



Introduction to Collect!

collect!

credit + debt collection software



This video provides a general overview of what the Collect! software application offers.

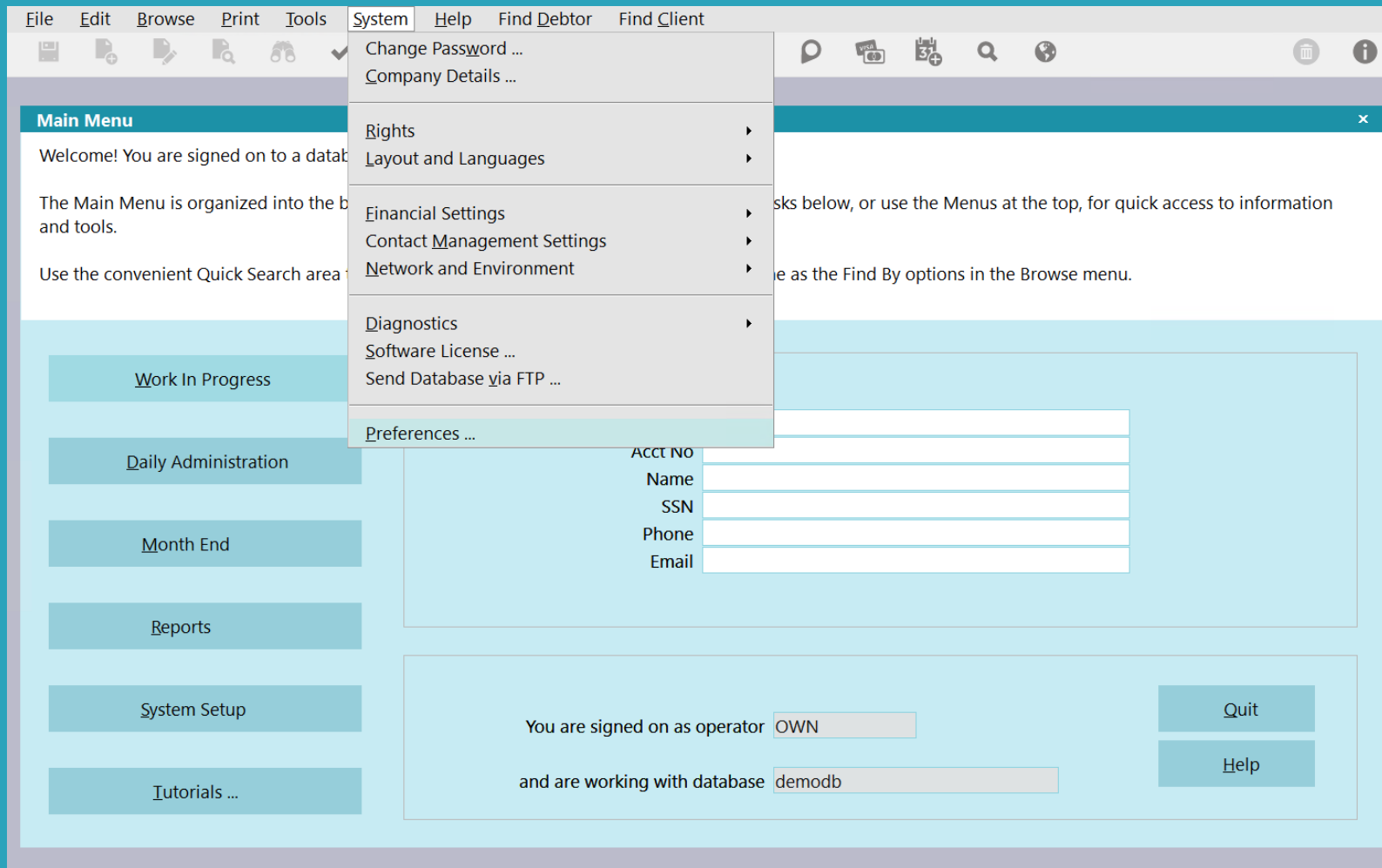
Collect! provides the scalable, configurable, and modular collection system that lets you collect the way you want to. With editions from Xpress to Corporate, you can select the capacity you need now, either as a cloud subscription, or as a premise purchase, knowing that you can change anytime. Unlike most other systems, all your data, configurations, and customizations move automatically when you increase your capacity, update, or upgrade.

Collect! is here for you. Our extensive online Help is second-to-none, and our support team is here to help you.



