

PATENTED MAR. 21, 1905.

COMBINATION STATEMENT AND COLLECTION RECORD.

APPLICATION FILED MAY 5, 1904.

COMBINATION STATEMENT AND COLLECTION RECORD		No.
7	CHECK	6
	COIN	
	DIST	
	DEBIT	
	TOTAL	
	CHECK SHOW	
	WAGON INFO	
	PLACE CIRCLE	
	FILE IN EAST	
	1 DID NOT CALL	
	2 NOT IN	
	3 CASH ON HAND	
	4 CASH ON HAND	
	5 CALL AGAIN	
	6 CALL ON	
	7 NEW CELL	
	8 TALKING	
	9 TALKING	
	10 TALKING	
	11 TALKING	
	12 TALKING	
	13 TALKING	
	14 TALKING	
	15 TALKING	
	16 TALKING	
	17 TALKING	
	18 TALKING	
	19 TALKING	
	20 TALKING	
	21 TALKING	
	22 TALKING	
	23 TALKING	
	24 TALKING	
	25 TALKING	
	26 TALKING	
	27 TALKING	
	28 TALKING	
	29 TALKING	
	30 TALKING	
	31 TALKING	
	32 TALKING	
	33 TALKING	
	34 TALKING	
	35 TALKING	
	36 TALKING	
	37 TALKING	
	38 TALKING	
	39 TALKING	
	40 TALKING	
	41 TALKING	
	42 TALKING	
	43 TALKING	
	44 TALKING	
	45 TALKING	
	46 TALKING	
	47 TALKING	
	48 TALKING	
	49 TALKING	
	50 TALKING	
	51 TALKING	
	52 TALKING	
	53 TALKING	
	54 TALKING	
	55 TALKING	
	56 TALKING	
	57 TALKING	
	58 TALKING	
	59 TALKING	
	60 TALKING	
	61 TALKING	
	62 TALKING	
	63 TALKING	
	64 TALKING	
	65 TALKING	
	66 TALKING	
	67 TALKING	
	68 TALKING	
	69 TALKING	
	70 TALKING	
	71 TALKING	
	72 TALKING	
	73 TALKING	
	74 TALKING	
	75 TALKING	
	76 TALKING	
	77 TALKING	
	78 TALKING	
	79 TALKING	
	80 TALKING	
	81 TALKING	
	82 TALKING	
	83 TALKING	
	84 TALKING	
	85 TALKING	
	86 TALKING	
	87 TALKING	
	88 TALKING	
	89 TALKING	
	90 TALKING	
	91 TALKING	
	92 TALKING	
	93 TALKING	
	94 TALKING	
	95 TALKING	
	96 TALKING	
	97 TALKING	
	98 TALKING	
	99 TALKING	
	100 TALKING	
	101 TALKING	
	102 TALKING	
	103 TALKING	
	104 TALKING	
	105 TALKING	
	106 TALKING	
	107 TALKING	
	108 TALKING	
	109 TALKING	
	110 TALKING	
	111 TALKING	
	112 TALKING	
	113 TALKING	
	114 TALKING	
	115 TALKING	
	116 TALKING	
	117 TALKING	
	118 TALKING	
	119 TALKING	
	120 TALKING	
	121 TALKING	
	122 TALKING	
	123 TALKING	
	124 TALKING	
	125 TALKING	
	126 TALKING	
	127 TALKING	
	128 TALKING	
	129 TALKING	
	130 TALKING	
	131 TALKING	
	132 TALKING	
	133 TALKING	
	134 TALKING	
	135 TALK	

[illegible]

195 2	COMBINATION STATEMENT AND COLLECTION RECORD,	7-	No.	6
			PAID	
			STATEMENT SENT	
			WITHOUT COMMENT	
			REMARKS	
			DAYS SIGHT	
			EXPIRY FOR	
			ACCEPTANCE	
			474 REP L&T	
			55MP 1015	
65TING BY				
6PMAL 10				
75TING				
STAMPA				
55MP 1015				

Figure 1 shows a form for a statement from The Simplex System Co. The form includes fields for "No.", "Name", and "Address". Below these fields is a grid for a balance sheet, with the heading "Balance as per Statement". The grid is divided into two main sections, A and B, with a vertical line separating them. The grid is labeled "Fig 1" in the top right corner.

[illegible]

Witnesses

Witnesses  
O. B. McAnally  
J. H. Stouss

Inventor

Max M. Bohn  
By Geo. H. Strong,  
Attorney



# UNITED STATES PATENT OFFICE.

MAX M. COHN, OF SAN FRANCISCO, CALIFORNIA.

## COMBINATION STATEMENT AND COLLECTION RECORD.

SPECIFICATION forming part of Letters Patent No. 785,291, dated March 21, 1905.

Application filed May 5, 1904. Serial No. 206,481.

*To all whom it may concern:*

Be it known that I, MAX M. COHN, a citizen of the United States, residing in the city and county of San Francisco and State of California, have invented new and useful Improvements in Combination Statement and Collection Records, of which the following is a specification.

My invention relates to a system of issuing statements, collecting accounts, and keeping a record of the same for the use of business houses.

