



Sage

GUIDE

**Credit control and accounts receivable  
software for Sage users**

**CHASER**

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## Introduction to credit control and accounts receivable automation for Sage users

It's no great insight that many businesses are having a tough time right now. What may be surprising is the impact of COVID-19 on accounts receivable. [An estimated 209% rise in overdue invoices](#) has been calculated since the start of the pandemic. Even in good times it's important to maintain consistent cash flow and avoid wasting valuable time chasing payments, especially for smaller businesses. What we learned after the 2008 crash is that when a recession comes around, getting paid on time is more crucial than ever.

Anticipated cash flow is what allows any business to function in a competitive market. Many believe that expansion is the biggest risk for a business, but in fact, it's a lack of working capital that sinks many companies - and that can be due to ineffective accounts receivable (A/R) processes. Effective A/R and credit control allows you to get paid faster, which in turn means that you can pay your own suppliers faster. This results in avoiding late payment fees, improving your own credit rating and gaining more opportunities to invest in the growth of your business.

Automating your accounts receivable (or credit control - as it's often referred to) involves getting customers to pay for your goods or services in a timely fashion. It sounds so simple. In a perfect world everyone would pay exactly when they're supposed to. You'd never have to spend a minute chasing or managing relationships with customers' accounts departments. But if 2020 has taught us anything it's that we don't live in a perfect world. In reality, our customers often have the same cash flow problems as us. It's often a juggle between ensuring smooth relationships and putting pressure on to be paid what you're owed when it's due.

Automating your accounts receivable process takes away the pain in getting paid one time; letting you save time on manual tasks and reduce days sales outstanding, whilst maintaining great customer relationships.



## Chaser customers get paid faster



**15+ hours**

Each week saved  
on credit control management



**25%**

Reduction in  
Days Sales Outstanding (DSO)\*  
Paystream Advisors study



**16+ days**

Sooner  
Our customers get paid, on  
average, 16 days sooner

## Personalisation with a human touch

### Your time is too valuable to write every invoice reminder.

Encourage on-time payments by personalising the look and text of all your invoice reminder messages. Use fully-customisable templates that automatically pull in your desired customer information, such as their name, amount owed and due from your Sage account. Add or edit a branding theme, or simply upload your logo and you're ready to go.



#### Automate personalised invoice reminders

Customise templates to your personal style and tone of voice so your customers won't know you're using an automated system.



#### Include multiple attachments

Speed up payment of invoices by automatically attaching their invoices and customer statements.



#### Maintain the human touch

All invoice reminder messages are sent from your usual email address and can match your usual signature, including your logo.



#### Thank your customers for paying

Build on your great customer relationships by sending automatic 'thank you for paying' emails after receipt of payment.



#### Group multiple invoices in one reminder

Don't bombard your customers with multiple reminders. Automatically group multiple invoices into a single reminder.

Subject

<our\_name>: Invoice <invoice\_refnum>

Hi <recipient\_firstname>

I hope you are well.

I just wanted to drop you a quick note to remind you that <invoice\_amount\_owed> in respect of our invoice <invoice\_refnum\_with\_link> is due for payment on <date\_due>

I would be really grateful if you could confirm that everything is on track for payment.

Best wishes

☐ Attach copy invoice

☐ Attach customer statement

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## Get the timing right

### Chase payments for overdue invoices at a time that suits you and your customers.

Chasing payments for overdue invoices can drain your energy and means time away from running your business. Never forget to follow up on an unpaid invoice again. Set up as many reminders as you need in a sophisticated schedule.



#### Create multiple customisable schedules

Choose the frequency and intervals of your invoice chasing. Multiple schedules can be created and tailored to different customer groups, such as good or bad payers, those on payment plans, or long-term clients.



