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Collections Process & Follow-Up SOP

Building Materials & Hardware

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Writes a collections SOP — statement/reminder cadence, follow-up scripts, escalation from polite to firm, linking collection to further supply, and recording promises-to-pay — so money comes in on time without souring relationships unnecessarily. Use it to run collections. For overdue analysis use the Outstanding & Ageing Management tool.

Purpose of this tool & output

A disciplined routine to get paid

How the output is used

Use it as a disciplined routine to get paid — reminders, follow-up and escalation that shrink overdue receivables without losing customers.

Important cautions

Systematic, documented follow-up collects far more than sporadic chasing; use further supply as leverage and never let one customer accumulate silently.

Companion documents

- Contractor Credit & Collections Policy
- Customer Credit Appraisal
- Cheque Bounce & Recovery Handling
- Outstanding & Ageing Management
- PDC & Security Management
- Bad Debt Prevention & Recovery

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.