULK

The platform provides a tool under the Billing area to send groups of overdue accounts in bulk to A.R.M. for collection processing.

To access this Collection Accounts tool, navigate to:

Billing > Collections



SENDING ACCOUNTS

CUSTOMIZE THE LIST AND SEND IT TO A.R.M.

The Collections report will initially contain all customers with an outstanding balance. To narrow this list down, utilize these steps:

1. Customize the List of Accounts
 - For example, choose all accounts in Frozen status that are in Pending collection status.
 - See our Collections guide for more information on the Collections report's filters.
2. Select Refresh to Filter the List
 - If, after refreshing, a customer should not be sent to A.R.M., then use the option to Remove in the far right column. Note that the customer will reappear if any action is taken or the report is refreshed.
3. From the Actions menu, select Send to A.R.M.

Collection Accounts

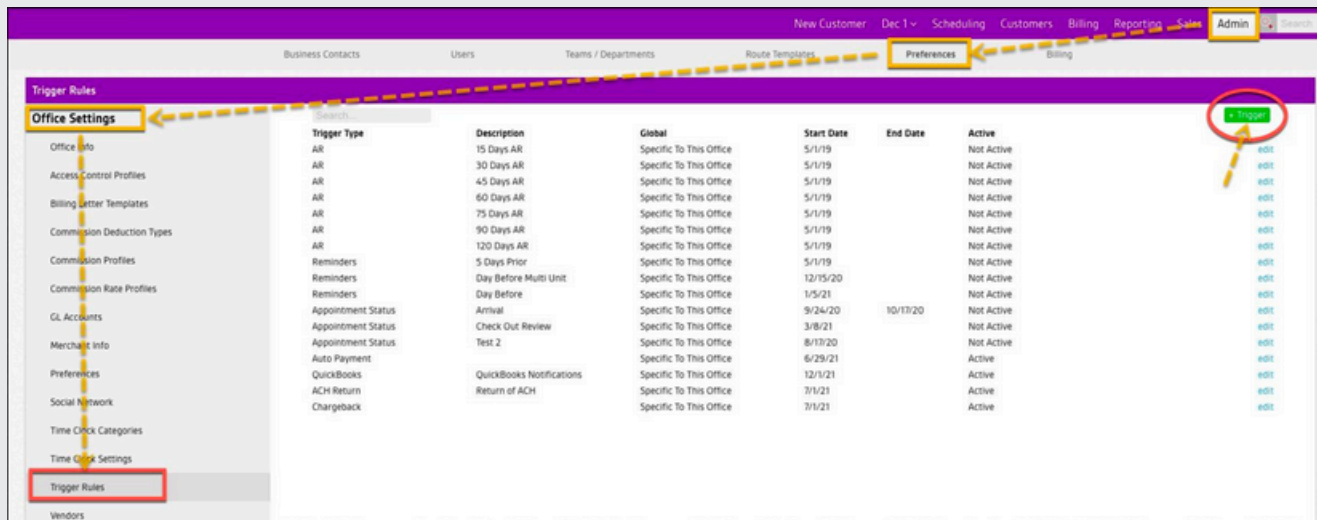
As Of Date: As of Date: Asst. Status: Frozen Balance Age: Any Balance Age: Payment Due: Payment Due Date: Days Overdue: Any Days Overdue: AutoPay: Any AutoPay Status: Status: Any AutoPay Rate: Prop. Type: All Properties: All: Max Email: All: Max Monthly: N/A: Inc. Collections: W. Pending: Inc. Flags: Include Flags: Actions: Refresh: Search: Add / Remove Flags: Send Message: Export to Excel: Add Fee: Update Status: Write Off Balances: Send to ARM: Export Placement Fee: Bulk Freeze: Bulk Freeze Rollback: CustomerID: Name: Balance: Age: Earliest Due Date: Days Overdue: Address: Email: Phone: Status: Stage: AutoPay: Payment Status: Last Payment: Remove: 4: Johnjahn Durgens: 152.80: 694: 5/8/20: 657: 34777 Knights Bridge D: Dalle: Heipderp@Herp...: Active: Sent To ARM: Card: Successful: 5: Richard Cortez: 107.17: 891: 10/17/19: 861: 2750 Virginia Parkway: McK: Otis Tramble@P...: Active: Pending: None: Invalid/Missing: 7: Raul Whittington: 329.00: 1497: 1/29/18: 1487: 81713 Pony Dr: McK: : Active: Not Set: None: Invalid/Missing: 13: Lewis Leatherman: 1.80: 37: 2/17/22: 7: 20436 Silverado Cir: Carl: : Active: Not Set: None: Invalid/Missing: 15: Ken Salisbury: 54.13: 652: 6/12/20: 622: 22889 Stone L: Carl: Faraz Quraishi@...: 2145368784: Active: Not Set: None: Invalid/Missing: 96: 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SENDING ACCOUNTS

USE TRIGGER RULES TO SEND ACCOUNTS TO A.R.M.

Create a Trigger Rule to autosend customers to A.R.M. who meet certain criteria for a fully automated process. To access the Trigger Rules, navigate to:

[Admin](#) > [Preferences](#) > [Office Settings](#) > [Trigger Rules](#)



Choose the +Trigger button and the AR Trigger Rule Type in the first field. Then set the criteria for the accounts that will be autosent to A.R.M. For example:

- Age/Past Due Days = 90
- Minimum Balance = \$50.00 Customer Status = Frozen
- Include Collections Stages = Pending
- Then select the +Action button, select Send to ARM from the dropdown list, and Save the rule.

All Frozen accounts with a 90+ day overdue balance >\$50.00 and set to Pending Collections will automatically be sent. To learn more about Trigger Rules, refer to the Preferences > Trigger Rules user guide.