#### Choose the best day and time

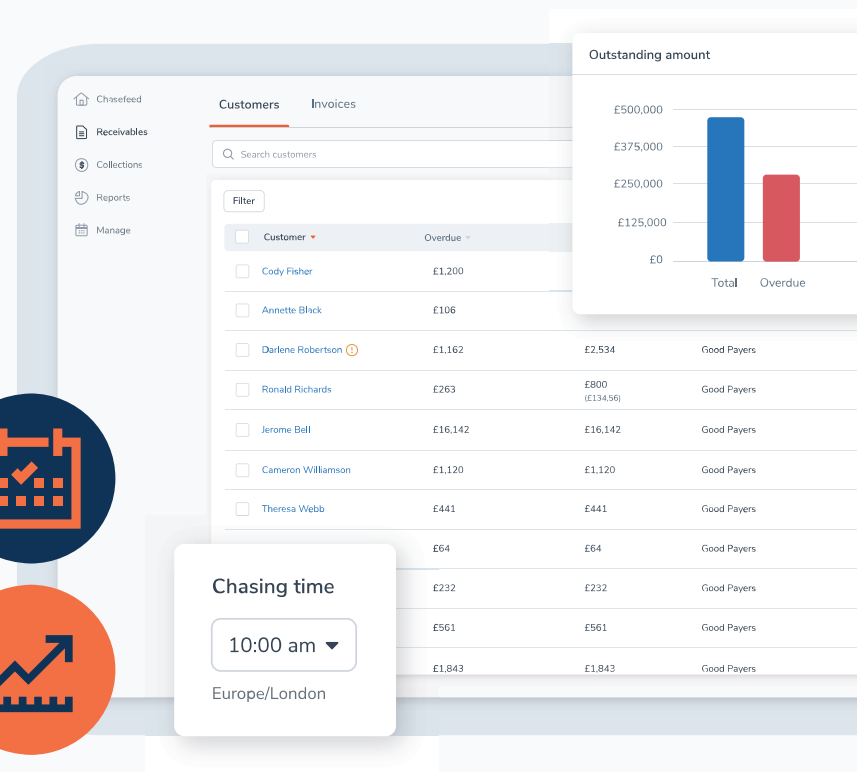
Encourage positive customer paying habits by sending invoice reminders on the same day and at the same time each week. Automatically avoiding sending reminders outside working hours, on weekends or bank holidays.



**UHY** Hacker Young  
Chartered Accountants

**Stuart Hurst**  
Head of Cloud Accounting

“A very easy to use app, that’s very clever at chasing debts. We’ve seen an improvement to debtor days almost immediately”



## Get paid sooner by automating your accounts receivable processes

Join one of our 20 minute webinars to learn how Chaser can help you get paid sooner.

[Register now](#)

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## Keep track

### See all your chasing activity in a centralized CRM, accessible from anywhere.

Trying to keep track of all follow-ups for every customer and invoice can be time-consuming and confusing. You can end up chasing the same invoice twice, or worse, never chasing the invoice at all. Seeing all your chasing activity in one place is essential to getting it right.



#### Use interactive reports to track your debtors

Easily understand your customers' payment behaviours and gain real-time insights into your aged receivables.



#### Ensure the right contact gets your reminders

Get alerted by forewarning emails summarising which contacts will be included in your next automated reminders, so you can edit if necessary.



#### Track notes and conversations

See at a glance all emails sent and replies received for each invoice and customer. This saves time spent searching through inboxes, and gives others in the business full visibility to stay up to date on communications. Add any notes from phone calls to keep your colleagues in the loop, set reminders and assign follow up tasks to your teammates.

