

## **Collect!** Primary Screens

| <u>F</u> ile | <u>E</u> dit | <u>B</u> rowse | <u>P</u> rint | <u>T</u> ools | <u>S</u> ystem | <u>H</u> elp | Find <u>D</u> ebtor | Find <u>(</u> | lient |         |   |      |             |   |          |   |   |
|--------------|--------------|----------------|---------------|---------------|----------------|--------------|---------------------|---------------|-------|---------|---|------|-------------|---|----------|---|---|
|              |              |                | R.            | <i>8</i> %    | ✓ II           |              | ► ►                 | 6             | ≞     | $\succ$ | ρ | WISA | 5<br>1<br>3 | Q | <b>(</b> | 0 | 0 |

### Main Menu

Welcome! You are signed on to a database, and the files are now open for your use.

The Main Menu is organized into the basic tasks you perform in Collect!. Select one of the tasks below, or use the Menus at the top, for quick access to information and tools.

Use the convenient Quick Search area to find an account to work. This feature works the same as the Find By options in the Browse menu.

| <u>W</u> ork In Progress | Quick Search                         |              |
|--------------------------|--------------------------------------|--------------|
|                          | File No                              |              |
| Daily Administration     | Acct No                              |              |
| Dury Administration      | Name                                 |              |
|                          | SSN                                  |              |
| <u>M</u> onth End        | Phone                                |              |
| <u></u> ontit 211d       | Email                                |              |
|                          |                                      |              |
| <u>R</u> eports          |                                      |              |
|                          |                                      |              |
|                          |                                      |              |
| <u>S</u> ystem Setup     |                                      | Quit         |
|                          | You are signed on as operator OWN    |              |
|                          | and are working with database demodb | <u>H</u> elp |
| <u>T</u> utorials        |                                      |              |
|                          |                                      |              |

Thank you for your interest in Collect!. This video will provide an overview of Collect!'s 3 main screens and the key automation systems that interact with them. The main screens are:

- 1. Client Screen
- 2. Debtor Account Screen
- 3. Work in Progress Screen

During your initial setup you can set global settings including: Commission, Tax, Itemization Date, Validation Period, Credit Bureau Reporting, and more. These settings will provide defaults unless they are overridden at the Client or Debtor level. The industrystandard default settings that Collect! ships with can be reconfigured for your exact needs.

| • · | 1 |
|-----|---|
| len |   |
|     |   |

| Clie | ent        |                     |           |              |          |          |            |           |             |                |         |         |               |            | 4:44PM ×           |
|------|------------|---------------------|-----------|--------------|----------|----------|------------|-----------|-------------|----------------|---------|---------|---------------|------------|--------------------|
|      | Client #   | 98                  | Alt C     | Client #     |          |          | _          | Owne      | d by client |                |         |         | Туре          | Personal : | Services 🗢         |
|      | Name       | Relative Measures C | Corp.     |              |          |          |            |           | Operator    |                | •       |         | Class         | Collection | ns ⊽               |
|      | D.B.A.     |                     |           |              |          |          |            |           | Status      |                | •       |         | Category      | Standard   | $\bigtriangledown$ |
|      | Contact    | Bruce Flaxion       |           |              |          |          |            |           |             | Inactive       |         |         | Listed        |            | \$109,508.29       |
|      | Address    | 10 Cloverdale Ave.  |           |              |          |          |            | Client    | listed date | 06/12/2021     | 鍣       |         | Paid          |            | \$14,244.19        |
|      |            |                     |           |              |          |          |            | l         | isted date  | 10/07/2022     | 2       |         | Closed        |            |                    |
|      | City       | Toronto             | Phone     | 803-555-47   | 68 🕚     |          |            | We        | orked date  | 03/05/2023     | 8       |         | Owing         |            | \$94,689.10        |
|      | State      | ON                  | Fax       | N/A          | و        |          |            |           | Date 2      |                | ίΠ.     |         | Principal     |            | \$109,467.79       |
|      | ZIP        | M5E 4C9             | Other     |              |          |          |            | Active    | e accounts  | 11             |         |         | Interest      |            |                    |
|      | Country    | ▽                   | Cell      | N/A          | ,        |          |            | Closed    | accounts    |                |         |         | Fees          |            | \$25.00            |
|      | Email      |                     |           |              |          |          |            | Othe      | r accounts  |                |         |         | Legal fees    |            |                    |
|      | User 1     |                     |           |              |          |          |            | Tota      | l accounts  | 11             |         |         | Miscellaneous |            |                    |
|      | User 2     |                     |           |              |          |          |            | Commissi  | on to date  | \$             | 5,599.9 | 90      | Other charges |            |                    |
|      | User 3     |                     |           |              |          |          |            | Su        | iccess rate | 13             | .555 %  | 6       | Adjustments   |            |                    |
|      | User 4     |                     |           |              |          |          |            |           | Timezone    | (-5) Eastern S | tanda   | rd -    | Run plan      |            |                    |
|      |            |                     |           |              |          |          |            |           |             |                |         |         |               |            | ок                 |
| D    | Debtors In | voices Payments N   | otes Cont | tacts Attach | ments 🖌  | ssociate | s Phones   | Emails Ad | dresses     |                |         |         |               |            |                    |
| File | e Na       | me                  |           | Client nur/  |          |          | Listed     | Status    | Ow          | /ing           |         | Pai     | d Group       | <<         | <u>&gt;</u> >      |
| 442  | 27 Leg     | gal Sample Debtor   |           | 98 2         | 34Y67Y   | Y789     | 08/31/2022 | 2 LEG     | \$4,60      | 0.00           | 9       | \$200.0 | 0             |            |                    |
| 142  | 23 Ba      | rclay, Tricia       |           | 98           | 3-01643  |          | 10/30/202  | 1 ACT     | \$5,25      | 0.00           | \$6     | 6,775.0 | 0             |            | Print              |
| 109  | 90 Be      | rnardo, Richard     |           | 98 (         | 6-75643  |          | 07/07/2022 | 2 NEW     | \$8,87      | 5.74           |         | \$50.0  | 0             |            | <u>.</u>           |
| 139  | 97 Cra     | awford, Harold      |           | 98 (         | 2-16458  | 1        | 09/06/2022 | 2 NEW     | \$2,15      | 1.31           | 9       | \$125.0 | 0             | <u>A</u> c | lvanced            |
| 441  | 15 De      | nnison, George      |           | 98 (         | 57-50697 | ·        | 07/11/2022 | 2 PPA     | \$2,89      | 5.81           | \$4     | 1,054.1 | 9             |            | <u>R</u> ecalc     |
| 442  | 25 Kir     | nler, Maude         |           | 98 9         | 0-35555  | i        | 09/01/2022 | 2 NEW     | \$5,20      | 3.12           | 9       | \$340.0 | 0             | 0          | Cancel             |
| 441  | 18 Mi      | tchell, Mary        |           | 98 3         | 4-60594  | Ļ        | 05/22/2022 | 2 NEW     | \$2,50      | 0.00           |         |         |               | 2          | Junicer            |
| 442  | 26 Nil     | lley, William       |           | 98 9         | 9-35465  |          | 09/09/2022 | 2 NEW     | \$7,35      | 6.22           | 9       | \$200.0 | 0 7           |            | Help               |
| 441  | 19 Ric     | e, Jeffrey          |           | 98 2         | 3-47890  | )        | 06/19/2022 | 2 NEW     | \$2,95      | 6.90           | 5       | \$500.0 | 0             |            | <u> </u>           |
|      |            |                     |           |              |          |          |            |           |             |                |         |         |               |            |                    |

First we will take a look at the Client Main Screen.

On the Client Screen you will see:

- Name, DBA, contact details to the left
- 4 user defined fields for you to use any way you want
- Summary of all client account financials on the right
- 10 tabs for sub-records at the bottom

### Client

File

4427

1423

1090

1397

4415

4425

4418

4426

4419

Debtors Invoices Payments I

Barclay, Tricia

Legal Sample Debtor

Bernardo, Richard

Crawford, Harold

Dennison, George

Kimler, Maude

Mitchell, Mary

Nilley, William

Rice, Jeffrey

Name

| Client # | 98                 | Alt   | Client #     |      |  |
|----------|--------------------|-------|--------------|------|--|
| Name     | Relative Measures  | Corp. |              |      |  |
| D.B.A.   |                    |       |              |      |  |
| Contact  | Bruce Flaxion      |       |              |      |  |
| Address  | 10 Cloverdale Ave. |       |              |      |  |
|          |                    |       |              |      |  |
| City     | Toronto            | Phone | 803-555-4768 | e.   |  |
| State    | ON                 | Fa    | K N/A        | ¢    |  |
| ZIP      | M5E 4C9            | Othe  | r            |      |  |
| Country  | ~                  | Ce    | I N/A        | ι, C |  |
| Email    |                    |       |              |      |  |
| User 1   |                    |       |              |      |  |
| User 2   |                    |       |              |      |  |
| User 3   |                    |       |              |      |  |
| User 4   |                    |       |              |      |  |

98

98

99-35465

23-47890

09/09/2022 NEW

06/19/2022 NEW

|     |           |                       |           |         |            | _              |             |                |          |            |             |              | 4:44PI   | N ×   |
|-----|-----------|-----------------------|-----------|---------|------------|----------------|-------------|----------------|----------|------------|-------------|--------------|----------|-------|
|     | Alt C     | lient #               |           |         |            | Ownee          | d by client |                |          |            | Туре        | Personal Ser | vices    | ▽     |
| s C | orp.      |                       |           |         |            |                | Operator    |                | •        |            | Class       | Collections  |          | ▽     |
|     |           |                       |           |         |            |                | Status      |                | •        |            | Category    | Standard     |          | ▽     |
|     |           |                       |           |         |            |                |             | Inactive       |          |            | Listed      |              | \$109,50 | 08.29 |
| 9.  |           |                       |           |         |            | Client         | isted date  | 06/12/2021     | 鼤        |            | Paid        |              | \$14,24  | 44.19 |
| _   |           |                       |           |         |            | L 1            | isted date  | 10/07/2022     | 121      |            | Closed      |              |          |       |
|     | Phone     | 803-555-4             | 768 🛰     |         |            | Wo             | orked date  | 03/05/2023     | ß        |            | Owing       |              | \$94,68  | 39.10 |
|     | Fax       | N/A                   | e.        |         |            |                | Date 2      |                | <u> </u> |            | Principal   |              | \$109,40 | 67.79 |
|     | Other     |                       |           |         |            | Active         | accounts    | 11             |          |            | Interest    |              |          |       |
| 7   | Cell      | N/A                   | e.        |         |            | Closed         | l accounts  |                |          |            | Fees        |              | \$2      | 25.00 |
|     |           |                       |           |         |            | Othe           | accounts    |                |          |            | Legal fees  |              |          |       |
|     |           |                       |           |         |            | Tota           | l accounts  | 11             |          | Mi         | scellaneous |              |          |       |
|     |           |                       |           |         |            | ommissi        | on to date  | \$             | 5,599    | .90 Ot     | her charges |              |          |       |
|     |           |                       |           |         |            | Su             | ccess rate  | 13             | 8.555    | % A        | djustments  |              |          |       |
|     |           |                       |           |         |            |                | Timezone    | (-5) Eastern S | Stand    | a∵d        | Run plan    |              |          |       |
|     |           |                       |           |         |            |                |             |                |          |            |             | 0            | к        |       |
| N   | otes Cont |                       |           | sociate | s Phones E |                | ldresses    |                |          |            |             |              |          |       |
|     |           | Client nun            |           |         | Listed     | Status         |             | ving           |          | Paid       | Group       | < <          | >        | >     |
|     |           | 98                    | 234Y67YY7 | 789     | 08/31/2022 |                | \$4,600     |                |          | \$200.00   |             |              |          |       |
|     |           | 98                    | 33-01643  |         | 10/30/2021 | ACT            | \$5,250     | 0.00           | \$       | \$6,775.00 |             | Pri          | nt       |       |
|     |           |                       |           |         | 07/07/2022 | NEW            | \$8,875     | 5.74           |          | \$50.00    |             | <u></u>      | -        |       |
|     |           |                       |           |         | 09/06/2022 | 2 NEW \$2,151  |             | 1.31           |          | \$125.00   |             | <u>A</u> dva | nced     |       |
|     |           | 98 67-50697 07/11/202 |           |         | 07/11/2022 | 2 PPA \$2,895  |             | 895.81 \$      |          | \$4,054.19 |             | <u>R</u> ec  | alc      |       |
|     |           | 98 90-35555 09/01/20  |           |         |            | 2 NEW \$5,203. |             | 3.12           |          | \$340.00   |             | Can          | cel      |       |
|     |           | 98                    | 34-60594  |         | 05/22/2022 |                |             | 500.00         |          |            |             |              |          |       |

\$7,356.22

\$2,956.90

\$200.00

\$500.00

Going through some key fields:

<u>H</u>elp

Alternate Client #: user-defined if you use an alternate number format.

Owned by Client #: if this client is a branch office of a larger corporation, you can enter the parent client.

Status and Operator: these are fields for tracking purposes only.

Type: if you report to the Credit Bureau, this field will contain the Creditor Classification Code. Otherwise, it is a user-defined field.

Class: this will likely always be collections.

Category: most clients will be standard, but you can also select Prospecting, Master (Parent), Legal, or Forwarding.

Client Listed Date: the date the client was created in the database.

Listed Date: the most recent Debtor Listed date.

Worked Date: the most recent Debtor Worked date.

| Client | :                  |                       |           |         |           |            |              |              |                           |                   |                       | 4:44PM ×            |  |
|--------|--------------------|-----------------------|-----------|---------|-----------|------------|--------------|--------------|---------------------------|-------------------|-----------------------|---------------------|--|
| C      | Client # 98        | Alt C                 | lient #   |         |           |            | Own          | ed by client |                           |                   | Type Persona          | l Services 🛛 👻      |  |
|        | Client Settings    |                       | _         |         |           |            |              | _            |                           |                   |                       | ×                   |  |
|        | Billing period Mon | thly 🔻                |           | Succ    | cess calc | ulation    |              |              |                           | Currency          | System default        | ~                   |  |
|        | Remit as Gross I   | unds                  |           | ۰       | Calcula   | te using   | all accounts |              | State                     | ement currency    | System default        | $\overline{\nabla}$ |  |
|        | Bill client for    | r negative To Us      |           | 0       | Use clo   | sed acco   | unts only    |              | It                        | emization date    | Last payment (Delr    | nqnt) 🔻             |  |
|        | Remit as Combi     | ned Funds             |           | 0       | Custom    | 1          |              |              | Variable in               | terest rates file |                       |                     |  |
|        |                    |                       | -         | Rep     | port      |            |              |              | A                         | Assign sales ID t | o new accounts SA     | L 🔹                 |  |
|        | Bill commission    | to debtor             |           |         | Only pa   | yments f   | or comm to   | date         |                           | Assign operato    | r ID to accounts OV   | WN 🔹                |  |
|        | Client is tax exe  | mpt                   |           |         | Exclude   | e reversal | s from Recal | с            |                           | Contact plan fo   | or new accounts NE    | W 🔹                 |  |
|        |                    |                       |           | ۲       | No fixe   | d fees     |              |              | Debtor so                 | ort order         |                       |                     |  |
|        | Credit card cont   | venience fees         |           | C       | Charge    | fee to cl  | ient         |              | C Debtor name CAW enabled |                   |                       |                     |  |
|        | ACH convenient     | ce fees               |           | C       | Charge    | fee to de  | ebtor        |              | <ul> <li>Deb</li> </ul>   | otor account      | 🗖 Disabl              | e metafiles         |  |
|        |                    |                       |           | Fixed   | fee       |            |              |              |                           |                   |                       |                     |  |
|        | Commission Ta      | ax                    |           |         |           |            |              |              |                           | Credit Bureau R   | Reporting             |                     |  |
|        |                    |                       | R         | Rate1   | Rate2     | Rate3      | Rate4        |              |                           | Report a          | accounts to bureaus   |                     |  |
|        | Rate 1             | 33.330 <mark>%</mark> | Principal |         |           |            |              |              |                           | 🗵 Send cli        | ent detail to bureau  | S                   |  |
| C      | Rate 2             | %                     | Interest  |         |           |            |              |              |                           | 🗆 Original        | creditor is in User 1 | 1                   |  |
| File   | Rate 3             | %                     | Fees      |         |           |            |              |              |                           | 🗆 Original        | creditor is in User 2 | 2                   |  |
| 442    | Rate 4             | %                     | Legal     |         |           |            |              |              |                           | Delay Days        | • From t              | today               |  |
| 142    |                    |                       | Misc      |         |           |            |              |              |                           |                   | • From o              | delinquency         |  |
| 109    | Rate plan          | •                     | Other     |         |           |            |              |              |                           |                   | • From o              | charged             |  |
| 139    |                    |                       |           |         |           |            |              |              |                           |                   |                       |                     |  |
| 441    |                    |                       |           |         |           |            |              |              |                           |                   |                       | <u>O</u> K          |  |
| 442    |                    |                       |           |         |           |            |              |              |                           |                   | < <u>&lt;</u>         | <u>&gt;</u> >       |  |
| 441    |                    |                       |           |         |           |            |              |              |                           |                   |                       | <u>H</u> elp        |  |
| 442    |                    |                       |           |         |           |            |              |              |                           |                   |                       |                     |  |
| 4419   | Rice, Jeffrey      |                       | 98 2      | 23-4789 | 90        | 06/19/2    | 2022 NEW     | \$2,95       | 6.90                      | \$500.00          |                       |                     |  |
|        | Rice, Jeffrey      |                       | 98 2      | 23-4789 | 90        | 06/19/2    | 2022 NEW     | \$2,95       | 6.90                      | \$500.00          |                       | Пеір                |  |

When you click on the Advanced button, it will take you to a form where you can set the options for the client.

The top left is where you set the remittance type and frequency (Billing Period).

If you charge Convenience Fees on electronic payments, it must be enabled on a client-by-client basis.

Recovery Rate Calculation is the success rate on the Client and is based on paid over listed. You can control if the formula uses all accounts, just closed accounts, or a custom formula.

| Client                         |  | 4:44PM ×  |
|--------------------------------|--|---|
| Client # 98 Alt Client #       | Owned by client                              | Type Personal Services 🗢                                      |
| Client Settings                |  | x   |
| Billing period Monthly  v      | Success calculation                          | Currency System default  v                                    |
| Remit as Gross Funds           | Calculate using all accounts                 | Statement currency System default  v                          |
| Bill client for negative To Us | <ul> <li>Use closed accounts only</li> </ul> | Itemization date Last payment (Delnqnt)                       |
| Remit as Combined Funds        | C Custom                                     | Variable interest rates file                                  |
|                                | Report                                       | Assign sales ID to new accounts SAL                           |
| Bill commission to debtor      | Only payments for comm to date               | Assign operator ID to accounts OWN                            |
| Client is tax exempt           | Exclude reversals from Recalc                | Contact plan for new accounts NEW                             |
|                                | <ul> <li>No fixed fees</li> </ul>            | Debtor sort order   |
| Credit card convenience fees   | <ul> <li>Charge fee to client</li> </ul>     | ○ Debtor name □ CAW enabled                                   |
| ACH convenience fees           | <ul> <li>Charge fee to debtor</li> </ul>     | <ul> <li>Debtor account</li> <li>Disable metafiles</li> </ul> |
|                                | Fixed fee                                    | _   |
| Commission Tax                 |  | Credit Bureau Reporting                                       |
|                                | Rate1 Rate2 Rate3 Rate4                      | Report accounts to bureaus                                    |
| Rate 1 33.330 % Principal      |  | Send client detail to bureaus                                 |
| C Rate 2 % Interest            |  | Original creditor is in User 1                                |
| File Rate 3 % Fees             |  | Original creditor is in User 2                                |
| 442 Rate 4 % Legal             |  | Delay Days 📀 From today                                       |
| 142 Misc                       |  | <ul> <li>From delinquency</li> </ul>                          |
| 109 Rate plan  • Other         |  | <ul> <li>From charged</li> </ul>                              |
| 139                            |  |   |
| 441                            |  | <u>O</u> K  |
| 442                            |  | < <u>&lt; &gt;&gt;</u>  |
| 441                            |  | <u>H</u> elp  |
| 442<br>4419 Rice, Jeffrey 98   | 23-47890 06/19/2022 NEW \$2,956.90           | \$500.00 <u>11</u> 01P  |

There are 3 fee options in Collect!: Flat Dollar, Flat Percentage, and Scaling Percentage.

The Optional Fees Setup is where you would enter a flat dollar amount, if that is the fee structure that you use.

The Commission tab is where you would enter the Commission rate.

If you select a Rate Plan, any value in Rate 1 will be ignored. If you don't use a Rate Plan, enter the primary rate into Rate 1.

You can enter more rates into Rates 2 to 4. For example, if you have a rate of 25%, but you want to recover 100% of fees, you can enter 25 into Rate 1 and 100 in to Rate 2.

In the apply to section, you would then check the boxes that each rate applies to.

Taxes is the same concept as Commissions in terms of entering Rates and checking the boxes in the Apply to section.

Please note that the tax is calculated on the Commission amount, not the payment amount.

| Clie | ent    |                 |                 |             |       |                             |             |              |               |                           |                |                              | 4:44PM ×           |
|------|--------|-----------------|-----------------|-------------|-------|-----------------------------|-------------|--------------|---------------|---------------------------|----------------|------------------------------|--------------------|
|      | Client | # 98            | A               | It Client # |       |                             |             | Owi          | ned by client |                           |                | Type Personal Se             | ervices 🔻          |
|      | Client | Settings        |                 |             |       |                             |             |              |               |                           |                |                              | ×                  |
|      | Bill   | ing period Mo   | onthly 🗸        |             | Su    | ccess calc                  | ulation     |              |               |                           | Currency       | System default               | $\bigtriangledown$ |
|      |        | Remit as Gros   | s Funds         |             |       | Calcula                     | ate using   | all accounts | 5             | Statem                    | ent currency   | System default               | ~                  |
|      |        | Bill client     | for negative To | Us          |       | <ul> <li>Use clo</li> </ul> | sed acco    | ounts only   |               | Item                      | nization date  | Last payment (Delnqn         | t) 🔻               |
|      |        | Remit as Com    | bined Funds     |             |       | <ul> <li>Custon</li> </ul>  | า           |              |               | Variable inter            | est rates file |                              |                    |
|      |        |                 |                 |             | R     | eport                       |             |              |               | Ass                       | ign sales ID t | o new accounts SAL           | •                  |
|      |        | Bill commission | on to debtor    |             |       | Only particular             | ayments     | for comm to  | date          | As                        | sign operato   | r ID to accounts OWN         | •                  |
|      |        | Client is tax e | xempt           |             |       | Exclude                     | e reversa   | ls from Reca | lc            | Co                        | ontact plan fo | or new accounts NEW          | •                  |
|      |        |                 |                 |             |       | • No fixe                   | ed fees     |              |               | Debtor sort               | order          |                              |                    |
|      |        | Credit card co  | onvenience fees | 5           |       | <ul> <li>Charge</li> </ul>  | e fee to cl | ient         |               | <ul> <li>Debto</li> </ul> |                | CAW ena                      |                    |
|      |        | ACH convenie    | ence fees       |             |       | <ul> <li>Charge</li> </ul>  | e fee to d  | ebtor        |               | <ul> <li>Debto</li> </ul> | r account      | 🗖 Disable n                  | netafiles          |
|      |        |                 |                 |             | Fixe  | d fee                       |             |              |               |                           |                |                              |                    |
|      |        | Commission      | Тах             |             |       |                             |             |              |               | Cr                        | edit Bureau F  | Reporting                    |                    |
|      |        | _               |                 |             | Rate1 | Rate2                       | Rate3       | Rate4        |               |                           | •              | ccounts to bureaus           |                    |
|      |        | Rate 1          | 33.330 %        |             |       |                             |             |              |               |                           |                | ent detail to bureaus        |                    |
|      |        | Rate 2          | %               |             |       |                             |             |              |               |                           |                | creditor is in User 1        |                    |
| File |        | Rate 3          | %               |             |       |                             |             |              |               |                           |                | creditor is in User 2        |                    |
| 442  |        | Rate 4          | %               | 5           |       |                             |             |              |               |                           | Delay Days     |                              |                    |
| 142  |        |                 |                 | Misc        |       |                             |             |              |               |                           |                | <ul> <li>From del</li> </ul> |                    |
| 109  |        | Rate plan       | •               | Other       |       |                             |             |              |               |                           |                | <ul> <li>From cha</li> </ul> | rged               |
| 139  |        |                 |                 |             |       |                             |             |              |               |                           |                |                              |                    |
| 441  |        |                 |                 |             |       |                             |             |              |               |                           |                | <u>O</u> I                   | <                  |
| 442  |        |                 |                 |             |       |                             |             |              |               |                           |                | < <u> &lt;</u>               | <u>&gt;</u> >      |
| 441  |        |                 |                 |             |       |                             |             |              |               |                           |                | <u>H</u> e                   | lp                 |
| 442  |        |                 |                 | 0.0         | 22.47 | 000                         | 0.0 / 1.0 / |              | to 050        |                           | ¢500.00        |                              | īcih               |
| 441  | 9 1    | Rice, Jeffrey   |                 | 98          | 23-47 | 890                         | 06/19/      | 2022 NEW     | \$2,956.9     | 90                        | \$500.00       |                              |                    |

Debtor Sort Order: this controls how debtors are sorted when Statements are generated.

