@Client Services
3.0

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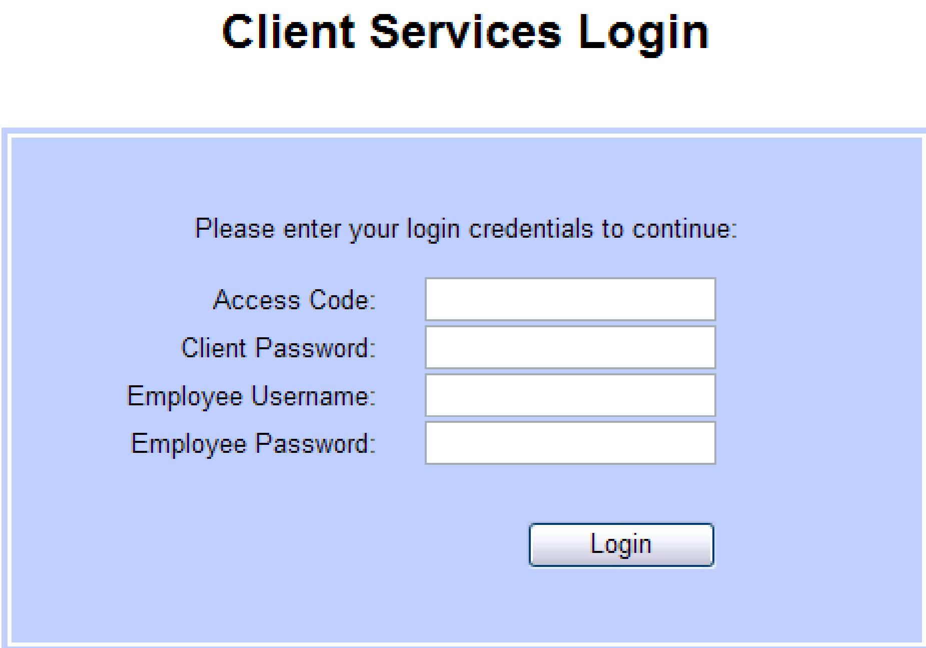
1. Logging in

The first screen the user sees is the login screen. If the connection to @Client Services times out, users will again be returned to the login screen. After logging back in, users will be taken back to the screen they were previously on.



The login procedure requires four key pieces of information:

Access Code

The Access Code tells @Client Services which agency the user is trying to connect to. Each agency has a unique code. If users are directed to @Client Services from your website, the access code can be provided as part of the link, in which case the Access Code will be automatically filled in. Also, the web browser should remember this code after the first time logging in on an individual computer. Once the access code is entered, your agency's banner will appear at the top of every page.

Client Password

The client password tells @Client Services which of your agency's clients is logging in. Each client has a unique Web Password assigned to the client when configuring the Remote Client in the @Client Services Utility.

Employee Username

All of the client's employees who use the site can have an individual username assigned to them and be given different permissions. Many clients, though, will have all their employees use the same username and password.

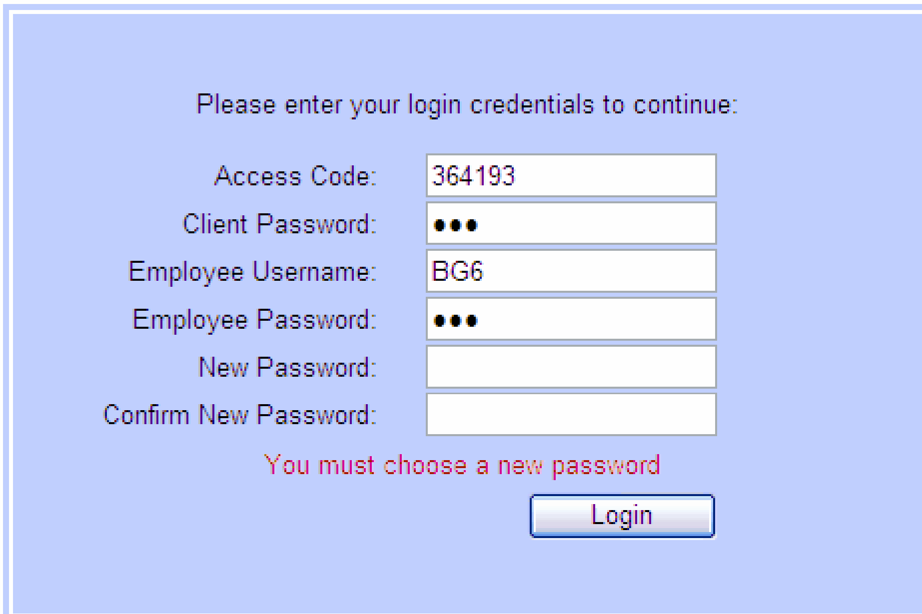
Employee Password

A user selected password associated with the Employee Username. If forgotten, the Employee Password cannot be recovered and must be reset by your agency.

Once all four fields are entered, select Login to continue. If users forget the access code, username or either password, they must contact your agency representative to retrieve the information.

Expired Password

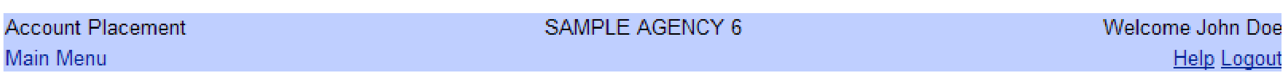
When a password expires, the user will be prompted to create a new password at the login screen.



Expired Password at Login Screen

The user must enter a new password and then confirm the password. The user then selects Login, and the site will either log them in or return with an error message. If secure passwords is enabled, the user cannot enter a password they have used previously.

2. Header



The information under the company banner provides the following information on every page on the site:

Company Name

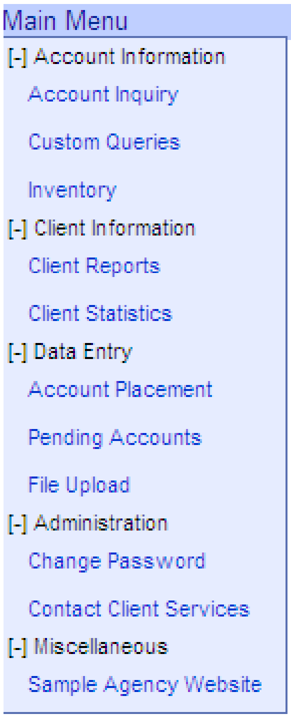
Your company name appears in the middle of the header bar.

Page Name

Each page has a specific name that appears in the top left corner of the Header. The Main Menu omits this name to avoid redundancy.

Main Menu Dropdown List

For ease in navigating the site, the Main Menu list contains all the links available to the user. Hover over Main Menu in the header to see the available menu items. The list will only show pages the user currently has permission to see. Clicking Main Menu in the Header will navigate to the Main Menu page. The menu headings can be collapsed and expanded in the menu dropdown by clicking on the heading.



Standard Dropdown Menu

Employee Name

The name of the employee logged into the site appears on the right.

Help

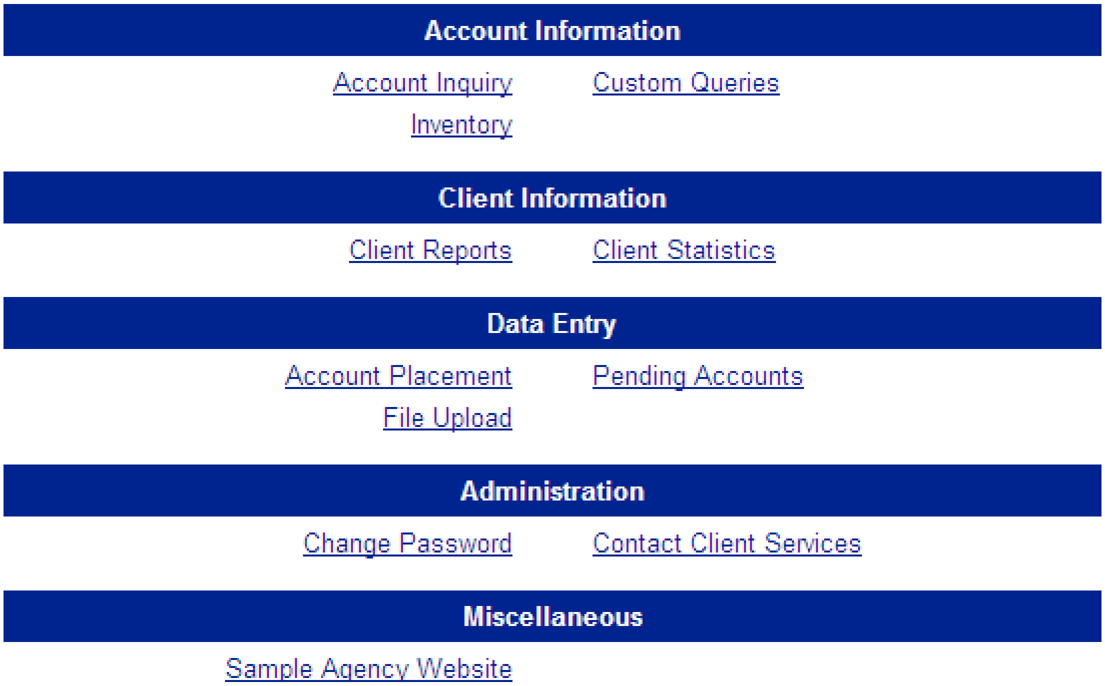
If a help page is available for the current page, a link will appear under the employee name.