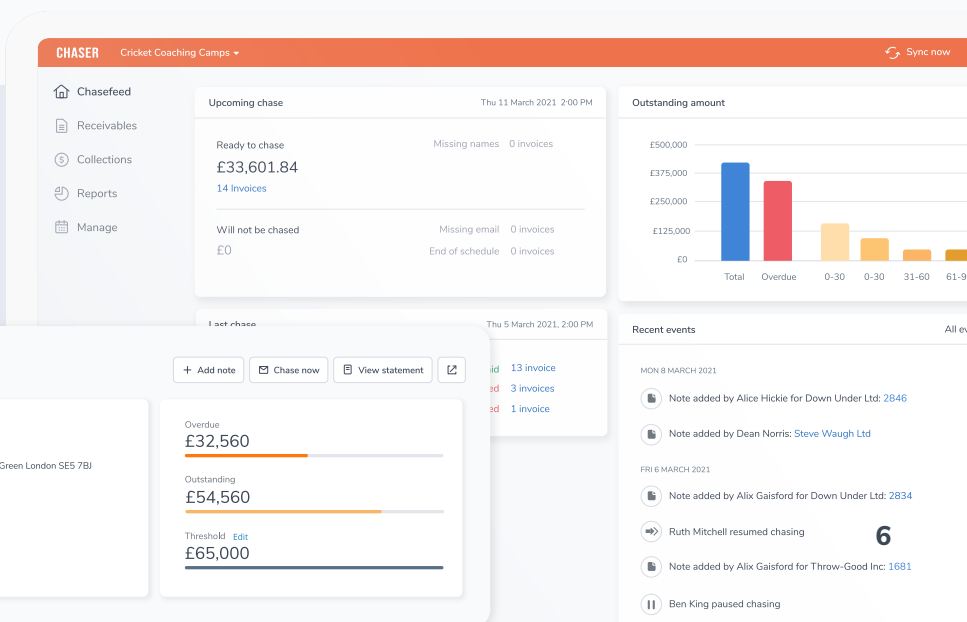


#### Don't chase a paid invoice by mistake

Chaser is automatically synchronised with your Sage account every hour, before any reminder is sent and on-demand to reconcile all payment transactions and ensure chasing reminders are stopped after a payment has been made.

**Start your 14-day free trial today**  
and see how much time you can save with automated communications tracking

**Get started**





## Encourage debtors to pay

### Make it easier for customers to pay you, through your dedicated customer portal

You and your customers can use your dedicated customer portal to see all relevant information about outstanding debts, make payments and explore alternative payment options. This helps encourage faster payment of invoices and provides more visibility over your customer accounts.



#### Never chase a paid invoice

Your customer portal automatically reconciles invoices with your integrated Sage account, so you never accidentally chase a paid invoice.



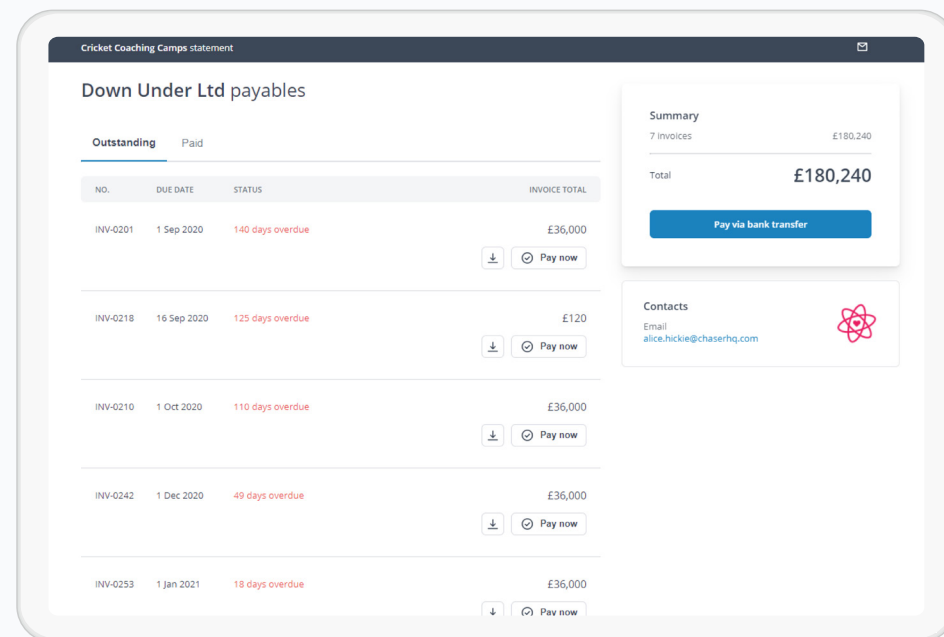
#### Increase your chances of getting paid

By offering overdue customers different payment options, you make it easier, and faster, for them to pay their invoices.



