Get started.

To start using the Trial please push the button on the tab “Import Demo Data” of the MaxCredible App.

Example data will be imported and actions like emailreminders and calls will be generated.

After importing the sample data you can find the calls to be made and the letters and/or emails to be send by clicking the “To Do” tab.

The Personal start page shows the workload

- calls tob e made
- emails and letters tob e send
- issues to be solved or followed up to ensure timely solving
- other tasks

Debtor information (tab: Debtors)
The Debtor tab opens the clientscreen that shows all information and tools you need to communicate with or about your clients:

- General information
- Address information
- Custom Information you can use for company specific information
- Financial information
- Invoice overview
- Issue handling
- Planned and performed Actions like calls and emails
- Payment Arrangement(s)
- Comments
- Contacts

From this screen you can

- register Issues blocking payment and assign them tot he right people for solving them
- register payment promisses
- register and confirm payment arrangements
- send manual letters and emails and register incomming calls
- add comments
- add relevant contacts
- attach notes and attachments

Other tabs show dashboards and pivot reports, invoice details, credit issue details, arrangement details and Setup functionality.

To set up the system and/or adjust the set up the tabs Administration and Credit Issue Categories are used.
Check the sample set up to see how to define profiles per group of clients and define the follow up strategy for each profile by defining actions (calls, letters, emails etc) tos end at specific moments in time conform your credit management strategy.