Logout

To log out of the site at any time, click the Logout link under the employee name.

3. Main Menu

The menu will only show the pages the users currently have permission for. The following is the full menu:



Standard Full Menu

The links are divided into categories. Click on the menu names below to jump to that page within this document.

Account Information

These links allow for the searching, viewing, and updating of accounts in the system.

Account Inquiry 8

Allows users to search for specific debtors or accounts in the system and access the Account Work Screen 10.

Custom Queries 20

Allows users to run customized queries designed by your agency that are exported to @Client Services.

Inventory 22

Provides a list of all the client's accounts and debtors in the system, and provides access to the Account Work Screen 10.

Client Information

These links provide a global view of the client's accounts with your agency.

Client Reports 24

Users can access and print reports of the business associated with their accounts.

Client Statistics 26

Users can view statistics on their accounts in the system.

Data Entry

These links add new accounts or submit files to your agency.

Account Placement 31

Users can enter all the information to submit a single account to your agency.

Pending Accounts 34

Users can view, edit, or delete accounts previously entered through the Account Placement page that have not yet been processed by the agency.

Upload File 35

Users can upload any type of file to your agency. If arranged with your agency, users can upload a batch of accounts to be imported into the system.

Administration

These links deal with the administration of the site.

Change Password 35

Allows users to change their password in the system.

Contact Client Services 35

Provides a form for users to send an email to your agency representatives.

Miscellaneous

Any agency-specific, uncategorized links will show up under this heading.

Company Homepage

A link to the collection agency's homepage is an example of a miscellaneous link.

4. Account Inquiry

Account Inquiry allows users to search for their accounts or debtors in the system.

Inquiry Search Fields

Search By

The Search By dropdown list allows users to choose from one of the following inquiry types:

Your Account

Search by the account number clients use for their own records.

Our Account

Search by the account number in your agency's system. If @Client Services finds a match, the Account Work Screen will open to that account.

SSN

Searching by Social Security Number will behave the same way as your agency's system. If the system is set to do a reverse lookup on SSN, then @Client Services will also.

Address

Search by address to find debtors in the system with matching addresses.

Name

Search by the debtor's name by entering the debtor's last name first. If a partial name is entered, @Client Services will return debtors matching the partial name.

Phone

Searching by phone number will behave the same way as your agency's system. If the system is set to do a reverse lookup on phone numbers, then @Client Services will also.

Search Terms

The search term needs to match the type of search performed. If users select Our Account # and put in a phone number, chances are they would not find a match.

Returned Results

Accounts found from your search will display on the screen. "No Results Found!" will display if no records were found matching your criteria.

Name	Address	City	SSN	Spouse	BA
DOE, JOHN	123 ROAD RD	ANYTOWN		JANE	N
DOTSON, GREG	1234 W 5678 N	OGDEN	123456789	GAIL	N

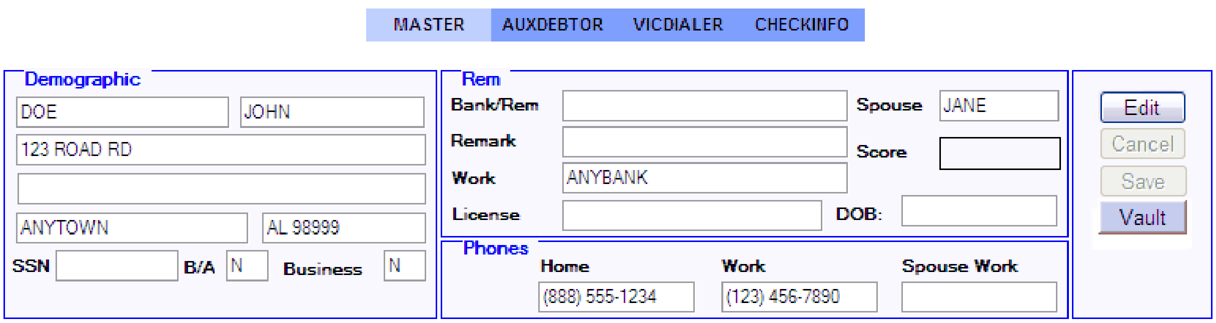
Click on the name of the debtor to open the Account Work Screen for that debtor.

4.1. Account Work Screen

The Account Work Screen is divided into two sections with tabs above each section that provide access to additional information if available. All the auxiliary screens are permission based, so users without permission to view an auxiliary screen will not be able to access the screen or see its tab. The top section contains the debtor demographic information and the bottom section contains the account information, account summary, comakers, comaker summary, and history.

Master/Debtor Information

The top section displays the debtor's demographic information. Debtor auxiliary screens show as tabs next to the Master tab. The buttons on the right (Edit, Cancel, and Save) are permission based, and will not be visible to users without those permissions. The Vault button is blue if there is anything in the vault and gray otherwise.



Default Debtor Screen

The following definition are for fields in the default layout. The Account Work Screen is customizable using Screen Designer.

Demographic

The fields typically listed in the demographic area are names, address information, and social security number.

Remark

This section typically holds additional information about the debtor, such as work and bank information.

Phones

Various phone numbers for the debtor.

Additional Options

With permissions, users can edit the debtor information and view the Debtor Vault. See Data Vault 19.

Account Summary

The Account Summary is a list of all accounts under a debtor. If users click on a debtor from an Inquiry search or from Inventory, the Account Work Screen will open showing the Account

Summary. Users can access the Account Summary any time by clicking the link at the bottom of the screen. To view an account, click on the account number. The Account Summary will be replaced by the account screen.

ACCOUNT	CLIENT ACCOUNT	CO	T	CLIENT	LLS	SC	DOR	DLP	SL	AMT REF	TOTAL BALANCE
1057		01	1	ANOTHERTECH - 1	ACT	PIF	06252007	05202008	00	$59.00	$0.00
1059	123434	01	1	ANOTHERTECH - 1	002	ACT	06252007		00	$534.00	$121.36
1060	123	01	1	ANOTHERTECH - 1	002	ACT	06262007	05202008	00	$234.87	$102.92
1063	123	01	1	ANOTHERTECH - 1	002	ACT	06262007		00	$199.89	$120.53
1064	123	01	1	ANOTHERTECH - 1	002	ACT	06262007		00	$400.00	$482.11

Default Account Summary Screen

ACCOUNT

Your agency's account number.

CLIENT ACCOUNT

The number the client uses for the account.

CO — Collector Code

The number of the collector assigned to the account.

T — Type of Debt

The type of debt assigned to the account. 1-5 are regular collections; 6 is for bad check collections; 7-9 are for pre-collect accounts.

CLIENT

The name of the client owning the account.

LLS — Last Letter Sent

The code of the last letter sent on the account.

SC — Status Code

The account's current Status Code.

DOR — Date of Referral

The date the account was referred to your agency.

DLP — Date of Last Payment.

The date the debtor last sent in a payment on the account.

SL — Suit Loan Number

A two digit number that indicates the account is involved in a suit or loan. A number in the first position indicates the account is involved in a suit. A number in the second position indicates the account is involved in a loan. Zeroes in either position indicate no suit or loan respectively.

AMT REF — Amount Referred

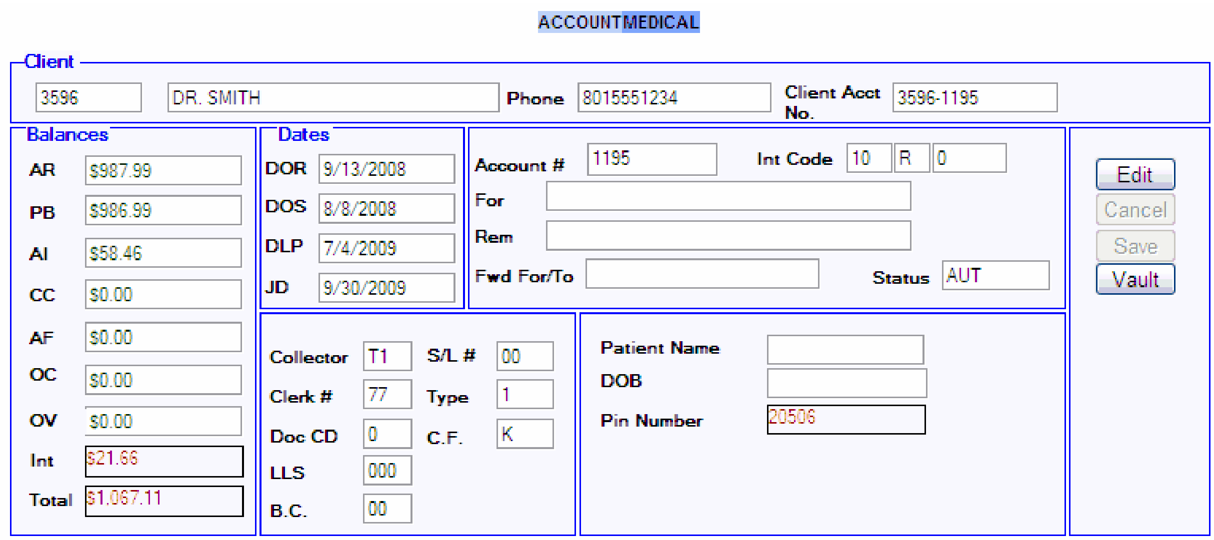
The amount the debtor owed that was initially referred to the agency.