#### Save time by giving your customers access to all invoice-related information

When using the customer portal, you can provide customers with all relevant information on their invoices (e.g. supporting documentation, invoices, customer statements), giving them visibility on upcoming payments and reducing the number of queries you receive on invoices.



### Want to make it easier for your customers to pay you?

Download the customer portal fact sheet here

[Download now](#)

## Escalate to debt collection services

### Protect your customer relationships and your reputation

Customer relationships are the cornerstone of your business, but you need to ensure that you're getting paid. We aim to secure payment in an agreeable manner, without putting a strain on your relationships with customers. As an experienced, professional and CICM-trained debt collection agency, we know that a proactive and sensitive approach often yields the best result. We strive to:

- Handle your requests with care
- Recover your debts in a timely manner
- Retain the business relationships you have with your customers

### Recover more compared to traditional agencies

Stop accepting late payments and writing off bad debt as just another part of doing business. No handover is needed as all debtor information is stored within your Chaser account. Gain full visibility over the collections process and all communications sent, through Chaser's CRM.

- Get an instant, obligation-free quote
- Submit multiple collection cases
- Stay updated on the collection progress 24/7

### Get your quote in app

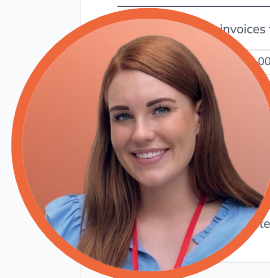
Chaser Collections is priced separately from the credit control functionality. With our no-win-no-fee Collections pricing, you only pay when we successfully collect the invoices you choose to escalate, which is a cost-effective alternative to traditional debt collection agencies.

**Book a meeting** to learn how you can recover aged receivables with **Chaser Collections**

[Book a meeting](#)

"Our goal is to collect your payments in the friendliest way!"

**Inga Schibsted**  
Chaser team



#### Escalate to collection ⓘ

Our considerate collections operate on a no-win, no-fee basis

#### Invoices (4)

Invoice nr	Outstanding	Due	Rate ⓘ
0001	£4,200	21 Jun 2020	15% + VAT
0002	£3,600	16 Apr 2020	15% + VAT
0003	£3,000	16 Apr 2020	15% + VAT
0004	£1,800	16 Apr 2020	15% + VAT
			Total

Invoices from this customer that are eligible for collection:

0006

(Required) ⓘ

[Add custom](#)

"Collect", we will review the invoices and either accept the instructions or reject them. All communications will be added to your invoice history by email.

Need help? [Book in a call](#) with the Collections Team

☒ I agree to Collector's [terms and conditions](#) and the quoted fee



## Sage and Chaser

### Sage users are getting paid faster and saving time with Chaser

Chaser has been helping Sage users to automate their accounts receivables and get invoices paid faster since 2014. Through a 2-way integration, Sage users are using Chaser to better personalise, schedule and track their receivables.