Collect! is used by the accounts receivable industry globally. Every day thousands of operators all around the globe use this software to collect accounts receivables of all kinds. Sectors that use Collect! include:

- 3rd party debt collection agencies
- 1st party accounts receivable departments
- 1st party pre-collection departments
- Debt buyers
- Property managers
- Banks and credit unions



Collect!'s Main Menu is the central location from which to access all Collect! functions. The menu provides buttons for major functions on the left, many additional menu options accessed by the tabs at the top, and a handy Quick Search function.

You can choose to work in your production database or in your staging database. Collect! provides you with a staging database for testing and experimentation before implementing in production. Collect! has the capacity for multiple production databases.

Managers will use the Daily Administration and Work in Progress functions daily. Collectors usually open to their work queues.

System Setup



The System Setup menu gives you access to all the configuration features of Collect!. Each selection takes you to a menu for a particular setup area.

You can set up your Company Details, set Operator User Levels and Access Rights, enter Password Settings, edit and create Reports and Letters, Transaction Types and Status Codes, enter Tax and Commission Rates, and set up interfaces with other components of the system.

Plans and Reference Tables

Company Details

Reports and Printing

Security and Aliases

Database Preferences

Options, Sounds and Colors

Credit Bureau Reporting

Auto Dialer Setup

Skip Trace Setup

ICN Setup

Payment Processing Setup

Exit

Help

Setting up Collect! follows a logical sequence: system, clients, and then debtors. The System Setup Screen provides access to all the configuration features of Collect!.

If there are functions you do not wish to use, leaving the configuration screens blank will mean those functions are not activated. You can activate additional functions later when you want to use them.

Setting up your system carefully to suit your desired workflow is important, because this is the basis of much of the automation provided by Collect!. Your installation can be branded with your company logo.

Code	Description
1	Administrator
10	System Manager
15	Admin/Clt Services
20	Office Manager
30	Sales Manager
40	Collection Manager
50	Senior Collector
60	Junior Collector
61	Web Dialer Operator
70	Sales
80	Accounting Manager
85	Accounting
90	Data Entry
95	Legal Operator
97	Parent Client
98	Client
99	Tech Access

Speaker icon

Delete Edit New Cancel << >> OK

Collect! has a very robust system of user access rights that allow you to set exactly what each operator level can access, edit, or delete. Collect! comes with a variety of industry standard user levels configured with typical access rights. You have the ability to add user levels and edit access rights down to the field level. You are also able to mask sensitive data like socials, provide aliases, and create operator or sales teams.

Robust access rights are available throughout the system including: the main application, the remote access system, and the dashboard.

Access Rights x

Name

Alias

Hide Label

Pick list file X

Control file Y

Color

Width

Height

List width

Counter Verify on exit
 Required Log verification
 Log to notes

Form Rights x

Rights	Level	Alias	Pick list file	Mask File
Full	System Manager			
Read Only	Junior Collector			
Read Only	Senior Collector			
Read Only	Collection Manager			
No Delete	Sales Manager			
No Delete	Office Manager			
Full	Administrator			
No Delete	Admin/Clt Services			

Collect! includes many settings that control security and properties for menus, forms, fields, and buttons. Fields can even display differently for different operator groups, for example, the name field may be named 'Patient' for one group, and 'Borrower' for another. This also gives you great flexibility and control over all aspects of your operators' use of Collect!

You can change form and field names, set a field color, attach a drop-down menu or control file, determine read & write privileges for various user levels, set data verification, and have changes logged to notes.

Client 1:36PM x

Client # 98	Alt Client #	Owned by client	Type Personal Services
Name Relative Measures Corp.		Operator	Class Collections
D.B.A.		Status	Category Standard
Contact Bruce Flaxion		<input type="checkbox"/> Inactive	Listed \$109,508.29
Address 10 Cloverdale Ave.		Client listed date 06/12/2020	Paid \$14,244.19
City Toronto	Phone 803-555-4768	Listed date 10/07/2021	Closed
State ON	Fax N/A	Worked date 03/05/2022	Owing \$94,689.10
ZIP M5E 4C9	Other	Date 2	Principal \$109,467.79
Country	Cell N/A	Active accounts 11	Interest
Email		Closed accounts	Fees \$25.00
User 1		Other accounts	Legal fees
User 2		Total accounts 11	Miscellaneous
User 3		Commission to date \$5,599.90	Other charges
User 4		Success rate 13.555%	Adjustments
		Timezone (-5) Eastern Standard	Run plan