TOTAL BALANCE

The amount the debtor currently owes on the account.

Account Information

The bottom section of the Account Work Screen shows the account information. Any available account auxiliary screens will show as tabs next to the Account tab.



Default Account Screen

The following definition are fields in the default layout. In a custom screen, the fields may be different.

Client

The section lists the client's number, name, and phone, and the client's reference number for the account.

Balances

AR — Amount Referred

The amount owed when the client sent the account to your agency.

PB — Principal Balance

The current amount the debtor owes on the amount referred.

AI — Accumulated Interest

The total of accumulated interest on the account.

CC — Court Costs

The total of all court costs accumulated for the account.

AF — Attorney Fees

The total of all attorney fees accumulated for the account.

OC — Other Charges

The total of all other charges applied to the account.

OV — Over Pay

The total of all money applied to the account in excess of what is owed.

Int — Interest

The amount of interest currently accruing on an account, generally beginning on the date of last payment or date of referral if a payment has not yet been made.

Total

The total amount owed by the debtor on the account.

Dates

DOR — Date of Referral

The date the account was referred to your agency.

DOS — Date of Service

The date the debtor used the service offered by the client.

DLP — Date of Last Payment

The date the debtor last sent in a payment on the account.

JD — Jackdate

The next date the account will be worked by a collector. Jackdate is also known as the Next Activity Date.

Account

Account #

Your agency's account number for the current account.

Int Code — Interest Code

The first field of the Interest Code is the Interest Rate. The second field is the Interest Flag that determines which date the accruing interest is computed from (R = Date of Referral; S = Date of Service; J = Date of Judgment; D= Date of Delinquency). The third field is the Commission Rate. The interest and commission rates are a percentage if the number is a 100 or less, meaning that 17 in the example above indicates that the Interest Rate is 17%. When these numbers are above 100, the number refers to a specific rate table, which determines how the rate is applied to a payment.

For

Remark field for the description of the debt. This field is typically used if the debt is for someone else, a minor for example.

Rem — Remark

Remark field to further explain the debt.

Fwd For/To

If the account has been forwarded to another agency, this field shows the code for that agency.

Status — Status Code

The account's current status code.

Office Information

Collector — Collector Code

The code of the Collector assigned to the account.

Clerk #

The Collector Code of your agency personnel who entered the account into the system.

Doc CD — Document Code

The type of document the client has supplied to support the debt. The code is a single alphanumeric character which is defined by your agency and the definitions are not stored in the system.

LLS — Last Letter Sent

The identifying number of the last letter sent to the debtor.

B.C. — Bulletin Code

This code can be used by agencies currently doing check collections.

S/L # — Suit Loan Number

A two digit number that indicates the account is involved in a suit or loan. A number in the first position indicates the account is involved in a suit. A number in the second position indicates the account is involved in a loan. Zeroes in either position indicate no suit or loan respectively.

Type — Type of Debt

The type of debt assigned to the account. 1-5 are regular collections; 6 is for bad check collections; 7-9 are for pre-collect accounts.

C.F. — Credit Flag

The credit flag identifies how the account is handled when your agency sends credit reports. D = Reported to Bureau (already reported). R = Report to Bureau (will be reported). E = Exception (needs attention). K = Do Not Report.

Aux Medical Info/Pin Number

Because of their usefulness in collecting on medical accounts, these fields were added to the default account screen. The Account Work Screen is customizable through Screen Designer.

Patient Name

The name of the patient who received the services from the client. This is often different from the party responsible for the debt.

DOB — Patient's Date of Birth

Often the patient is a child of the debtor, and this helps identify those cases.

Pin Number

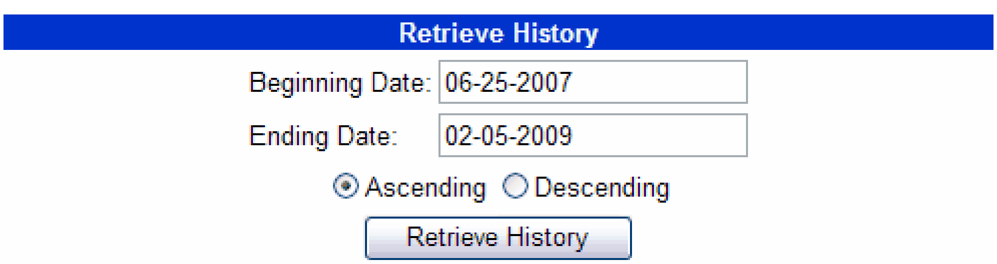
The pin number is an identifier used on letters sent to the debtor to help insure that when communicating with the debtor, the collector accesses the appropriate account. Also, debtors can use the pin number to access the online payment module to make credit card or check payments.

Additional Options

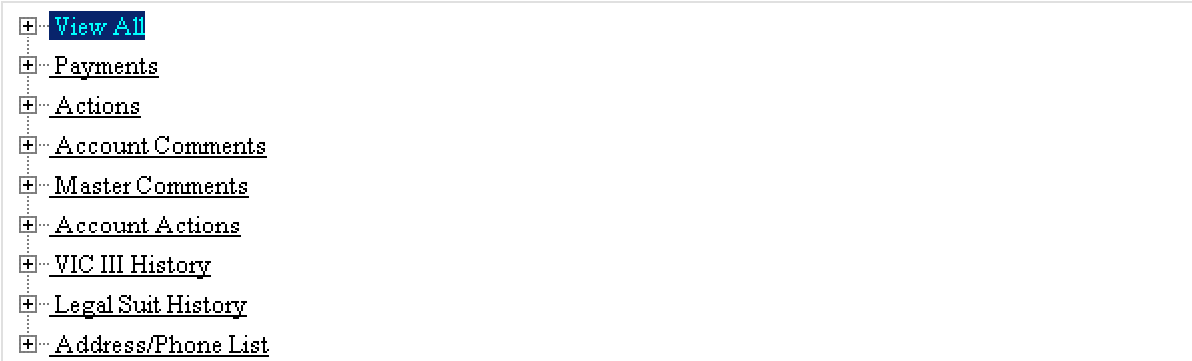
With permissions, users can edit the account information and view the Account Vault. See Data Vault [19].

4.1.1. History

Users can click the History link at the bottom of the Account Work Screen to access the History records on an account. User will only see the history types for which they have permission.



Enter a beginning date and an ending date to limit the history results. Select ascending to have the earliest record first or descending to have the latest record first. Click Retrieve History to continue. A tree list of available history types will display.



Collapsed View

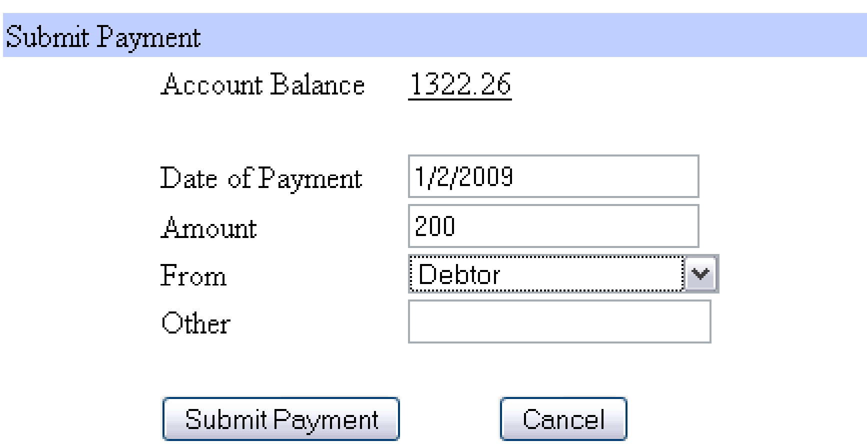
Click on the ⊞ to expand a type:

Expanded View

4.1.2. Submit Payment

Click the Submit Payment link at the bottom of the Account Work Screen to submit a payment on an account. This process doesn't complete any payment transactions immediately, but instead reports that the client has received a payment from the debtor. Generally, a payment clerk at your agency will then act on all payments reported this way.

