



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

| | |
|--------------------------|------------|
| OVERVIEW | |
| PRODUCT NAME | DebtPayPro |
| SOFTWARE FEATURES | |
| 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 | ✗ |
| SUPPLEMENTARY FEATURES | |
| CPQ | ✗ |
| CUSTOMER SERVICE AUTOMATION | ✗ |
| MARKETING AUTOMATION | ✓ |
| SOCIAL RELATIONSHIP MANAGEMENT | ✗ |
| CUSTOMER SIZE | |
| SMALL (1-50 USERS) | ✓ |
| MEDIUM (51-200 USERS) | ✓ |
| ENTERPRISE (201+ USERS) | ✓ |
| OTHER FEATURES | |
| MULTIPLE LOCATIONS | ✓ |
| MULTIPLE CURRENCY | ✗ |
| CUSTOMIZABLE | ✓ |
| HOSTING METHOD | |
| CLOUD | ✓ |
| ON-PREMISE | ✗ |
| FURTHER INFORMATION | |

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