Itemization Date: Use the dropdown to select which of the 5 CFPB Regulation F itemization dates this client will use for their Validation Notice. Regulation F will not apply to all Collect! users.

Variable Interest Rates File: Variable Interest is an optional module. The filename in this field will be used to calculate the rates for this Client's Debtors.

Please refer to the Help documentation on the remaining check boxes.

| Clie | nt     |                  |                  |                       |            |                             |            |            |                |        |  | 4:44PM ×                             |
|------|--------|------------------|------------------|-----------------------|------------|-----------------------------|------------|------------|----------------|--------|--|--------------------------------------|
|      | Client | # 98             | Alt              | t Client #            |            |                             |            | 0          | wned by client |        |  | Type Personal Services 🛛 🔻           |
|      | Client | Settings         |                  |                       |            |                             |            |            |                |        |  | x                                    |
|      | Billi  | ing period Mo    | nthly 👻          |                       | Su         | ccess calo                  | ulation    |            |                |        | Currency Syste   | em default 🛛 🔻                       |
|      |        | Remit as Gross   |                  |                       |            | <ul> <li>Calcula</li> </ul> |            |            |                |        | Statement currency Syste                                   |                                      |
|      |        |                  | or negative To I | Js                    |            | <ul> <li>Use clo</li> </ul> |            | unts only  |                |        | Itemization date Last                                      | payment (Delnqnt) 🛛 🥆                |
|      |        | Remit as Comb    | pined Funds      |                       |            | <ul> <li>Custor</li> </ul>  | n          |            |                | Variab | ole interest rates file                                    |                                      |
|      |        |                  |                  |                       |            | eport                       |            |            |                |        | Assign sales ID to nev                                     |                                      |
|      |        | Bill commissio   |                  |                       |            | Only p                      | ·          |            |                |        | Assign operator ID to                                      |                                      |
|      |        | Client is tax ex | æmpt             |                       |            | Exclud                      |            | Is from Re | ecalc          |        | Contact plan for nev                                       | v accounts NEW                       |
|      | _      |                  |                  |                       |            | No fixe                     |            |            |                |        | tor sort order   |                                      |
|      |        |                  | nvenience fees   |                       |            | Charge                      |            |            |                |        | Debtor name  | CAW enabled                          |
|      |        | ACH convenie     | nce fees         |                       |            | Charge                      | e fee to d | ebtor      |                | С      | Debtor account   | Disable metafiles                    |
|      |        | Commission       | T                |                       | Fixe       | d fee                       |            |            |                |        |  | 1                                    |
|      |        | Commission       | Iax              |                       | Dated      | D-t-2                       | D-t-2      | Data       |                |        | Credit Bureau Report                                       | 5                                    |
|      |        | Rate 1           | 33.330 %         |                       | Rate1<br>□ | Rate2                       | Rate3      | Rate4      |                |        | <ul> <li>Report account</li> <li>Send client de</li> </ul> |                                      |
|      |        | Rate 1           | 33.330 %         | Principal<br>Interest |            |                             |            |            |                |        | Send client de<br>Griginal credi                           |                                      |
| File |        | Rate 3           | %                | Fees                  |            |                             |            |            |                |        | Original credi   |                                      |
| 442  |        | Rate 4           | %                | Legal                 |            |                             |            |            |                |        | Delay Days   | From today                           |
| 142  |        | Nate 4           | 70               | Misc                  |            |                             |            |            |                |        | Delay Days   | <ul> <li>From delinquency</li> </ul> |
| 109  |        | Rate plan        |                  |                       |            |                             |            |            |                |        |  | <ul> <li>From charged</li> </ul>     |
| 139  |        | Nate plan        |                  | Other                 |            |                             |            |            |                |        |  | romenargea                           |
| 441  |        |                  |                  |                       |            |                             |            |            |                |        |  | ОК                                   |
| 442  |        |                  |                  |                       |            |                             |            |            |                |        |  | << >>                                |
| 441  |        |                  |                  |                       |            |                             |            |            |                |        |  | Help                                 |
| 442  |        |                  |                  |                       |            |                             |            |            |                |        |  | <u> </u>                             |
| 4419 | ) R    | Rice, Jeffrey    |                  | 98                    | 23-47      | 890                         | 06/19/     | 2022 NEV   | N \$2,956.     | .90    | \$500.00   | Псіћ                                 |

New Accounts: values filled in the Assign Sales ID to New Accounts and Assign Operator ID to Accounts will fill in the Debtor when new accounts are created.

The Contact Plan for New Accounts specifies the plan that will automatically run when new accounts are created.

| Clie | nt       |              |            |              |           |        |                           |              |           |                 |        |                        |                | 4:44                               | IPM × |  |
|------|----------|--------------|------------|--------------|-----------|--------|---------------------------|--------------|-----------|-----------------|--------|------------------------|----------------|------------------------------------|-------|--|
|      | Client # | # 98         |            | Alt C        | lient #   |        |                           |              | (         | Owned by client |        |                        | Туре           | Personal Services                  | ▽     |  |
|      | Client   | Settings     |            |              |           |        |                           |              |           |                 |        |                        |                |                                    | ×     |  |
|      | Billi    | ng period    | Monthly    | ▽            |           | Su     | ccess ca                  | lculation    |           |                 |        | Currenc                | y System de    | efault                             | ~     |  |
|      |          | Remit as G   | ross Fund  | s            |           |        |                           | late using   |           |                 |        | Statement currence     | xy System de   | efault                             | ~     |  |
|      |          |              | J          | jative To Us |           | 1      | <ul> <li>Use c</li> </ul> | losed acco   | unts only | у               |        | Itemization dat        | e Last paym    | nent (Delnqnt)                     | ~     |  |
|      |          | Remit as Co  | ombined I  | Funds        |           | 1      | <ul> <li>Custo</li> </ul> | m            |           |                 | Variab | ole interest rates fil | e              |                                    |       |  |
|      |          |              |            |              |           | Re     | eport                     |              |           |                 |        | Assign sales ID        | ) to new acco  | ounts SAL                          | •     |  |
|      |          | Bill commis  | ssion to d | ebtor        |           |        |                           | payments     |           |                 |        |                        |                | ID to accounts OWN                 |       |  |
|      |          | Client is ta | x exempt   |              |           |        |                           | de reversa   | s from R  | lecalc          |        | Contact plan           | for new acco   | ounts NEW                          | •     |  |
|      |          |              |            |              |           |        | • No fix                  |              |           |                 |        | tor sort order         |                |                                    |       |  |
|      |          | Credit card  |            |              |           |        | -                         | ge fee to cl |           |                 |        | Debtor name            |                | CAW enabled                        |       |  |
|      |          | ACH conve    | enience fe | es           |           |        |                           | ge fee to d  | ebtor     |                 | 0      | Debtor account         |                | Disable metafile                   | es    |  |
|      |          |              |            |              |           | Fixe   | d fee                     |              |           |                 |        |                        |                |                                    |       |  |
|      |          | Commissio    | on Tax     |              |           |        |                           |              |           |                 |        | Credit Bureau          |                |                                    |       |  |
|      |          |              |            |              |           | Rate1  | Rate2                     |              | Rate4     |                 |        |                        | t accounts to  |                                    |       |  |
|      |          | Rate 1       | 3          | 33.330 %     | Principal |        |                           |              |           |                 |        |                        | lient detail t |                                    |       |  |
|      |          | Rate 2       |            | %            | Interest  |        |                           |              |           |                 |        |                        | al creditor is |                                    |       |  |
| File |          | Rate 3       |            | %            | Fees      |        |                           |              |           |                 |        | <u> </u>               | al creditor is |                                    |       |  |
| 442  |          | Rate 4       |            | %            | Legal     |        |                           |              |           |                 |        | Delay Day              |                | From today                         |       |  |
| 142  |          |              |            |              | Misc      |        |                           |              |           |                 |        |                        |                | <ul> <li>From delinquer</li> </ul> | ісу   |  |
| 109  |          | Rate pla     | an         | •            | Other     |        |                           |              |           |                 |        |                        |                | <ul> <li>From charged</li> </ul>   |       |  |
| 139  |          |              |            |              |           |        |                           |              |           |                 |        |                        |                |                                    |       |  |
| 441  |          |              |            |              |           |        |                           |              |           |                 |        |                        |                | <u>O</u> K                         |       |  |
| 442  |          |              |            |              |           |        |                           |              |           |                 |        |                        |                | < <u>&lt;</u> >>                   |       |  |
| 441  |          |              |            |              |           |        |                           |              |           |                 |        |                        |                | <u>H</u> elp                       |       |  |
| 442  | 0 0      |              |            |              | 00        | 22 47  | 000                       | 00/10/       |           | 1. do or        | 6.00   | ¢500.00                |                | Пеіћ                               |       |  |
| 441  | 9 R      | ice, Jeffrey |            |              | 98        | 23-478 | 890                       | 06/19/       | 2022 NE   | W \$2,95        | 6.90   | \$500.00               |                |                                    |       |  |

Credit Bureau Reporting is an optional module. If you enable it, you can use the Credit Bureau Setup section to setup the client for reporting.

The Original Creditor fields apply primarily to Debt Buyers who need to report the Creditor.

Please refer to the Help documentation on Credit Bureau Reporting for more information.

| Client #       98       Alt Client #       Owned by client       Image: Status       Status       Status       Status       Collections       Collectio   | Client   |                     |           |                 |             |            |        |             |                |           |             |               | 4:44PM ×     |  |               |  |  |
|---|--|---------------------|-----------|-----------------|-------------|------------|--------|-------------|----------------|-----------|-------------|---------------|--------------|--|---------------|--|--|
| DBAStatusCategopStandardStatusCategopStandardStatusStatusCategopStandardStatus <t< td=""><td>Client #</td><td>98</td><td>Alt C</td><td>lient #</td><td></td><td></td><td>Owne</td><td>d by client</td><td></td><td></td><td>Туре</td><td>Personal Se</td><td>rvices 🗢</td></t<>   | Client #   | 98                  | Alt C     | lient #         |             |            | Owne   | d by client |                |           | Туре        | Personal Se   | rvices 🗢     |  |               |  |  |
| Indefinition in the second of | Name   | Relative Measures C | Corp.     |                 |             |            |        | Operator    |                | -         | Class       | Collections   | ▽            |  |               |  |  |
| Address       10 Cloverdale Ave.       Client listed dat       0/1/2/2021       Paid       5/1/2/201         City       Torono       Phone       803-555-4768       C       0       Client listed dat       10/07/2022       Closed       U       U         State       ON       Fax       Control       Phone       803-555-4768       C       Closed       0       State       Owing       State       State       State       Owing       State       State       State       State       Closed accounts       I       Interest       State       <   | D.B.A.   |                     |           |                 |             |            |        | Status      |                | •         | Category    | Standard      | ▽            |  |               |  |  |
|   | Contact  | Bruce Flaxion       |           |                 |             |            |        |             | Inactive       |           | Listed      |               | \$109,508.29 |  |               |  |  |
| $ \begin{array}{ c c c c c } \hline \begin{tabular}{ c c c c } \hline \begin{tabular}{ c c c c c c } \hline \begin{tabular}{ c c c c c c c } \hline \begin{tabular}{ c c c c c c c c } \hline \begin{tabular}{ c c c c c c c c c c c c c c c c c c c$   | Address  | 10 Cloverdale Ave.  |           |                 |             |            | Client | listed date | 06/12/2021     | 趲         | Paid        |               | \$14,244.19  |  |               |  |  |
| StateONFaxImage: StateDate 2Principal\$109,467.79ZIPMSE 4C9OtherImage: StateActive accounts11InterestImage: StateStateCountyCellImage: StateClosed accountsImage: StateFees\$25.00Emailemail@company.comImage: StateOther accountsImage: StateImage: StateStateUser 1Image: StateImage: StateImage: StateImage: StateImage: StateImage: StateImage: StateUser 2Image: StateImage: StateStateStateStateStateImage: StateImage: StateUser 4Image: StateImage: StateStateStateStateStateImage: StateImage: StateFileNameClosed accountsStateStateOther accountsImage: StateImage: StateImage: StateImage: StateImage: StateImage: StateStateStateStateStateStateImage: StateImage: StateImage: StateUser 4Image: StateStateStateOthingPaidGroupImage: StateImage: StateImag  |  |                     |           |                 |             |            | L      | isted date  | 10/07/2022     | 7         | Closed      |               |              |  |               |  |  |
| $\begin that the the the the the the the the the th$  | City   | Toronto             | Phone     | 803-555-4768    | C.          |            | Wo     | orked date  | 03/05/2023     | 13        | Owing       |               | \$94,689.10  |  |               |  |  |
| CountyCellClosed acountsFees $ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$   | State  | ON                  | Fax       |                 |             |            |        | Date 2      |                | <b>11</b> | Principal   |               | \$109,467.79 |  |               |  |  |
| Email<br>User 1email@company.comOther accountsILegal feesIIUser 2ICommission to date $\$5,599.00$ Other chargesIII </td <td>ZIP</td> <td>M5E 4C9</td> <td>Other</td> <td></td> <td></td> <td></td> <td>Active</td> <td>e accounts</td> <td>11</td> <td></td> <td>Interest</td> <td></td> <td></td>  | ZIP  | M5E 4C9             | Other     |                 |             |            | Active | e accounts  | 11             |           | Interest    |               |              |  |               |  |  |
| User 1User 2Total accounts11Miscellaneous<br>\$5,599,90Other charges<br>AdjustmentsUser 3User 4Success rate13.555 %Adjustments $MiscellaneousAdjustments$   | Country  | ~                   | Cell      |                 |             |            | Closed | accounts    |                |           | Fees        |               | \$25.00      |  |               |  |  |
| User 2Other chargesOther charges   | Email  | email@company.co    | m         |                 | 1           |            | Othe   | r accounts  |                |           | Legal fees  |               |              |  |               |  |  |
| User 3<br>User 4ILING KALLILING KALL <th <="" colspan="4" td=""><td>User 1</td><td></td><td></td><td></td><td></td><td></td><td>Tota</td><td>l accounts</td><td>11</td><td></td><td>Miscellaneous</td><td></td><td></td></th>   | <td>User 1</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Tota</td> <td>l accounts</td> <td>11</td> <td></td> <td>Miscellaneous</td> <td></td> <td></td>             |                     |           |                 | User 1      |            |        |             |                |           | Tota        | l accounts    | 11           |  | Miscellaneous |  |  |
| INVECT <th cols<="" td=""><td>User 2</td><td></td><td></td><td></td><td></td><td></td><td>Commissi</td><td>on to date</td><td>\$</td><td>5,599.90</td><td>Other charges</td><td></td><td></td></th>   | <td>User 2</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Commissi</td> <td>on to date</td> <td>\$</td> <td>5,599.90</td> <td>Other charges</td> <td></td> <td></td> | User 2              |           |                 |             |            |        | Commissi    | on to date     | \$        | 5,599.90    | Other charges |              |  |               |  |  |
| DebtorsNovicesPaymentsNotesClient num AcctListedStatusOwingPaidGroup4427Legal Sample Debtor98234Y67YY78908/31/2022LEG\$4,600.00\$200.00 $< < < < < < < < < < < < < < < < < < < $  | User 3   |                     |           |                 |             |            | Su     | iccess rate | 13             | .555 %    | Adjustments |               |              |  |               |  |  |
| DebtorsInvoicesPaymentsNotesContactsAttachmentsAssociatesPhonesEmailsAddressesFileNameClient nur AcctListedStatusOwingPaidGroup4427Legal Sample Debtor98234Y67YY78908/31/2022LEG\$4,600.00\$200.00 $<<<<<>><<<<>><<<<>><<<<>>Print1423Barclay, Tricia9833-0164310/30/2021ACT$5,250.00$6,775.00<<<<<>><$   | User 4   |                     |           |                 |             |            |        | Timezone    | (-5) Eastern S | tanda⊽d   | Run plan    |               |              |  |               |  |  |
| DebtorsInvoicesPaymentsNotesContactsAttachmentsAssociatesPhonesEmailsAddressesFileNameClient nur AcctListedStatusOwingPaidGroup4427Legal Sample Debtor98234Y67YY78908/31/2022LEG\$4,600.00\$200.00 $<<<<<>><<<<>><<<<>><<<<>>Print1423Barclay, Tricia9833-0164310/30/2021ACT$5,250.00$6,775.00<<<<<>><$   |  |                     |           |                 |             |            |        |             |                |           |             | C             | Ж            |  |               |  |  |
| 4427       Legal Sample Debtor       98       234Y67YY789       08/31/2022       LEG       \$4,600.00       \$200.00       \$<   | Debtors In   | voices Payments N   | otes Cont |                 | its Associa |            |        | dresses     |                |           |             |               | 2.1          |  |               |  |  |
| 4427       Legal Sample Debtor       98       234Y67YY789       08/31/2022       LEG       \$4,600.00       \$200.00       62       200.00         1423       Barclay, Tricia       98       33-01643       10/30/2021       ACT       \$5,250.00       \$6,775.00       Print         1090       Bernardo, Richard       98       66-75643       07/07/2022       NEW       \$8,875.74       \$50.00       Advanced         1397       Crawford, Harold       98       02-16458       09/06/2022       NEW       \$2,151.31       \$125.00       Advanced         4415       Dennison, George       98       67-50697       07/11/2022       PPA       \$2,895.81       \$4,054.19       Recalc         4425       Kimler, Maude       98       90-35555       09/01/2022       NEW       \$5,203.12       \$340.00       Cancel         4418       Mitchell, Mary       98       34-60594       05/22/2022       NEW       \$2,500.00       7       Help         4426       Nilley, William       98       9-35465       09/09/2022       NEW       \$7,356.22       \$200.00       7       Help  | File Na  | me                  |           | Client nurrAcct |             | Listed     | Status | Ow          | ving           | P         | aid Group   | <<            | >>           |  |               |  |  |
| 1090         Bernardo, Richard         98         66-75643         07/07/2022         NEW         \$8,875.74         \$50.00         Print           1397         Crawford, Harold         98         02-16458         09/06/2022         NEW         \$2,151.31         \$125.00         Advanced           4415         Dennison, George         98         67-50697         07/11/2022         PPA         \$2,895.81         \$4,054.19         Recalc           4425         Kimler, Maude         98         90-35555         09/01/2022         NEW         \$5,203.12         \$340.00         Cancel           4418         Mitchell, Mary         98         34-60594         05/22/2022         NEW         \$2,500.00         7         Help           4426         Nilley, William         98         99-35465         09/09/2022         NEW         \$7,356.22         \$200.00         7         Help   | 4427 Leg   | gal Sample Debtor   |           | 98 234Y         | 67YY789     | 08/31/2022 | 2 LEG  | \$4,60      | 0.00           | \$200     | .00         | · —           | <u> </u>     |  |               |  |  |
| 1090       Bernardo, Richard       98       66-75643       07/07/2022       NEW       \$8,875.74       \$50.00       Calc         1397       Crawford, Harold       98       02-16458       09/06/2022       NEW       \$2,151.31       \$125.00       Advanced         4415       Dennison, George       98       67-50697       07/11/202       PPA       \$2,895.81       \$4,054.19       Becalc         4425       Kimler, Maude       98       90-35555       09/01/2022       NEW       \$5,203.12       \$340.00       Cancel         4418       Mitchell, Mary       98       34-60594       05/22/2022       NEW       \$2,500.00       The point         4426       Nilley, William       98       99-35465       09/09/2022       NEW       \$7,356.22       \$200.00       7       Help  | 1423 Ba  | rclay, Tricia       |           | 98 33-0         | 1643        | 10/30/2021 | 1 ACT  | \$5,25      | 0.00           | \$6,775   | .00         | Pr            | int          |  |               |  |  |
| 4415       Dennison, George       98       67-50697       07/11/2022       PPA       \$2,895.81       \$4,054.19       Recalc         4425       Kimler, Maude       98       90-35555       09/01/2022       NEW       \$5,203.12       \$340.00       Cancel         4418       Mitchell, Mary       98       34-60594       05/22/2022       NEW       \$2,500.00       7       Help   | 1090 Be  | rnardo, Richard     |           | 98 66-7         | 5643        | 07/07/2022 | 2 NEW  | \$8,87      | 5.74           | \$50      | .00         |               |              |  |               |  |  |
| 4425       Kimler, Maude       98       90-35555       09/01/2022       NEW       \$5,203.12       \$340.00       Cancel         4418       Mitchell, Mary       98       34-60594       05/22/2022       NEW       \$2,500.00       Cancel         4426       Nilley, William       98       99-35465       09/09/2022       NEW       \$7,356.22       \$200.00       7   | 1397 Cra   | awford, Harold      |           | 98 02-1         | 6458        | 09/06/2022 | 2 NEW  | \$2,15      | 1.31           | \$125     | .00         | <u>A</u> dva  | anced        |  |               |  |  |
| 4418         Mitchell, Mary         98         34-60594         05/22/2022         NEW         \$2,500.00         Cancel           4426         Nilley, William         98         99-35465         09/09/2022         NEW         \$7,356.22         \$200.00         7         Help   | 4415 De  | nnison, George      |           | 98 67-5         | 0697        | 07/11/2022 | 2 PPA  | \$2,89      | 5.81           | \$4,054   | .19         | <u>R</u> e    | calc         |  |               |  |  |
| 4418     Mitchell, Mary     98     34-60594     05/22/2022     NEW     \$2,500.00     The second s   | 4425 Kir   | nler, Maude         |           | 98 90-3         | 5555        | 09/01/2022 | 2 NEW  | \$5,20      | 3.12           | \$340     | .00         | Ca            | ncel         |  |               |  |  |
| Help  | 4418 Mi  | tchell, Mary        |           | 98 34-6         | 0594        | 05/22/2022 | 2 NEW  | \$2,50      | 0.00           |           |             | <u>c</u> u    |              |  |               |  |  |
| 4419 Rice, Jeffrey 98 23-47890 06/19/2022 NEW \$2,956.90 \$500.00   | 4426 Nil   | lley, William       |           | 98 99-3         | 5465        | 09/09/2022 | 2 NEW  | \$7,35      | 6.22           | \$200     | .00 7       | Н             | eln          |  |               |  |  |
|   | 4419 Ric   | ce, Jeffrey         |           | 98 23-4         | 7890        | 06/19/2022 | 2 NEW  | \$2,95      | 6.90           | \$500     | .00         | <u> </u>      | orp.         |  |               |  |  |

The following tabs are available on the Client form:

**Debtors**: All of the accounts placed by this Client.

| Client     |                     |            |                 |     |     |          |            |           |              |                      |                 |                | 4:44PN     |
|------------|---------------------|------------|-----------------|-----|-----|----------|------------|-----------|--------------|----------------------|-----------------|----------------|------------|
| Client #   | 98                  | Alt C      | lient #         |     |     |          | Owned      | by client |              |                      | Туре            | Personal Se    | ervices    |
| Name       | Relative Measures C | Corp.      |                 |     |     |          |            | Operator  |              | •                    | Class           | Collections    |            |
| D.B.A.     |                     |            |                 |     |     |          |            | Status    |              | •                    | Category        | Standard       |            |
| Contact    | Bruce Flaxion       |            |                 |     |     |          |            |           | Inactive     |                      | Listed          |                | \$109,50   |
| Address    | 10 Cloverdale Ave.  |            |                 |     |     |          | Client li  | sted date | 06/12/2021   | 飽                    | Paid            |                | \$14,24    |
|            |                     |            |                 |     |     |          | Li         | sted date | 10/07/2022   | 121                  | Closed          |                |            |
| City       | Toronto             | Phone      | 803-555-4768    | ¢   |     |          | Wo         | rked date | 03/05/2023   | 8                    | Owing           |                | \$94,68    |
| State      | ON                  | Fax        |                 |     |     |          |            | Date 2    |              | <u> </u>             | Principal       |                | \$109,40   |
| ZIP        | M5E 4C9             | Other      |                 |     |     |          | Active     | accounts  | 11           |                      | Interest        |                |            |
| Country    | ~                   | Cell       |                 |     |     |          | Closed     | accounts  |              |                      | Fees            |                | \$2        |
| Email      | email@company.co    | m          |                 |     |     |          | Other      | accounts  |              |                      | Legal fees      |                |            |
| User 1     |                     |            |                 |     |     |          |            | accounts  | 11           |                      | Miscellaneous   |                |            |
| User 2     |                     |            |                 |     |     |          | Commissio  | n to date | \$           | 5,599.9              | 0 Other charges |                |            |
| User 3     |                     |            |                 |     |     |          | Suc        | cess rate | 13           | 3.555 <mark>%</mark> | Adjustments     |                |            |
| User 4     |                     |            |                 |     |     |          | ٦          | imezone   | (-5) Eastern | Standar              | d Run plan      |                |            |
|            |                     |            |                 |     |     |          |            |           |              |                      |                 | (              | <u>0</u> K |
|            | voices Payments N   | otes Cont  | tacts Attachmer |     |     |          |            |           |              |                      |                 |                |            |
| Date       | Check Client        |            |                 | Num |     | Total    | 30 days    | 60 c      | days 90 d    | ays Typ              | ,               | < <u> &lt;</u> | >          |
| 03/01/2023 | Relative M          |            |                 | 98  |     | \$452.79 |            |           |              | Net                  |                 |                |            |
| 02/01/2023 | Relative M          |            |                 | 98  |     | ,096.12  |            |           |              | Net                  |                 | P              | rint       |
| 01/01/2023 | Relative M          |            |                 | 98  |     | \$619.46 |            |           |              | Net                  |                 |                |            |
| 12/01/2022 | Relative M          |            | •               | 98  |     | ,186.12  |            |           |              | Net                  |                 | <u>A</u> dv    | anced      |
| 11/01/2022 | Relative M          |            |                 | 98  |     | ,191.69  |            |           |              | .09 Net              |                 | R              | ecalc      |
| 10/01/2022 | Relative M          |            |                 | 98  |     | 361.09)  |            | \$74      |              | Net                  |                 | <u>C</u> a     | incel      |
| 09/01/2022 | Relative M          |            | •               | 98  |     | 747.21)  | \$1,000.00 | \$33      | 3.33         | Net                  |                 |                |            |
| 08/01/2022 | Relative M          |            | •               | 98  |     | 333.33)  | \$333.33   |           |              | Net                  |                 | H              | lelp       |
| 07/01/2022 | Relative M          | easures Co | orp.            | 98  | (\$ | 333.33)  |            |           |              | Net                  | 99              |                |            |

## Invoices: The invoice history for the Client.

4:44PM ×

\$109,508.29 \$14,244.19

\$94,689.10 \$109,467.79

\$25.00

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| Client     |                    |            |                  |             |           |                    |                 |                    |                 |            | 4:44PM         | ×  |
|------------|--------------------|------------|------------------|-------------|-----------|--------------------|-----------------|--------------------|-----------------|------------|----------------|----|
| Client #   | 98                 | Alt C      | Client #         |             |           | Owned by client    |                 |                    | Туре            | Personal S | Services 🔹     | ~  |
| Name       | Relative Measures  | Corp.      |                  |             |           | Operator           |                 | •                  | Class           | Collection | IS 🔻           | ~  |
| D.B.A.     |                    |            |                  |             |           | Status             |                 | •                  | Category        | Standard   | ~              | ~  |
| Contact    | Bruce Flaxion      |            |                  |             |           |                    | Inactive        |                    | Listed          |            | \$109,508.2    | 29 |
| Address    | 10 Cloverdale Ave. |            |                  |             |           | Client listed date | 06/12/2021      | 茵                  | Paid            |            | \$14,244.1     | 19 |
|            |                    |            |                  |             |           | Listed date        | 10/07/2022      | 7                  | Closed          |            |                |    |
| City       | Toronto            | Phone      | 803-555-4768     | e.          |           | Worked date        | 03/05/2023      |                    | Owing           |            | \$94,689.1     | 10 |
| State      | ON                 | Fax        |                  |             |           | Date 2             |                 | -                  | Principal       |            | \$109,467.7    | 79 |
| ZIP        | M5E 4C9            | Other      |                  |             |           | Active accounts    | 11              |                    | Interest        |            |                |    |
| Country    | ~                  | Cell       |                  |             |           | Closed accounts    |                 |                    | Fees            |            | \$25.0         | 00 |
| Email      | email@company.co   | om         |                  | 100         |           | Other accounts     |                 |                    | Legal fees      |            |                |    |
| User 1     |                    |            |                  |             |           | Total accounts     | 11              |                    | Miscellaneous   |            |                |    |
| User 2     |                    |            |                  |             |           | Commission to date | \$5             | 599.90             | 0 Other charges |            |                |    |
| User 3     |                    |            |                  |             |           | Success rate       | 13.             | 555 <mark>%</mark> | Adjustments     |            |                |    |
| User 4     |                    |            |                  |             |           | Timezone           | (-5) Eastern St | anday:             | d Run plan      |            |                |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 |            | <u>O</u> K     |    |
| Debtors In | voices Payments N  | lotes Cont | tacts Attachment | s Associate | es Phones | Emails Addresses   |                 |                    |                 |            |                |    |
| Date       | Descriptio         | n          |                  |             |           |                    |                 |                    | Amount          | < <        | <u>&gt;</u> >  |    |
| 11/15/2021 | Payment b          | by Check   |                  |             |           |                    |                 |                    | \$361.09        |            | <u> </u>       |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 | l          | <u>P</u> rint  |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 | <u>A</u> d | lvanced        |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 |            | <u>R</u> ecalc |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 | <u>C</u>   | Cancel         |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 |            | <u>H</u> elp   |    |
|            |                    |            |                  |             |           |                    |                 |                    |                 |            |                |    |

# **Payments**: The payment history for the Client.

| Client     |  |                                       |                  |             |          |                    |                  |             |               |                | 4:44PM ×      |
|------------|--|---------------------------------------|------------------|-------------|----------|--------------------|------------------|-------------|---------------|----------------|---------------|
| Client #   | 98   | Alt C                                 | lient #          |             |          | Owned by client    |                  |             | Туре          | Personal Se    | rvices 🔻      |
| Name       | Relative Measures O                              | Corp.                                 |                  |             |          | Operator           |                  | •           | Class         | Collections    | ~             |
| D.B.A.     |  |                                       |                  |             |          | Status             |                  | •           | Category      | Standard       | ~             |
| Contact    | Bruce Flaxion                                    |                                       |                  |             |          |                    | Inactive         |             | Listed        |                | \$109,508.29  |
| Address    | 10 Cloverdale Ave.                               |                                       |                  |             |          | Client listed date | 06/12/2021       | 2           | Paid          |                | \$14,244.19   |
|            |  |                                       |                  |             |          | Listed date        | 10/07/2022       | 2           | Closed        |                |               |
| City       | Toronto  | Phone                                 | 803-555-4768     | e.          |          | Worked date        | 03/05/2023       |             | Owing         |                | \$94,689.10   |
| State      | ON   | Fax                                   |                  |             |          | Date 2             |                  |             | Principal     |                | \$109,467.79  |
| ZIP        | M5E 4C9  | Other                                 |                  |             |          | Active accounts    | 11               |             | Interest      |                |               |
| Country    | ~  | Cell                                  |                  |             |          | Closed accounts    |                  |             | Fees          |                | \$25.00       |
| Email      | email@company.co                                 | m                                     |                  |             |          | Other accounts     |                  |             | Legal fees    |                |               |
| User 1     |  |                                       |                  |             |          | Total accounts     | 11               |             | Miscellaneous |                |               |
| User 2     |  |                                       |                  |             |          | Commission to date | \$5,5            | 99.90       | Other charges |                |               |
| User 3     |  |                                       |                  |             |          | Success rate       | 13.5             | 55 <b>%</b> | Adjustments   |                |               |
| User 4     |  |                                       |                  |             |          | Timezone           | (-5) Eastern Sta | ndayd       | Run plan      |                |               |
| Debtors In | voices Payments N                                | otes Cont                             | acts Attachments | s Associate | s Phones | Emails Addresses   |                  |             |               | <u>(</u>       | <u>)</u> K    |
|            | 3:25:27 SAL : received<br>4:31:57 SAL : sent pro |                                       |                  |             |          |                    |                  |             |               | < <u> &lt;</u> | <u>&gt;</u> > |
|            |  | · · · · · · · · · · · · · · · · · · · |                  |             |          |                    |                  |             |               |                |               |
|            |  |                                       |                  |             |          |                    |                  |             |               | <u>P</u> r     | int           |
|            |  |                                       |                  |             |          |                    |                  |             |               | <u>A</u> dva   | anced         |
|            |  |                                       |                  |             |          |                    |                  |             |               | <u>R</u> e     | ecalc         |
|            |  |                                       |                  |             |          |                    |                  |             |               | <u>C</u> a     | ncel          |
|            |  |                                       |                  |             |          |                    |                  |             |               | H              | elp           |
|            |  |                                       |                  |             |          |                    |                  |             |               |                |               |

**Notes**: These are notes that you can enter specific to this Client.

| Client        |                    |            |              |          |                           |        |                |         |                   |                | 4:44PM        | x   |
|---------------|--------------------|------------|--------------|----------|---------------------------|--------|----------------|---------|-------------------|----------------|---------------|-----|
| Client #      | 98                 | Alt C      | lient #      |          | Owned by cli              | ient   |                |         | Туре              | Personal Ser   | vices         | ▽   |
| Name          | Relative Measures  | Corp.      |              |          | Opera                     | ator   |                | •       | Class             | Collections    |               | ~   |
| D.B.A.        |                    |            |              |          | Sta                       | atus   |                | •       | Category          | Standard       |               | ~   |
| Contact       | Bruce Flaxion      |            |              |          |                           |        | Inactive       |         | Listed            |                | \$109,508     | .29 |
| Address       | 10 Cloverdale Ave. |            |              |          | Client listed d           | late ( | 06/12/2021     | 菣       | Paid              |                | \$14,244      | .19 |
|               |                    |            |              |          | Listed d                  | late 1 | 10/07/2022     | 2       | Closed            |                |               |     |
| City          | Toronto            | Phone      | 803-555-4768 | с.,      | Worked d                  | late ( | 03/05/2023     | ŝ       | Owing             |                | \$94,689      | .10 |
| State         | ON                 | Fax        |              |          | Dat                       | te 2   |                | 11      | Principal         |                | \$109,467     | .79 |
| ZIP           | M5E 4C9            | Other      |              |          | Active accou              | unts 1 | 11             |         | Interest          |                |               |     |
| Country       | $\nabla$           | Cell       |              |          | Closed accou              | unts   |                |         | Fees              |                | \$25          | .00 |
| Email         | email@company.co   | om         |              |          | Other accou               | unts   |                |         | Legal fees        |                |               |     |
| User 1        |                    |            |              |          | Total accou               | unts 1 | 11             |         | Miscellaneous     |                |               |     |
| User 2        |                    |            |              |          | Commission to d           | late   | \$             | 5,599   | .90 Other charges |                |               |     |
| User 3        |                    |            |              |          | Success r                 | rate   | 13             | 8.555   | % Adjustments     |                |               |     |
| User 4        |                    |            |              |          | Timezo                    | one (  | (-5) Eastern S | stand   | ard Run plan      |                |               |     |
|               |                    |            |              |          |                           |        |                |         |                   | <u>0</u>       | к             |     |
|               | voices Payments N  | lotes Cont |              |          | es Phones Emails Addresse | es     |                |         |                   |                | -             |     |
| Client        |                    | Туре       | Due date     | Priority | Description               |        |                | ollecto | or Done           | < <u> &lt;</u> | <u>&gt;</u> > |     |
| Relative Meas | ures Corp.         | Phone      | 06/22/2021   | 30       | 8035554768                |        | SA             | ٨L      | Yes               | _              | _             |     |
| Relative Meas | ures Corp.         | Phone      | 06/14/2021   | 30       | 8035554768                |        | SA             | ٨L      | Yes               | Prir           | nt            |     |
|               |                    |            |              |          |                           |        |                |         |                   | <u> </u>       |               |     |
|               |                    |            |              |          |                           |        |                |         |                   | <u>A</u> dvar  | nced          |     |
|               |                    |            |              |          |                           |        |                |         |                   | <u>R</u> ec    | calc          |     |
|               |                    |            |              |          |                           |        |                |         |                   | <u>C</u> an    | cel           |     |
|               |                    |            |              |          |                           |        |                |         |                   | <u>H</u> e     | lp            |     |

**Contacts**: These are Contact events that will appear in the Work in Progress. If you use Collect! for sales, you can create a Work in Progress for your sales staff based on Client Events.

| Client       |                   |             |                  |           |          |                    |                |       |  |               | 4:44PM        | ×  |
|--------------|-------------------|-------------|------------------|-----------|----------|--------------------|----------------|-------|--|---------------|---------------|----|
| Client #     | 98                | Alt C       | lient #          |           |          | Owned by client    |                |       | Туре   | Personal Ser  | vices         | ~  |
| Name         | Relative Measures | Corp.       |                  |           |          | Operator           |                | •     | Class  | Collections   |               | ▽  |
| D.B.A.       |                   |             |                  |           |          | Status             |                | •     | Category   | Standard      |               | ~  |
| Contact      | Bruce Flaxion     |             |                  |           |          |                    | Inactive       |       | Listed   |               | \$109,508.    | 29 |
| Address      | 10 Cloverdale Ave |             |                  |           |          | Client listed date | 06/12/2021     | 茵     | Paid   |               | \$14,244.     | 19 |
|              |                   |             |                  |           |          | Listed date        | 10/07/2022     | 2     | Closed   |               |               |    |
| City         | Toronto           | Phone       | 803-555-4768     | e.        |          | Worked date        | 03/05/2023     | ß     | Owing  |               | \$94,689.     | 10 |
| State        | ON                | Fax         |                  |           |          | Date 2             |                | 11    | Principal  |               | \$109,467.    | 79 |
| ZIP          | M5E 4C9           | Other       |                  |           |          | Active accounts    | 11             |       | Interest   |               |               |    |
| Country      | ~                 | Cell        |                  |           |          | Closed accounts    |                |       | Fees   |               | \$25.         | 00 |
| Email        | email@company.c   | om          |                  |           |          | Other accounts     |                |       | Legal fees   |               |               |    |
| User 1       |                   |             |                  |           |          | Total accounts     | 11             |       | Miscellaneous  |               |               |    |
| User 2       |                   |             |                  |           |          | Commission to date | \$             | 5,599 | 0.90 Other charges                                   |               |               |    |
| User 3       |                   |             |                  |           |          | Success rate       |                | 8.555 | · · · <b>,</b> · · · · · · · · · · · · · · · · · · · |               |               |    |
| User 4       |                   |             |                  |           |          | Timezone           | (-5) Eastern S | stand | ayd Run plan   |               |               |    |
|              |                   |             |                  |           |          |                    |                |       |  | <u>0</u>      | ĸ             |    |
|              |                   |             | acts Attachments | Associate | s Phones | Emails Addresses   |                |       |  | _             | -             |    |
| Client Numbe |                   | Description |                  |           |          |                    |                |       |  | < <u>&lt;</u> | <u>&gt;</u> > |    |
| 98           | Class 1           | Agreement   |                  |           |          |                    |                |       |  | _             |               |    |
|              |                   |             |                  |           |          |                    |                |       |  | <u>P</u> rir  | nt            |    |
|              |                   |             |                  |           |          |                    |                |       |  | <u>A</u> dvar | nced          |    |
|              |                   |             |                  |           |          |                    |                |       |  | <u>R</u> ec   | alc           |    |
|              |                   |             |                  |           |          |                    |                |       |  | <u>C</u> an   | cel           |    |
|              |                   |             |                  |           |          |                    |                |       |  | <u>H</u> e    | lp            |    |

# Attachments: Any attached document for this Client.

| Client    |                          |          |                  |    |           |                    |                  |                   |               |               | 4:44PM ×      |
|-----------|--------------------------|----------|------------------|----|-----------|--------------------|------------------|-------------------|---------------|---------------|---------------|
| Client #  | 98                       | Alt C    | Client #         |    |           | Owned by client    |                  |                   | Туре          | Personal S    | ervices 🔻     |
| Name      | <b>Relative Measures</b> | Corp.    |                  |    |           | Operator           |                  | •                 | Class         | Collection    | s ⊽           |
| D.B.A.    |                          |          |                  |    |           | Status             |                  | •                 | Category      | Standard      | ~             |
| Contact   | Bruce Flaxion            |          |                  |    |           |                    | Inactive         |                   | Listed        |               | \$109,508.29  |
| Address   | 10 Cloverdale Ave        |          |                  |    |           | Client listed date | 06/12/2021       | 茵                 | Paid          |               | \$14,244.19   |
|           |                          | _        |                  |    |           | Listed date        | 10/07/2022       | 21                | Closed        |               |               |
| City      | Toronto                  | Phone    | 803-555-4768     | فر |           | Worked date        | 03/05/2023       | 6                 | Owing         |               | \$94,689.10   |
| State     | ON                       | Fax      |                  |    |           | Date 2             |                  | (m)               | Principal     |               | \$109,467.79  |
| ZIP       | M5E 4C9                  | Other    |                  |    |           | Active accounts    | 11               |                   | Interest      |               |               |
| Country   | ~                        | Cell     |                  |    |           | Closed accounts    |                  |                   | Fees          |               | \$25.00       |
| Email     | email@company.c          | om       |                  |    | <b>XX</b> | Other accounts     |                  |                   | Legal fees    |               |               |
| User 1    |                          |          |                  |    |           | Total accounts     | 11               |                   | Miscellaneous |               |               |
| User 2    |                          |          |                  |    |           | Commission to date | \$5,             | 599.90            | Other charges |               |               |
| User 3    |                          |          |                  |    |           | Success rate       | 13.5             | <mark>55 %</mark> | Adjustments   |               |               |
| User 4    |                          |          |                  |    |           | Timezone           | (-5) Eastern Sta | nda⊽d             | Run plan      |               |               |
|           |                          |          |                  |    |           |                    |                  |                   |               |               | <u>O</u> K    |
|           |                          |          | tacts Attachment |    |           | Emails Addresses   |                  |                   |               |               | <u> </u>      |
| Class     | Type Nar                 |          |                  |    | ntact     |                    |                  | ах                | Client Na     | < <u>&lt;</u> | <u>&gt;</u> > |
| President | Other Smi                | th, John |                  | Jo | nn Smith  | 8                  | 03-555-4760      |                   | Relative      | _             | _             |
|           |                          |          |                  |    |           |                    |                  |                   |               | E             | <u>P</u> rint |
|           |                          |          |                  |    |           |                    |                  |                   |               | <u>A</u> dv   | vanced        |
|           |                          |          |                  |    |           |                    |                  |                   |               | Ē             | Recalc        |
|           |                          |          |                  |    |           |                    |                  |                   |               | C             | ancel         |
|           |                          |          |                  |    |           |                    |                  |                   |               | l             | <u>H</u> elp  |
|           |                          |          |                  |    |           |                    |                  |                   |               |               |               |

Associates: These are related parties to the Client, such as board members or contact people.

| Client       |                    |       |         |          |    |      |          |             |                |       |                   |               | 4:44P      | м×    |
|--------------|--------------------|-------|---------|----------|----|------|----------|-------------|----------------|-------|-------------------|---------------|------------|-------|
| Client #     | 98                 | Alt C | lient # |          |    |      | Owne     | d by client |                |       | Туре              | Personal Se   | ervices    | ▽     |
| Name         | Relative Measures  | Corp. |         |          |    |      |          | Operator    |                | •     | Class             | Collections   | 6          | ▽     |
| D.B.A.       |                    |       |         |          |    |      |          | Status      |                | •     | Category          | Standard      |            | ▽     |
| Contact      | Bruce Flaxion      |       |         |          |    |      |          |             | Inactive       |       | Listed            |               | \$109,5    | 08.29 |
| Address      | 10 Cloverdale Ave. |       |         |          |    |      | Client   | listed date | 06/12/2021     | 菣     | Paid              |               | \$14,2     | 44.19 |
|              |                    |       |         |          |    |      | l        | isted date  | 10/07/2022     | 2     | Closed            |               |            |       |
| City         | Toronto            | Phone | 803-555 | 5-4768   | e. |      | We       | orked date  | 03/05/2023     |       | Owing             |               | \$94,6     | 89.10 |
| State        | ON                 | Fax   |         |          |    |      |          | Date 2      |                | (iii  | Principal         |               | \$109,4    | 67.79 |
| ZIP          | M5E 4C9            | Other |         |          |    |      | Active   | e accounts  | 11             |       | Interest          |               |            |       |
| Country      | ~                  | Cell  |         |          |    |      |          | accounts    |                |       | Fees              |               | \$         | 25.00 |
| Email        | email@company.co   | om    |         |          |    |      | Othe     | r accounts  |                |       | Legal fees        |               |            |       |
| User 1       |                    |       |         |          |    |      | Tota     | l accounts  | 11             |       | Miscellaneous     |               |            |       |
| User 2       |                    |       |         |          |    |      | Commissi | on to date  | \$             | 5,599 | .90 Other charges |               |            |       |
| User 3       |                    |       |         |          |    |      | Su       | iccess rate | 13             | .555  | % Adjustments     |               |            |       |
| User 4       |                    |       |         |          |    |      |          | Timezone    | (-5) Eastern S | tand  | ayd Run plan      |               |            |       |
|              |                    |       |         |          |    |      |          |             |                |       |                   |               | <u>O</u> K |       |
|              | voices Payments N  |       |         |          |    |      |          |             |                |       |                   |               | _          |       |
| Phone numbe  |                    | ion   | Active  | Position |    | vner | RPC      | Date        |                |       |                   | < <u>&lt;</u> | >          | ·>    |
| 803-555-4768 |                    |       | Yes     | Phone    | Se | lf   |          |             |                |       |                   |               |            |       |
|              |                    |       |         |          |    |      |          |             |                |       |                   | P             | rint       |       |
|              |                    |       |         |          |    |      |          |             |                |       |                   | <u>A</u> dv   | anced      |       |
|              |                    |       |         |          |    |      |          |             |                |       |                   | R             | ecalc      |       |
|              |                    |       |         |          |    |      |          |             |                |       |                   | <u>C</u> a    | ancel      |       |
|              |                    |       |         |          |    |      |          |             |                |       |                   |               |            |       |

Phones: Any associated phone record for the Client, including historical numbers.

