



**DEBTPAYPRO**

**EXTENDED PROFILE**



## OVERVIEW

DebtPayPro is a CRM platform designed to facilitate a range of financial needs and processes, including debt settlement, credit repair, practice management, student loan consolidation and more.

DebtPayPro offers a host of finance-specific features, such as settlement forecasting, dispute letters and internal and external attorney management. Alongside these, DebtPayPro offers a solid range of core CRM functionality like lead import, email marketing, and task automation. One particularly useful feature of DebtPayPro is the sales script builder, which allows users to optimize time on the phone for information gathering.

DebtPayPro also offers a considerable range of finance-specific integrations - these include payment gateways (13, including PayPal, USAePay and FedChex), credit and finance bureaus, and merchant account providers. Alongside these, users can benefit from integration with more general solutions, including nine phone systems, electronic signature providers (DocuSign, clixsign and Adobe Echosign), Slack and Zendesk.

DebtPayPro is a cloud CRM offered on a SaaS 'per user per month' pricing model. Implementation takes between five and seven business days.



## SOFTWARE SPECIFICATION

<b>OVERVIEW</b>	
PRODUCT NAME	DebtPayPro
<b>SOFTWARE FEATURES</b>	
API ACCESS	✗
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✗
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✗
PIPELINE MANAGEMENT	✗
PRODUCT & PRICE CONTROL	✓
SALES GAMIFICATION	✗

QUOTATION HANDLING	✗
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
<b>SUPPLEMENTARY FEATURES</b>	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✗
<b>CUSTOMER SIZE</b>	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
<b>OTHER FEATURES</b>	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
<b>HOSTING METHOD</b>	
CLOUD	✓
ON-PREMISE	✗
<b>FURTHER INFORMATION</b>	

**IMPLEMENTATION TIMEFRAME**

5-7 business days



## SOFTWARE SCREENSHOTS

Contacts > Client Dashboard

Search:

[Edit Contact](#) [Budget Analysis](#) [Creditors](#) [Enrollment](#) [Settlements](#) [Retrieve Loans and Programs](#)

### Samantha Montanaro

STUDENT LOANS  
Lead: **New Lead** 14 days

[update status](#)

Customer ID: DCMO-26328463

Assigned Company: [Test Account](#)

[Cancel Assignment](#)

Created At: 05/29/2015 2:34 pm - Trey Market  
Modified At Assigned To: 04/21/2016 10:22 am - Trey Market

Data Source: Manual Entry  
SSN: XXX-XX-1233  
Birthday: Apr 13, 1973

Email: carrie@debtpaypro.com  
Home Phone: 123-123-1233  
Work Phone: 123-123-1233  
Cell Phone: 123-123-1233

Address: 456 Main St  
1875 E. 18th  
Buckhead, GA 30604

Client Snapshot  
Repayment Plan: Graduated

Enrolled Date: Sep 08, 2015  
Debt: \$30,637.00  
Plan: Student Loan Plan  
Comp Template: Performance Comp. Template  
Length: 6 Months

Consolidation Fee: \$698.00  
Balance: \$0.00

#### History

Category	Date	Event
Docs	04/21/2016 10:35 am	E-Sign Sent To: carrie@debtpaypro.com
Docs	04/21/2016 10:35 am	PDF Document Generated: *Student Loan
Call	04/21/2016 10:30 am	Call Log Added
General	04/21/2016 10:22 am	Contact Data Updated
Docs	04/20/2016 11:13 am	E-Sign Sent To: carrie@debtpaypro.com
Docs	04/20/2016 11:13 am	PDF Document Generated: *Student Loan
General	04/20/2016 11:12 am	Contact Data Updated
Tasks	04/19/2016 3:11 pm	Task Updated: Welcome Call
Tasks	04/19/2016 3:10 pm	Task Created: Welcome Call
Docs	04/19/2016 2:35 pm	E-Sign Sent To: tmarket@debtpaypro.com
Docs	04/19/2016 2:35 pm	PDF Document Generated: Client Agree...
General	04/19/2016 2:35 pm	Contact Data Updated
Docs	04/19/2016 2:34 pm	E-Sign Sent To: carrie@debtpaypro.com
Docs	04/19/2016 2:34 pm	PDF Document Generated: Client Agree...