File	Name	Client num	Acct	Listed	Status	Owing	Paid	Group
4427	Legal Sample Debtor	98	234Y67YY789	08/31/2021	LEG	\$4,600.00	\$200.00	
1423	Barclay, Tricia	98	33-01643	10/30/2020	ACT	\$5,250.00	\$6,775.00	
1090	Bernardo, Richard	98	66-75643	07/07/2021	NEW	\$8,875.74	\$50.00	
1397	Crawford, Harold	98	02-16458	09/06/2021	NEW	\$2,151.31	\$125.00	
4415	Dennison, George	98	67-50697	07/11/2021	PPA	\$2,895.81	\$4,054.19	
4425	Kimler, Maude	98	90-35555	09/01/2021	NEW	\$5,203.12	\$340.00	
4418	Mitchell, Mary	98	34-60594	05/22/2021	NEW	\$2,500.00		
4426	Nilley, William	98	99-35465	09/09/2021	NEW	\$7,356.22	\$200.00	7
4419	Rice, Jeffrey	98	23-47890	06/19/2021	NEW	\$2,956.90	\$500.00	

Your clients are set on the Client and Client Settings Screens. The client system allows for the use of a DBA, numbering options, multiple classification options, parent/sub-client relationships, and user defined fields to configure for your purposes.

The client system can also be set for portfolios or other forms of account categorization. The client form provides a running overview of your business with this client.

The Advanced Form provides more options for setting financial details for this client, your commission structure, and credit bureau reporting.

Debtor
10:37AM x

Name Barclay, Tricia		Client Relative Measures Corp.		98	View
File 1423	Group	Acct 33-01643	Operator JC		
Contact Tricia Barclay		Timezone (-8) Pacific Standard Time	Sales TM		
Address 1101-791 Wallaston Drive		Master	Type	Rate 33.330%	
<input checked="" type="checkbox"/> OK		Forward	Mode Active	Principal \$12,000.00	
City Brampton	Home 916-555-0100	Legal	Status ACT	Interest	
State CA	POE# 719-555-0102 260	Charged 03/03/2020	Score	Fees \$25.00	
ZIP 98974-21	Cell 812-555-0103	Delnqnt	Worked 07/12/2028	Legal fees	
Country United States	Other	Listed 10/30/2020	Validation	Miscellaneous	
Speech	Email barclay@example.com	Closed	Payment 01/11/2022	Other charges	
SSN 735-40-2471	POE Mr. Bathtub	Time-bar 01/11/2026	Next	Adjustments	
DL 3256RP63Q	User 1	# attempts	Promise	Paid \$6,775.00	
DOB 11/02/1977	User 2	# RPC	Date1	Owing \$5,250.00	
Summary			Date2	Settle	
				Run plan	

Notes
Contacts
Attachments
Cosigners
Transactions
Detail
A1
A2
A3
CBR
Group
Misc
Phones

Emails
Addresses

12/18/2021 13:07:12 ACT OWN : Post transaction 101 Payment By Check \$250.00 Owing \$5,250.00

10/04/2021 08:03:09 ACT OWN : Post transaction 101 1000.00

07/18/2021 08:03:09 ACT OWN : Post transaction 101 1000.00

07/13/2021 07:59:05 ACT MGR : Fee paid. Had an accident. Will bring account to current soon.

07/10/2021 07:32:18 ACT OWN : Phone about NSF Check and Fee.

07/10/2021 07:31:11 ACT ACT : Post transaction 105 -1000.00

06/28/2021 08:50:29 ACT OWN : Post transaction 101 1000.00

05/25/2021 08:21:46 ACT ACM : Post transaction 101 1000.00

04/03/2021 10:43:34 NEW ACM : Post transaction 101 1000.00

03/04/2021 09:28:30 NEW OWN : Post transaction 101 1000.00

02/02/2021 09:16:25 NEW OWN : Post transaction 101 1000.00

01/02/2021 10:05:22 NEW OWN : Post transaction 101 1000.00

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

Most commonly, debtors are brought into Collect! via bulk data imports. In Collect!, each debtor represents a debtor account, rather than the debtor as an individual.

Debtors who have multiple debts will have multiple Debtor profiles and you can group them together.

Debtor 10:42AM x

Name	Barclay, Tricia			Client	Relative Measures Corp.	98	View
File	1423	Group		Acct	33-01643	Operator	JC
Contact	Tricia Barclay			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-791 Wallaston Drive			Master		Rate	33.330 %
<input checked="" type="checkbox"/> OK		Forward		Mode	Active	Principal	\$12,000.00
City	Brampton	Home	916-555-0100	Legal		Interest	
State	CA	POE#	719-555-0102	Charged	03/03/2020	Fees	\$25.00
ZIP	98974-21	Cell	812-555-0103	Delinqnt		Legal fees	
Country	United States	Other		Listed	10/30/2020	Miscellaneous	
Speech		Email	barclay@example.com	Closed		Other charges	
SSN	735-40-2471	POE	Mr. Bathtub	Time-bar	01/11/2026	Adjustments	
DL	3256RP63Q	User 1		# attempts		Paid	\$6,775.00
DOB	11/02/1977	User 2		# RPC	1	Owing	\$5,250.00
Summary							