<u>H</u>elp

| Client        |                    |            |                 |           |            |                    |                  |                   |                 |              | 4:44PM ×      |
|---------------|--------------------|------------|-----------------|-----------|------------|--------------------|------------------|-------------------|-----------------|--------------|---------------|
| Client #      | 98                 | Alt C      | lient #         |           |            | Owned by client    |                  |                   | Туре            | Personal Ser | rvices 🔻      |
| Name          | Relative Measures  | Corp.      |                 |           |            | Operator           |                  | •                 | Class           | Collections  | ▽             |
| D.B.A.        |                    |            |                 |           |            | Status             |                  | •                 | Category        | Standard     | ~             |
| Contact       | Bruce Flaxion      |            |                 |           |            |                    | Inactive         |                   | Listed          |              | \$109,508.29  |
| Address       | 10 Cloverdale Ave. |            |                 |           |            | Client listed date | 06/12/2021       | 茵                 | Paid            |              | \$14,244.19   |
|               |                    |            |                 |           | _          | Listed date        | 10/07/2022       |                   | Closed          |              |               |
| City          | Toronto            | Phone      | 803-555-4768    | e.        |            | Worked date        | 03/05/2023       | 6                 | Owing           |              | \$94,689.10   |
| State         | ON                 | Fax        |                 |           |            | Date 2             |                  | <b>*</b>          | Principal       |              | \$109,467.79  |
| ZIP           | M5E 4C9            | Other      |                 |           | _          | Active accounts    | 11               |                   | Interest        |              |               |
| Country       | ~                  | Cell       |                 |           |            | Closed accounts    |                  |                   | Fees            |              | \$25.00       |
| Email         | email@company.c    | om         |                 |           |            | Other accounts     |                  |                   | Legal fees      |              |               |
| User 1        |                    |            |                 |           |            | Total accounts     | 11               |                   | Miscellaneous   |              |               |
| User 2        |                    |            |                 |           |            | Commission to date | \$5,             | 599.9             | 0 Other charges |              |               |
| User 3        |                    |            |                 |           |            | Success rate       | 13.5             | <mark>55</mark> % | Adjustments     |              |               |
| User 4        |                    |            |                 |           |            | Timezone           | (-5) Eastern Sta | nda₹              | d Run plan      |              |               |
| Debtors In    | voices Payments I  | Notes Cont | acts Attachment | s Associa | tes Phones | Emails Addresses   |                  |                   |                 | <u>0</u>     | K             |
| Email Address | 5                  |            |                 |           |            | Active             | Source           |                   |                 | < <          | ~ ~ ~         |
| email@comp    | any.com            |            |                 |           |            | Yes                | Client           |                   |                 | ~_           | <u>&gt;</u> > |
|               |                    |            |                 |           |            |                    |                  |                   |                 | <u>P</u> ri  | nt            |
|               |                    |            |                 |           |            |                    |                  |                   |                 | <u>A</u> dva | nced          |
|               |                    |            |                 |           |            |                    |                  |                   |                 | <u>R</u> e   | calc          |
|               |                    |            |                 |           |            |                    |                  |                   |                 | <u>C</u> ar  | ncel          |
|               |                    |            |                 |           |            |                    |                  |                   |                 | <u>H</u> e   | elp           |

**Emails**: Any associated email record for the Client, including historical addresses.

| Client        |                    |            |                     |         |          |           |             |                |        |                   |               | 4:44           | PM ×          |
|---------------|--------------------|------------|---------------------|---------|----------|-----------|-------------|----------------|--------|-------------------|---------------|----------------|---------------|
| Client #      | 98                 | Alt C      | lient #             |         |          | Owne      | d by client |                |        | Туре              | Personal Se   | ervices        | ~             |
| Name          | Relative Measures  | Corp.      |                     |         |          |           | Operator    |                | -      | Class             | Collections   |                | ▽             |
| D.B.A.        |                    |            |                     |         |          |           | Status      |                | •      | Category          | Standard      |                | ~             |
| Contact       | Bruce Flaxion      |            |                     |         |          |           |             | Inactive       |        | Listed            |               | \$109,         | 508.29        |
| Address       | 10 Cloverdale Ave. |            |                     |         |          | Client    | listed date | 06/12/2021     | 鍣      | Paid              |               | \$14,          | 244.19        |
|               |                    |            |                     |         |          | L         | isted date  | 10/07/2022     | 2      | Closed            |               |                |               |
| City          | Toronto            | Phone      | 803-555-4768 🕓      |         |          | We        | orked date  | 03/05/2023     | 61     | Owing             |               | \$94,          | 689.10        |
| State         | ON                 | Fax        |                     |         |          |           | Date 2      |                | 11     | Principal         |               | \$109,         | 467.79        |
| ZIP           | M5E 4C9            | Other      |                     |         |          | Active    | e accounts  | 11             |        | Interest          |               |                |               |
| Country       | ~                  | Cell       |                     |         |          | Closed    | accounts    |                |        | Fees              |               |                | \$25.00       |
| Email         | email@company.co   | om         |                     |         |          | Othe      | r accounts  |                |        | Legal fees        |               |                |               |
| User 1        |                    |            |                     |         |          | Tota      | l accounts  | 11             |        | Miscellaneous     |               |                |               |
| User 2        |                    |            |                     |         |          | Commissi  | on to date  | \$             | 5,599  | .90 Other charges |               |                |               |
| User 3        |                    |            |                     |         |          | Su        | ccess rate  | 13             | 8.555  | % Adjustments     |               |                |               |
| User 4        |                    |            |                     |         |          |           | Timezone    | (-5) Eastern S | Standa | ayd Run plan      |               |                |               |
| Debtors In    | voices Payments 1  | Notes Cont | acts Attachments As | sociate | s Phones | Emails Ac | dresses     |                |        |                   | <u>(</u>      | <u>)</u> K     |               |
| Address       |                    |            | City                |         |          | State     | Туре        |                |        |                   |               |                |               |
| 10 Cloverdale | e Ave.             |            | Toront              | 0       |          | ON        | Person      | al             |        |                   | < <u>&lt;</u> |                | <u>&gt;</u> > |
|               |                    |            |                     |         |          |           |             |                |        |                   | P             | rint           |               |
|               |                    |            |                     |         |          |           |             |                |        |                   |               | anced<br>ecalc |               |
|               |                    |            |                     |         |          |           |             |                |        |                   | <u>C</u> a    | incel          |               |
|               |                    |            |                     |         |          |           |             |                |        |                   | H             | lelp           |               |

Addresses: Any associated address record for the Client, including historical addresses.

| Debtor    |                                      |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | 2:45P              | M ×   |
|-----------|--------------------------------------|-----------|--------|----------|------------|-----|--------------------|---------------|-----------------|------|-------------|-----------|--------|------|---------------|---------------|--------------------|-------|
| Name      | Aubin, Kevin                         |           |        |          |            |     |                    | ▽             | Client Rela     | tive | Measures Co | rp.       |        | •    | 98 💌          |               | <u>V</u> iew       |       |
| File      | 1423                                 | Group     |        | 8        | 3          |     | <u>≤</u> <u>G</u>  | roup ≥        | Acct 33-0       | 1643 | }           |           |        |      | Operator      | JC            |                    | •     |
| Contact   | Kevin Aubin                          |           |        |          |            |     | $\bigtriangledown$ | Timezone      | (-8) Pacific St | anda | ird Time    |           |        | ~    | Sales         | ΤM            |                    | •     |
| Address   | 1101-703 Eastwo                      | ood Cresc | ent    |          |            |     |                    | Master        |                 | •    | Туре        |           |        | ~    | Rate          |               | 33.3               | 30 %  |
| OK        |                                      |           |        |          |            |     |                    | Forward       |                 | •    | Mode        | Active    | ▽      |      | Principal     |               | \$12,0             | 00.00 |
| City      | Princeton                            | Ho        | ome    | 619-55   | 5-0100     | ٩   | •                  | Legal         |                 | •    | Status      | ACT       |        | •    | Interest      |               |                    |       |
| State     | CA                                   | PC        | OE#    | 619-55   | 5-0102     | ٢   | 260                | Charged       | 03/03/2021      | 6    | Score       |           |        |      | Fees          |               |                    |       |
| ZIP       | 98975-0016                           |           | Cell   | 619-55   | 5-0103     | ٩   | •                  | Delnqnt       |                 | m    | Worked      | 07/12/20  | 029    | 茵    | Legal fees    |               |                    |       |
| Country   | United States                        |           | ther   |          |            |     |                    | Listed        | 10/30/2021      | 豑    | Validation  | 12/09/20  | 021    |      | Miscellaneous |               |                    |       |
| Speech    | ~                                    | Er        | mail   | aubin@   | @example.  | co  | n 📼                | Closed        |                 | m    | Payment     | 02/02/20  | 022    |      | Other charges |               |                    |       |
| SSN       | 735-40-2471                          | F         | POE    | Global   | Auto Ltd   |     |                    | Time-bar      | 01/11/2027      |      | Next        |           |        |      | Adjustments   |               |                    |       |
| DL        | 3256RP63Q                            | Use       | er 1   |          |            |     |                    | # attempts    |                 |      | Promise     |           |        |      | Paid          |               | \$2,0              | 00.00 |
| DOB       | 11/02/1978                           | 🛍 Us      | er 2   |          |            |     |                    | # RPC         |                 |      | Date1       |           |        | (f)  | Owing         |               | \$10,0             | 00.00 |
| Summary   |                                      |           |        |          |            |     |                    |               |                 |      | Date2       |           |        | 11   | Settle        |               |                    |       |
|           |                                      |           |        |          |            |     |                    |               |                 |      |             |           |        |      | Run plan      |               |                    |       |
| Notes (   | Contacts Attachr                     | nents Co  | osign  | ers Tra  | nsactions  | D   | etail A1           | A2 A3 CBF     | R Group Mis     | : Ph | iones Group | o notes E | Emails | Addr | esses         |               |                    |       |
|           | 2 13:07:12 ACT O                     |           |        |          |            |     |                    | ck \$250.00 C | wing \$5,250.0  | 0    |             |           |        |      |               |               |                    |       |
|           | 2 08:03:09 ACT O                     |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | <u>O</u> K         |       |
|           | 2 08:03:09 ACT O<br>2 07:59:05 ACT N |           |        |          |            |     |                    | account to c  | urrent soon     |      |             |           |        |      |               | < <u>&lt;</u> |                    | > >   |
|           | 2 07:32:18 ACT O                     |           |        |          |            |     |                    |               | unent soon.     |      |             |           |        |      |               | C             | Credi <u>t</u> Car | d     |
|           | 2 07:31:11 ACT A                     |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | АС <u>Н</u>        |       |
| 06/28/202 | 2 08:50:29 ACT O                     | WN : Pos  | t trar | nsaction | n 101 1000 | .00 | )                  |               |                 |      |             |           |        |      |               |               | <u>R</u> ecalc     |       |
|           | 2 08:21:46 ACT A                     |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | <u>P</u> rint      |       |
|           | 2 10:43:34 NEW                       |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | <u>A</u> ction     |       |
|           | 2 09:28:30 NEW (<br>2 09:16:25 NEW ( |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | A <u>d</u> vanceo  | 1     |
|           | 2 10:05:22 NEW (                     |           |        |          |            |     |                    |               |                 |      |             |           |        |      |               |               | <u>C</u> ancel     |       |
| 51,02,202 |                                      |           |        |          |            | 5.0 | -                  |               |                 |      |             |           |        |      |               |               | <u>H</u> elp       |       |

The Debtor screen has a similar look as the Client screen in terms of the demographic information located on the left and the account information on the right.

Along the bottom, you will see the tabs for the Debtor's subrecords.

| Debtor    |  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | 2:4             | 5PM ×         |
|-----------|--|-------|-----------|---------|-----------|------|---------------|--------------|----------------|-----------------|------------|-------------|---------|----------|-----------|---------------|---------------|-----------------|---------------|
| Name      | Aubin, Kevin   |       |           |         |           |      |               |              | ▽              | Client Rela     | tive N     | Aeasures Co | rp.     |          | •         | 98 🔻          |               | <u>V</u> iew    |               |
| File      | 1423   | (     | Group     | 8       | 3         |      | <u>&lt; 0</u> | <u>G</u> rou | up <u>&gt;</u> | Acct 33-0       | )1643      |             |         |          |           | Operator      | JC            |                 | •             |
| Contact   | Kevin Aubin  |       |           |         |           |      | ~             | Т            | imezone        | (-8) Pacific St | anda       | rd Time     |         |          | ▽         | Sales         | TM            |                 | •             |
| Address   | 1101-703 Eastw   | ood   | Crescent  |         |           |      |               | Г            | Master         |                 | •          | Туре        |         |          | ▽         | Rate          |               | 33              | 3.330 %       |
| OK        |  |       |           |         |           |      |               |              | Forward        |                 | •          | Mode        | Active  | $\nabla$ |           | Principal     |               | \$1             | 2,000.00      |
| City      | Princeton  |       | Home      | 619-5   | 55-0100   | ٩    | -             |              | Legal          |                 | •          | Status      | ACT     |          | •         | Interest      |               |                 |               |
| State     | CA   |       | POE#      | 619-5   | 55-0102   | ٩    | - 260         |              | Charged        | 03/03/2021      | 131        | Score       |         |          |           | Fees          |               |                 |               |
| ZIP       | 98975-0016   |       | Cell      | 619-5   | 55-0103   | ٩    | -             |              | Delnqnt        |                 | m          | Worked      | 07/12/2 | 2029     | 茵         | Legal fees    |               |                 |               |
| Country   | United States  | ~     | Other     |         |           |      |               |              | Listed         | 10/30/2021      | 30         | Validation  | 12/09/2 | 2021     |           | Miscellaneous |               |                 |               |
| Speech    | ~  |       | Email     | aubin   | @example  | .coi | m 🖾           | _            | Closed         |                 | <u>iii</u> | Payment     | 02/02/2 | 2022     |           | Other charges |               |                 |               |
| SSN       | SSN     735-40-2471     POE     Global Auto Ltd     Time-bar     01/11/2027     Next     Adjustments       DL     3256RP63Q     User 1     # attempts     Promise     Promise     Paid |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               |                 |               |
| DL        |  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           | \$            | 2,000.00      |                 |               |
| DOB       | 11/02/1978   | 2     | User 2    |         |           |      |               |              | # RPC          |                 |            | Date1       |         |          | <b>11</b> | Owing         |               | \$1             | 0,000.00      |
| Summary   |  |       |           |         |           |      |               |              |                |                 |            | Date2       |         |          | 1         | Settle        |               |                 |               |
|           |  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           | Run plan      |               |                 |               |
|           | Contacts Attach  |       |           |         |           | _    |               | _            |                |                 |            | ones Group  | notes   | Emails   | Addre     | esses         |               |                 |               |
|           | 22 13:07:12 ACT (  |       |           |         |           |      | -             | eck          | \$250.00 C     | )wing \$5,250.0 | 00         |             |         |          |           |               |               |                 |               |
|           | 2 08:03:09 ACT (<br>2 08:03:09 ACT (   |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | <u>O</u> K      |               |
|           | 2 08.03.09 ACT 0<br>22 07:59:05 ACT N  |       |           |         |           |      |               | acc          | count to c     | urrent soon     |            |             |         |          |           |               | < <u>&lt;</u> |                 | > <u>&gt;</u> |
|           | 2 07:32:18 ACT 0   |       |           |         |           |      | <u> </u>      | ucc          |                | unent soon.     |            |             |         |          |           |               | C             | redi <u>t</u> C | ard           |
| 07/10/202 | 2 07:31:11 ACT A   | ACT : | Post tran | sactior | 105 -1000 | 0.00 |               |              |                |                 |            |             |         |          |           |               |               | АС <u>Н</u>     |               |
|           | 22 08:50:29 ACT C  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | <u>R</u> ecal   |               |
|           | 22 08:21:46 ACT A  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | <u>P</u> rint   | 1             |
|           | 2 10:43:34 NEW<br>2 09:28:30 NEW   |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | <u>A</u> ctior  |               |
|           | 22 09:28:30 NEW  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | A <u>d</u> vano |               |
|           | 22 10:05:22 NEW  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | <u>C</u> ance   |               |
|           |  |       |           |         |           |      |               |              |                |                 |            |             |         |          |           |               |               | <u>H</u> elp    |               |

### Here are some key fields to note:

Client Account #: identifier from the client, not to be confused with your Debtor File #

Master: alternative way of tracking client ownership if your client has unique reporting requirements. It will likely be left blank.

Forward: you can track if you have forwarded this account to another collection agency

Legal: you can track if this account was sent to a lawyer for legal action

Charged Date: the initial date of the debt. Usually the same as the invoice date.

Delinquent Date: the date the client deemed the account delinquent. Required for CBR

Time-bar, # attempts, # RPC: results of compliance calculations using system data

| Debtor    |                                      |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | 2:4              | 5PM ×         |
|-----------|--------------------------------------|--------|-----------|----------|------------|------|-------------|---------------|-----------------|--------|-------------|----------|-------|-----------|-------|------------|---------------|------------------|---------------|
| Name      | Aubin, Kevin                         |        |           |          |            |      |             | ▽             | Client Rela     | tive N | Measures Co | rp.      |       | •         | 98    | •          |               | View             | ,             |
| File      | 1423                                 | Gr     | oup       | 8        | 3          |      | <u>&lt;</u> | iroup ≥       | Acct 33-0       | 1643   |             |          |       |           |       | Operator   | JC            |                  |               |
| Contact   | Kevin Aubin                          |        |           |          |            |      | ~           | Timezone      | (-8) Pacific St | anda   | rd Time     |          |       | ~         |       | Sales      | ΤM            |                  | -             |
| Address   | 1101-703 Eastwo                      | ood Ci | rescent   |          |            |      |             | Master        |                 | •      | Туре        |          |       | ▽         |       | Rate       |               | 33               | 3.330 %       |
| OK        |                                      |        |           |          |            |      |             | Forward       |                 | •      | Mode        | Active   | ▽     |           |       | Principal  |               | \$1              | 2,000.00      |
| City      | Princeton                            |        | Home      | 619-55   | 5-0100     | ٩    |             | Legal         |                 | •      | Status      | ACT      |       | -         |       | Interest   |               |                  |               |
| State     | CA                                   |        | POE#      | 619-55   | 5-0102     | ٢    | · 260       | Charged       | 03/03/2021      | 3      | Score       |          |       |           |       | Fees       |               |                  |               |
| ZIP       | 98975-0016                           |        | Cell      | 619-55   | 5-0103     | ٩    |             | Delnqnt       |                 | 11     | Worked      | 07/12/20 | 29    | 茵         |       | Legal fees |               |                  |               |
| Country   | United States                        | ▽      | Other     |          |            |      |             | Listed        | 10/30/2021      | 30     | Validation  | 12/09/20 | 21    |           | Mis   | cellaneous |               |                  |               |
| Speech    | ~                                    |        | Email     | aubin@   | example    | .coi | n 📼         | Closed        |                 | 首      | Payment     | 02/02/20 | 22    |           | Oth   | er charges |               |                  |               |
| SSN       | 735-40-2471                          |        | POE       | Global   | Auto Ltd   |      |             | Time-bar      | 01/11/2027      |        | Next        |          |       |           | Ad    | djustments |               |                  |               |
| DL        | 3256RP63Q                            |        | User 1    |          |            |      |             | # attempts    |                 |        | Promise     |          |       |           |       | Paid       |               | \$               | 2,000.00      |
| DOB       | 11/02/1978                           | 2      | User 2    |          |            |      |             | # RPC         |                 |        | Date1       |          |       | <b>11</b> |       | Owing      |               | \$1              | 0,000.00      |
| Summary   |                                      |        |           |          |            |      |             |               |                 |        | Date2       |          |       | <b>11</b> |       | Settle     |               |                  |               |
|           |                                      |        |           |          |            |      |             |               |                 |        |             |          |       |           |       | Run plan   |               |                  |               |
| Notes (   | Contacts Attach                      | nents  | Cosign    | ers Tra  | insactions | D    | etail A1    | A2 A3 CBF     | R Group Mis     | : Ph   | ones Group  | notes E  | mails | Addr      | esses |            |               |                  |               |
|           | 2 13:07:12 ACT C                     |        |           |          |            |      | -           | ck \$250.00 C | wing \$5,250.0  | 0      |             |          |       |           |       |            |               |                  |               |
|           | 22 08:03:09 ACT C                    |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | <u>O</u> K       |               |
|           | 2 08:03:09 ACT C<br>2 07:59:05 ACT N |        |           |          |            |      |             | account to c  | urrent soon     |        |             |          |       |           |       |            | < <u>&lt;</u> |                  | > <u>&gt;</u> |
|           | 22 07:32:18 ACT C                    |        |           |          |            |      |             |               | unent soon.     |        |             |          |       |           |       |            | (             | Credi <u>t</u> C | Card          |
|           | 2 07:31:11 ACT A                     |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | AC <u>H</u>      | <u>l</u>      |
| 06/28/202 | 2 08:50:29 ACT C                     | WN :   | Post trar | nsaction | n 101 100  | 0.00 | )           |               |                 |        |             |          |       |           |       |            |               | <u>R</u> eca     | lc            |
|           | 2 08:21:46 ACT A                     |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | <u>P</u> rint    | t             |
|           | 2 10:43:34 NEW                       |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | <u>A</u> ctio    | n             |
|           | 22 09:28:30 NEW<br>22 09:16:25 NEW   |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | A <u>d</u> van   | ced           |
|           | 2 10:05:22 NEW                       |        |           |          |            |      |             |               |                 |        |             |          |       |           |       |            |               | <u>C</u> ance    | el            |
| 51,02,202 |                                      |        |           |          |            |      | -           |               |                 |        |             |          |       |           |       |            |               | <u>H</u> elp     |               |

### Type: user-defined for tracking.

Mode: Active or Closed – this field determines if you are actively collecting on this account.

Status: where the account is in the collection's lifecycle.

Score: user-defined field for tracking.

Validation: indicates the final date of the validation period; the field is maroon during the validation period.

Collector: the Operator assigned to collect this account.

Sales: this is for tracking purposes if you offer sales commission.

| Financial Detail                      |                    |                   |          |                 |       |       |            |       | ×               |
|---------------------------------------|--------------------|-------------------|----------|-----------------|-------|-------|------------|-------|-----------------|
|                                       | J                  | ludgement Commiss | ion Tax  | Fees            |       |       |            |       |                 |
|                                       |                    |                   |          | F               | Rate1 | Rate2 | Rate3      | Rate4 |                 |
| Referral Rate %                       |                    | Rate 1 33         | 8.330 %  | Principal       |       |       |            |       |                 |
|                                       |                    | Rate 2            | %        | Interest        |       |       |            |       |                 |
| Currency System default               | ~                  | Rate 3            | %        | Fees            |       |       |            |       |                 |
|                                       |                    | Rate 4            | %        | Legal           |       |       |            |       |                 |
| □ Show 30/60/90                       |                    |                   |          | Misc            |       |       |            |       |                 |
| Tax exempt                            |                    | Rate plan         | •        | Other           |       |       |            |       |                 |
|                                       |                    |                   |          | A               |       |       |            |       |                 |
| Commission to date \$666              |                    | Add cor           | nmission | to owing        |       |       |            |       |                 |
| Principal paid to date \$2,000        |                    |                   |          |                 |       |       |            |       |                 |
| Assignment Interest Payment Plan      |                    |                   |          |                 |       |       |            |       |                 |
| Assignment interest rayment rain      |                    |                   |          |                 |       |       |            |       |                 |
| Last statement                        | Original principal | \$12,000.0        | 0        | Req valid an    | nt    |       | 60         |       | 014             |
| Transaction (Charged) 03/03/2021      | Original interest  |                   |          | Req clt backu   |       |       | (iii)      |       | <u>O</u> K      |
| Last payment (Delnqnt)                | Original fees      |                   | -        | Sent valid an   |       |       | <u>111</u> |       | Transactions    |
| Charge-off 🛛 🗯                        | Original legal     |                   |          |                 |       |       |            |       |                 |
| Itemization date Last payment (Delnqr | Original misc      |                   | Req      | orig cred inf   | ō     |       | <u>iii</u> |       | <u>S</u> ummary |
| Balance at itemization                | Original other     |                   | Sent     | t orig cred inf | o     |       | <b>11</b>  |       | <u>S</u> ummary |
| Validation end 12/09/2021             | Original paid      |                   |          |                 |       |       |            |       | Cancel          |
|                                       |                    |                   |          |                 |       |       |            |       |                 |
|                                       | Assigned amount    | \$12,000.0        | 0 Or     | ig last pay an  | nt    |       |            |       | Calculators     |
|                                       |                    |                   | Ori      | g last pay dat  | te    |       | <u> </u>   |       |                 |
|                                       |                    |                   |          |                 |       |       |            |       | <u>H</u> elp    |
|                                       |                    |                   |          |                 |       |       |            |       |                 |
|                                       |                    |                   |          |                 |       |       |            |       |                 |

If you click the Advanced button at the bottom right of the Debtor Screen, you will be taken to the Debtor Financial Summary screen.