The Submit Payment screen opens in a new window:



Account Balance

Total owed on the current account.

Date of Payment

The date the payment was received from the debtor.

Amount

The amount of the payment made.

From

The type of payment: Debtor, Insurance, Increase Adjustment, or Decrease Adjustment.

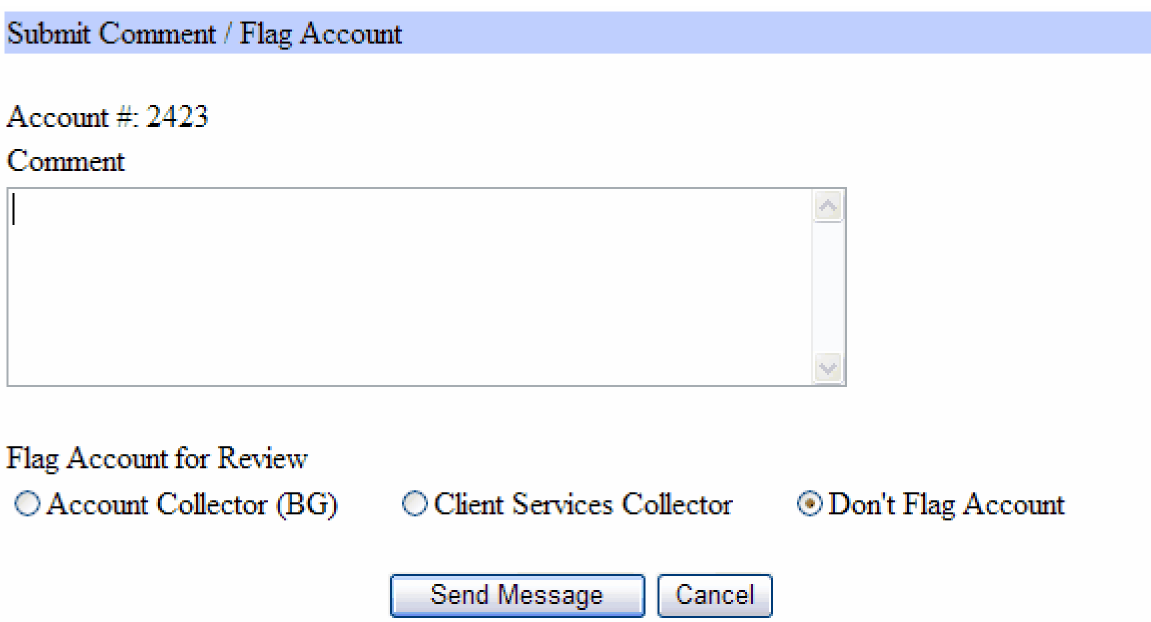
Other

Any additional information that may be helpful in processing the payment.

After all the fields are filled out, click Submit Payment. If successful, a "Thank you" message will display.

4.1.3. Submit Comment/Flag Account (VTR)

Users submit a comment on an account to your agency, or to flag that account by clicking on the Submit Comment/Flag Account link at the bottom of the Account Work Screen. This option was called "VTR" in an older version of @Client Services.



Account

The Agency's account number of the current account.

Comment

The comment field. Enter in all pertinent information the collector or agency needs to know about the account.

Flag Account for Review

Flagging an account will trigger the system to put the account into a collector work queue.

Account Collector

The account will be sent to the collector currently assigned to the account.

Client Services Collector

If your agency has a specific collector assigned to handle accounts through @Client Services, this option will be sent to that collector number. By default, this option sends the account to the house collector queue.

Don't Flag Account

This option will submit a comment on the account, but the account will not show up in a collector's queue.

Click Send Message when finished to send the comment/flag. If successful, a "Comments received" message will display.

4.1.4. Comaker Summary

The Comaker Summary provides a list of all comakers for the account.

Name	STREETADDR1	CITY	PHONE	SPOUSE	BA
COMAKER, SCORE	456 ROAD RD	ANYCITY	8015551234	MARY	N

List of Comakers

Users can click on the name of the comaker to see more detailed information. The ability to edit the information is based on permissions.

Last Name:	COMAKER	**Spouse:**	MARY		
First Name:	SCORE	**Bad Address:**	N	**Last Letter Sent:**	
Address #1:	456 ROAD RD	**Business:**	N	**Date of Last Ltr:**	
Address #2:		**Phone:**	(801) 555-1234		
City:	ANYCITY	**SSN:**	123-45-6789		
St and Zip:	UT 84403	**License:**			
Employer:					
Remark 1:					
Remark 2:					

Comaker Information

4.1.5. Data Vault

The Data Vault is used to access files stored in the system associated with the client in Client Reports, debtors and accounts on the Account Work Screen, and for attaching files in Account Placement. The Debtor Vault contains all the attachments for a particular debtor, for example. Users can add a new attachment to the vault or view, delete, or download an attachment already in the system. Each of these features has a separate permission.

Data Vault

Comment:

Attach File: Browse...

Attach Memo:

Attach

Date	User	Comment	File Type	File Name	Size (KB)			
4/29/2008	EW6	TEST	PDF	TESTREPORT.pdf	49.93	View	Delete	Download
4/29/2008	EW6	TEST	RTF	REPORT.rtf	228.87	View	Delete	Download
4/29/2008	EW6	TEST	XLS	REPORT.xls	113.89	View	Delete	Download
4/29/2008	EW6	TEST	TIF	REPORT.tif	59.77	View	Delete	Download
8/7/2008	eric		PDF	eric-360-39666.402310.PDF	10.25	View	Delete	Download
8/7/2008	eric		PDF	eric-340-39666.404370.PDF	65.26	View	Delete	Download

Comment

A brief description or comment about the attachment.

Attach File

Users can enter a file path or click Browse to select a file.

Attach Memo

Select to type a free-form message. You can also cut and paste text from another application.

Note: Users can attach a file or a memo, but not both at the same time.

Attach

Once the comment and file/memo are entered, click Attach to submit it.

Viewing Attachments

A list of attachments appears at the bottom of the screen:

Date	User	Comment	File Type	File Name	Size (KB)			
	EW6	Recipt	GIF	._DAKCSlogo.gif	0.08	View	Delete	Download
	EW6	Recipt	TXT	memo.txt	15	View	Delete	Download

View

Opens the attachment in a new browser window.

Delete

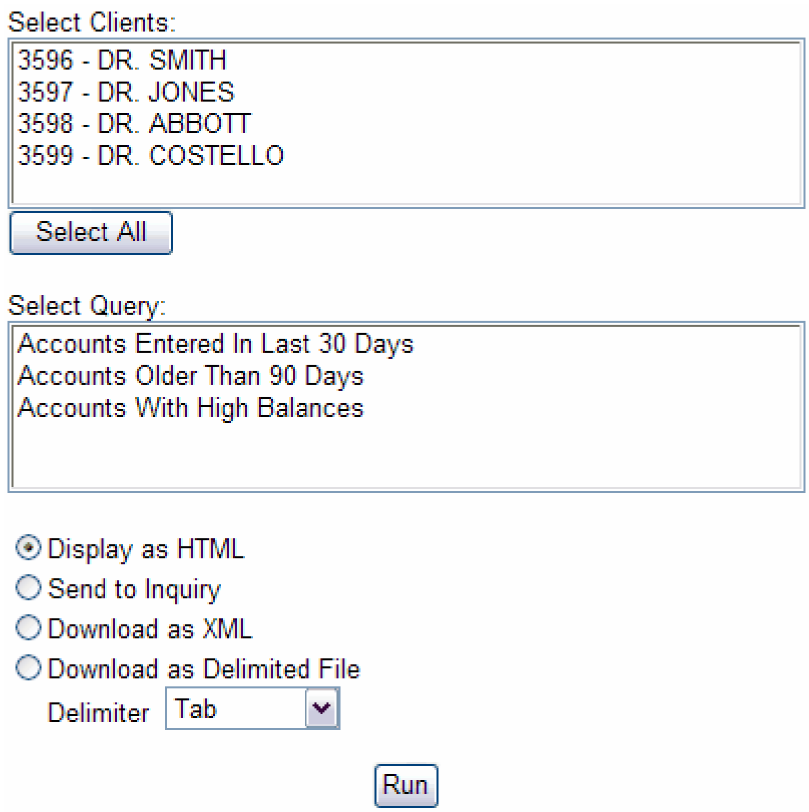
Removes the attachment from the vault.

Download

Saves the attachment to the user's local computer.