Validation 12/09/2020
 Payment 01/11/2022
 Next
 Promise
 Date1
 Date2

[Notes](#) [Contacts](#) [Attachments](#) [Cosigners](#) [Transactions](#) [Detail](#) [A1](#) [A2](#) [A3](#) [CBR](#) [Group](#) [Misc](#) [Phones](#) [Emails](#) [Addresses](#)

12/18/2021 13:07:12 ACT OWN : Post transaction 101 Payment By Check \$250.00 Owing \$5,250.00
 10/04/2021 08:03:09 ACT OWN : Post transaction 101 1000.00
 07/18/2021 08:03:09 ACT OWN : Post transaction 101 1000.00
 07/13/2021 07:59:05 ACT MGR : Fee paid. Had an accident. Will bring account to current soon.
 07/10/2021 07:32:18 ACT OWN : Phone about NSF Check and Fee.
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 05/25/2021 08:21:46 ACT ACM : Post transaction 101 1000.00
 04/03/2021 10:43:34 NEW ACM : Post transaction 101 1000.00
 03/04/2021 09:28:30 NEW OWN : Post transaction 101 1000.00
 02/02/2021 09:16:25 NEW OWN : Post transaction 101 1000.00
 01/02/2021 10:05:22 NEW OWN : Post transaction 101 1000.00

Debtor accounts house key data for compliance. Some data is provided by the original creditor, some is the result of system calculations, and some is the result of working the account. New compliance features, created to meet US Regulation F requirements, were built with enough flexibility to be useful in all highly regulated regions.

If a condition exists that could lead to non-compliance the system will create a hard-stop for automated functions and provide an operator alert if the account is being handled manually.

Scheduler [x]

Schedule tasks to run offline and unattended with Collect!'s Scheduler module. This optional module works like Windows Scheduler in that you can set up specific tasks to launch on preset dates/times/repeat cycles and have the Collect! system look after these processes itself thereafter.

In order to be able to use the Scheduler module, you will have to have purchased a license for use from Comtech. Contact us at sales@collect.org for pricing.

[Start Scheduler](#) [Help](#) [Settings](#) [View Log](#) [Quit](#)

Scheduler Tasks [x]

Task	ID	Interval	Day of week	Date	Time
Import routine		Daily	Tuesday	02/01/2022	01:00:00
Batch processing		Daily	Tuesday	02/01/2022	02:00:00
Recalculate totals		Daily	Tuesday	02/01/2022	03:00:00
Letter service		Daily	Tuesday	02/01/2022	04:00:00
Credit bureau reporting		Monthly	Saturday	02/05/2022	05:00:00
Generate statements		Monthly	Saturday	02/05/2022	06:00:00

Collect!'s many automations enable the system to complete routine tasks that do not require human involvement. The 3 primary automation systems that handle accounts are:

- Work queues, called the Work in Progress (WIP)
- Action plans, called Contact Plans
- Payment Posting

Additionally, writebacks, batch processes, scheduling, data exchanges, and partner integrations provide further automation potential.