The Assignment Tab stores account information from your client. Some of this is needed for the CFPB Regulation F Model Validation Notice. Note that the Itemization Date is copied from the Itemization Date selection on the Client Screen we looked at earlier.

Judgement information is stored on a dedicated Judgement Screen.

The Commission, Tax, and Fees are brought from the client settings, but can be overridden.

Collect! supports Simple, Compound, and Variable interest.

| Debtor    |   |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | 2:4             | 5PM ×    |
|-----------|---|-------|------------|--------|-----------|-----|---------------|---------------------------|--------------|------------|-------------|---------|--------|-------|---------------|---------------|-----------------|----------|
| Name      | Aubin, Kevin  |       |            |        |           |     |               | ▽                         | Client R     | elative    | Measures Co | orp.    |        | •     | 98 🔹          |               | <u>V</u> iew    |          |
| File      | 1423  | 0     | Group      | 8      | 3         |     | <u>&lt; (</u> | <u>∃</u> roup <u>&gt;</u> | Acct 3       | 3-0164     | 3           |         |        |       | Operator      | JC            |                 | •        |
| Contact   | Kevin Aubin   |       |            |        |           |     | ~             | Timezone                  | (-8) Pacific | Stand      | ard Time    |         |        | ~     | Sales         | TM            |                 | •        |
| Address   | 1101-703 Eastw  | ood   | Crescent   |        |           |     |               | Master                    |              | •          | Туре        |         |        | ~     | Rate          |               | 33              | .330 %   |
| OK        |   |       |            |        |           |     |               | Forward                   |              | •          | Mode        | Active  | ~      |       | Principal     |               | \$1             | 2,000.00 |
| City      | Princeton   |       | Home       | 619-55 | 5-0100    | *   | -             | Legal                     |              | •          | Status      | ACT     | 1      | •     | Interest      |               |                 |          |
| State     | CA  |       | POE#       | 619-55 | 5-0102    | *   | - 260         | Charged                   | 03/03/202    | 1 🖾        | Score       |         |        |       | Fees          |               |                 |          |
| ZIP       | 98975-0016  |       | Cell       | 619-55 | 5-0103    | 1   | -             | Delnqnt                   |              | (t)        | Worked      | 07/12/2 | 2029   | 1     | Legal fees    |               |                 |          |
| Country   | United States   | ~     | Other      |        |           |     |               | Listed                    | 10/30/202    | 1 🛍        | Validation  | 12/09/2 | 2021   |       | Miscellaneous |               |                 |          |
| Speech    | ~   |       | Email      | aubin@ | example.  | со  | m 📼           | Closed                    |              | <u>fri</u> | Payment     | 02/02/2 | 2022   |       | Other charges |               |                 |          |
| SSN       | 735-40-2471   |       | POE        | Global | Auto Ltd  |     |               | Time-bar                  | 01/11/202    | 7          | Next        |         |        |       | Adjustments   |               |                 |          |
| DL        | DL         3256RP63Q         User 1         # attempts         Image: Comparison of the state of the s |       |            |        |           |     |               |                           |              |            |             |         |        |       |               | \$            | 2,000.00        |          |
| DOB       | DOB         11/02/1978         User 2         # RPC         Date1         Image: Control of the second          |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | \$1             | 0,000.00 |
| Summary   | Summary Date2 Settle  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               |                 |          |
|           | Summary Date2  Date2  Settle Settle  Run plan Notes Contacts Attachments Cosigners Transactions Detail A1 A2 A3 CBR Group Misc Phones Group notes Emails Addresses  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               |                 |          |
|           |   |       |            |        |           |     |               |                           |              |            | hones Grou  | o notes | Emails | Addre | esses         |               |                 |          |
|           | 22 13:07:12 ACT (   |       |            |        |           |     |               | ck \$250.00 C             | wing \$5,25  | 0.00       |             |         |        |       |               | _             |                 |          |
|           | 2 08:03:09 ACT (<br>2 08:03:09 ACT (  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | <u>O</u> K      |          |
|           | 2 07:59:05 ACT N  |       |            |        |           |     |               | account to c              | urrent soor  | n.         |             |         |        |       |               | < <u>&lt;</u> |                 | >>       |
|           | 2 07:32:18 ACT (  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               | C             | redi <u>t</u> C | ard      |
| 07/10/202 | 2 07:31:11 ACT /  | ACT : | Post trans | action | 105 -1000 | .00 |               |                           |              |            |             |         |        |       |               |               | AC <u>H</u>     |          |
|           | 22 08:50:29 ACT (   |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | <u>R</u> ecal   |          |
|           | 2 08:21:46 ACT /<br>2 10:43:34 NEW  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | Print           |          |
|           | 2 09:28:30 NEW  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | <u>A</u> ctior  |          |
|           | 2 09:16:25 NEW  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | A <u>d</u> vand |          |
|           | 2 10:05:22 NEW  |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | Cance           |          |
|           |   |       |            |        |           |     |               |                           |              |            |             |         |        |       |               |               | <u>H</u> elp    |          |

The following tabs are available on the Debtor form:

**Notes**: These are notes that you can enter specific to this Debtor.

Many actions in Collect! will automatically add a note line to leave a comprehensive record of interactions and decisions.

Operators can also add freeform notes to this field.

Key information can be pinned to the top by preceding the note with an asterisk (\*).

| NameAubin, Kevin   | ⊻iew<br>33.330 %<br>\$12,000.00 |
|--|---------------------------------|
| Contact       Kevin Aubin       Image: Contact       Kevin Aubin       Image: Contact       Timezone       (-8) Pacific Stand=Time       Image: Contact       Sales       Timezone       Image: Contact       Timezone       (-8) Pacific Stand=Time       Image: Contact       Sales       Timezone       Image: Contact       Image: Conta  |                                 |
| Address       1101-703 Eastwool Crescent       Image: Constraint of the sector |                                 |
| Image: Normal CityNormal CityNor  |                                 |
| CityPrincetonHome619-555-0100LegalStatusACTInterestStateCAPOE#619-555-0102260Charged03/03/2021ScoreFeesZIP98975-0016Cell619-555-0103DelnqntImage: Constraint of the second secon   | \$12,000.00                     |
| State       CA       POE#       619-555-0102       260       Charged       03/03/2021       Score       More       Fees         ZIP       98975-0016       Cell       619-555-0103       Cell       Delnqnt       More       07/12/2029       Legal fees   |                                 |
| ZIP         98975-0016         Cell         619-555-0103         Delnqnt         Morked         07/12/2029         Legal fees  |                                 |
|  |                                 |
| Country United States 🔻 Other Listed 10/30/2021 🛍 Validation 12/09/2021 Miscellaneous  |                                 |
|  |                                 |
| Speech 🗢 Email aubin@example.com 🔍 Closed 🃁 Payment 02/02/2022 Other charges   |                                 |
| SSN 735-40-2471 POE Global Auto Ltd Time-bar 01/11/2027 Next Adjustments   |                                 |
| DL   3256RP63Q   User 1   # attempts   Promise   Promise   Paid  | \$2,000.00                      |
| DOB         11/02/1978         IUser 2         # RPC         Date1         Owing   | \$10,000.00                     |
| Summary Date2 🗯 Settle   |                                 |
| Run plan   |                                 |
| Notes Contacts Attachments Cosigners Transactions Detail A1 A2 A3 CBR Group Misc Phones Group notes Emails Addresses   |                                 |
| Type Due date Priority Description Collector Done  |                                 |
| Review 03/28/2023 30 Rcvd - Trans Union Pull - View Attachment: JC No  | <u>О</u> К                      |
| Review 03/16/2023 30 Review file JC No <<  | <u>&lt; &gt;&gt;</u>            |
| Phone 03/13/2023 30 Home JC No 0   | Credi <u>t</u> Card             |
| Review 03/08/2023 30 Rcvd - Experian Pull - View Attachments JC No   | AC <u>H</u>                     |
| Review 03/07/2023 30 Rcvd - Equifax Pull - View Attachments JC No  | <u>R</u> ecalc                  |
| Review 03/05/2023 30 Review file 99 No   | <u>P</u> rint                   |
| Letter 11/26/2022 Letter 1 Merge Template 99 Yes   | <u>A</u> ction                  |
|  | A <u>d</u> vanced               |
| Letter   12/29/2021   10   No Response Threat of Action   SC   Yes   | <u>C</u> ancel                  |
| Letter 11/29/2021 10 Letter 2 SC Yes   | <u>H</u> elp                    |

**Contacts**: These are contact events that have been executed or are scheduled for this account.

Automated contacts will be managed by the system without any operator attention. As noted previously, notes and other evidence of completion will be added to the system automatically.

Contacts that need to be worked manually will appear in the work queue, or Work in Progress (WIP) List, of the operator assigned to this account. We will look at the WIP list next.

| Debtor    |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               | 2:4             | 5PM ×    |
|-----------|-----------------|------|----------|--------|-------------|-----|---------------|------------------|-----------------|---------|-------------|-----------|---------|------|---------------|---------------|-----------------|----------|
| Name      | Aubin, Kevin    |      |          |        |             |     |               | ▽                | Client Rela     | tive I  | Measures Co | orp.      |         | •    | 98 🔹          |               | <u>V</u> iew    |          |
| File      | 1423            | (    | Group    | 8      | 3           |     | <u>&lt; 6</u> | roup <u>&gt;</u> | Acct 33-        | 01643   | 3           |           |         |      | Operator      | JC            |                 | •        |
| Contact   | Kevin Aubin     |      |          |        |             |     | ~             | Timezone         | (-8) Pacific St | anda    | ard Time    |           | ▽       |      | Sales         | TM            |                 | •        |
| Address   | 1101-703 Eastv  | vood | Crescent |        |             |     |               | Master           |                 | •       | Туре        |           | ~       |      | Rate          |               | 33              | 3.330 %  |
| OK        |                 |      |          |        |             |     |               | Forward          |                 | •       | Mode        | Active    | ▽       |      | Principal     |               | \$1             | 2,000.00 |
| City      | Princeton       |      | Home     | 619-5  | 55-0100     | 1   | -             | Legal            |                 | •       | Status      | ACT       | •       |      | Interest      |               |                 |          |
| State     | CA              |      | POE#     | 619-5  | 55-0102     | 1   | - 260         | Charged          | 03/03/2021      | 1       | Score       |           |         |      | Fees          |               |                 |          |
| ZIP       | 98975-0016      |      | Cell     | 619-5  | 55-0103     | 1   | -             | Delnqnt          |                 | <u></u> | Worked      | 07/12/20  | 29 閲    |      | Legal fees    |               |                 |          |
| Country   | United States   | ▽    | Other    |        |             |     |               | Listed           | 10/30/2021      | 30      | Validation  | 12/09/202 | 21      |      | Miscellaneous |               |                 |          |
| Speech    | ~               |      | Email    | aubir  | @example    | .co | m 📼           | Closed           |                 | (iii)   | Payment     | 02/02/20  | 22      |      | Other charges |               |                 |          |
| SSN       | 735-40-2471     |      | POE      | Globa  | al Auto Ltd |     |               | Time-bar         | 01/11/2027      |         | Next        |           |         |      | Adjustments   |               |                 |          |
| DL        | 3256RP63Q       |      | User 1   |        |             |     |               | # attempts       |                 |         | Promise     |           |         |      | Paid          |               | \$              | 2,000.00 |
| DOB       | 11/02/1978      | 2    | User 2   |        |             |     |               | # RPC            |                 |         | Date1       |           | Ê       |      | Owing         |               | \$1             | 0,000.00 |
| Summary   |                 |      |          |        |             |     |               |                  |                 |         | Date2       |           | 11      |      | Settle        |               |                 |          |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      | Run plan      |               |                 |          |
|           | Contacts Attach | hmen |          |        | ransactions | D   | etail A1      | A2 A3 CBF        | R Group Mis     |         |             | o notes E | mails A | ddre | esses         |               |                 |          |
| Class     | Туре            |      | Descrip  |        |             |     |               |                  |                 |         | Index 1     |           |         |      |               |               |                 |          |
| Financial | 1               |      | 2300.00  |        |             |     |               |                  |                 |         | Secretary   |           |         |      |               |               | <u>O</u> K      |          |
| CBPull    | 1               |      | Equifax  |        |             |     |               |                  |                 |         |             |           |         |      |               | < <u>&lt;</u> |                 | >>       |
| CBPull    | 3               |      | Trans U  |        | ull         |     |               |                  |                 |         |             |           |         |      |               | C             | redi <u>t</u> C | ard      |
| CBPull    | 2               |      | Experia  |        |             |     |               |                  |                 |         |             |           |         |      |               |               | АС <u>Н</u>     |          |
| Assets    | 2               |      | Condon   | ninium |             |     |               |                  |                 |         |             |           |         |      |               |               | <u>R</u> ecal   | с        |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               | <u>P</u> rint   |          |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               | <u>A</u> ctior  | <u>،</u> |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               | A <u>d</u> vano | ed       |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               | <u>C</u> ance   | 1        |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               | <u>H</u> elp    |          |
|           |                 |      |          |        |             |     |               |                  |                 |         |             |           |         |      |               |               |                 |          |

Attachments: These are any stored attachments related to this account. The system provides two classifications options and many fields for additional details.

The Attachments form can also be used to build custom, userdefined forms to store information like Health Insurance, Court Dates, and Disputes.

| Debtor   |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | 2:45PM ×           |
|----------|---------------|------|------------|-----|-----------------|------|--------------------|-------------|------------------------|--------------|--------|-------------|----------|--------|-----------|---------------|---------------|--------------------|
| Name     | Aubin, Kevin  |      |            |     |                 |      |                    |             | ▽                      | Client Re    | lative | Measures Co | orp.     |        | -         | 98 🔹          |               | <u>V</u> iew       |
| File     | 1423          |      | Group      |     | 8 3             |      | <u>&lt;</u>        | <u>G</u> ro | oup ≥                  | Acct 33      | -0164  | 3           |          |        |           | Operator      | JC            | •                  |
| Contact  | Kevin Aubin   |      |            |     |                 |      |                    | ~           | Timezone               | (-8) Pacific | Standa | ard Time    |          |        | ~         | Sales         | TM            | •                  |
| Address  | 1101-703 East | wood | l Crescent |     |                 |      |                    |             | Master                 |              | •      | Туре        |          |        | ~         | Rate          |               | 33.330 %           |
| OK       |               |      |            | _   |                 |      |                    |             | Forward                |              | •      | Mode        | Active   | ▽      |           | Principal     |               | \$12,000.00        |
| City     | Princeton     |      | Home       | 6   | 519-555-0100    |      | L .                |             | Legal                  |              | •      | Status      | ACT      |        | •         | Interest      |               |                    |
| State    | CA            |      | POE#       | 6   | 519-555-0102    |      | <mark>د</mark> 260 |             | Charged                | 03/03/2021   | 3      | Score       |          |        |           | Fees          |               |                    |
| ZIP      | 98975-0016    |      | Cell       | 6   | 519-555-0103    |      | L                  |             | Delnqnt                |              | Ê      | Worked      | 07/12/2  | 029    | 趐         | Legal fees    |               |                    |
| Country  | United States | ~    | Other      | •   |                 |      |                    |             | Listed                 | 10/30/2021   | 30     | Validation  | 12/09/2  | 021    |           | Miscellaneous |               |                    |
| Speech   | ~             | ,    | Email      | а   | aubin@example   | e.co | m                  |             | Closed                 |              | Ê      | Payment     | 02/02/2  | 022    |           | Other charges |               |                    |
| SSN      | 735-40-2471   |      | POE        | G   | Global Auto Ltd |      |                    |             | Time-bar               | 01/11/2027   |        | Next        |          |        |           | Adjustments   |               |                    |
| DL       | 3256RP63Q     |      | User 1     |     |                 |      |                    | #           | # attempts             |              |        | Promise     |          |        |           | Paid          |               | \$2,000.00         |
| DOB      | 11/02/1978    | 2    | User 2     |     |                 |      |                    |             | # RPC                  |              |        | Date1       |          |        | <b>11</b> | Owing         |               | \$10,000.00        |
| Summary  |               |      |            |     |                 |      |                    |             |                        |              |        | Date2       |          |        | <b>11</b> | Settle        |               |                    |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           | Run plan      |               |                    |
|          |               | hmei |            |     | rs Transaction  | s D  | etail /            | 41 <i>I</i> | <mark>A2 A3</mark> CBF |              | isc Pl |             |          | Emails | Addre     | esses         |               |                    |
| Class    | Туре          |      |            | am  |                 |      |                    |             |                        | Home         |        |             | Vork     |        |           |               |               |                    |
| Cosigner |               |      | Da         | aws | son, Thomas     |      |                    |             |                        |              |        | 7           | 19-555-0 | 0101   |           |               |               | <u>О</u> К         |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               | < <u>&lt;</u> |                    |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               | C             | redi <u>t</u> Card |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | АС <u>Н</u>        |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | <u>R</u> ecalc     |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | <u>P</u> rint      |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | <u>A</u> ction     |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | A <u>d</u> vanced  |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | <u>C</u> ancel     |
|          |               |      |            |     |                 |      |                    |             |                        |              |        |             |          |        |           |               |               | <u>H</u> elp       |

**Cosigners**: These are related parties to the Debtor, such as spouses, relatives, and employers.

The Cosigner form provides many fields for details, and Collect! contains many options regarding how cosigner involvement can be handled.

| Debtor  |                     |             |         |             |      |             |                        |                |            |             |            |      |     |               |               | 2:45PM ×           |
|---------|---------------------|-------------|---------|-------------|------|-------------|------------------------|----------------|------------|-------------|------------|------|-----|---------------|---------------|--------------------|
| Name    | Aubin, Kevin        |             |         |             |      |             | ▽                      | Client Rela    | ative      | Measures Co | orp.       |      | •   | 98 💌          |               | <u>V</u> iew       |
| File    | 1423                | Group       | 8       | 3           |      | <u>&lt;</u> | <u>i</u> roup <u>≻</u> | Acct 33-       | 01643      | 3           |            |      |     | Operator      | JC            | •                  |
| Contact | Kevin Aubin         |             |         |             |      | ~           | Timezone               | (-8) Pacific S | tanda      | ard Time    |            | ~    |     | Sales         | TM            | •                  |
| Address | 1101-703 Eastwo     | od Crescen  | t       |             |      |             | Master                 |                | •          | Туре        |            | ~    |     | Rate          |               | 33.330 %           |
| OK      |                     |             |         |             |      |             | Forward                |                | •          | Mode        | Active     | ▽    |     | Principal     |               | \$12,000.00        |
| City    | Princeton           | Home        | e 619-  | 555-0100    | 1    | -           | Legal                  |                | •          | Status      | ACT        | -    |     | Interest      |               |                    |
| State   | CA                  | POE         | # 619-  | 555-0102    | 1    | - 260       | Charged                | 03/03/2021     |            | Score       |            |      |     | Fees          |               |                    |
| ZIP     | 98975-0016          | Cel         | ll 619- | 555-0103    | 1    | -           | Delnqnt                |                | 11         | Worked      | 07/12/202  | 29 🖻 |     | Legal fees    |               |                    |
| Country | United States       |             | r       |             |      |             | Listed                 | 10/30/2021     | <u>\$0</u> | Validation  | 12/09/202  | 21   |     | Miscellaneous |               |                    |
| Speech  | $\overline{\nabla}$ | Emai        | il aubi | n@example.  | .co  | m 📼         | Closed                 |                | -          | Payment     | 02/02/202  | 22   |     | Other charges |               |                    |
| SSN     | 735-40-2471         | PO          | E Glob  | al Auto Ltd |      |             | Time-bar               | 01/11/2027     |            | Next        |            |      |     | Adjustments   |               |                    |
| DL      | 3256RP63Q           | User        | 1       |             |      |             | # attempts             |                |            | Promise     |            |      |     | Paid          |               | \$2,000.00         |
| DOB     | 11/02/1978          | 🛍 👘 User 2  | 2       |             |      |             | # RPC                  |                |            | Date1       |            | (n)  |     | Owing         |               | \$10,000.00        |
| Summary |                     |             |         |             |      |             |                        |                |            | Date2       |            | ţ.   |     | Settle        |               |                    |
|         |                     |             |         |             |      |             |                        |                |            |             |            |      |     | Run plan      |               |                    |
| Notes   | Contacts Attachn    | nents Cosig |         |             |      | etail A1    | A2 A3 CBF              |                | sc Ph      | nones Group | o notes Er |      |     |               |               |                    |
| Туре    | То                  | us          | Direct  | Description |      | Pay         | ment date              | Posted date    |            |             |            | C    | omm | ission amount |               |                    |
| 101     | \$1,000             |             |         | Payment By  | / C  | heck 01/    | 11/2023                | 01/11/2023     |            |             |            |      |     | \$333.33      |               | <u>О</u> К         |
| 101     | \$250               |             |         | Payment By  | / Cl | heck 12/    | 18/2022                | 12/18/2022     |            |             |            |      |     | \$83.33       | < <u>&lt;</u> | >>                 |
| 101     | \$500               | .00         |         | Payment By  | / Cl | heck 10/    | 04/2022                | 10/04/2022     |            |             |            |      |     | \$166.67      | C             | redi <u>t</u> Card |
| 101     |                     | \$1         | ,000.00 | Payment By  | / Cl | heck 07/    | 18/2022                | 07/18/2022     |            |             |            |      |     | \$333.33      |               | АС <u>Н</u>        |
| 106     | \$25                | .00         |         | Payment of  | Ag   | gency 07/   | 13/2022                | 07/13/2022     |            |             |            |      |     | \$25.00       |               | <u>R</u> ecalc     |
| 301     | (\$25.0             | 00)         |         | NSF Charge  | e D  | ue Ac07/    | 10/2022                | 07/10/2022     |            |             |            |      |     |               |               | <u>P</u> rint      |
| 105     | (\$1,000.0          | 00)         |         | Returned N  | SF   | Chec 07/    | 10/2022                | 07/10/2022     |            |             |            |      |     | (\$333.33)    |               | <u>A</u> ction     |
| 101     |                     | \$1         | ,000.00 | Payment By  | / Cl | heck 06/    | 28/2022                | 06/28/2022     |            |             |            |      |     | \$333.33      |               | A <u>d</u> vanced  |
| 101     | \$1,000             | .00         |         | Payment By  | C    | heck 04/    | 03/2022                | 04/03/2022     |            |             |            |      |     | \$333.33      |               | <u>C</u> ancel     |
| 101     | \$1,000             | .00         |         | Payment By  | C    | heck 03/    | 03/2022                | 03/04/2022     |            |             |            |      |     | \$333.33      |               | <u>H</u> elp       |

**Transactions**: This tab holds a record of everything to do with money, including Principal, Fees, and Payments.

Click on any transaction to reach the underlying Transaction Form for details on that individual transaction.