5. Custom Queries

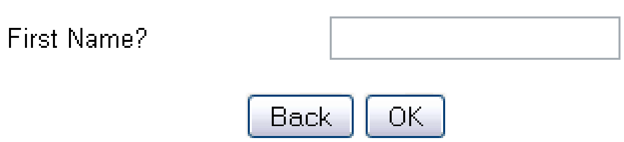
Custom Queries allows users to utilize predefined searches based on specific criteria created by your agency. These queries are exported from your agency's system. The Custom Queries screen will look something like this:



Users select one or more clients to run the query on, select the desired query from the list (if no queries are in the list, none are set up in the system), select how they want the results, and click Run.

Prompts

Some queries contain prompts, which ask the user for information used in the search. Selecting Back returns the user to the selection screen.



Example Prompt

Type of Results

The results are a data set from the accounts on the your system. There are various ways to display the data

Display as HTML

Shows the search results on the current page.

Send to Inquiry

Shows the search results in Account Inquiry. This allows users to view the debtors or accounts returned from the search in the Account Work Screen.

Download as XML

Allows users to save the query results to their local computer as an XML file.

Download as Delimited File

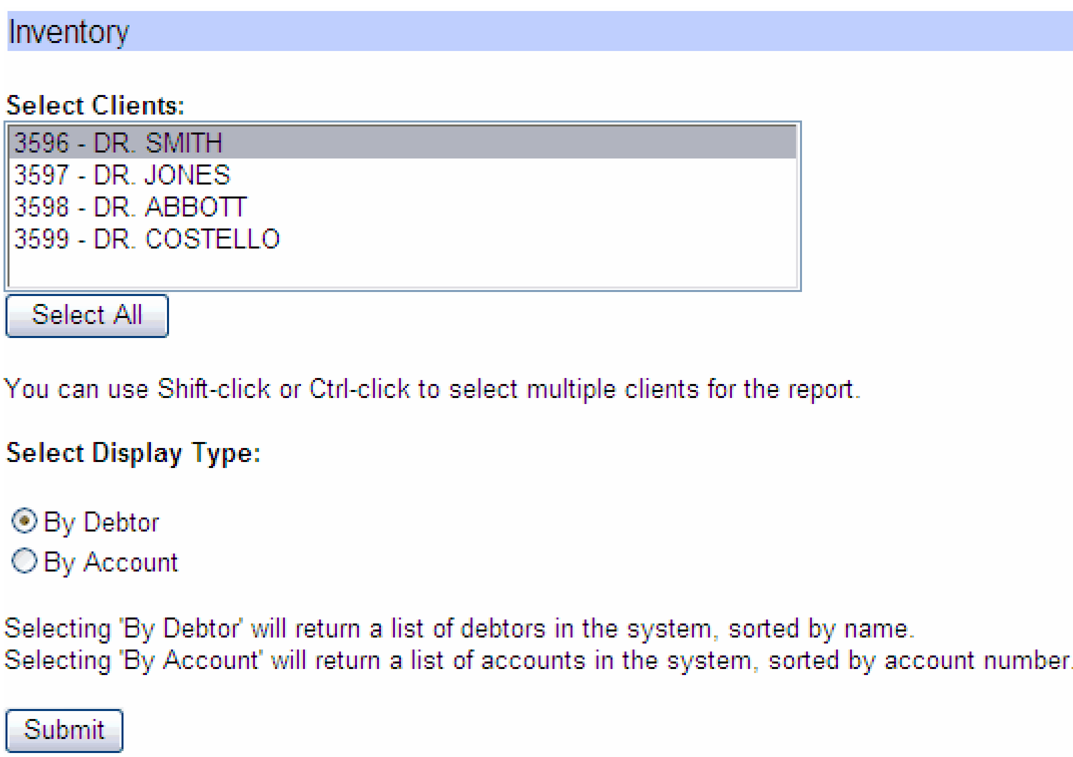
Allows users to save the query results as a delimited file for use in other applications.

What is a Delimiter?

A delimiter is a predefined character set that is inserted between the fields in your file. A comma is an often used delimiter.

6. Inventory

Inventory shows a complete list of accounts or debtors. For ease in opening and searching multiple accounts, this screen opens in a new browser window. When an account or debtor is selected, that Account Work Screen opens in the original browser window, and the Inventory window remains open with the search results unaltered. Users can then switch back to the Inventory window and select a different account or debtor.



Inventory Screen

Select Clients

The list shows all available clients. Users can search for accounts or debtors on one client or multiple clients.

Select Display Type

Selecting By Debtor shows a list of that client's debtors. Selecting By Account shows a list of that client's accounts.

Inventory

1 through 6 of 6

Debtor Name	SSN	Spouse	Address	City	BA
DOE, JOHN	987654321	JANE	ANY ST	ANYTOWN	N
DONOR, JOHN	987654321	SHIRLEY	BUCKET LN	OGDEN	N
SCORE, BOTH	258476003		123 TEST ST	SOMEWHERE	N
SCORE, COMAKER	258476002		123 TEST ST	SOMEWHERE	N
SCORE, MASTER	258476001		123 TEST ST	SOMEWHERE	N
TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N

By Debtor Inventory Display

Click on a Debtor Name to open the Account Work Screen for that Debtor. The Account Summary Screen will display the accounts under that debtor.

Inventory

1 through 12 of 12

Your Account #	Client	Our Account #	Debtor Name	SSN	Spouse	Address	City	BA
3596-1046	3596	1046	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-1047	3596	1047	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-1195	3596	1195	DOE, JOHN	987654321	JANE	ANY ST	ANYTOWN	N
3596-2421	3596	2421	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-2422	3596	2422	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-2423	3596	2423	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-2537	3596	2537	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-2666	3596	2666	SCORE, MASTER	258476001		123 TEST ST	SOMEWHERE	N
3596-2667	3596	2667	SCORE, COMAKER	258476002		123 TEST ST	SOMEWHERE	N
3596-2668	3596	2668	SCORE, BOTH	258476003		123 TEST ST	SOMEWHERE	N
3596-2669	3596	2669	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N
3596-2746	3596	2746	TEST, MASTER	123983596	MARSHA	1313 MOCKINGBIRD LN	NOWHERESVILLE	N

By Account Inventory Display

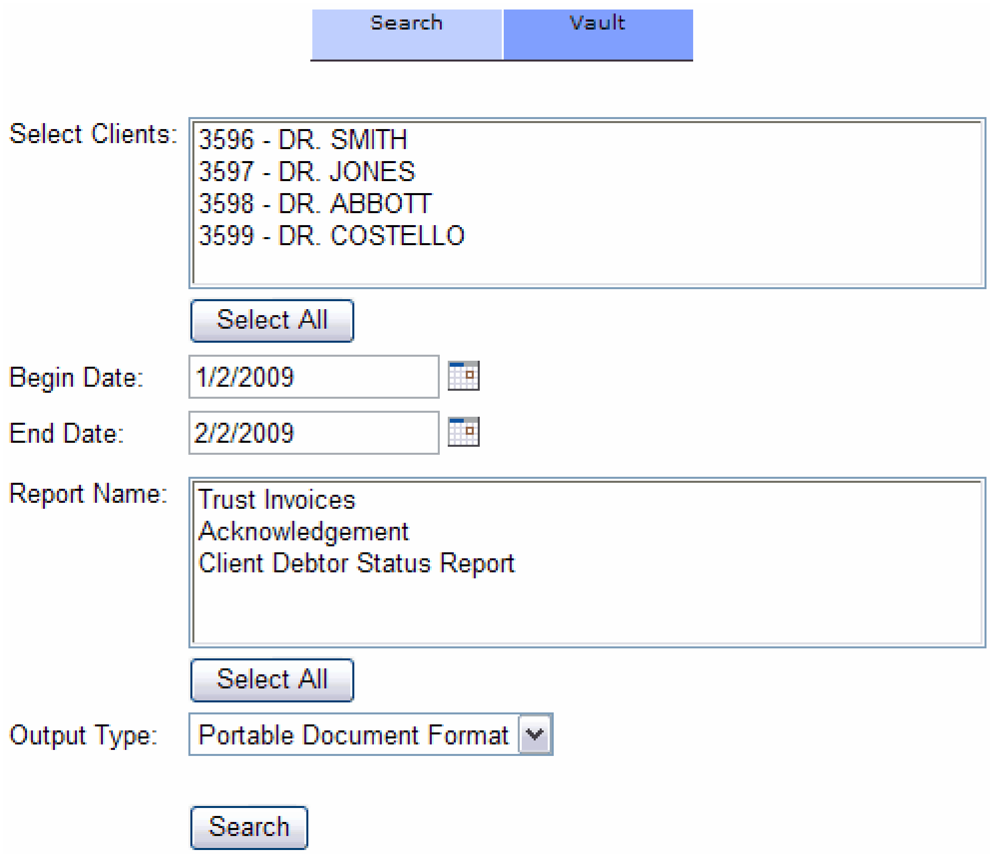
Click on the Account Number to open the Account Work Screen for that Debtor showing the specific account, or click the debtor name to open the Account Work Screen open to Account Summary.