Work In Progress

Priority
 All
 High
 Medium
 Low

Type All
 Client
 Status

To 01/01/2022
 From 01/01/2022
 Total 28

	Total	Today	Past	Done
Promise	1		1	
Phone	23		23	
Review	4		4	
Other				

Exit
Reload

To Do List For: OWN

Type	Priori	Name	Status	Description	Date	Client	Owing Score	Time Zone	Days since last payment
Phone	50	Mitchell, Mary	NEW	Home	01/01/2022	98	\$2,500.00	(-6) Central Stand	
Phone	50	Murdoch, Roger S.	NEW	Home	01/01/2022	97	\$7,362.30	(-5) Eastern Stand	-284
Phone	50	Nadeau, Pierre	NEW	Home	01/01/2022	92	\$6,477.78	(-5) Eastern Stand	
Phone	50	Parris, Trevor	ACT	Home	01/01/2022	94	\$3,067.50	(-8) Pacific Stand	-170
Phone	50	Peters, Henry	ACT	Home	01/01/2022	96	\$4,389.12	(-7) Mountain Sta	-148
Phone	30	Bradley, William	ACT	Home	01/01/2022	94	\$2,988.45	Local Time	-170
Phone	30	Freeman, James	NEW	Home	01/01/2022	99	\$3,272.50	450 (-5) Eastern Stand	-352
Phone	30	Nilley, William	NEW	Home	01/01/2022	98	\$7,356.22	(-8) Pacific Stand	-393
Phone	30	Rice, Jeffrey	NEW	Home	01/01/2022	98	\$2,956.90	(-5) Eastern Stand	-218
Phone	30	Riggs, Terry	ACT	Home	01/01/2022	97	\$1,256.40	(-5) Eastern Stand	-148
Phone	30	Ryan, John	NEW	Home	01/01/2022	106	\$1,467.00	(-7) Mountain Sta	
Phone	30	Scott, Sandra R.	NEW	Home	01/01/2022	92	\$1,560.70	(-5) Eastern Stand	
Phone	30	Selinas, Christopher	NEW	Home	01/01/2022	92	\$5,680.00	(-7) Mountain Sta	
Phone	30	Stanfield, Rachael	JDG	Home	01/01/2022	98	\$5,500.00	(-5) Eastern Stand	
Phone	30	Stockton, Sammy	NEW	Home	01/01/2022	99	\$3,457.90	(-8) Pacific Stand	
Phone	30	Stutt, Jane H.	NEW	Home	01/01/2022	97	\$4,734.80	(-6) Central Stand	-380
Phone	30	Taylor, Elizabeth	NEW	Home	01/01/2022	104	\$6,112.00	Local Time	-271
Phone	30	Tessier, Petre	NEW	Home	01/01/2022	99	\$1,975.78	(-8) Pacific Stand	-380

Each operator has a Work in Progress list containing their current tasks from which they can access all the screens they need to work the account and then automatically be returned to their WIP list. WIP lists can be configured globally or set by the operator to increase their efficiency.

WIP lists are generated by Contact Plans run on accounts during each stage of collections. When collectors sign in, outstanding tasks can be automatically loaded for them.

Contact Plan [x]

Code Description

Prompt for start date Do not run on closed debtors
 Delete all pending contacts Allow all users to delete
 Prompt before deleting Sub-plan

Events

Type	Description	Attachment	Operat..... Days	PriorSchedule if	If	Value 1
Status	NEW					
Activate	Ensure the account is active					
Letter	Letter 1					
Phone	Home		10	30		
Letter	Letter 2		30			
Letter	Letter 3		60			

Collection activity is managed by a well-thought-out series of Contact Plans that will apply multiple actions to an account in a single step. Contact Plans can be simple or complex, depending on your desired work-flow needs. Contact Plans can call other Plans using conditional logic.

The screen shows the default NEW Contact Plan intended to be applied when new accounts are loaded into the system.

Payment Posting Options



The Payment Posting Options form is used for setting actions performed when a payment is posted to an account. Each action is a contact plan that runs automatically when the payment posting condition is true.

Promise contact actions

Promise full payment	<input type="text"/>
Promise underpayment	<input type="text"/>
Promise overpayment	<input type="text"/>
Promise NSF payment	<input type="text"/>
Promise broken payment	PRB <input type="text"/>

- Write date to debtor record
- Automatically manage promises when posting
- Use today for payment date
- Use today for posted date
- Truncate 33 percent commission
- Automatically run default plan
- Don't automatically create 196
- Early payments skip promises

Promise schedule payment order

Principal	First <input type="text"/>
Interest	Third <input type="text"/>
Fees, Legal, Other, Misc	Second <input type="text"/>

Run only when balance below	<input type="text" value=".01"/>
Default contact plan	PIF <input type="text"/>
Confirmation delay	<input type="text"/>

Payment plan actions

Plan full payment	<input type="text"/>
Plan underpayment	<input type="text"/>
Plan overpayment	<input type="text"/>

<input type="button" value="OK"/>
<input type="button" value="Advanced"/>
<input type="button" value="Cancel"/>
<input type="button" value="Help"/>

In Collect!, you will use the Payment Posting Options to set what actions will be performed when a payment is posted to an account. Each action triggers an appropriate Contact Plan when the set conditions are true.

You can set accounts to close when the balance is under a set threshold.

Contact Plans and Payment Posting Options provide a great deal of consistency and saves operators a lot of routine decision-making.

Import Menu x

The Import Menu allows you to choose a file format, enter the name of the file being imported, choose between several automatic default activities, and load the file into Collect!. You can attach incoming Debtors to a specific Client, and also assign a fixed fee and various other attributes of the files as they are loaded. Separate contact plans may be run on imported data, for new accounts or modified accounts. This provides many possibilities for automatically processing the data that you import.

