

## Recommended Phase 1 Training Solution

### Preliminary Services

Script Configuration  
AutoCollect Configuration

### Day 1 Classes

star\*collect Basics  
Reporting Module  
star\*collect Administration

### Day 2 Classes

Script Configuration Review  
AutoCollect Configuration Review

### Day 3: On-site Support

## Recommended Phase 2 Training Solution

### Day 1 Classes

star\*collect Advanced

### Day 2 Classes

AutoCollect Workshop  
Notices Script Editor Workshop

### Day 3: On-site Advanced Consulting

### Classroom Requirements

- Training space with minimum distractions
- A workstation for each student
- Instructor workstation

### Additional Classroom Requests

- Projector and screen
- White board or chart paper and markers



star\*collect

## Training and Configuration Services

Carefully designed

classes and services build the skills  
and assurance necessary to use  
star\*collect to its full potential.

Our *two-phase* approach fosters high knowledge retention, leaving students eager to integrate star\*collect into their daily routine. After phase one, users confidently complete essential tasks with ease and immediately benefit from star\*collect's powerful features. Phase two's follow-up visit then propels users to even more advanced, efficient, and firm-specific uses of the software.

*To discuss your training needs further  
or request class objectives,  
call Mike Drnec at (410) 308-7615.*



## Phase 1 Classes

### **star\*collect Basics**      **6 hours**

Students master the skills necessary to effectively use star\*collect to maintain contacts, record collection notes, review payment and billing histories, create and reference ticklers, prioritize new collection efforts, and more.

### **Reporting Module**      **2 hours**

Students learn how to independently create, maintain, and run various setups of the A/R Aging and Master Aging reports.

### **star\*collect Administration**      **2 hours**

This class prepares your star\*collect Administrator to independently maintain Windows authentication and SQL Server logins, all star\*collect maintenance tables, and all options settings, including the setups necessary for e-mail integration and activity code-dependent notices.

### **Script Configuration Review**      **2 hours**

For firms benefiting from our Script Configuration service, this class reviews the resulting scripts, including how and when to run each. A demo provides students with the background needed to define future script requirements.

### **AutoCollect Configuration Review**      **2 hours**

For firms benefiting from our AutoCollect Configuration service, this class reviews the automated processes defined, including how and when to run each.

## Phase 2 Classes

### **star\*collect Advanced**      **6 hours**

Advanced concepts and techniques enable experienced users to integrate star\*collect's full potential into their collection process. Users master the powerful ad hoc inquiry and management capabilities of the Account Navigator. This class presents a unique opportunity to target firm-specific solutions.

### **AutoCollect Workshop**      **3 hours**

Detailed instruction prepares your star\*collect Administrator to identify processes that would directly benefit the firm's collection efforts. Exercises reinforce skills needed to independently create, test, schedule, and maintain the available AutoCollect operations.

### **Notices Script Editor Workshop**      **4 hours**

By the conclusion of this hands-on workshop, students use basic and advanced functions to produce *at least* one custom dunning letter and one custom statement, test and run each, and reference them in AutoCollect processes.

## Phase 1 or 2 Class

### **Account Navigator for Attorneys**      **2 hours**

Students learn the ins and outs of the Account Navigator and its use as a powerful ad hoc inquiry and management tool.

## Phase 1 Services

### **Script Configuration**      **4 hours**

To satisfy your immediate dunning letter and statement needs, we develop up to six Notices scripts. For additional scripts, submit requirements for evaluation and price quote.

### **AutoCollect Configuration**      **4 hours**

To get you up and running on the first day, we develop up to four processes, such as the automatic creation of collection accounts and generation of letters and statements. For additional processes, submit requirements for evaluation and price quote.

### **On-site End-User Support**      **8 hours**

Desk-side assistance helps users apply recent instruction to their daily workflow.

## Phase 2 Service

### **On-site Advanced Consulting**      **8 hours**

Individual consulting reinforces advanced techniques, assists management in optimally employing the software, and provides direct assistance to experienced users in areas such as the Notices Script Editor.

Hours noted are approximate and for estimating billable costs only.