Prev, Next, Back

Depending on the number of accounts in the system, several pages of debtors or accounts may be displayed. To navigate through all the records, click Prev (for previous) or Next. Clicking Back returns the user to the selection screen.

7. Client Reports

Client Reports allows users to search and view archived Trust Invoices, Acknowledgements, and Client Debtor Status Reports. This page also provides access to the Client Vault. If your agency doesn't have the reporting package, and the user has the permission for this page, the Report Name will say "No Reports Available."



Select Clients

The reports will be pulled only for the clients selected. Clicking Select All will highlight all clients.

Begin/End Date

Users enter a begin and end date to search for reports generated within those dates.

Report Name

A list of the reports available. Users can select all the report types they wish to search for. If no reports are available, it will say so here.

Output Type

The reports will be downloadable and viewable in the format selected here, either as a PDF or in plain text.

Search

When searching, the reports matching the criteria will display on the screen.

Report	Comment	Date	Time	Job ID	Email	View
COLLTRUSTPRT		12052007	10:33:57	celeste-492-039420.013064	Email	View
COLLTRUSTPRT		03012007	14:03:01	arts-492-039141.007073	Email	View
COLLTRUSTPRT		10102007	16:35:21	support-492-039364.010195	Email	View

Back

Note: To go back to the search fields, click the Back link under the results. Clicking Back in the browser will take the user back to the previous screen.

Email

The report can be mailed to one or more email addresses. Clicking the link opens the following:

Enter an email address and click Add. That address is added to the list. Select an email in the list and click Remove to delete that address. After entering the desired addresses, click Send.

View

Opens the report in another window in either PDF or plain text, depending on the output type selected.

Vault Tab

The Client Vault contains files important to the client not associated with a particular debtor or account. See Data Vault[19] for more information.

8. Client Statistics

Client Statistics show your agency's activity on accounts sent by the client. There are three types of client statistics: Actuary, Stats, and Accounts Receivable.

Current Client: 3598 - DR. ABBOTT

Actuary	Stats	Accounts Receivable

Actuary

This report shows the statistics of all business for accounts for the month in which they were dropped, which means that the numbers for a month were collected throughout the year.

Period	# New	Amount	# PIF	Receipts	Commission	# Canceled	$ Canceled	Recovery %
Oct	12	$ 13839.00	0	$ 0.00	$ 0.00	22	$ 14449.00	0
Sep	8	$ 2979.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
Aug	8	$ 1455.00	1	$ 288.00	$ 0.00	0	$ 0.00	19.8
Jul	1	$ 1000.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
Jun	4	$ 235.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
May	10	$ 2291.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
Apr	1	$ 1000.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
Mar	2	$ 19250.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
Feb	4	$ 3701.00	0	$ 355.00	$ 89.00	0	$ 0.00	9.6
Jan	3	$ 1248.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
Dec	2	$ 12260.00	0	$ 100.00	$ 50.00	0	$ 0.00	0.8
Nov	1	$ 200.00	0	$ 0.00	$ 0.00	0	$ 0.00	0
CLY	94	$ 557552.00	10	$ 15623.00	$ 5930.00	0	$ 0.00	2.8
T1Y	97	$ 570012.00	10	$ 15723.00	$ 5980.00	0	$ 0.00	2.8

Period

The month or time period. CLY = Current Calendar Year. T1Y = Last Calendar Year.

New

The number of new accounts listed.

Amount

The amount listed for those accounts.

PIF

The number of those accounts which have been paid in full.

Receipts

The amount collected by your agency.

Commission

The amount of agency fees.

Canceled

The number of accounts which were canceled.

$ Canceled

The amount referred of the canceled accounts.

Recovery %

The percentage of the amount listed (Amount) that has been collected (Receipts). This is computed as Receipts divided by Amount times 100.

Stats

The stats tab shows the monthly, yearly and total business for the client.

Type	MTD	YTD	Total
# of Accounts:	12	50	433
Dollar Listed:	$13,839.00	$45,750.00	$1,761,184.00
Average Listed:	$1,153.25	$915.00	$4,067.40
# Collected:	27	104	313
Dollars Collected:	$773.45	$7,910.45	$31,226.45
Trust Remittance:	$1,109.31	$6,731.31	$21,178.31
Unit Cost:	($27.99)	$23.58	$23.21
Performance %:	5.60	17.30	1.80
Last New Business Date:	01/02/2009		
Original Setup Date:	09/18/1991		
Total Due Agency:	-205.99		

Inventory Comparison   Recovery Value

of Accounts

Show the total number of accounts the client has sent to your agency.

Dollar Listed

Shows the dollar amount of accounts listed.

Average Listed

Shows the average dollar amount of accounts listed.

 # Collected

The number of accounts which have had money collected.

Dollars Collected

The amount collected on accounts listed.

Trust Remittance

The client's portion of the amount collected, also referred to as "$ NetToYou."

Unit Cost

Your agency's portion of the amount collected.

Performance %

The percentage collected of the amount listed.

Last New Business Date

The last date your agency received new business from the client.

Original Setup Date

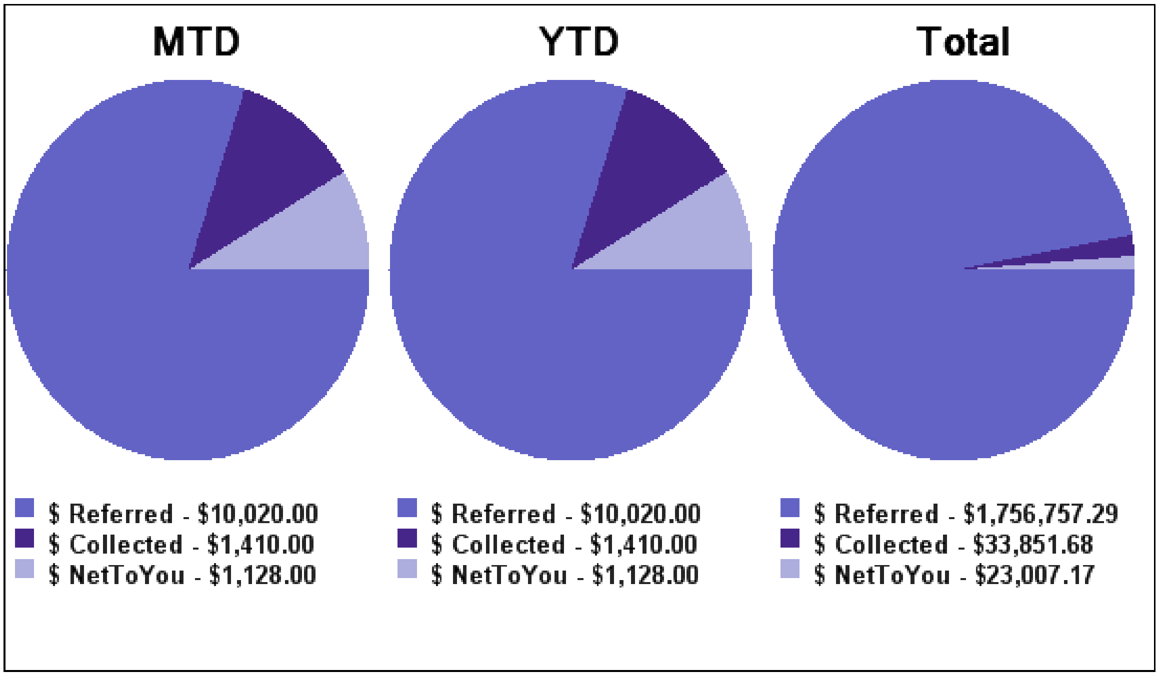
The date the client was first set up with your agency.

Total Due Agency

How much money the client owes or is owed by your agency.

