



**COLLECTION MADE EASY**

## **TRANSFORMING DEBT RECOVERY WITH AUTOMATION**

CollectXpert's advanced Collections Management Software empowers businesses to optimize debt recovery strategies tailored for every customer. This automation streamlines your collections processes, enhances customer interactions, and boosts operational efficiency through intelligent analytics and integrated solutions.



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# OVERVIEW

CollectXpert is a next-generation collections automation platform designed specifically for Salesforce. Built by experts with decades of experience in debt management and CRM optimisation, CollectXpert empowers organisations to streamline operations, enhance customer engagement, and improve recovery rates. It addresses common challenges such as disconnected systems, manual inefficiencies, and compliance risks by providing a unified, automated, and customer-centric solution.

Seamlessly integrated with Salesforce, CollectXpert enables organisations to automate collections workflows across the full lifecycle, deliver personalised and omnichannel engagement strategies, access real-time reporting and analytics to drive better decisions, and scale operations with flexible, configurable architecture. It ensures alignment with evolving compliance and privacy standards while enhancing operational transparency and efficiency.

The screenshot displays the CollectXpert interface within a Salesforce environment. The main account view for 'Jeremy Wilson' is shown, with a 'High Risk' status. The interface is divided into several sections:

- Process Details:** Shows the current process status as 'Active' with 53 days in collection. A list of executed steps includes 'Payment Reminder - SMS', 'Payment Reminder - Email', 'Payment Overdue - SMS', 'Arrears Letter', and 'First Outbound Call'.
- Customer Risk Profile:** Displays a 'High Risk' status and 'Active Collection Details' including start date, amount, and next steps.
- Collection History:** Provides a summary of collection attempts, including the number of times in collection, average steps executed, and total amount collected.
- Dunning Processes (3):** A table listing active dunning processes with columns for Dunning Process Name, Process Template, Initiating Amount, and Status.
- Timeline:** A chronological log of recent activities, such as email follow-ups and completed calls.
- Contacts (1) and Cases (1):** Quick links to related contact information and open cases.

Dunning Process Name	Process Template	Initiating Amount	Status
DPN-84949	Standard Strategy	696.411	In Progress
DPN-80990	Overdue - Industrial	1,199.006	Closed
DPN-84948	Standard Strategy	3,365.636	Closed

CollectXpert transforms collections into a strategic advantage—delivering operational efficiency, superior customer experiences, and measurable financial outcomes.

# DEEP DIVE

## End-to-End Workflow Automation

CollectXpert replaces manual, fragmented collections processes with intelligent automation. Using Salesforce Flow and configurable strategy logic, CollectXpert orchestrates dynamic, risk-based collections journeys, from first contact to final resolution. Agents are equipped with prioritised task queues and real-time prompts, freeing time for high-value interactions.

## Personalised Omnichannel Communications

CollectXpert integrates email, SMS, call, portal, and third-party agency communications into seamless workflows. Customers receive timely, respectful, and channel-appropriate outreach, improving response rates while reducing friction and complaint risks. Messaging strategies are tailored to customer segments, risk profiles, and account history.

## Embedded Compliance and Ethical Collections

With built-in support for privacy management, hardship pathways, culturally safe engagement practices, and consent-driven communications, CollectXpert ensures that organisations operate ethically and in compliance with regulatory frameworks. All communications, actions, and outcomes are audit-tracked, providing defensible transparency.

## Real-Time Reporting and Intelligence

CollectXpert replaces static spreadsheets and fragmented reporting with CRM Analytics-powered dashboards. Finance, operations, and executive teams can access real-time insights into outstanding balances, collector performance, Days Sales Outstanding (DSO), dispute rates, and risk segmentation. Predictive insights help teams proactively refine strategies.

## Integration-Ready Architecture

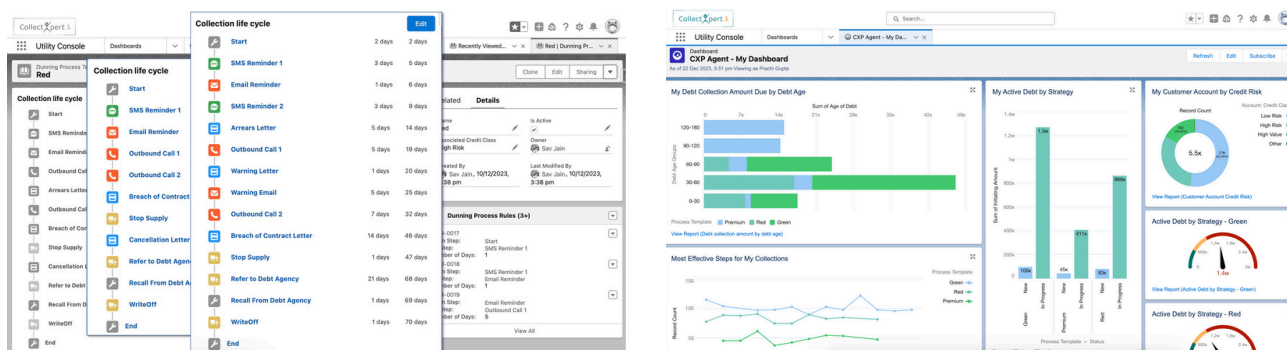
Built on Salesforce and extendable via MuleSoft, CollectXpert integrates seamlessly with ERP systems, billing platforms, payment gateways, and document management solutions. This ensures a true 360° view of customer and receivables information without data duplication or latency.

## Scalable and Configurable for Enterprise Needs

CollectXpert's modular design supports businesses of any size—from high-growth scaleups to large enterprises. Treatment strategies, customer journeys, and escalation paths are fully configurable to align with internal credit policies, risk appetites, and operational models.

# REAL WORLD SUCCESS STORY

We recently implemented a large North American enterprise in the real estate and infrastructure sector with over 2,500 active commercial accounts, receivables exceeding USD \$800k, and significant internal pressure to scale collections processes without increasing headcount. The client faced inefficiencies due to siloed financial systems, limited visibility into receivables performance, and manual follow-up processes prone to delay and error.



In this engagement, we deployed CollectXpert as part of an enterprise-wide digital finance initiative to:

- Centralise collections activity across finance, sales, and customer success functions by extending their Salesforce environment
- Automate collections workflows using Salesforce Flow and custom strategy logic to trigger targeted emails, payment reminders, and follow-up tasks based on days overdue and risk profile
- Enable payment automation by integrating Salesforce with Stripe, allowing agents to trigger secure payment links directly from the CRM, and improving cash flow visibility in real time
- Replace legacy spreadsheets and manual reports with CRM Analytics dashboards that track outstanding balances, DSO, collector performance, and escalated cases across multiple business units
- Lay the foundation for omnichannel communications, including SMS-based reminders and third-party agency escalations, while ensuring compliance with privacy and consent requirements

The solution has since become a core part of the client's collections and receivables operations, empowering their internal teams to manage growing volumes without additional overhead.

## GETTING STARTED

CollectXpert is available as a modular solution, allowing organisations to start with core functionality and expand capabilities over time. Our discovery-led implementation ensures a tailored approach that matches each client's operational needs, compliance requirements, and growth ambitions.

## ABOUT COLLECTXPERT

CollectXpert is developed by Peachy Cypher, a Salesforce and MuleSoft partner based in Australia. We are specialists in customer-centric debt management solutions, delivering faster, more ethical, and more intelligent collections strategies to leading organisations across the public and private sectors.

### Contact Information

To learn more or to schedule a discovery call:

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