| Debtor  |            |        |       |            |         |            |     |             |            |           |         |            |              |         |              |                    |               |               | 2:52            | PM ×     |
|---------|------------|--------|-------|------------|---------|------------|-----|-------------|------------|-----------|---------|------------|--------------|---------|--------------|--------------------|---------------|---------------|-----------------|----------|
| Name    | Aubin, Kev | /in    |       |            |         |            |     |             | ~          | Client    | Relat   | ive N      | Measures Co  | rp.     |              | •                  | 98 🔹          |               | <u>V</u> iew    |          |
| File    | 1423       |        | G     | roup       | 8       | 3          |     | <u>&lt;</u> | iroup ≥    | Acct      | 33-0    | 1643       |              |         |              |                    | Operator      | JC            |                 | •        |
| Contact | Kevin Aub  | in     |       |            |         |            |     | ~           | Timezone   | (-8) Paci | fic Sta | anda       | rd Time      |         |              | $\bigtriangledown$ | Sales         | TM            |                 | •        |
| Address | 1101-703 I | Eastwo | ood ( | Crescent   |         |            |     |             | Master     |           |         | •          | Туре         |         |              | ▽                  | Rate          |               | 33              | .330 %   |
| OK      |            |        |       |            |         |            |     |             | Forward    |           |         | •          | Mode         | Active  | ▽            |                    | Principal     |               | \$12            | 2,000.00 |
| City    | Princeton  |        |       | Home       | 619-55  | 5-0100     | ٩   | •           | Legal      |           |         | •          | Status       | ACT     |              | •                  | Interest      |               |                 |          |
| State   | CA         |        |       | POE#       | 619-55  | 5-0102     | ٩   | - 260       | Charged    | 03/03/20  | )21     | 13         | Score        |         |              |                    | Fees          |               |                 |          |
| ZIP     | 98975-001  | 6      |       | Cell       | 619-55  | 5-0103     | ٩   | •           | Delnqnt    |           |         | <u>iii</u> | Worked       | 07/12/  | 2029         | 茵                  | Legal fees    |               |                 |          |
| Country | United Sta | tes    | ▽     | Other      |         |            |     |             | Listed     | 10/30/20  | )21     | 鍣          | Validation   | 12/09/  | 2021         |                    | Miscellaneous |               |                 |          |
| Speech  |            | ~      |       | Email      | aubin@  | Dexample.  | col | n 📟         | Closed     |           |         | (ii)       | Payment      | 02/02/  | 2022         |                    | Other charges |               |                 |          |
| SSN     | 735-40-24  | 71     |       | POE        | Global  | Auto Ltd   |     |             | Time-bar   | 01/11/20  | )27     |            | Next         |         |              |                    | Adjustments   |               |                 |          |
| DL      | 3256RP630  | Q      |       | User 1     |         |            |     |             | # attempts |           |         |            | Promise      |         |              |                    | Paid          |               | \$2             | 2,000.00 |
| DOB     | 11/02/197  | 8      | 2     | User 2     |         |            |     |             | # RPC      |           |         |            | Date1        |         |              | (iii)              | Owing         |               | \$1(            | 0,000.00 |
| Summary |            |        |       |            |         |            |     |             |            |           |         |            | Date2        |         |              | 11                 | Settle        |               |                 |          |
|         |            |        |       |            |         |            | _   |             |            |           |         |            |              |         |              |                    | Run plan      |               |                 |          |
| Notes ( | Contacts A | ttachr | nent  | s Cosign   | ers Tra | insactions | D   | etail A1    | A2 A3 CB   | R Group   | Miso    | : Ph       | ones Group   | o notes | Emails       | Addr               | esses         |               |                 |          |
|         |            |        |       |            |         |            |     |             |            |           |         |            |              |         |              |                    |               | _             |                 |          |
| A       | cct holder |        |       |            |         |            |     |             |            |           |         |            | or contact n | ame     |              |                    |               |               | <u>0</u> K      |          |
|         | Bank       | Samp   | le Ba | ank        |         |            |     |             |            | Use (     | cosig   | her f      | or recurring |         |              |                    |               | < <u>&lt;</u> |                 | >>       |
|         | Branch     |        |       |            |         |            |     |             |            |           |         |            |              |         |              |                    |               | Cr            | edi <u>t</u> Ca | ard      |
|         | Account    |        |       |            |         |            |     |             |            |           |         |            |              | k SC    |              | •                  |               |               | AC <u>H</u>     |          |
|         |            | 11111  |       |            |         |            |     |             |            |           |         |            | Acces        | S       |              | •                  |               |               | <u>R</u> ecal   | :        |
|         | Detail 1   |        |       |            |         | 6 <b>7</b> |     |             |            |           |         |            |              |         |              |                    |               |               | Print           |          |
|         |            | Bram   | pton  | , Californ | ia 985  | 67         | _   |             |            |           |         |            |              |         | <u>H</u> elp |                    |               |               | <u>A</u> ction  |          |
|         | Detail 3   | c :    |       |            |         |            |     |             |            |           |         |            |              |         |              |                    |               |               | <u>d</u> vanc   |          |
|         | Detail 4   | Savin  | gs    |            |         |            |     |             |            |           |         |            |              |         |              |                    |               |               | <u>C</u> ancel  |          |
|         |            |        |       |            |         |            |     |             |            |           |         |            |              |         |              |                    |               |               | <u>H</u> elp    |          |

**Detail**: These fields are used to store the banking information for Checks by Phone.

Collect! has a built-in Payment Processing module that allows you to process Credit Card and ACH payments via our partners in a PCI compliant environment.

| Debtor  |                   |             |         |             |     |               |                        |           |         |          |             |                    |      |               |               | 2:52PM ×         |
|---------|-------------------|-------------|---------|-------------|-----|---------------|------------------------|-----------|---------|----------|-------------|--------------------|------|---------------|---------------|------------------|
| Name    | Aubin, Kevin      |             |         |             |     |               | ▽                      | Client    | Relat   | ive N    | Aeasures Co | orp.               | •    | 98 🔹          | V             | iew              |
| File    | 1423              | Group       | 8       | 3           |     | <u>&lt; 6</u> | <u>i</u> roup <u>≻</u> | Acct      | 33-0    | 1643     |             |                    |      | Operator      | JC            | •                |
| Contact | Kevin Aubin       |             |         |             |     | $\nabla$      | Timezone               | (-8) Paci | fic Sta | nda      | rd Time     | $\nabla$           |      | Sales         | TM            | •                |
| Address | 1101-703 Eastwo   | od Crescent |         |             |     |               | Master                 |           |         | •        | Туре        | ~                  |      | Rate          |               | 33.330 %         |
| OK      |                   | _           | _       |             |     |               | Forward                |           |         | •        | Mode        | Active 🔻           |      | Principal     |               | \$12,000.00      |
| City    | Princeton         | Home        | 619-5   | 55-0100     | ¢   |               | Legal                  |           |         | •        | Status      | ACT 🔹              |      | Interest      |               |                  |
| State   | CA                | POE#        | 619-5   | 55-0102     | ¢   | 260           | Charged                | 03/03/20  | )21     | <u>B</u> | Score       |                    |      | Fees          |               |                  |
| ZIP     | 98975-0016        | Cell        | 619-5   | 55-0103     | ر   |               | Delnqnt                |           |         | 11       | Worked      | 07/12/2029 🛛 🖄     |      | Legal fees    |               |                  |
| Country | United States     | 7 Other     |         |             |     |               | Listed                 | 10/30/20  | )21     | 颤        | Validation  | 12/09/2021         |      | Miscellaneous |               |                  |
| Speech  | ~                 | Email       | aubin   | @example.   | cor | n 🔤           | Closed                 |           |         | 11       | Payment     | 02/02/2022         |      | Other charges |               |                  |
| SSN     | 735-40-2471       | POE         | Globa   | l Auto Ltd  |     |               | Time-bar               | 01/11/20  | )27     |          | Next        |                    |      | Adjustments   |               |                  |
| DL      | 3256RP63Q         | User 1      |         |             |     |               | # attempts             |           |         |          | Promise     |                    |      | Paid          |               | \$2,000.00       |
| DOB     | 11/02/1978        | User 2      |         |             |     |               | # RPC                  |           |         |          | Date1       | <u></u>            |      | Owing         |               | \$10,000.00      |
| Summary |                   |             |         |             |     |               |                        |           |         |          | Date2       | <u></u>            |      | Settle        |               |                  |
|         |                   |             |         |             |     |               |                        |           |         |          |             |                    |      | Run plan      |               |                  |
| Notes ( | Contacts Attachm  | ents Cosigr | ners Tr | ansactions  | De  | etail A1      | A2 A3 CB               | Group     | Misc    | Ph       | ones Group  | o notes Emails A   | ddre | esses         |               |                  |
|         |                   |             |         |             |     |               |                        |           |         |          |             |                    |      |               |               |                  |
|         | Reporting industr |             |         |             |     |               |                        |           |         |          |             | eport to credit bu |      |               |               | <u>)</u> K       |
|         | Account typ       |             |         |             |     |               |                        |           |         |          |             | ontrol account m   | anua | ally          | < <u>&lt;</u> | >>               |
|         |                   | e Delete en |         | count from  | cre | dit burea     | au                     |           |         |          | ~           |                    |      |               |               | li <u>t</u> Card |
|         | * Payment rating  | · ·         |         |             |     |               |                        |           |         |          |             | tart reporting 03, |      |               |               | KC <u>H</u>      |
|         |                   | Open Acc    |         | 0 or 90 day | 'S) |               |                        |           |         |          |             | port cosigner No   | )    | ▽             | _             | ecalc            |
|         | Special comment   |             |         |             |     |               |                        |           |         |          | ~           |                    |      |               |               | rint             |
| Assoc   | iation code (ECOA | ·           |         |             |     |               |                        |           |         |          | ~           |                    |      |               |               | tion             |
|         | Condition cod     |             |         |             |     |               |                        |           |         |          | ~           | Co <u>s</u> igner  |      |               |               | vanced           |
|         | Country cod       |             |         |             |     |               |                        |           |         |          | ~           | <u>D</u> efaults   |      |               |               | ncel             |
|         | Indicato          | r None Spe  | cified  |             |     |               |                        |           |         |          | ~           |                    |      |               | H             | elp              |

**CBR**: If this Debtor is to be reported to a Bureau, here is where you can setup and manage the CBR settings.

| Debtor  |                 |         |         |         |            |     |               |                   |          |        |          |             |           |                     |                      |        |               | 2:52PM           | ×        |
|---------|-----------------|---------|---------|---------|------------|-----|---------------|-------------------|----------|--------|----------|-------------|-----------|---------------------|----------------------|--------|---------------|------------------|----------|
| Name    | Aubin, Kevin    |         |         |         |            |     |               | ▽                 | Client   | Rela   | ative I  | Measures Co | rp.       | •                   | 98                   | -      |               | <u>V</u> iew     |          |
| File    | 1423            | Gro     | oup     | 8       | 3          |     | <u>&lt; G</u> | iroup <u>&gt;</u> | Acct     | 33-    | 01643    | }           |           |                     | Ope                  | rator  | JC            |                  | •        |
| Contact | Kevin Aubin     |         |         |         |            |     | ~             | Timezone          | (-8) Pac | ific S | tanda    | rd Time     |           | ~                   |                      | Sales  | ТМ            |                  | •        |
| Address | 1101-703 Eastw  | vood Ci | rescent |         |            |     |               | Master            |          |        | •        | Туре        |           | ~                   |                      | Rate   |               | 33.330           | %        |
| OK      |                 |         |         |         |            |     |               | Forward           |          |        | •        | Mode        | Active    | $\overline{\nabla}$ | Prir                 | icipal |               | \$12,000         | ).00     |
| City    | Princeton       |         | Home    | 619-55  | 5-0100     | ٩   | -             | Legal             |          |        | •        | Status      | ACT       | •                   | Int                  | erest  |               |                  | _        |
| State   | CA              |         | POE#    | 619-55  | 5-0102     | ٩   | - 260         | Charged           | 03/03/2  | 021    |          | Score       |           |                     |                      | Fees   |               |                  | _        |
| ZIP     | 98975-0016      |         | Cell    | 619-55  | 5-0103     | ٩   | •             | Delnqnt           |          |        | 11       | Worked      | 07/12/202 | 9 🖻                 | Lega                 | l fees |               |                  |          |
| Country | United States   | ▽       | Other   |         |            |     |               | Listed            | 10/30/2  | 021    | 50       | Validation  | 12/09/202 | 1                   | Miscellar            | eous   |               |                  |          |
| Speech  | ~               |         | Email   | aubin@  | example.   | cor | m 📼           | Closed            |          |        | <u> </u> | Payment     | 02/02/202 | 2                   | Other ch             | arges  |               |                  |          |
| SSN     | 735-40-2471     |         | POE     | Global  | Auto Ltd   |     |               | Time-bar          | 01/11/2  | 027    |          | Next        |           |                     | Adjustr              | nents  |               |                  |          |
| DL      | 3256RP63Q       |         | User 1  |         |            |     |               | # attempts        |          |        |          | Promise     |           |                     |                      | Paid   |               | \$2,000          | ).00     |
| DOB     | 11/02/1978      | 2       | User 2  |         |            |     |               | # RPC             |          |        |          | Date1       |           | <b>11</b>           | C                    | wing   |               | \$10,000         | ).00     |
| Summary |                 |         |         |         |            |     |               |                   |          |        |          | Date2       |           | <b>**</b>           | :                    | Settle |               |                  |          |
|         |                 |         |         |         |            |     |               |                   |          |        |          |             |           |                     | Run                  | plan   |               |                  |          |
| Notes ( | Contacts Attach | nments  | Cosign  | ers Tra | insactions | D   | etail A1      | A2 A3 CB          | _        | Mis    | sc Ph    | iones Group | notes Em  | nails Add           | resses               |        |               |                  |          |
| Tot     | al accounts 6   | _       | Pri     | incipal |            | \$7 | 4,819.51      |                   | Paid     |        |          | \$2,450.00  |           | Edit <u>M</u>       | ember                |        |               |                  |          |
| Acti    | ve accounts 6   | _       | Ir      | nterest |            |     |               | Active            | Owing    |        |          | \$72,369.51 |           | Membe               | er <u>S</u> etup     |        |               | <u>O</u> K       |          |
| Close   | ed accounts     |         | Fees    | /Legal  |            |     |               | Closed            | Owing    |        |          |             |           | <u>C</u> onta       | ct Plan              |        | < <u>&lt;</u> | >>               | <u>-</u> |
| Other/  | Misc            |         | Adjust  | ments   |            |     |               | Total             | Owing    |        |          | \$72,369.51 |           | <u>E</u> dit G      | roup                 |        | Cre           | di <u>t</u> Card |          |
|         | Members         |         |         |         |            |     |               |                   |          |        |          |             |           |                     | □ x                  |        |               | АС <u>Н</u>      |          |
| File    | <b></b> Name    |         |         | Δ       | Client nun |     |               | _ Liste           |          | Statu  |          | Owing       |           | F                   | aid <sub>∎</sub> oup |        | 1             | <u>R</u> ecalc   |          |
| 1400    | Aubin, Kevi     |         |         |         | 98         |     | 8-77564       |                   | 7/2022   |        |          | \$50,000.00 |           |                     |                      |        |               | <u>P</u> rint    |          |
| 1287    | Aubin, Kevi     |         |         |         | 99         |     | 26-88546      |                   | 2/2022   |        |          | \$350.00    |           |                     |                      |        | A             | ction            |          |
| 1423    | Aubin, Kevi     | n       |         |         | 98         | 33  | 3-01643       | 10/3              | 0/2021   | ACT    |          | \$10,000.00 |           | \$2,000             | 0.00                 |        | A <u>c</u>    | <u>d</u> vanced  |          |
|         |                 |         |         |         |            |     |               |                   |          |        |          |             |           |                     |                      |        | <u> </u>      | ancel            |          |
|         |                 |         |         |         |            |     |               |                   |          |        |          |             |           |                     |                      |        |               | <u>H</u> elp     |          |

**Group**: If this Debtor has multiple debts, you can group them together. The Group tab allows you to setup and navigate the group members.

| Debtor  |                  |       |          |            |         |     |               |                  |                 |       |             |                |          |       |              |               | 2:52P               | м×            |
|---------|------------------|-------|----------|------------|---------|-----|---------------|------------------|-----------------|-------|-------------|----------------|----------|-------|--------------|---------------|---------------------|---------------|
| Name    | Aubin, Kevin     |       |          |            |         |     |               | ▽                | Client Rela     | tive  | Measures Co | orp.           | •        | • 9   | 8            |               | <u>V</u> iew        |               |
| File    | 1423             | Gr    | roup     | 8          | 3       |     | <u>&lt; G</u> | roup <u>&gt;</u> | Acct 33-0       | )1643 | 3           |                |          |       | Operator     | JC            |                     | •             |
| Contact | Kevin Aubin      |       |          |            |         |     | $\nabla$      | Timezone         | (-8) Pacific St | anda  | ird Time    |                | ~        |       | Sales        | TM            |                     | •             |
| Address | 1101-703 Eastwo  | ood C | Crescent |            |         |     |               | Master           |                 | •     | Туре        |                | ~        |       | Rate         |               | 33.33               | 30 %          |
| OK      |                  |       |          |            |         |     |               | Forward          |                 | •     | Mode        | Active 🗢       |          |       | Principal    |               | \$12,0              | 00.00         |
| City    | Princeton        |       | Home     | 619-555-0  | 0100    | ¢   |               | Legal            |                 | •     | Status      | ACT            | •        |       | Interest     |               |                     |               |
| State   | CA               |       | POE#     | 619-555-0  | )102    | ¢   | 260           | Charged          | 03/03/2021      | 3     | Score       |                |          |       | Fees         |               |                     |               |
| ZIP     | 98975-0016       |       | Cell     | 619-555-0  | 0103    | ¢   |               | Delnqnt          |                 | ίΪ    | Worked      | 07/12/2029     | 鍣        |       | Legal fees   |               |                     |               |
| Country | United States    | ~     | Other    |            |         |     |               | Listed           | 10/30/2021      | 50    | Validation  | 12/09/2021     |          | Μ     | iscellaneous |               |                     |               |
| Speech  | ~                |       | Email    | aubin@ex   | ample.  | con | n 📼           | Closed           |                 | 11    | Payment     | 02/02/2022     |          | 0     | ther charges |               |                     |               |
| SSN     | 735-40-2471      |       | POE      | Global Au  | to Ltd  |     |               | Time-bar         | 01/11/2027      |       | Next        |                |          |       | Adjustments  |               |                     |               |
| DL      | 3256RP63Q        |       | User 1   |            |         |     |               | # attempts       |                 |       | Promise     |                |          |       | Paid         |               | \$2,0               | 00.00         |
| DOB     | 11/02/1978       |       | User 2   |            |         |     |               | # RPC            |                 |       | Date1       |                | ίά (     |       | Owing        |               | \$10,0              | 00.00         |
| Summary |                  |       |          |            |         |     |               |                  |                 |       | Date2       |                | <u> </u> |       | Settle       |               |                     |               |
|         |                  |       |          |            |         |     |               |                  |                 |       |             |                |          |       | Run plan     |               |                     |               |
| Notes ( | Contacts Attachr | nents | s Cosign | ers Transa | actions | De  | etail A1      | A2 A3 CBF        | R Group Mis     | c Ph  | iones Group | o notes Emails | Add      | resse | es           |               |                     |               |
|         |                  |       |          |            |         |     |               |                  |                 |       |             |                |          |       |              |               |                     |               |
| Numbe   | er 1             |       | Esti     | mated Tim  | e       |     | _             | User 1           |                 |       |             | 🗆 Swite        | :h 1     |       |              |               | <u>O</u> K          |               |
| Numbe   | er 2             |       | El       | apsed Tim  | e       |     |               | User 2           |                 |       |             | 🗆 Swite        | :h 2     |       |              | < <u>&lt;</u> | :                   | > <u>&gt;</u> |
|         |                  |       |          |            |         |     |               | User 3           |                 |       |             | 🗆 Swite        | :h 3     |       |              | (             | Credi <u>t</u> Caro | b             |
| Dat     | e 1              | m     |          | Process I  | d       |     |               | User 4           |                 |       |             | 🗆 Swite        | :h 4     |       |              |               | АС <u>Н</u>         |               |
| Dat     | e 2              | Ê     | P        | rocess Ste | р       |     |               | User 5           |                 |       |             | 🗆 Swite        | :h 5     |       |              |               | <u>R</u> ecalc      |               |
|         |                  |       |          |            |         |     |               | User 6           |                 |       |             | 🗆 Swite        | :h 6     |       |              |               | <u>P</u> rint       |               |
| Amour   | nt 1             |       |          | Percent    | 1       |     | %             | 5 User 7         |                 |       |             | 🗆 Swite        | :h 7     |       |              |               | <u>A</u> ction      |               |
| Amour   | nt 2             |       |          | Percent    | 2       |     | %             | User 8           |                 |       |             | 🗖 Swite        | :h 8     |       |              |               | A <u>d</u> vanced   | 1             |
|         |                  |       |          | Risk Scor  | e       | 9   | %             |                  |                 |       |             |                |          |       |              |               | <u>C</u> ancel      |               |
|         |                  |       |          |            |         |     |               |                  |                 |       |             |                |          |       |              |               | <u>H</u> elp        |               |

Miscellaneous: Completely user-defined with a variety of numeric and checkbox fields.

| Debtor    |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       |               |     | 2:52              | PM ×          |
|-----------|-----------------|------|-----------|------------|--------|-----|---------------|------------|----------|---------|----------|-------------|-----------|-------|-------|---------------|-----|-------------------|---------------|
| Name      | Aubin, Kevin    |      |           |            |        |     |               | ▽          | Client   | t Rela  | tive I   | Measures Co | orp.      |       | -     | 98 💌          |     | <u>V</u> iew      |               |
| File      | 1423            | (    | Group     | 8          | 3      |     | <u>&lt; G</u> | iroup ≥    | Acc      | t 33-0  | 01643    | }           |           |       |       | Operator      | JC  |                   | •             |
| Contact   | Kevin Aubin     |      |           |            |        |     | ~             | Timezone   | (-8) Pac | ific St | anda     | ird Time    |           |       | ~     | Sales         | ΤM  |                   | •             |
| Address   | 1101-703 Eastw  | vood | Crescent  |            |        |     |               | Master     |          |         | •        | Туре        |           |       | ~     | Rate          |     | 33.               | .330 %        |
| OK        |                 |      |           |            |        |     |               | Forward    |          |         | •        | Mode        | Active    | ~     |       | Principal     |     | \$12              | 2,000.00      |
| City      | Princeton       |      | Home      | 619-555-0  | 100    | ¢   |               | Legal      |          |         | •        | Status      | ACT       |       | -     | Interest      |     |                   |               |
| State     | CA              |      | POE#      | 619-555-0  | 102    | ¢   | 260           | Charged    | 03/03/2  | 2021    | 8        | Score       |           |       |       | Fees          |     |                   |               |
| ZIP       | 98975-0016      |      | Cell      | 619-555-0  | 103    | ¢   |               | Delnqnt    |          |         | <u> </u> | Worked      | 07/12/20  | 29 1  | 2     | Legal fees    |     |                   |               |
| Country   | United States   | ~    | Other     |            |        |     |               | Listed     | 10/30/2  | 2021    | 訪        | Validation  | 12/09/20  | 21    |       | Miscellaneous |     |                   |               |
| Speech    | ~               |      | Email     | aubin@ex   | ample. | com | n 📼           | Closed     |          |         | m        | Payment     | 02/02/20  | 22    |       | Other charges |     |                   |               |
| SSN       | 735-40-2471     |      | POE       | Global Aut | to Ltd |     |               | Time-bar   | 01/11/2  | 2027    |          | Next        |           |       |       | Adjustments   |     |                   |               |
| DL        | 3256RP63Q       |      | User 1    |            |        |     |               | # attempts |          |         |          | Promise     |           |       |       | Paid          |     | \$2               | 2,000.00      |
| DOB       | 11/02/1978      | 2    | User 2    |            |        |     |               | # RPC      |          |         |          | Date1       |           | l     |       | Owing         |     | \$10              | 0,000.00      |
| Summary   |                 |      |           |            |        |     |               |            |          |         |          | Date2       |           | ť     |       | Settle        |     |                   |               |
|           |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       | Run plan      |     |                   |               |
| Notes     | Contacts Attach | nmen | ts Cosign | ers Transa |        |     |               | A2 A3 CBF  |          |         | c Ph     | iones Grou  | o notes E | mails | Addre | esses         |     |                   |               |
| Phone nu  | mber            | Exte | ension    | Active     | Posit  | ion |               | Owner      | RPC      | 2       | D        | ate         |           |       |       |               |     |                   |               |
| 619-555-0 | 0103            |      |           | Yes        | Cell   |     |               | Self       |          |         |          |             |           |       |       |               |     | <u>O</u> K        |               |
| 619-555-0 | 0102            | 260  |           | Yes        | Fax    |     |               | Self       |          |         |          |             |           |       |       |               | < < |                   | > <u>&gt;</u> |
| 619-555-0 | 0100            |      |           | Yes        | Phor   | ne  |               | Self       |          |         |          |             |           |       |       |               |     | Credi <u>t</u> Ca | ird           |
| 719-555-0 | 0102            | 260  |           | Yes        | Fax    |     |               | Employer   |          |         |          |             |           |       |       |               |     | АС <u>Н</u>       |               |
| 812-555-0 | 0103            |      |           | No         | Cell   |     |               | Self       |          |         |          |             |           |       |       |               |     | <u>R</u> ecalo    | :             |
| 916-555-0 | 0100            |      |           | No         | Phor   | ne  |               | Self       | Х        |         |          |             |           |       |       |               |     | <u>P</u> rint     |               |
|           |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       |               |     | <u>A</u> ction    |               |
|           |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       |               |     | A <u>d</u> vance  | ed            |
|           |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       |               |     | <u>C</u> ancel    |               |
|           |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       |               |     | <u>H</u> elp      |               |
|           |                 |      |           |            |        |     |               |            |          |         |          |             |           |       |       |               |     |                   |               |

**Phones**: This tab lists associated phone numbers for the Debtor, including historical numbers, and the last Right Party Contact (RPC). Click on any number to open the Phone Screen to add detail on that number and to add opt-in and opt-out information for phone and text that will be logged in dedicated Opt In/Out Logs.