Rated 5/5 overall on



### Why Sage users love Chaser



**15+ hours**

Each week saved  
on credit control management



**25%**

Reduction in  
Days Sales Outstanding (DSO)\*  
Paystream Advisors study



**16+ days**

Sooner  
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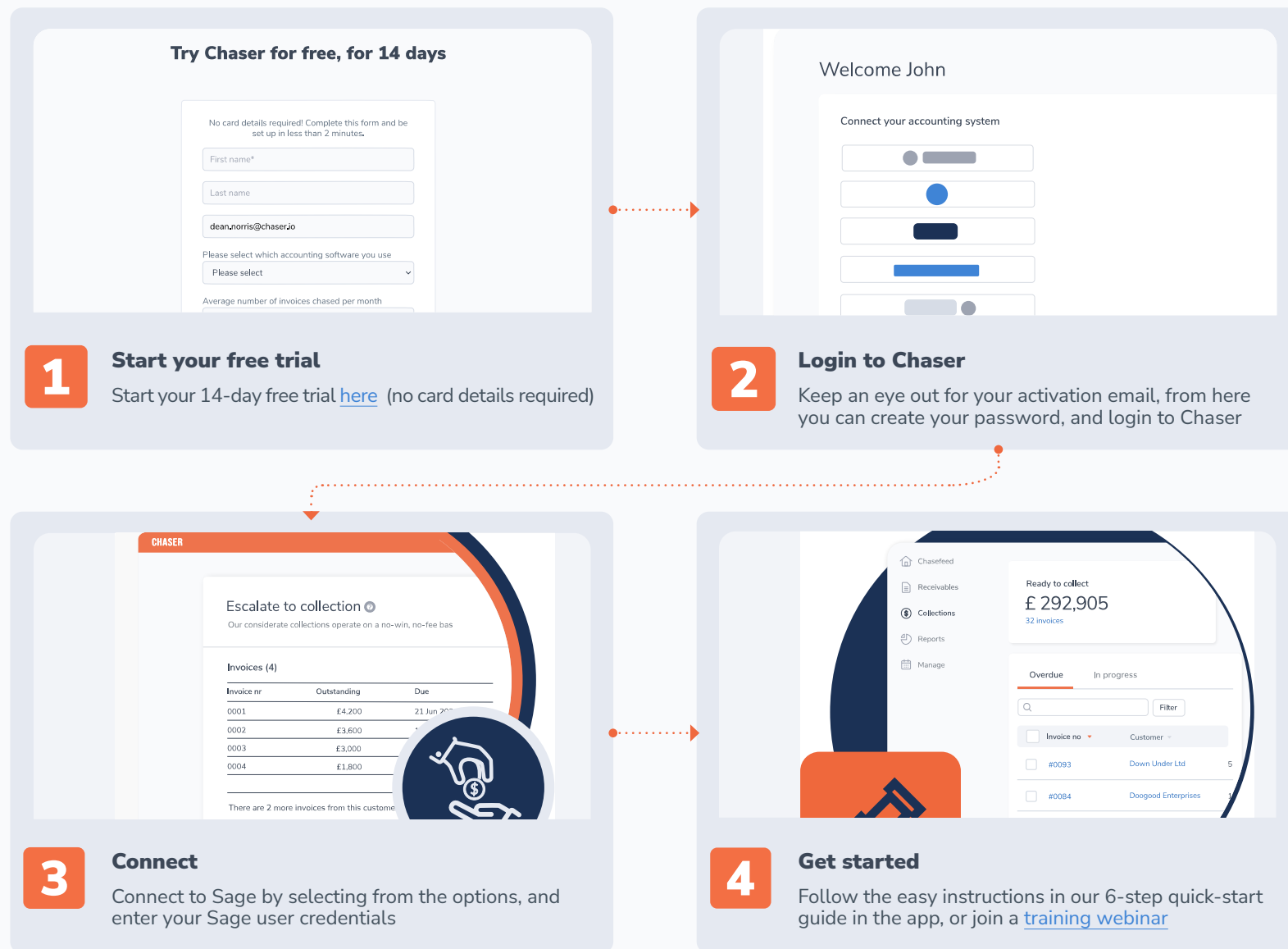


For us, Chaser is best in class for credit control. Chaser has that singular focus on credit control, which obviously reflects itself in the product. The feature set is fantastic, particularly the CRM functionality for maintaining complete invoice communication histories. Having a healthy cash flow is absolutely essential for every business, and we saw that Chaser makes an instant positive impact for our clients.

Steven Kühn, Director Technology Solutions, Azets

## Sage and Chaser

### Connect Chaser and Sage in 2 minutes



## Proven results

### Chaser customers get paid faster



#### Automation without the frustration:

Award-winning digital marketing agency Wolfgang Digital maintained great client relationships with automated, personalised invoice chasing.

“We at Wolfgang really care about our customers and Chaser’s ‘Thanks for Paying’ emails help us show just that”

[Read the case study here](#)



“Chaser really has freed up my time. You can schedule a number of emails and word them all slightly differently, making them personal yet getting the point across. We invoice every two weeks and have payment terms of 48 hours so this software really is a godsend!”