Trigger Type	Description	Global	Start Date	End Date	Active
AR	ARM Transmission	Specific To This Office	11/1/21		Active

Filters

Age/Past Due *	Age	Age/Past Due Days *	90
Minimum Balance	50.00	Maximum Balance	
Customer Status	x Frozen	Multi Unit	Include Multi Unit Properties
Include Customer Flags		Exclude Customer Flags	
Include Divisions		Exclude Divisions	
Include Collections Stages	x Pending	Exclude Collections Stages	
Prefers Paper	All	Property Type	All Properties

Actions

Action: Send to ARM Remove + Action

WRITE OFF BALANCES IN BULK

Once the decision has been made to write off a group of accounts, the user can also do this in bulk. Return to the Collection Accounts tool at:

Billing > Collections

1. Use the filters to customize the list of accounts whose balances are to be written off.
2. Select the *Refresh* button to update the list.
3. Select *Write Off Balances* from the *Action* menu.
4. At the prompt, confirm that the accounts should be written off.

CustomerID	Name	Balance	Age	Earliest Due Date	Days Overdue	Address	Email	Phone	Status	Stage	AutoPay	Payment Status	Last Payment	Remove
4	Johnalyn Durgens	152.80	694	5/8/20	657	34777 Knights Bridge D	Della		Active	Sent To ARM	Card	Successful		Remove
5	Richard Cortez	107.17	891	10/17/19	861	2750 Virginia Parkway	McK		Active	Pending	None	Invalid/Mising		Remove
7	Raul Whittington	329.00	1497	1/29/18	1487	81713 Pony Dr	McK		Active	Not Set	None	Invalid/Mising		Remove
13	Lewis Leatherman	1.80	37	2/17/22	7	20436 Silverado Cir	Gerl		Active	Not Set	None	Invalid/Mising	1/18/22	Remove
15	Ken Salisbury	54.13	652	6/12/20	622	22889 Stone L	Gerl		Active	Not Set	None	Invalid/Mising		Remove
96	Debbie McKinney	135.31	531	10/11/20	501	9597 Summit Vle	Rowl		Active	Not Set	Card	Successful		Remove
259	Peter Pan	10436.30	1420	5/2/18	1394	123 Ship Sea Lane	McK		Active	Not Set	Card	Successful		Remove
330	Deb Selu	193.66	503	10/9/20	503	11466 Rivercove Dr	McKinney TX	75069	Active	Not Set	None	Invalid/Mising		Remove

WRITE OFF INDIVIDUAL INVOICE

To write off a single outdated invoice:

1. Open the Customer Card.
2. Go to the Invoices tab.
3. Select the invoice to be written off from the left menu.
4. Click + Add Payment and select Coupon/Credit as the payment type.
5. Under Payment Flags, select the Write Off checkbox.
6. Finally, select Record Coupon

[66857] Kirk Searcy Frozen Account

Overview Info Subscription Leads Billing Notes Documents Appointments **Invoices** Properties Equipment Admin

Account Summary ▶ Account Statement Report + New Invoice

347623 11/29/17 PREMIUM BIM... UNPAID

321820 9/11/17 PREMIUM BIM... UNPAID

285879 5/22/17 PREMIUM BIM...

Cash Check Card ACH **Coupon / Credit**

Coupon Payment \$69.00 1542 DAYS PAST DUE

Payment Details

Payment Amount: 69.00

Confirm Amount:

Coupon Code:

Description:

Customer Payment Notes:

Distribution Details

Limited To Customer: Any Customer

Limited To Subscription: Any Subscription

Apply To First: 347623 - \$69.00 PREMIUM BIMON...

Payment Flags

Office Payment:

Collection Payment:

Collections Agency Payment:

Write Off: ☒

Cancel Payment Record Coupon

RECORDING PAYMENTS COLLECTED BY A.R.M.

Usually, A.R.M. will direct the customer in question to pay the balance directly to your company.

For cases where the customer pays A.R.M., the user should record the Payment in their Customer Card in the following manner:

1. Open the Customer Card.
2. Go to the Invoices tab.
3. Select the invoice whose balance was paid to A.R.M.
4. Click + Add Payment and select Check as the payment type.
5. Under Payment Flags, select the Collection Agency Payment checkbox. 6. Finally, select Record Check.

[66857] Kirk Searcy Frozen Account

Overview Info Subscription Leads Billing Notes Documents Appointments **Invoices** Properties Equipment Admin

Account Summary ▶

Account Statement Report

+ New Invoice

Invoice Number	Invoice Date	Invoice Description	Amount	Status
347623	11/29/17	PREMIUM BIM... Service	\$69.00	UNPAID
321820	9/11/17	PREMIUM BIM... Service	\$69.00	UNPAID
285879	5/22/17	PREMIUM BIM... Service	\$69.00	FULLY PAID

Check Payment \$69.00 1542 DAYS PAST DUE

Payment Details

Payment Amount: 69.00

Confirm Amount:

Check Number:

Customer Payment Notes:

Distribution Details

Limited To Customer: Any Customer

Limited To Subscription: Any Subscription

Apply To First: 347623 - \$69.00 PREMIUM BIMON...

Payment Flags

Office Payment: ☐

Collection Payment: ☐

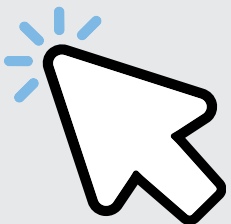
Collections Agency Payment: ☒

Cancel Payment Record Check

Schedule Transfer Close



QUESTIONS?
**ACCESS THE
RESOURCE
CENTER HERE**



2024