

Primary Collection Notes

- Go to left side of the Client Dashboard, midway down click 'Edit'

Assurance Manager
CAS Manager
Billing Admin Andy Zinkle Andyup Zinkleup
Sales Rep
Primary Office Madison
Subsidiary Smith & Jones CPA
Date Added
Status CLIENT-Closed Won
On Hold
Disallow New Work

Email | Phone | Address
Email mgierach@govirtualoffice.com
Alt. Email 1
Alt. Email 2
Phone (617) 555-0156
Alt. Phone 1
Alt. Phone 2

Billing Address
Devify Industries
123 Devils Lake Road
Black Earth WI 53515
United States Map

Web Address
Billing Email 1 mgierach@govirtualoffice.com
Billing Email 2
Billing Email 3

Tax Information
Entity Type
FYE December
Tax Reg. Number
SS1
SS2

[View](#) [Edit](#)

- Box will appear for 'Primary Collection Note,' type and click Save.

Client 10018 Devify Industries

[Save](#) [Cancel](#) | [Actions](#)

▼ Accounts Receivable

OVERDUE BALANCE	CONSOLIDATED	DAYS	CONSOLIDATED
5,841.08	5,841.08	783	783
TOTAL BALANCE	CONSOLIDATED		
6,191.08	6,191.08		

▼ Billing Detail

PARENT BILL TO CLIENT
<Type then tab>

PRIMARY COLLECTION NOTE
ACH agreement of \$500/month

This will show on the left side of the client dashboard after saving. This is also a field that can be pulled into many reports. If you make changes to this section they will be noted in the system information tab within the edit screen of the client for tracking purposes.