The Opt In/Out functionality is an important part of Collect!'s compliance functionality. The Phone Screen also provides an RPC Override for occasions when a consumer gives permission for a further call within a lockout period.

| Debtor    |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | 2:52P              | M ×           |
|-----------|-----------------|-----|-----------|------|---------------------|----|---------------|------------|-----------------|------------|-------------|------------|------------|-------|---------------|---------------|--------------------|---------------|
| Name      | Aubin, Kevin    |     |           |      |                     |    |               | ▽          | Client Rela     | tive       | Measures Co | orp.       |            | •     | 98 🔹          |               | <u>V</u> iew       |               |
| File      | 1423            | (   | Group     | 8    | 3                   |    | <u>&lt; 0</u> | iroup ≥    | Acct 33-0       | 0164       | 3           |            |            |       | Operator      | JC            |                    | •             |
| Contact   | Kevin Aubin     |     |           |      |                     |    | ▽             | Timezone   | (-8) Pacific St | anda       | ard Time    |            | ~          |       | Sales         | ΤM            |                    | •             |
| Address   | 1101-703 Eastw  | ood | Crescent  |      |                     |    |               | Master     |                 | •          | Туре        |            | ~          |       | Rate          |               | 33.3               | 30 %          |
| OK        |                 |     |           |      |                     |    |               | Forward    |                 | •          | Mode        | Active 🔹   | 7          |       | Principal     |               | \$12,0             | 00.00         |
| City      | Princeton       |     | Home      | 61   | 9-555-0100          | ٩  |               | Legal      |                 | •          | Status      | ACT        | •          |       | Interest      |               |                    |               |
| State     | CA              |     | POE#      | 61   | 9-555-0102          | فر | 260           | Charged    | 03/03/2021      | 3          | Score       |            |            |       | Fees          |               |                    |               |
| ZIP       | 98975-0016      |     | Cell      | 61   | 9-555-0103          | ٩  |               | Delnqnt    |                 | Ê          | Worked      | 07/12/2029 | 箆          |       | Legal fees    |               |                    |               |
| Country   | United States   | ~   | Other     |      |                     |    |               | Listed     | 10/30/2021      | 30         | Validation  | 12/09/2021 |            | Μ     | liscellaneous |               |                    |               |
| Speech    | ~               |     | Email     | au   | bin@example.o       | on | n 📼           | Closed     |                 | <u>iii</u> | Payment     | 02/02/2022 |            | 0     | ther charges  |               |                    |               |
| SSN       | 735-40-2471     |     | POE       | Glo  | obal Auto Ltd       |    |               | Time-bar   | 01/11/2027      |            | Next        |            |            |       | Adjustments   |               |                    |               |
| DL        | 3256RP63Q       |     | User 1    |      |                     |    |               | # attempts |                 |            | Promise     |            |            |       | Paid          |               | \$2,0              | 00.00         |
| DOB       | 11/02/1978      | 2   | User 2    |      |                     |    |               | # RPC      |                 |            | Date1       |            | <u> </u>   |       | Owing         |               | \$10,0             | 00.00         |
| Summary   |                 |     |           |      |                     |    |               |            |                 |            | Date2       |            | <u>iii</u> |       | Settle        |               |                    |               |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       | Run plan      |               |                    |               |
|           | Contacts Attach | men | ts Cosign | ners | <b>Transactions</b> | De | etail A1      | A2 A3 CBF  |                 |            |             |            | ils Ad     | dress | es            |               |                    |               |
| Email Add |                 |     |           |      |                     |    |               |            | Acti            | ve         |             | ource      |            |       |               |               |                    |               |
| aubin@ex  | kample.com      |     |           |      |                     |    |               |            | Yes             |            | C           | lient      |            |       |               |               | <u>O</u> K         |               |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               | < <u>&lt;</u> |                    | > <u>&gt;</u> |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               | (             | Credi <u>t</u> Car | d             |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | АС <u>Н</u>        |               |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | <u>R</u> ecalc     |               |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | <u>P</u> rint      |               |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | <u>A</u> ction     |               |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | A <u>d</u> vanced  | ł             |
|           |                 |     |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | <u>C</u> ancel     |               |
|           |                 | -   |           |      |                     |    |               |            |                 |            |             |            |            |       |               |               | <u>H</u> elp       |               |

**Emails**: Any associated email record for the Debtor, including historical addresses.

The Opt In/Out functionality of this tab mirrors that of the Phone Tab.

| Debtor   |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               |                | 2:52PM ×           |
|----------|-----------------|------|-----------|--------|-------------|----|-------------|-------------------|-----------------|------|-------------|-----------|--------------------|----------|---------------|----------------|--------------------|
| Name     | Aubin, Kevin    |      |           |        |             |    |             | ▽                 | Client Rela     | tive | Measures Co | orp.      |                    | •        | 98 💌          |                | <u>V</u> iew       |
| File     | 1423            | (    | Group     | 8      | 3           |    | <u>&lt;</u> | iroup <u>&gt;</u> | Acct 33-01643   |      |             |           |                    | Operator | JC            | •              |                    |
| Contact  | act Kevin Aubin |      |           |        |             |    | ~           | Timezone          | (-8) Pacific St | anda | ard Time    |           |                    | ~        | Sales         | TM             | •                  |
| Address  | 1101-703 Eastw  | lood | Crescent  |        |             |    |             | Master            |                 | •    | Туре        |           | •                  | ~        | Rate          |                | 33.330 %           |
| OK       |                 |      |           |        |             |    |             | Forward           |                 | •    | Mode        | Active    | $\bigtriangledown$ |          | Principal     |                | \$12,000.00        |
| City     | Princeton       |      | Home      | 619-5  | 55-0100     |    |             | Legal             |                 | •    | Status      | ACT       |                    | •        | Interest      |                |                    |
| State    | CA              |      | POE#      | 619-5  | 55-0102     |    | - 260       | Charged           | 03/03/2021      | 3    | Score       |           |                    |          | Fees          |                |                    |
| ZIP      | 98975-0016      |      | Cell      | 619-5  | 55-0103     |    | L           | Delnqnt           |                 |      | Worked      | 07/12/20  | 29 1               | <b>1</b> | Legal fees    |                |                    |
| Country  | United States   | ▽    | Other     |        |             |    |             | Listed            | 10/30/2021      | 颤    | Validation  | 12/09/20  | 21                 |          | Miscellaneous |                |                    |
| Speech   | ~               |      | Email     | aubin  | @example.   | со | m 📼         | Closed            |                 |      | Payment     | 02/02/20  | 22                 |          | Other charges |                |                    |
| SSN      | 735-40-2471     |      | POE       | Globa  | al Auto Ltd |    |             | Time-bar          | 01/11/2027      |      | Next        |           |                    |          | Adjustments   |                |                    |
| DL       | 3256RP63Q       |      | User 1    |        |             |    |             | # attempts        |                 |      | Promise     |           |                    |          | Paid          |                | \$2,000.00         |
| DOB      | 11/02/1978      | Ë    | User 2    |        |             |    |             | # RPC             |                 |      | Date1       |           | ĺ                  |          | Owing         |                | \$10,000.00        |
| Summary  |                 |      |           |        |             |    |             |                   |                 |      | Date2       |           | ĺ                  |          | Settle        |                |                    |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          | Run plan      |                |                    |
| Notes (  | Contacts Attach | men  | ts Cosign | ers Tr | ansactions  | D  | etail A1    | A2 A3 CB          | R Group Mis     | c Ph | nones Group | o notes E | mails              | Addre    | esses         |                |                    |
| Address  |                 |      |           |        |             | С  | ity         |                   | State           | Tj   | ype         |           |                    |          |               |                |                    |
| 1101-703 | Eastwood Cresc  | ent  |           |        |             | Ρ  | rinceton    |                   | CA              | Ρ    | ersonal     |           |                    |          |               |                | <u>О</u> К         |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               | < <u>&lt;</u>  | > <u>&gt;</u>      |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               | C              | redi <u>t</u> Card |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               |                | AC <u>H</u>        |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               | <u>R</u> ecalc |                    |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               |                | <u>P</u> rint      |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               |                | <u>A</u> ction     |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               | 1              | A <u>d</u> vanced  |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               |                | <u>C</u> ancel     |
|          |                 |      |           |        |             |    |             |                   |                 |      |             |           |                    |          |               |                | <u>H</u> elp       |

Addresses: Any associated address record for the Debtor, including historical addresses.

This brings us to the end of our overview of the Debtor Screen.

|  | Prog |  |
|--|------|--|
|  |      |  |
|  |      |  |

| Priority                   |        |     |   |       |          |    |
|----------------------------|--------|-----|---|-------|----------|----|
| • All                      | Туре А | All | ~ | То    | 01/01/20 | 22 |
| <ul> <li>High</li> </ul>   | Client | •   |   | From  | 01/01/20 | 22 |
| <ul> <li>Medium</li> </ul> | Status | •   |   | Total | 28       |    |
| ○ Low                      |        |     |   |       |          |    |

| Total | Today | Past | Done | - 11           |
|-------|-------|------|------|----------------|
| 1     | , i   | 1    |      | E <u>x</u> it  |
| 23    |       | 23   | 3    |                |
| 4     |       | 4    |      | <u>R</u> eload |
|       |       |      |      |                |
|       | 1     | 1    | 1 1  | 1 1            |

|   | IO DO L | List For:                        | OWN                  |              |                 |             |            |                |                     |                         |   |
|---|---------|----------------------------------|----------------------|--------------|-----------------|-------------|------------|----------------|---------------------|-------------------------|---|
|   | Туре .  | <sub>∎</sub> Priori <sub>∎</sub> | Name 🗸               | ₄ Status   ₄ | Description     | Date ₄      | Client 🖣 🖣 | Owing Score₄   | Time Zone 🛛 🤘       | Days since last payment | ۹ |
|   | 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  | -262                    |   |
|   | 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 Standa | -148                    |   |
|   | Phone   | 50                               | Peters, Henry        | ACT          | Home            | 01/01/2022  | 96         | \$4,389.12     | (-7) Mountain Sta   | -126                    |   |
|   | Phone   | 30                               | Bradley, William     | ACT          | Home            | 01/01/2022  | 94         | \$2,988.45     | Local Time          | -148                    |   |
|   | Phone   | 30                               | Freeman, James       | NEW          | Home            | 01/01/2022  | 99         | \$3,272.50 450 | (-5) Eastern Stand  | -330                    |   |
|   | Review  | 30                               | Heinberg, Klaus      | PRA          | Review file     | 01/01/2022  | 99         | \$183.06       | (-5) Eastern Stand  | -54                     |   |
|   | Review  | 30                               | Kelley, Frank        | PRA          | Review file     | 01/01/2022  | 97         | \$1,425.00     | (-5) Eastern Stand  | -126                    |   |
|   | Review  | 30                               | Matheson, Debra      | NEW          | Review file     | 01/01/2022  | 95         | \$1,178.46     | (-5) Eastern Stand  | -170                    |   |
|   | Phone   | 30                               | Nilley, William      | NEW          | Home            | 01/01/2022  | 98         | \$7,356.22     | (-8) Pacific Standa | -371                    |   |
|   | Phone   | 30                               | Rice, Jeffrey        | NEW          | Home            | 01/01/2022  | 98         | \$2,956.90     | (-5) Eastern Stand  | -196                    |   |
|   | Phone   | 30                               | Riggs, Terry         | ACT          | Home            | 01/01/2022  | 97         | \$1,256.40     | (-5) Eastern Stand  | -126                    |   |
|   | Phone   | 30                               | Ryan, John           | NEW          | Home            | 01/01/2022  | 106        | \$1,467.00     | (-7) Mountain Sta   |                         |   |
|   | Promis  | e 30                             | Schneider, Arthur    | JDG          | judgment to pay | 101/01/2022 | 95         | \$6,600.00     | (-8) Pacific Standa | -371                    |   |
|   | 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  |                         |   |
| 4 |         |                                  |                      |              |                 |             |            |                |                     |                         |   |

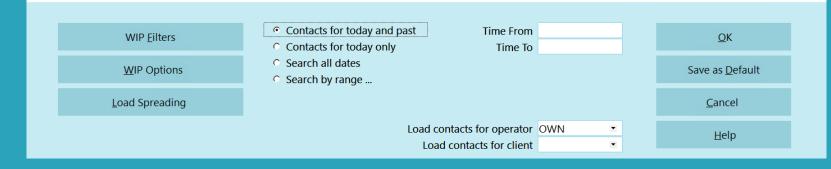
Finally, we will look at the Work in Progress List. Operators work from individual work queues, called Work in Progress (WIP) lists. WIP Lists are made up of scheduled contact events, or operator tasks, not debtor accounts. The purpose of the WIP list is to present operators with their current tasks and provide quick access to the screens they need to complete those tasks. Automated tasks do not show up on WIP lists.

Collectors are usually set to open to their WIP list when they sign in. Operators can use the filtering options in the upper left and track their progress in the upper right.

#### **Reload Work In Progress List**

Refresh your Work In Progress (WIP) list by reloading from the database. Access WIP Options and WIP Reload Filters forms where you can change WIP List load settings. Select other Operator IDs to load multiple WIP Lists.

Promise, Review, Phone and Other contacts scheduled for today and the past, and assigned to your Operator ID are loaded into your To Do List automatically, each time you open it fresh.



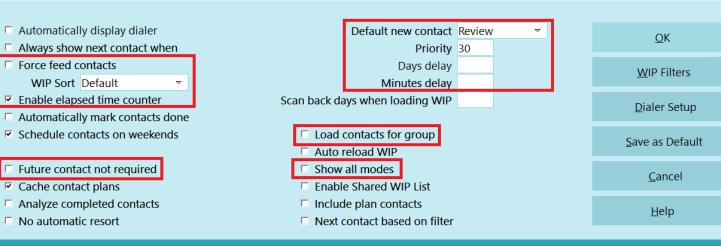
When you click the Reload button, you get access to the Date and Operator filters.

The Load Contacts for Operator field is only accessible for Managers, or Operators with the Group option enabled.

When accessing the WIP list of another Operator, Collect! will also load that Operator's configuration, so you can see their WIP list from their point of view.

#### **WIP Options**

The WIP Options form displays many settings used to control the behavior of your Work In Progress (WIP) List. The settings determine what displays in the WIP List and assist in managing your contact scheduling. You may set options on an individual basis for each of your operators and their WIP settings will be loaded when they load their WIP Lists.



#### If you click the WIP Options button, you get more options to configure your WIP list. Some key items are:

Force Feed: forces the user to work the WIP in the order set in the WIP Sort field.

WIP Sort: Sets the default sort order for the WIP when reloaded.

Enabled Elapsed Time Counter: when enabled, Collect! will track how long users are on an account while working the WIP and store the value in the Elapsed field of the applicable contact.

Future Contact not Require: if checked, Collect! will not check the account for a future-dated contact. This is not recommended for collectors as it can orphan the account.

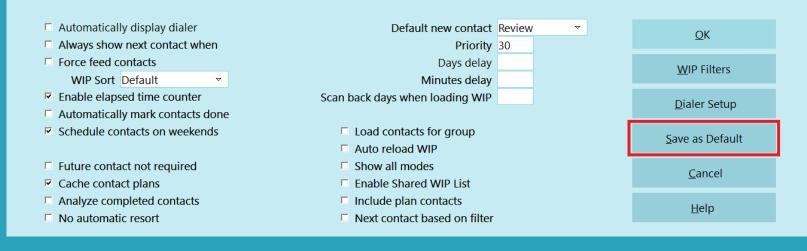
Load Contacts for Group: this is primarily for a Team Leader to be able to see all the team's open contacts in a single list.

Show All Mode: by default, Collect! will only show contacts for Debtors with Mode Active. This option allows users to see all modes, including Suspended or Closed.

Defaults for New Contacts: this section allows you to set your defaults for new contacts.

#### **WIP Options**

The WIP Options form displays many settings used to control the behavior of your Work In Progress (WIP) List. The settings determine what displays in the WIP List and assist in managing your contact scheduling. You may set options on an individual basis for each of your operators and their WIP settings will be loaded when they load their WIP Lists.



If you modify anything, use the SAVE AS DEFAULT button to save the changes.

The OK button will only store the changes for the current session. Changes will only apply to the currently signed in Operator.

To make changes for all Operators, sign in with Operator 99. Please note that if a user already has a custom configuration file, changes with 99 will not affect the operator's configuration.

#### Work In Progress

| Priority |        |     |   |   |       |          |    |
|----------|--------|-----|---|---|-------|----------|----|
| • All    | Туре   | All | ~ | ~ | То    | 01/01/20 | 22 |
| High     | Client |     | • |   | From  | 01/01/20 | 22 |
| Medium   | Status |     | • |   | Total | 28       |    |
| C Low    |        |     |   |   |       |          |    |

| Total | Today | Past | Done | <b>F.</b>      |
|-------|-------|------|------|----------------|
| 1     |       | 1    |      | E <u>x</u> it  |
| 23    |       | 23   | 3    |                |
| 4     |       | 4    |      | <u>R</u> eload |
|       |       |      |      |                |
|       | 1     | 1    | 1 1  | 1 1            |

Right-clicking the column header for the To Do list and selecting Insert or Remove Field allows you to select which columns will appear in the WIP list.

| Γο Do L | ist For: | OWN                     |     |            |            |              |                          |                     |                         | ∎ × |
|---------|----------|-------------------------|-----|------------|------------|--------------|--------------------------|---------------------|-------------------------|-----|
| Туре    | Priori a | Nar <u>E</u> dit        |     | cription . | d Date     | ₄ Client 🔺 ₄ | Owing Score <sub>4</sub> | Time Zone 🛛 🧃       | Days since last payment |     |
| Phone   | 50       | Mit <u>M</u> ove        |     | ne         | 01/01/2022 | 2 98         | \$2,500.00               | (-6) Central Stand  | 1                       |     |
| Phone   | 50       | Mu                      |     | ne         | 01/01/2022 | 2 97         | \$7,362.30               | (-5) Eastern Stand  | -262                    |     |
| Phone   | 50       | Nac Insert Field        |     | ne         | 01/01/2022 | 2 92         | \$6,477.78               | (-5) Eastern Stand  |                         |     |
| Phone   | 50       | Par <u>Remove Field</u> |     | ne         | 01/01/2022 | 2 94         | \$3,067.50               | (-8) Pacific Standa | -148                    |     |
| Phone   | 50       | Pet                     |     | me         | 01/01/2022 | 2 96         | \$4,389.12               | (-7) Mountain Sta   | 1-126                   |     |
| Phone   | 30       | Bra Restore Defaul      | t   | ne         | 01/01/2022 | 2 94         | \$2,988.45               | Local Time          | -148                    |     |
| Phone   | 30       | Freeman, James          | NEW | Home       | 01/01/2022 | 2 99         | \$3,272.50 450           | (-5) Eastern Stand  | 1-330                   |     |
| Phone   | 30       | Nilley, William         | NEW | Home       | 01/01/2022 | 2 98         | \$7,356.22               | (-8) Pacific Standa | -371                    |     |
| Phone   | 30       | Rice, Jeffrey           | NEW | Home       | 01/01/2022 | 2 98         | \$2,956.90               | (-5) Eastern Stand  | 1-196                   |     |
| Phone   | 30       | Riggs, Terry            | ACT | Home       | 01/01/2022 | 2 97         | \$1,256.40               | (-5) Eastern Stand  | 1-126                   |     |
| Phone   | 30       | Ryan, John              | NEW | Home       | 01/01/2022 | 2 106        | \$1,467.00               | (-7) Mountain Sta   |                         |     |
| Phone   | 30       | Scott, Sandra R.        | NEW | Home       | 01/01/2022 | 2 92         | \$1,560.70               | (-5) Eastern Stand  | 1                       |     |
| Phone   | 30       | Selinas, Christopher    | NEW | Home       | 01/01/2022 | 2 92         | \$5,680.00               | (-7) Mountain Sta   |                         |     |
| Phone   | 30       | Stanfield, Rachael      | JDG | Home       | 01/01/2022 | 2 98         | \$5,500.00               | (-5) Eastern Stand  | 1                       |     |
| Phone   | 30       | Stockton, Sammy         | NEW | Home       | 01/01/2022 | 2 99         | \$3,457.90               | (-8) Pacific Standa |                         |     |
| Phone   | 30       | Stutt, Jane H.          | NEW | Home       | 01/01/2022 | 2 97         | \$4,734.80               | (-6) Central Stand  | -358                    |     |
| Phone   | 30       | Taylor, Elizabeth       | NEW | Home       | 01/01/2022 | 2 104        | \$6,112.00               | Local Time          | -249                    |     |
| Phone   | 30       | Tessier, Petre          | NEW | Home       | 01/01/2022 | 2 99         | \$1,975.78               | (-8) Pacific Standa | -358                    |     |
|         |          |                         |     |            |            |              |                          |                     |                         |     |

| Debtor  |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               |               | 5:00F             | M ×    |
|---------|------------------|---------------------------|----------|----------|--------|-------|---------------------------------------|-------------|------------|-------------|-----------|----------|-----|---------------|---------------|-------------------|--------|
| Name    | Mitchell, Mary   |                           |          |          |        |       | ~                                     | Client Re   | elative    | Measures Co | orp.      |          | •   | 98 🔹          |               | <u>V</u> iew      |        |
| File    | 4418             | Group                     |          |          | <      |       | iroup ≥                               | Acct 34     | 4-60594    | 1           |           |          |     | Operator      | OWN           |                   | •      |
| Contact | Mary Mitchell    |                           |          |          |        | ~     | Timezone                              | (-6) Centra | al Stand   | ard Time    |           | ~        |     | Sales         |               |                   | •      |
| Address | 2203 Amanda Dri  | ve                        |          |          |        |       | Master                                |             | •          | Туре        |           | ~        |     | Rate          |               | 33.3              | 30 %   |
| OK      |                  |                           |          |          |        |       | Forward                               |             | •          | Mode        | Active    | ~        |     | Judgement     |               | \$2,              | 500.00 |
| City    | Fort Wayne       | Hom                       | e 219-5  | 55-0133  | و      |       | Legal                                 |             | •          | Status      | NEW       | •        |     | Interest      |               |                   |        |
| State   | IN               | POE                       | #        |          |        |       | Charged                               | 01/13/2022  | 2 🛍        | Score       |           |          |     | Fees          |               |                   |        |
| ZIP     | 19685            | Ce                        | II       |          |        |       | Delnqnt                               |             | <u>iii</u> | Worked      | 03/04/202 | 23 🖾     |     | Legal fees    |               |                   |        |
| Country | United States    | <ul> <li>Other</li> </ul> | r        |          |        |       | Listed                                | 05/22/2022  | 2 凿        | Validation  |           |          |     | Miscellaneous |               |                   |        |
| Speech  | ~                | Ema                       | il maryr | n@exampl | e.com  |       | Closed                                |             | (ii)       | Payment     |           |          |     | Other charges |               |                   |        |
| SSN     | 777-12-4857      | PO                        | E        |          |        |       | Time-bar                              | 02/08/2043  | 3          | Next        |           |          |     | Adjustments   |               |                   |        |
| DL      | DL103847563      | User                      | 1        |          |        |       | # attempts                            |             |            | Promise     |           |          |     | Paid          |               |                   |        |
| DOB     | 02/01/1985       | User                      | 2        |          |        |       | # RPC                                 |             |            | Date1       |           | 11       |     | Owing         |               | \$2, <del>;</del> | 459.50 |
| Summary |                  |                           |          |          |        |       |                                       |             |            | Date2       |           | 11       |     | Settle        |               |                   |        |
|         |                  |                           |          | (        | 01/01, | /2022 | 50 OWN Ho                             | me          |            |             | _         |          |     | Run plan      |               |                   |        |
|         | contacts Attacnm |                           |          |          | Deta   | II AT | · · · · · · · · · · · · · · · · · · · | - ' - ' - ' |            | iones       | E         | naiis Ad | dre | sses          |               |                   |        |
| Туре    | Due date         | Priority                  |          |          |        |       |                                       | Collector   | Do         |             |           |          |     |               |               |                   |        |
| Letter  | 06/21/2022       | 10                        | Letter 2 | 2        |        |       |                                       | SC          | Yes        |             |           |          |     |               |               | <u>O</u> K        |        |
| Phone   | 05/25/2022       | 30                        | Home     |          |        |       |                                       | SC          | Yes        |             |           |          |     |               | < <u>&lt;</u> |                   | >>     |
| Letter  | 05/22/2022       | 10                        | Letter 1 |          |        |       |                                       | SC          | Yes        |             |           |          |     | _             | Cr            | edi <u>t</u> Car  | d      |
| Phone   | 01/01/2022       | 50                        | Home     |          |        |       |                                       | OWN         | No         |             |           |          |     |               |               | AC <u>H</u>       |        |
|         |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               |               | <u>R</u> ecalc    |        |
|         |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               |               | <u>P</u> rint     |        |
|         |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               |               | <u>A</u> ction    |        |
|         |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               |               | <u>d</u> vance    | d      |
|         |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               | !             | <u>C</u> ancel    |        |
|         |                  |                           |          |          |        |       |                                       |             |            |             |           |          |     |               |               | <u>H</u> elp      |        |

Clicking a WIP list item will open the Debtor account with the Current WIP Event highlighted in the bar above the tabs.