File format	<input type="text" value="Sample Debtor Import"/>	<input type="button" value="Import >>"/>
File name	<input type="text" value="..\import\sampldebtor.csv"/> <input type="button" value="Browse..."/>	<input type="button" value="Totals"/>
Client	<input type="text" value="Relative Measures Corp."/>	<input type="button" value="Close"/>
Client Number	<input type="text" value="98"/>	<input type="button" value="Edit Format"/>
Client fixed fee	<input type="text"/>	<input type="button" value="Help"/>
Interest rate	<input type="text"/> %	
Commission rate	<input type="text"/> %	
Utility report	<input type="text"/>	
	Starting file number <input type="text" value="4436"/>	
	Assign accounts to collector <input type="text"/>	
	Run plan on new accounts <input type="text" value="NEW"/>	
	Run plan on updated accounts <input type="text"/>	

Now that we have looked at system setup, clients, debtors, and automations, let's take a look at some other essential functions, starting with importing.

Data is usually imported into Collect! in bulk from CSV files. Collect! ships with a Sample Import map that allows you to supply your clients with a pre-defined data format.

If the Sample doesn't meet your needs, Collect! has the capacity for you to build import maps to suit your existing file formats.

Collect!'s import module can add fees, interest rates, commission rates, assign operators, add contact plans, and differentiate between new and updated accounts as part of the import process.

Letter 1 ✕

The Print Report form displays several settings that control report printing. The title bar displays the report that you are about to print. Different settings are displayed depending on the choices you make in this form. Press F1 for details.

Printer Microsoft Print to PDF Print >>

Screen Tray

File

Spreadsheet

Email Print Number of copies Setup

Fax Preview Print from page to page Cancel

Browser

Other Monochrome Page height Top margin

Letter service Page width Left margin Help

PDF

Collect! offers many letter options:

- Use letter templates
- Build custom letters
- Use MS Word with Rich Text Format (stored)
- Use MS Word with Mail Merge (not stored)
- Send to printer manually or automatically
- Export to an outside letter service vendor manually or automatically

REPORT OPTIONS

Execute Report

- Show Results in Table Format
- Show Results in Table Format and Save Report - (Web Host)
- Run a Saved Report - (Web Host)
- Delete a Saved Report - (Web Host)
- Show Results in Graph Format
- Show Results in Graph Format and Save Report - (Web Host)

Save to Collect Report Library

Report Library:
 Report Type (Destination):
 Start On:
 Report Name:

Email Body Area

Client Form Field Codes: | Text, N
 == Drag this line of code "@cl.aac" to the email body

Summary of accounts listed with us up to date:

Active Accounts	Closed Accounts	Total Accounts	Amount Listed	Amount Paid	Owing
@cl.aac	@cl.cac	@cl.tac	@cl.lac	@cl.pac	@cl.owc

body p strong span span

REPORT COLUMNS

Join Info	Form/Table	Summary	Column Name	Data Type	Header Name	Replace Empty	Date Format	Show Column	Unique Rows
INNER JOIN	client		Client Name	Text	Client Name	<input type="checkbox"/>	ex yyyy-MM-dd	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	debtor		Name	Text	Name	<input type="checkbox"/>	ex yyyy-MM-dd	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	debtor		Principal	Numeric	Principal Amt	<input type="checkbox"/>	ex yyyy-MM-dd	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	debtor		Select a column			<input type="checkbox"/>	ex yyyy-MM-dd	<input checked="" type="checkbox"/>	<input type="checkbox"/>

FILTERS

Group	Group Logic	Form/Table	Column Name	Data Type	Criteria Logic	From / Value	To / Value	Create Prompt
Group 1		client	Select a column		Equal to			<input type="checkbox"/>

GROUP BY

Form/Table	Column Name	Data Type	Date Format
client	Select a column		ex yyyy-MM-dd

SUMMARY LEVEL FILTERS (SQL HAVING COMMAND)

SORTING

Summary	Form/Table	Column Name	Data Type	Sort Type	Date Format
	client	Select a column			ex yyyy-MM-dd

Report SQL Data Query

```

/* Data Retrieval */
SELECT cl_name,
       de_name,
       de_principal
FROM client
ORDER BY debor
/*
  OF cl_rowid = de_rowid_client
  For Customer Record Ids
  WHERE cl_rowid = 801.us
*/
  
```

Report Column Names

Client Name, Name, Principal Amt.

Collect! also offers many report options:

- Use stock reports
- Build custom reports with native report language
- Build custom reports with user-friendly Report Generator
- Have our technicians build custom reports

The image shows the Report Generator Utility.