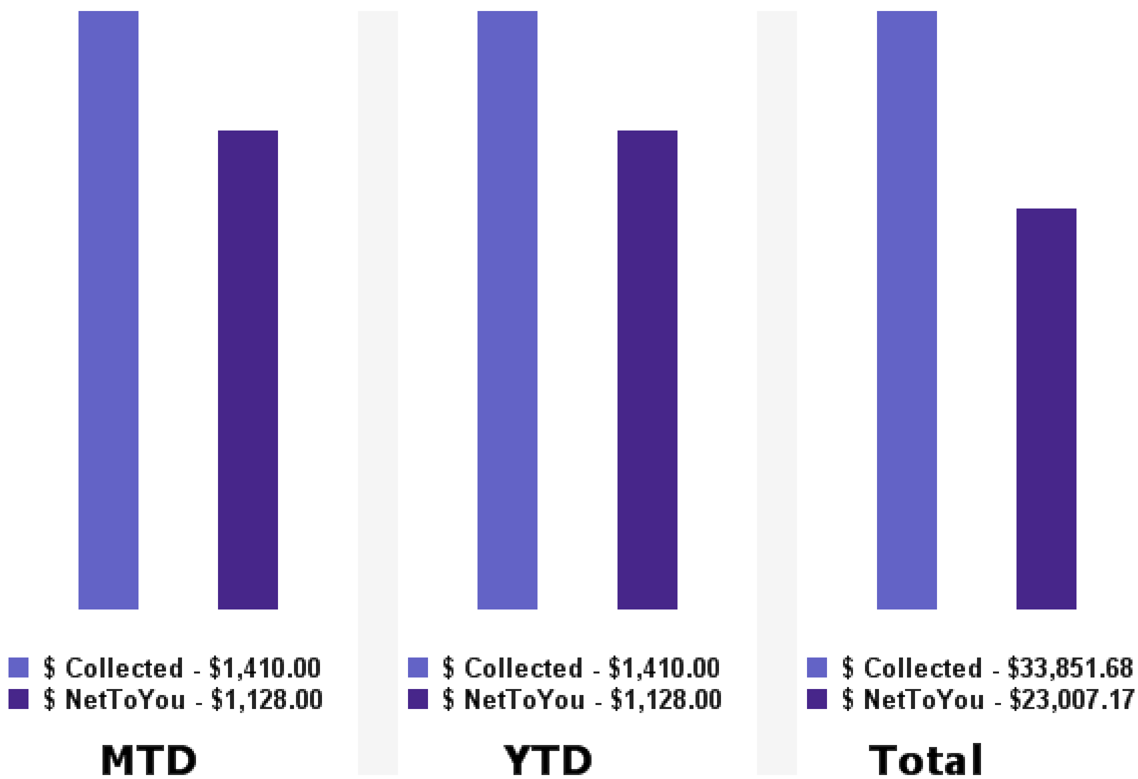
Inventory Comparison

Shows a graphical representation of the amount referred to your agency, the amount collected, and the client's portion of that amount.



Recovery Value

A graphical representation of the amount collected compared to the client's portion of that income.



Accounts Receivable

This tab shows the business between the client and your agency. Negative amounts indicate that your agency owes the client.

Amount Breakdown

Current	Over 30	Over 60	Over 90
-60	0	0	-145.99
29%	0%	0%	70%

The top row shows the amount owed for the time period. The bottom row shows what percentage the amount owed is of the Ending Balance Due below. Over 30, 60, 90 indicates the amount currently owed that is 30, 60, and 90 days past the payment schedule.

Totals

The middle portion shows different totals.

Total Paid This Month

The amount received for the selected client.

Due you

The client's commission.

Previous Balance Due

Subtracts all payments and adjustments that have not been processed through month end yet from current fee/commission due agency. This gives the balance due on the previous month end statement to the client.

Ending Balance Due

The total fee/commission due your agency.

Transactions

The bottom portion shows the transactions between the client and your agency.

Date	Invoice Number	Clk#	Description	Charges	Credits
010909	000100000020	77	AD+ - ADJUSTMENT INCREASE TO A/R	300	0
010909	000100000021	77	AD+ - ADJUSTMENT INCREASE TO A/R	0	-100
010909	000100000022	77	AD- - ADJUSTMENT DECREASE TO A/R	0	-100
010909	000100000023	77	AD+ - ADJUSTMENT INCREASE TO A/R	150	0
020108	000100000000	77	AD- - ADJUSTMENT DECREASE TO A/R	0	-128
053008	000100000002	77	AD- - ADJUSTMENT DECREASE TO A/R	0	-9.78
053008	000100000003	77	POA - PAID ON ACCOUNT	0	-100
061507	000100000041	77	POA - PAID ON ACCOUNT	0	-100
062007	000100000042	77	AD- - ADJUSTMENT DECREASE TO A/R	0	-10
062007	000100000043	77	AD- - ADJUSTMENT DECREASE TO A/R	0	-100
103107	000100000046	77	POA - PAID ON ACCOUNT	0	-1
111607	000100000047	77	AD+ - ADJUSTMENT INCREASE TO A/R	6	0
111607	000100000048	77	AD+ - ADJUSTMENT INCREASE TO A/R	3	0
			Total	$709	$-858.78

Date

The date the transaction occurred.

Invoice Number

The internal control/tracking number for the transaction.

Clk#

Your agency number for the clerk who process the transaction.

Description

A description of the transaction entered by the clerk.

Charge

The amount your agency adds to the total owed by the client.

Credits

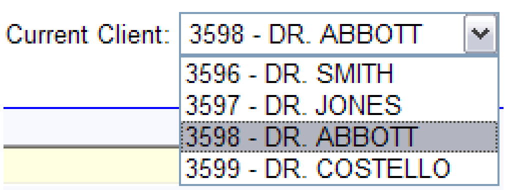
The amount your agency subtracts from the total owed by the client.

9. Account Placement

Clients may manually enter new accounts and submit them to your agency. Once an account is entered, your agency must process the accounts using the @Client Services Utility.

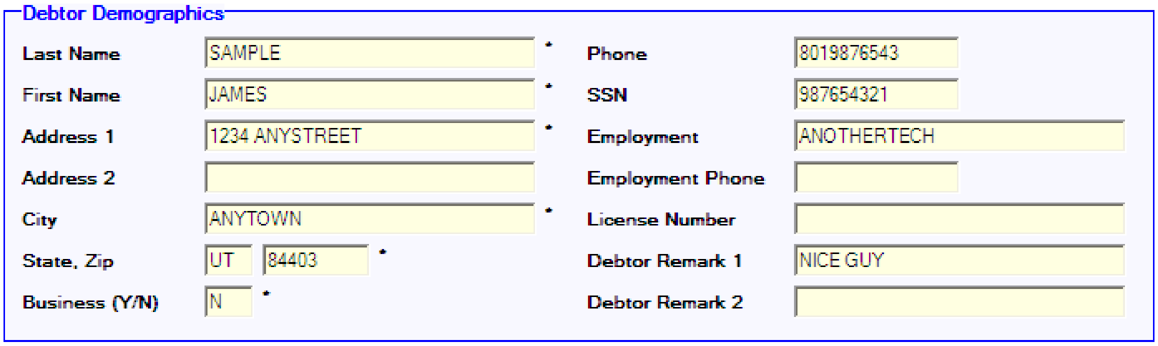
Filling Out the Form

Users select the appropriate client from the dropdown list and fill out the form as described below.



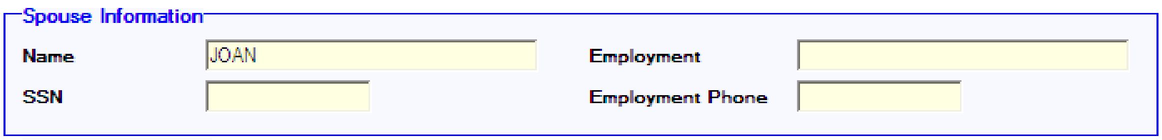
Debtor Demographic

Fill out all available information about the debtor.



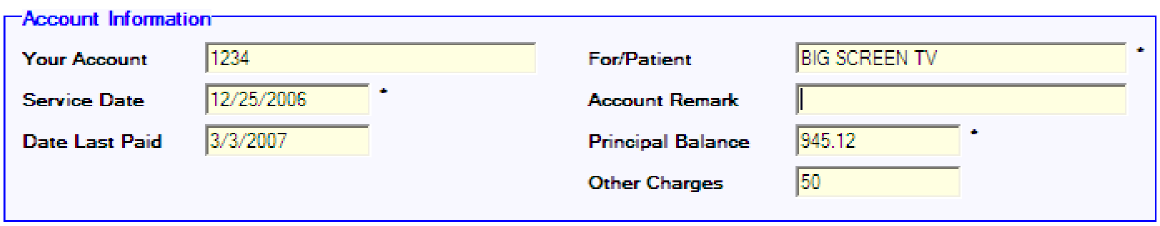
Spouse Info

Fill out all available information about the debtor's spouse.

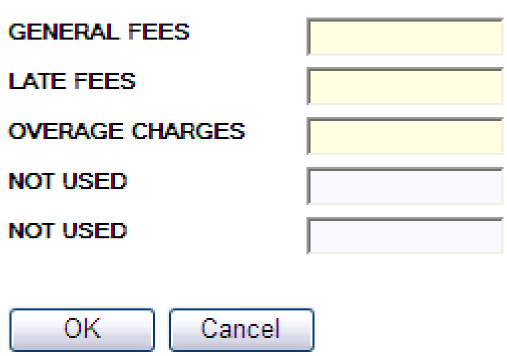


Account Info

Fill out all available account information.