Gemma David, Finance Manager, Lead-Tech



“Our experience with Chaser has been very positive - we’ve seen almost immediate results. The functionality Chaser offers is a complete personalised debt chasing solution. If you’re serious about managing your cashflow, Chaser is a no-brainer really.”

Paul Bulpitt, Co-Founder, The Wow Company



#### Video testimonial

Watch this video to hear how Rossana Vittorielli, Credit Control Manager at fashion wholesaler LoveBrands saves over 15 hours per week on their accounts receivable tasks using Chaser.

[Watch now](#)

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## Pricing

### Pricing plans adapted to your needs

Everything you need for a first-class credit control automation process, at a price that works for you. Visit our website to view our pricing plans.

Try it for free

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## Who is Chaser

[Chaser](#) helps SMEs worldwide get paid in an efficient and friendly way so that they improve cash flow.



Free  
Automate invoice payment reminders.



Get paid faster.



Maintain great customer relationships.



## Award winning

- ▶ Accounting Excellence Cloud App of The Year, 17', 18', 19'
- ▶ Xero App of The Year 16'



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## Chaser

Businesses spend countless hours manually chasing invoices. Since launching in 2014, Chaser has been dedicated to solving this late payment problem for all businesses that sell on payment terms. By sending automatic and intelligent email chasers, the software and service provider effectively gets invoices paid on time without losing the human touch. To date, Chaser has helped users chase over £3 billion in overdue invoices.

The start-up's achievements have not gone unnoticed. Chaser has been named the Accounting Excellence 'Cloud App of the Year' three years in a row (2017, 2018, and 2019). Chaser was also named Xero's 'App Partner of the Year' (2016), and App Partner of the Month (August 2019).

### Contact us for more information about our pricing



[chaserhq.com](https://chaserhq.com)



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[https://twitter.com/chaser\\_hq](https://twitter.com/chaser_hq)



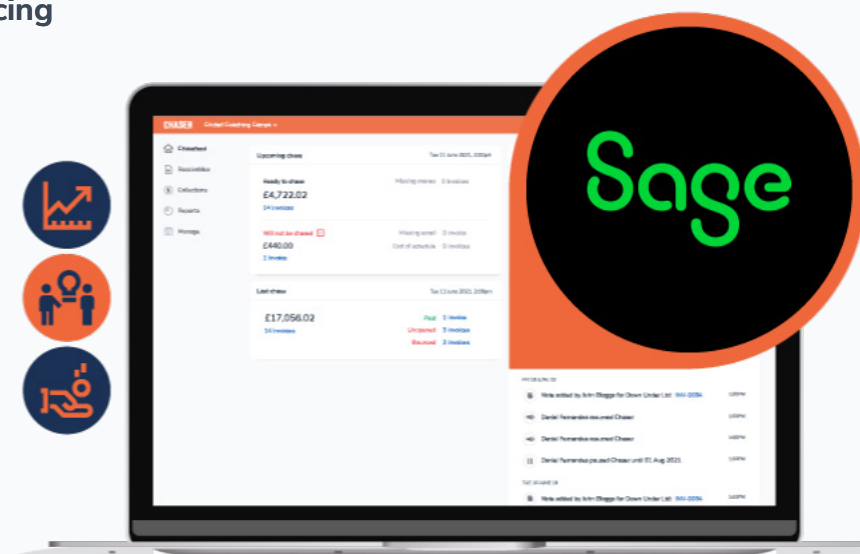
<https://www.facebook.com/ChaserAR>



020 3196 7695



[marketing@chaserhq.com](mailto:marketing@chaserhq.com)



## About Sage

Sage Accounting is a type of cloud-based accounting software. It allows you to quickly and easily create and track invoices, track cash flow, accept payments, record transactions, automate admin, capture expenses, and much more.

It's designed for small business owners (supports unlimited users) and sole traders (with or without staff) operating in any industry, including professional services, construction and retail.

You can use Sage Accounting either by yourself or with collaborators. It's easy to give access to multiple users, including an accountant (if you have one). You don't need any previous experience with accounting software to get started. You can also add additional features like support for payroll.

Try it for free



**CHASER**

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