Payment Processing Setup



The Payment Processing Setup window is accessed via the menu path "System\Preferences\Payment Processing Setup". This screen is where you set up the configurations that the module will use for your connectivity and default company preferences. These details include login credentials that the module needs to connect to the Payment Provider Gateways and the default transaction types, convenience fee and other preferences that the module will use.

You have separate setup windows for credit cards or ACH payments. ACH payments are for debits coming from someone's checking or savings bank account. These are possible because the debtor provides their banking information to you with their verbal authorization to withdraw a payment electronically. You can also set up sending EFT Notices to comply with EFT regulations.

Credit Card Setup

ACH Payments Setup

EFT Notices Setup

OK

Help

Collect!'s wide range of optional modules add just the functionality that you need. You can add modules at any time.

Modules: Dashboard, Data Import, Task Scheduler, Client Web Access, Report Generator, Variable Interest

Modules Requiring 3rd Party Account: Payment Processing, Dialer, Credit Bureau Reporting, Letter Service

White Label Add-Ons: Texting

Single Credit Card Transaction

The Single Credit Card Transaction screen enables you to process one time only credit card payments. It can update demographics on the account as well as store limited, PCI compliant amounts of data about the card and pertinent about the transaction itself.

To access this window, click the Credit Card button in the lower right corner of the main Debtor screen and choose "Run a Transaction".

Card holder	Kevin Aubin	Date	01/31/2022
First	Kevin	Amount	
Last	Aubin	<input type="checkbox"/> Apply fee	
Street	1101-703 Eastwood Crescent	Fee	
City	Princeton	Total billed to card	
State	CA	ZIP	98975-0016
Email	aubin@example.com	PIN	*****
<input type="checkbox"/> Send email receipt			
Card type		<input type="checkbox"/> Save credit card info	
Card number		<input checked="" type="radio"/> To debtor	
Exp		<input type="radio"/> To cosigner	
AVS street	1101-703 Eastwood Crescen		
AVS ZIP	98975-0016		

Submit
Cancel
Help

Collect!'s range of integrations enable you to interact from your Collect! screen with an integration partner with an automated exchange of data between the 2 systems.

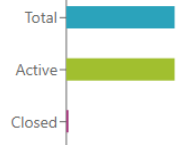
Integration partners include:

- Payment processors
- Dialers
- Texting providers
- Letter service
- Accounting packages
- E-OSCAR automation
- Reporting
- Training
- Backups
- Scoring & Skip Tracing

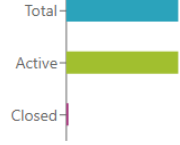
Relative Measures Corp. [Edit Client](#)

Contact Person	Bruce Flaxion
Phone	8035554768
Email	email@company.com
Address	123 Main Street, CA
Client Number	98

Number of Accounts



Owing Value of Accounts



General Information

Customer Since	2021-10-07
Total Accounts	11
Active Accounts	11
Closed Accounts	0
Owing on All Accounts	\$94,689.10
Owing on Active Accounts	\$94,689.10
Owing on Closed Accounts	0
Commission to Date	\$33.33
Recovery Rate	13.55%

Payment Information

Principal	\$109,467.79
Interest	
Fees	\$25.00
Legal Fees	
Miscellaneous	
Other Charges	
Adjustments	
Total	\$109,492.79
Collected	\$14,844.19

Aging Information

Last Invoice Date	2022-03-01
Current Due	\$452.79
30 Days Outstanding	
60 Days Outstanding	
90+ Days Outstanding	
Payments Applied	\$361.09
Total Due	

- Debtors
- Invoices/Statements
- Payments
- Associates

Listed Date: Start date → End date Close Date: Start date → End date Status: Mode:

Judgment: Credit Reporting:

[Add a Debtor](#)

Name	File #	Client Account #	Listed Date	Closed Date	Judgement	Principal	Owing	Status
Aubin, Kevin	1400	18-77564	2021-10-07			\$50,000.00	\$47,500.00	NEW

Collect! provides a user-friendly Client Portal that allows clients to access their data via a web browser. Access rights from the main Collect! system cascade to the Client Portal. Changes made in the Client Portal are posted in the database in real-time. Clients can:

- Post payments
- Add accounts
- Edit information
- Run reports
- View invoicing history

RELATIVE MEASURES CORP.

