
Telephone: 949/955-2940

20271 SW Birch Street, Suite 100
Newport Beach, California 92660
robert.dewberry@dewlaw.net

Facsimile: 949/209-3883

Collection Intake Worksheet

Your customer's name, address, telephone, email, contact person: _____

Describe in a sentence what you provided the customer: _____

How much does the customer owe you: \$_____

Attach the following as applicable to prove the debt:

- Contract
- Purchase order(s)
- Invoice(s)
- Credit application
- Check or credit card paid by customer
- Important letters, faxes or emails with the customer
- Anything in writing where the customer admits or disputes the debt
- If you feel that there is anything unusual or confusing in what developed between you and the customer, prepare a brief fact summary in chronological order
- Anything else important that we know or understand