It is usual for firms to prepare statements of account with their local customers and send these out by collectors on certain days and to their country customers to mail statements. Under present methods an immense amount of labor is entailed on the office force on these constantly recurrent occasions by the necessity, after going through the ledgers and making out all due and discount statements, of having to enter up these statements separately in the collection-book before sending them out with the collector and on his return to segregate the various unpaid accounts according to the oral or hastily-noted reasons given by the collector on which payment was deferred or refused for the future use of the credit-man.

The object of the present invention is to provide a time-and-labor-saving system which does away with the need of separately entering up the statements in the collectors' books, affords a means for rapidly and intelligently noting memoranda, and assists in the book-keeping and in the general supervision of accounts requiring attention.

The invention consists of the parts and the construction and combination of parts, as hereinafter more fully described and claimed, having reference to the accompanying drawings, in which—

Figure 1 represents a pad with an ordinary statement-blank alternating with my city-collection record. Fig. 2 shows city-collection record of the form employed in Fig. 1. Fig. 3 shows the statement in combination with the collection-record when odd-size statement is used. Fig. 4 shows the same statement as Fig. 3 separately. Fig. 5 shows a country-collection record.

A represents any suitable form of blank statement having the usual heading and ruled space 2 for entry of amount due, &c., and B is my improved blank upon which a carbon copy in duplicate of the statement is to be made. The statement is sent out or mailed. The duplication is retained.

Where a statement of uniform size is used by a firm, the statement and blank may be both of the same size, as shown in Fig. 1, and bound up in pad form, with one alternating with the other. In this case the blank is printed with a space 3 for the name and address, a ruled space 4 for the account proper, and an intermediate space 5, having advisory notation setting forth the several reasons for non-payment or character of payment, &c., the rulings for the name and the statement of account on the two sheets registering and the intermediate printed space on the blank B corresponding to the space on the statement-sheet A generally occupied with the name of the firm sending out the statement, address, and other matter.

The record-blanks are preferably of different color from the regular statements to avoid any possible confusing of the two.

In Fig. 3 is shown a style of blank adapted for use with all sorts and sizes of statements. In this case the blank comprises a plain sheet of paper with a marginal space 5' set off for the legend in connection with the presentation and collection of the account. Preferably this marginal space is to the right side of the sheet, leaving the blank space of sufficient width to be covered by the statement. In case the statement is narrower than the record-blank the latter may be trimmed to suit. If desired, the statements and blanks may be bound up in pad form, the imprinted margin of the blank extending beyond the edge of the statement.

In practice statements are written with an indelible pencil or type-written, and a carbon copy is simultaneously made on the special record-blank. The statements and duplicates having been properly made out the former are mailed or delivered, while the latter are retained for future use and guidance. The copies are then numbered consecutively in the space 6 in the order in which they were made



out, so that they may be easily and quickly reassembled in the same order after their return from the various collectors' hands. The copies are then segregated according to the several routes, placed in temporary binders, and taken out by the collectors on collection day. It will be observed that these temporarily-bound copies form a collection-book in lieu of the old-style collection-book, which had to be separately written up before a collector started out on his rounds.

If a statement is paid, the collector makes his entry in a space 7, set apart for this purpose, which shows the amount and discount and also indicates whether the account was settled for in coin or by check.

If any changes are made on the statement by the customer, the collector, having an exact facsimile, makes the same change on his copy. This gives the ledger-clerk the correct information, which under the old system is very difficult to arrive at owing to many collectors being incompetent to make proper memoranda.

In case of non-payment the collector indicates the reason therefor by a suitable mark opposite the proper one of the many printed possible reasons in space 5 or 5'.

On the return of the copies to the office those that are paid are separated from those unpaid, the former rearranged consecutively according to the numbering in space 6 and entered in the cash-book. Being in the same order as the accounts in the ledger, posting is greatly facilitated. The data noted in space 5 or 5' as to the unpaid accounts form the basis for future action in respect to these accounts. For out-of-town accounts a record-blank Fig. 5, is used of essentially the same character, but having notation suiting it to the difference in prevailing conditions. The carbon copies are retained, and each indicates exactly what was done with the statement.

Having thus described my invention, what I claim, and desire to secure by Letters Patent, is—

1. A combination statement and collecting

record comprising independent members arranged in succession with alternate members constituting the original or customer's statement-blank and the other member constituting the merchant's filing-blank, said original blank printed in the usual manner with reserved spaces for the name and for the account and said filing-blank having reserved spaces registrable with the corresponding spaces of the original blank and having thereon in permanent form a variety of legal excuses of selective character any one or more of which may be resorted to by the collector to indicate the disposal of the original statement.

2. A combination statement and collection account comprising original and duplicate sheets, said original sheet printed in the usual manner and said duplicate sheet having areas registrable with the name and account spaces of the original, and said duplicate blank having, also, in permanent form a variety of legal excuses any one or more of which may be resorted to by the collector to indicate the disposal of the account.

3. A combination statement and collection record comprising original and duplicate sheets, said original sheet having a reserved area suitably designated for the customer's name, a reserved area designated for the account and an intermediate area printed with the merchant's name, and said duplicate sheet having reserved areas registrable with the said areas of the original sheet which are designated for the customer's name and the account and having, also, an area registrable with the said intermediate area of the original sheet, provided with notation in permanent form which is resorted to by the collector to indicate the disposal of the account.

In testimony whereof I have hereunto set my hand in presence of two subscribing witnesses.

MAX M. COHN.

Witnesses:

N. C. ELLINGWOOD,  
ANTOINE SCHMITT.