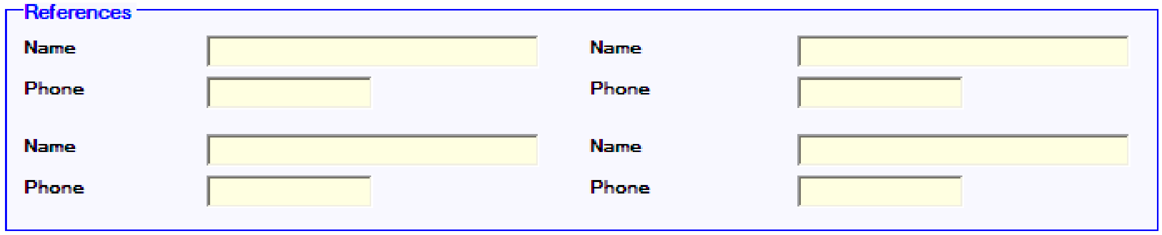


If your agency has extra other fields active, then a ... button will display next to the Other Charges field. When clicked, the Other Extra Add window will open, showing all available extra other fields. Enter the amounts into each available field and click OK. The total of these field is entered into the Other Charges field.



References

List any references for the debtor.



Submit

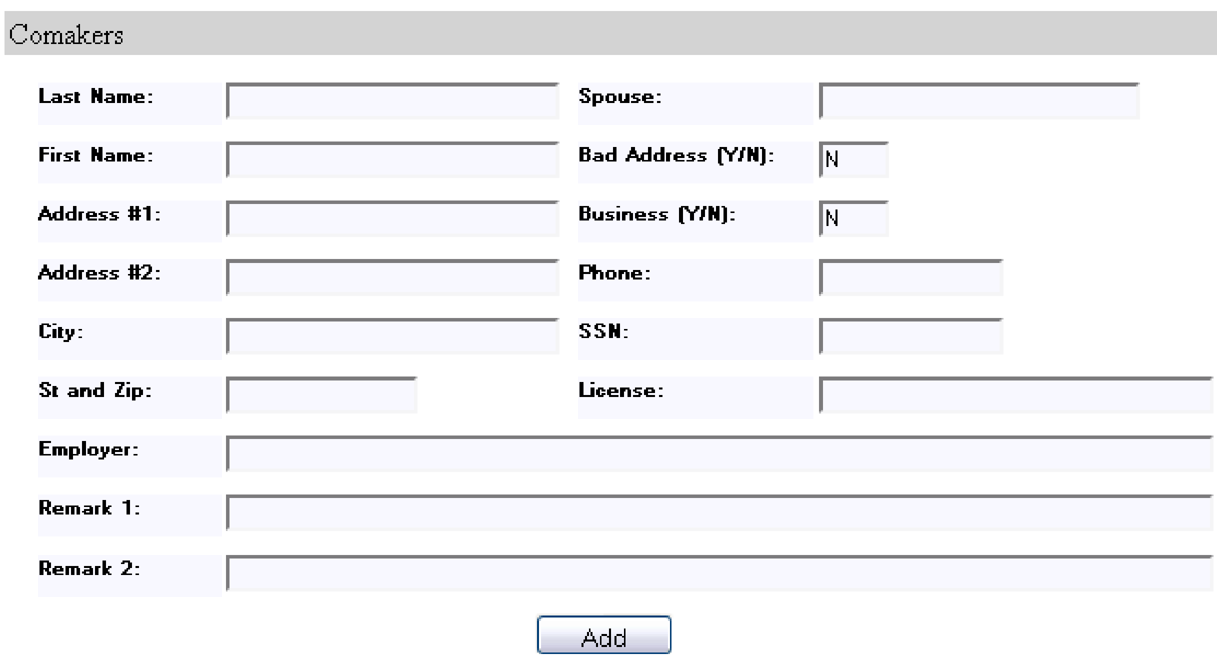
Click to submit the entered information to the agency. If any required field is not entered or not valid, a message will pop up, prompting the user with the specific fields needing revision. The information is stored until your agency processes the accounts. Clients can access Pending Accounts 34 from the main menu to view, edit, copy or delete accounts which have been entered, but have not yet been processed.

Clear Form

Click to clear the form of all data.

Comakers

Click to enter a comaker for the current account. The following opens in a new window.



Fill out all available information about the comaker and click Add. Comakers for the account are listed at the bottom of this window.

Name	STREETADDR1	CITY	PHONE	SPOUSE	BA
COMAKER, SCORE	456 ROAD RD	ANYCITY	8015551234	MARY	N

Edit

Populates the Comaker screen with the comaker's information. Make any changes and click Save.

Remove

Deletes the comaker from the account.

Attachments

Click the Attachments button to add files with the submission. This needs to be done before submitting the debtor information. Clicking the Attachment button opens the New Business Attachments window, which is similar to how the Vault works on other parts of the site.

New Business Attachments

Comment: LEGAL NOTICE

Attach File: legal.txt Browse...

Attach Memo:

Attach

Date	User	Comment	File Type	File Name	Size (KB)			
	BG6	Reciept	TXT	memo.txt	0	View	Delete	Download

New Business Attachment Window

Enter a comment for the attachment and either attach a file or write a memo in the space provided and select Attach. Users can View, Delete, or Download the attachment at any time after being attached but before the agency processes the account.

10. Pending Accounts

Shows the accounts which have been entered into the system by the client, but have not been processed by your agency. The client can copy, edit, and delete these accounts at any time until your agency processes them. The client can also delete all of the accounts at once by clicking the option on the bottom right of the list.

Current Client: 3599 - DR. COSTELLO

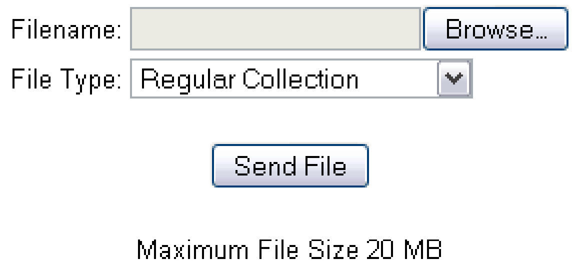
	First Name	Last Name	Address	Last Changed By	Last Changed Date			
	JAMES	SAMPLE	1234 ANYSTREET	BG6-172.27.224.49	4/15/2009	Copy	Edit	Delete
	JACK	BUYER	9876 ANYROAD	BG6-172.27.224.49	4/15/2009	Copy	Edit	Delete
	JAMES	SAMPLE	1234 ANYSTREET	BG6-172.27.224.49	4/15/2009	Copy	Edit	Delete

Delete All

Pending Accounts

11. File Upload

Users can send your agency any type of file. If the client has a file drop set up with your agency, users can then send the file containing the batch of accounts in the specified format.



Filename

Users select the file they want to upload by clicking Browse and selecting the file.

File Type

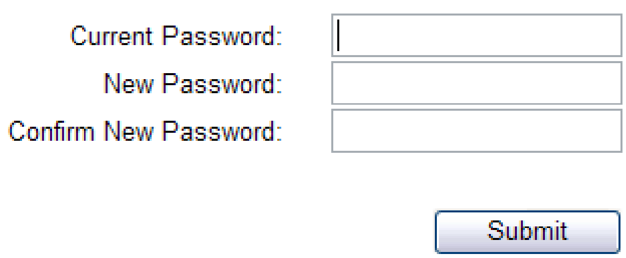
The type of file: Regular Collections, Pre-collect/Letter Series, Early Out, or Other. The file types pertain to the batch-dropping system. "Other" should be used for all other kinds of files.

Send File

After selecting the file and file type, the user clicks Send File. The file cannot be larger than 20 MB.

12. Change Password

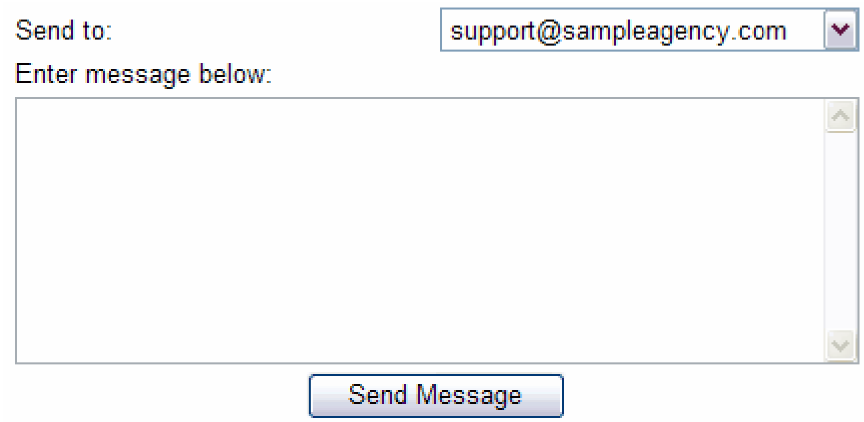
When logged in to @Client Services, users can change their current password.



Users must fill in their current password and enter a new one and confirm the new password. If users forget their password, they will need to contact their agency representative to have the password reset in the system. If Secure Passwords is enabled, users cannot enter a password they have previously used.

13. Contact Client Services

Select the appropriate email address from the drop-down list, enter a message, and select Send Message.



This message will be emailed to the selected address. You may set up to five general purpose email addresses using the @Client Services utility.

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