Make a Payment

ACCOUNT # 18-77564

CURRENT BALANCE

FILE # 1400

\$47,500.00

ACCOUNT DETAILS

CONSUMER

Aubin, Kevin
ADDRESS
1101-703 Eastwood Crescent
Princeton, CA 98975-0016
United States

HOME PHONE

(619) 555-0100
CELL PHONE
(619) 555-0103
WORK PHONE
(619) 555-0102

EMAIL ADDRESS

aubin@example.com

PAYMENT HISTORY

Payment Date	Description	Payment to Agency	Payment to Client
1/12/2022	Payment By Check	\$500.00	\$0.00
11/19/2021	Payment By Check	\$1,000.00	\$0.00
10/18/2021	Credit Card Payment	\$1,000.00	\$0.00

Collect! also provides a Consumer Portal that allows consumers to login using information already known to them for self-service. Configuration options enable you to control the consumer's view. Consumers can:

- View account and payment history
- Initiate payments with supported payment gateways
- View, but not edit, current contact information
- Add contact information for agency review
- Opt-in to communication methods

Phone [Close]

Phone number: 916-555-0100 [Phone icon]

Debtor name: Barclay, Tricia

Active: Yes [v]

Owner: Self [v]

Position: Home [v]

File: 1423 [v]

Source: Client [v]

Status: RPC SMS

Timezone: (-8) Pacific Standard Time [v]

Invalid number / debtor unknown

Best time to call

Do not call

Time from: [] Time to: []

Not in service

Last called

Date: []

User 1: []

Time: []

User 2: []

Last RPC: 01/31/2023 []

NIS ID: None specified [v]

Last result: None specified [v]

NIS reason: None specified [v]

Opt in calls: 01/24/2022 [] Verbal []

Opt out calls: [] []

Call opt

Buttons: OK, <<, >>, New, Delete, Cancel, Help, Opt Out Calls, RPC Override

Opt In/Out Logs

Type	Date	Time	Operator	Consent Method	Description
Call Opt	01/24/2022	11:10:47	OWN	Verbal	Debtor has consented to Calling.

Collect! supports your compliance requirements:

- HIPAA compliant since 2015
- Works with PCI compliant payment processors
- Working on SOC 2
- CFPB Regulation F
 - Validation notice, judgment, dispute tracking forms
 - Agent alerts, contact analytics
 - Contact opt-in/opt-out status, details, methods
 - Contact control engine
 - Workflow analysis reports
 - Letter template audit report



Image Credit: Amazon Web Services, Inc.

The Collect! application offers many forms of data security including encryption, redaction, access restrictions, MFA, logging, easy backup, password management, and convenient data access.

Collect! hosts its cloud version in the fully redundant Tier 3 AWS Data Center closest to your primary location and includes daily backups, network tests, penetration tests, encryption, continuous security monitoring, intrusion prevention, and more.

Collect! implements best coding practices using the OWASP framework and best practices in database security. In keeping with its comprehensive set of security policies, Collect! maintains a highly secure internal work environment.



Page Table of Contents

- Installing Collect!
- Getting Started
- Working Accounts
- Month End
- Client Web Portal
- Client Web Portal User Interface
- Collect!'s Optional Modules

Contents

Welcome to the Collect! Online Help Documentation. The help documentation is divided into 2 parts:

- Form and Field Help - Accessible from Collect! when you Push F1 on your Keyboard
- 'How To' Tutorials

In the navigation bar on the left, there are 3 sections:

- Detailed Field Information - If you are on a help page for a form, this section will display all of the fields for the form.
- Page Table of Contents - This section lists all of the main headings for the page you are on.
- Related 'How To' Tutorials - This section provides a list of related tutorials that may be of interest.

Installing Collect!

- [How to Install Collect!](#)
- [How to Network Collect!](#)
- [How to Have a Successful Data Conversion](#)
- [How to Backup Collect!](#)
- [How to Upgrade Collect!](#)

Getting Started

- [Starting Right](#)
- [Quick User's Guide](#)
- [View Training Videos](#)
- [How to Setup Collect!](#)
- [How to Setup Operators](#)
- [How to Use Access Rights](#)
- [How to Use Aliases](#)
- [How to Use Pick Lists](#)
- [How to Use Control Files](#)

You will have many resources to help you learn and optimize your use of Collect!, including :

- Extensive online documentation
- Training pop-ups you can disable at will
- Training videos
- Help desk
- Technical support



Collect! is continually developing with several minor releases every year and a major release every few years.

Collect! Version 13 is currently available with access via Remote Desktop. Collect! Version 14, currently in development, will be a full browser-based application.

Collect! is a feature-rich, modular solution for first and third party receivables with lots of power and flexibility.

Additional Learning Resources

- Evaluation Download: <https://www.collect.org/evaluation>
- Find further details in our massive online Help documentation by using the search function or by consulting the Index
<http://www.collect.org/documentation>
- Contact Sales: sales@collect.org
- 1-800-661-6722, option 1
- 250-391-0466, option 1