From here you can review the account, proceed with the necessary action, then click the bar to manage the Current WIP Event.

The next few slides will go over different ways of working an account.

| Debtor   |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | 5:00PM ×                |
|----------|---|--------------|--------------|----------|-------------|----|------------------|----------|---------|-------|-------------|------------|----------|---------------|---------------|-------------------------|
| Name     | Mitchell, Mary  |              |              |          |             |    | ▽                | Client   | Relat   | ive I | Measures Co | orp.       | -        | 98 🔹          | Ŋ             | <u>V</u> iew            |
| File     | 4418  | Group        |              |          | <u>&lt;</u> | G  | roup <u>&gt;</u> | Acct     | 34-6    | 0594  | ļ           |            |          | Operator      | OWN           | •                       |
| Contact  | Mary Mitchell   |              |              |          |             | ~  | Timezone         | (-6) Cen | tral St | and   | ard Time    |            | ~        | Sales         |               | •                       |
| Address  | 2203 Amanda Driv  | /e           |              |          |             |    | Master           |          |         | -     | Туре        |            | ~        | Rate          |               | 33.330 %                |
| OK       |   |              |              |          |             |    | Forward          |          |         | •     | Mode        | Active 🔻   |          | Judgement     |               | \$2,500.00              |
| City     | Fort Wayne  | Home         | 219-555-013  | 33       | ٤           |    | Legal            |          |         | •     | Status      | NEW        | •        | Interest      |               |                         |
| State    | IN  | POE#         |              |          |             |    | Charged          | 01/13/20 | )22     | 饡     | Score       |            |          | Fees          |               |                         |
|          | 19685   | Cell         |              |          |             |    | Delnqnt          |          |         | 首     |             | 03/04/2023 | 23       | Legal fees    |               |                         |
| Country  | United States   | ound         |              |          |             |    | Listed           | 05/22/20 | )22     | 趐     | Validation  |            |          | Miscellaneous |               |                         |
| Speech   |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               |                         |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               |                         |
|          | DL     DL103847563     User 1     # attempts     Promise     Promise            |              |              |          |             |    |                  |          |         |       |             |            |          |               |               |                         |
|          | DOB         02/01/1985         User 2         # RPC         Date1         Date1 |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | \$2,459.50              |
| Summary  |   |              |              |          |             |    |                  |          |         |       | Date2       |            | <u> </u> | Settle        |               |                         |
|          |   |              | _            |          |             |    | 50 OWN Ho        |          |         |       |             |            |          | Run plan      |               |                         |
|          | Contacts Attachm  | ents Cosign  | ers Transact | ions     | Detail      | A1 | A2   A3   CBI    | RGroup   | Misc    | Ph    | ones        | Emails     | Addr     | esses         |               |                         |
| Debtor   |   |              |              |          |             | -  |                  |          |         |       |             |            |          | ×             |               | 01/                     |
| 02/22/20 | 022 15:01:34 NEW  | OWN : called | d home, and  | left a i | messag      | e  |                  |          |         |       |             |            |          |               |               | <u>O</u> K              |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               | < <u>&lt;</u> | > <u>&gt;</u>           |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | di <u>t</u> Card        |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | AC <u>H</u>             |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | <u>R</u> ecalc<br>Print |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | ction                   |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | lvanced                 |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          | ¥             |               | ancel                   |
|          |   |              |              |          |             |    |                  |          |         |       |             |            |          |               |               | Help                    |
| Line:    | 1 Col: 62   |              |              |          |             |    |                  |          |         |       |             |            |          | li.           | 1             |                         |

Typing a note line, such as a call result, then clicking OK will prompt you to take an action on the current event.

| Debtor    |                  |            |          |               |             |                   |           |           |                          |               |   |             |               | 5:00PM ×         |
|-----------|------------------|------------|----------|---------------|-------------|-------------------|-----------|-----------|--------------------------|---------------|---|-------------|---------------|------------------|
| Name      | Mitchell, Mary   |            |          |               |             |                   | ▽         | Client    | Relative Measures Co     | rp.           | • | 98 🔹        | 7             | <u>/</u> iew     |
| File      | 4418             | Group      |          |               | <u>&lt;</u> | <u>G</u> roup     | ) >       | Acct      | 34-60594                 |               |   | Operator    | OWN           | •                |
| Contact   | Mary Mitchell    |            |          |               |             |                   |           |           |                          |               | × | Sales       |               | •                |
| Address   | 2203 Amanda Dri  | ve         |          |               |             |                   |           |           |                          |               |   | Rate        |               | 33.330 %         |
| OK        |                  |            | ?        | What wo       | ould yo     | ou like to        | do with   | h this ph | none contact event?      |               |   | Judgement   |               | \$2,500.00       |
| City      | Fort Wayne       | Hor        | <u> </u> | 0             |             |                   |           |           |                          |               |   | Interest    |               |                  |
| State     | IN               | PO         |          | Owner<br>Type |             | hell, Ma:<br>Ph : | -         |           |                          |               |   | Fees        |               |                  |
| ZIP       | 19685            | C          |          | Descript      | ion         | : Ho              |           |           |                          |               |   | Legal fees  |               |                  |
| Country   | United States    | ✓ Oth      |          | Date an       |             |                   | /01/2022  | 2         |                          |               |   | scellaneous |               |                  |
| Speech    | ~                | Em         |          | Operato       | r : OW      | N                 |           |           |                          |               |   | her charges |               |                  |
| SSN       | 777-12-4857      | P          |          |               |             |                   |           |           |                          |               |   | djustments  |               |                  |
| DL        | DL103847563      | Use        |          |               |             |                   | n WIP lis | st" to ke | ep the contact in your   | To Do         |   | Paid        |               |                  |
| DOB       | 02/01/1985       | Use        |          | to go ba      |             |                   | it done"  | to mar    | k the current contact ev | ient ac       |   | Owing       |               | \$2,459.50       |
| Summary   |                  |            |          | complet       |             |                   | it done   | to man    | k the current contact ev | cint as       |   | Settle      |               |                  |
|           |                  |            |          |               |             | o stay on         | the acc   | ount fo   | r the moment and deci    | de later, you |   | Run plan    |               |                  |
|           | Contacts Attachm |            |          | can sele      | ect "Sta    | y on acc          | ount."    |           |                          |               |   | S           |               |                  |
| 02/22/202 | 2 15:01:34 NEW O | WN : calle |          |               |             |                   |           |           |                          |               |   |             |               |                  |
|           |                  |            |          | Which a       | ction v     | vould yo          | u like to | take?     |                          |               |   |             |               | <u>O</u> K       |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             | < <u>&lt;</u> | >>               |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             |               | di <u>t</u> Card |
|           |                  |            |          |               |             |                   |           | _         |                          |               |   |             |               | AC <u>H</u>      |
|           |                  |            |          |               | Sta         | y on acco         | ount      |           | Leave in WIP list        | Mark it don   | e |             |               | Recalc           |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             |               | <u>P</u> rint    |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             |               | ction            |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             |               | vanced           |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             |               | ancel            |
|           |                  |            |          |               |             |                   |           |           |                          |               |   |             | Ŀ             | <u>H</u> elp     |

You can choose to stay on the account to do some more work, leave it for later, or mark it as done.

| Debtor    |                                   |               |                  |         |               |                        |                                |              |           |                    |              |                     |               | 5:00PM ×         |
|-----------|-----------------------------------|---------------|------------------|---------|---------------|------------------------|--------------------------------|--------------|-----------|--------------------|--------------|---------------------|---------------|------------------|
| Name      | Mitchell, Mary                    | r             |                  |         |               | $\bigtriangledown$     | Client Relative                | Measures Co  | orp.      | •                  | 98           | •                   | 2             | <u>√</u> iew     |
| File      | 4418                              | Group         |                  |         | <u>&lt;</u> ( | <u>}</u> roup <u>≻</u> | Acct 34-60594                  | ļ            |           |                    | C            | Operator            | OWN           | •                |
| Contact   | Mary Mitchell                     |               |                  |         | ~             | Timezone               | (-6) Central Stand             | ard Time     |           | $\bigtriangledown$ |              | Sales               |               | •                |
| Address   | 2203 Amanda                       | Drive         |                  |         |               | Master                 | •                              | Туре         |           | $\bigtriangledown$ |              | Rate                |               | 33.330 %         |
| OK        |                                   |               |                  |         |               | Forward                | •                              | Mode         | Active    | ~                  | Jud          | lgement             |               | \$2,500.00       |
| City      | Fort Wayne                        | Home          | 219-555-0133     |         | e -           | Legal                  | •                              | Status       | NEW       | •                  |              | Interest            |               |                  |
| State     | IN                                | Schedule Nex  | t Contact - N    | ew      |               |                        |                                |              |           |                    |              | ×                   | _             |                  |
| ZIP       | 19685                             |               |                  |         |               |                        | l situations where             |              |           |                    |              |                     |               |                  |
| Country   | United States                     |               |                  |         |               |                        | et you know which              |              |           | re handlin         | g. You c     | an                  |               |                  |
| Speech    | ~                                 | confirm and/o | or edit the deta | ails. P | ress the N    | NEXT button            | to schedule the co             | ntact as dis | played.   |                    |              |                     |               |                  |
| SSN       | 777-12-4857                       |               |                  |         |               |                        |                                |              |           |                    |              |                     |               |                  |
| DL        | SSN ///-12-485/<br>DL DL103847563 |               |                  |         |               |                        |                                |              |           |                    |              |                     |               |                  |
| DOB       | 02/01/1985                        | Туре          | Phone            |         | -             | 7                      |                                | Repeat       | No Repeat |                    |              | $\overline{\nabla}$ |               | \$2,459.50       |
| Summary   |                                   | Class         | ;                |         | _             |                        |                                |              |           |                    |              |                     |               |                  |
|           |                                   |               | 02/22/2022       | 趐       |               |                        |                                |              | Advance   | · · · ·            | ayment       |                     |               |                  |
| Notes (   | Contacts Attac                    | Time          | 2                |         |               | Amour                  | nt                             |              | Do not au | utodelete          |              |                     |               |                  |
| 02/22/202 | 22 15:01:34 NEV                   | Priority      | 30               |         |               |                        |                                |              | No autoc  |                    |              |                     |               |                  |
|           |                                   |               |                  |         |               |                        |                                |              | No autoc  |                    |              |                     | _             | <u>O</u> K       |
|           |                                   | Description   | Home             |         |               |                        |                                |              | Create co |                    |              |                     | < <u>&lt;</u> | >>               |
|           |                                   | Data          |                  |         |               |                        | = 0                            |              | Log repe  |                    |              |                     |               | di <u>t</u> Card |
|           |                                   | Attachment    | t                |         |               |                        | <u>₽</u> <b>1</b> 0 <u>6</u> 4 |              |           |                    | (t >>        |                     |               | АС <u>Н</u>      |
|           |                                   |               |                  |         |               |                        |                                |              |           | _                  | ncel         |                     |               | Recalc           |
|           |                                   | Operator      | OWN              | •       |               |                        |                                |              |           | H                  | <u>l</u> elp |                     |               | <u>P</u> rint    |
|           |                                   |               |                  |         |               |                        |                                |              |           |                    |              |                     |               | ction            |
|           |                                   |               |                  |         |               |                        |                                |              |           |                    |              |                     |               | lvanced          |
|           |                                   |               |                  |         |               |                        |                                |              |           |                    |              |                     |               | ancel            |
|           |                                   |               |                  |         |               |                        |                                |              |           |                    |              |                     |               | <u>H</u> elp     |

If you select Mark as Done, it will then prompt you to create a follow up and return you to the WIP list.

| Debtor                                |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | 6:03PM ×           |
|---------------------------------------|------------------|---------------------------|-----------|---------|-----|---------------|------------------|------------|----------|-----------|-----------|----------|------|---------------|---------------|--------------------|
| Name                                  | Murdoch, Roger   | S.                        |           |         |     |               | ~                | Client     | Price Sh | ields     |           |          | •    | 97 🔹          |               | <u>V</u> iew       |
| File                                  | 4351             | Group                     |           |         | 1   | <u>&lt; G</u> | roup <u>&gt;</u> | Acct       | AA0392   | 2         |           |          |      | Operator      | OWN           | •                  |
| Contact                               | Roger Murdoch    |                           |           |         |     | $\nabla$      | Timezone         | (-5) Easte | ern Stan | dard Time |           | $\nabla$ |      | Sales         | TM            | •                  |
| Address                               | 450 Cedar Stands | s Road                    |           |         |     |               | Master           |            | •        | Туре      |           | ▽        |      | Rate          |               | 20.000 %           |
| ✓ OK                                  |                  |                           |           |         |     |               | Forward          |            | •        | Mode      | Active    | ▽        |      | Principal     |               | \$8,112.30         |
|                                       | Hempstead        |                           | 516-555-0 | 0141    | د   |               | Legal            |            | •        | otatab    | NEW       | •        |      | Interest      |               |                    |
| State                                 |                  | POE#                      |           |         |     |               | Charged          | 04/07/20   | 22 🛍     | 00010     |           |          |      | Fees          |               |                    |
|                                       | 14890            | Cell                      |           |         |     |               | Delnqnt          |            | Ê        | -         | 03/04/202 | 23 🖾     |      | Legal fees    |               |                    |
| · · · · · · · · · · · · · · · · · · · | officed otdeep   |                           |           |         |     |               |                  | 07/26/20   |          | randation |           |          |      | Miscellaneous |               |                    |
| Speech                                | ~                | Email                     |           |         |     |               | Closed           |            | Ê        | rayment   |           |          | (    | Other charges |               |                    |
| SSN                                   |                  | POE                       |           |         |     |               | Time-bar         | 11/11/20   | 28       | Next      |           |          |      | Adjustments   |               |                    |
|                                       | DL25734829       | User 1                    |           |         |     |               | # attempts       |            |          | Promise   |           |          |      | Paid          |               |                    |
|                                       | 09/24/1975       | 🖄 User 2                  |           |         |     |               | # RPC            |            |          | Date1     |           | É.       |      | Owing         |               | \$8,112.30         |
| Summary                               |                  |                           |           |         |     |               |                  |            |          | Date2     |           | 11       |      | Settle        |               |                    |
|                                       |                  |                           |           |         |     | •             | 50 OWN Ho        |            |          |           | _         |          |      | Run plan      |               |                    |
| Notes (                               | Contacts Attachn | nents <mark>Cosign</mark> | ers Trans | actions | Det | ail A1        | A2 A3 CBI        | RGroup     | Misc P   | hones     | Er        | nails Ac | dres | ses           |               |                    |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | <u>O</u> K         |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               | < <u>&lt;</u> | >>                 |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               | C             | redi <u>t</u> Card |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | АС <u>Н</u>        |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | <u>R</u> ecalc     |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | <u>P</u> rint      |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | <u>A</u> ction     |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               | ŀ             | A <u>d</u> vanced  |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | <u>C</u> ancel     |
|                                       |                  |                           |           |         |     |               |                  |            |          |           |           |          |      |               |               | <u>H</u> elp       |

If you find that typing the same thing over and over is becoming repetitive, you can use Contact Plans to save time.

On the second account, let's click the Action button at the bottom right to open the list of Contact Plans.

| Debtor  |                | Action Plan  |     |               | 6:03PM ×         |
|---------|----------------|--|-----|---------------|------------------|
| Name    | Murdoch, Rog   | Choose a contact plan and press Enter                                      | 1   | V             | <u>/</u> iew     |
| File    | 4351           | 100 - Tel Home - No Answer   | or  | OWN           | •                |
| Contact | Roger Murdoc   | 101 - Tel Home - Left Message on Machine                                   | les | TM            | •                |
| Address | 450 Cedar Star | 102 - Tel Home - Left message with person                                  | ate |               | 20.000 %         |
| OK      |                | 103 - Tel Home - Debtor not in, will call back. No message left.           | bal |               | \$8,112.30       |
| City    | Hempstead      | 104 - Tel Home - spoke to debtor. Verified right party. Details to follow: | est |               |                  |
| State   | NY             | 105 - Tel Home - Wrong number / debtor unknown.                            | es  |               |                  |
| ZIP     | 14890          | 106 - Tel Home - NIS   | es  |               |                  |
| Country | United States  | 107 - Tel Home - Comment:  | us  |               |                  |
| Speech  | ~              | 200 - Tel POE - No Answer  | jes |               |                  |
| SSN     |                | 201 - Tel POE - Left Message on Machine                                    | nts |               |                  |
| DL      | DL25734829     | 202 - Tel POE - Left message with person                                   | aid |               |                  |
| DOB     | 09/24/1975     | 203 - Tel POE - Debtor not in, will call back. No message left.            | ng  |               | \$8,112.30       |
| Summary |                | 204 - Tel POE - spoke to debtor. Verified right party. Details to follow:  | tle |               |                  |
|         |                | 205 - Tel POE - Wrong number / debtor unknown.                             | an  |               |                  |
| Notes   | Contacts Attac | 206 - Tel POE - NIS  |     |               |                  |
|         |                | 207 - Tel POE - Comment:   |     |               |                  |
|         |                | 300 - Tel Cell - No Answer   |     |               | <u>O</u> K       |
|         |                | 301 - Tel Cell - Left Message on Machine                                   |     | < <u>&lt;</u> | > >              |
|         |                | 302 - Tel Cell - Left message with person                                  |     | Crea          | di <u>t</u> Card |
|         |                | 303 - Tel Cell - Debtor not in, will call back. No message left.           |     | ļ             | AC <u>H</u>      |
|         |                | 304 - Tel Cell - spoke to debtor. Verified right party. Details to follow: |     | <u>R</u>      | ecalc            |
|         |                | 305 - Tel Cell - Wrong number / debtor unknown.                            |     | Ē             | <u>P</u> rint    |
|         |                | 306 - Tel Cell - NIS   |     | <u>A</u>      | ction            |
|         |                | 307 - Tel Cell - Comment:  |     | A <u>d</u>    | vanced           |
|         |                | 400 - Tel Other - No Answer  |     | <u>C</u> a    | ancel            |
|         |                | Print << >> Cancel Select  |     | F             | <u>-l</u> elp    |
|         |                | <u>P</u> rint < <u>≤</u> > <u>&gt;</u> Cancel <u>S</u> elect               |     |               |                  |

In the list, select an action. For our example, let's select 101.

| Debtor   |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | 6:03             | BPM ×    |
|--|-------------------|-------------|-----|----------------|------|------|--------|------------------|----------------|------------|------------|------------|----------|---------------|---------------|------------------|----------|
| Name   | Murdoch, Roger    | S.          |     |                |      |      |        | ▽                | Client Price   | e Shi      | elds       |            | •        | 97 🔹          |               | <u>V</u> iew     |          |
| File   | 4351              | Group       |     |                |      | <    | G      | roup <u>&gt;</u> | Acct AA0       | 3922       |            |            |          | Operator      | OWN           |                  | •        |
| Contact  | Roger Murdoch     |             |     |                |      |      | ~      | Timezone         | (-5) Eastern S | tand       | ard Time   |            | ~        | Sales         | TM            |                  | •        |
| Address  | 450 Cedar Stand   | s Road      |     |                |      |      |        | Master           |                | •          | Туре       |            | ~        | Rate          |               | 20               | .000 %   |
| OK   |                   |             |     |                |      |      |        | Forward          |                | •          | Mode       | Active ⊽   | _        | Principal     |               | \$8              | 3,112.30 |
| City   | Hempstead         | Hor         | ne  | 516-555-0141   |      | e.   |        | Legal            |                | •          | Status     | ACT        | •        | Interest      |               |                  |          |
| State  | NY                | PO          | E#  |                |      |      |        | Charged          | 04/07/2022     | 2          | Score      |            |          | Fees          |               |                  |          |
| ZIP  | 14890             |             | ell |                |      |      |        | Delnqnt          |                | <u>iii</u> | Worked     | 02/22/2022 | 趐        | Legal fees    |               |                  |          |
| Country  | United States     |             | er  |                |      |      |        |                  | 07/26/2022     | 趱          | Validation |            |          | Miscellaneous |               |                  |          |
| Speech      Email      Closed     Payment     Other charges       SSN     POE     Time-bar     11/11/2028     Next     Adjustments   |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               |                  |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               |                  |          |
| DL     DL25734829     User 1     # attempts     Promise     Promise  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               |                  |          |
| DOB         09/24/1975         User 2         # RPC         Date1         Image: Control of the second |                   |             |     |                |      |      |        |                  |                |            |            |            |          | \$8           | 8,112.30      |                  |          |
| Summary  |                   |             |     |                |      |      |        |                  |                |            | Date2      |            | <u> </u> | Settle        |               |                  |          |
|  |                   |             |     |                |      |      |        | 50 OWN Hoi       |                |            |            |            |          | Run plan      |               |                  |          |
|  | Contacts Attachn  |             |     |                |      |      |        | A2 A3 CBF        | R Group Mis    | c Ph       | iones      | Email      | s Addı   | esses         |               |                  |          |
|  | 22 15:05:24 ACT O |             |     |                |      |      |        |                  |                |            |            |            |          |               |               |                  |          |
| 02/22/202  | 22 15:05:24 NEW ( | JWN : IEI I | Hom | ne - Leπ Messa | ge c | on m | nachin | e                |                |            |            |            |          |               |               | <u>O</u> K       |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               | < <u>&lt;</u> |                  | >>       |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               | Ci            | redi <u>t</u> Ca | ard      |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | АС <u>Н</u>      |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | <u>R</u> ecal    |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | <u>P</u> rint    |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | <u>A</u> ction   |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | A <u>d</u> vanc  |          |
|  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | Cancel           |          |
| _  |                   |             |     |                |      |      |        |                  |                |            |            |            |          |               |               | <u>H</u> elp     |          |

On the Debtor, you will see that the note line was written for us. The plan also did something that we forgot on the last account. It set the status to ACT, instead of NEW as we are now actively working this account.

Contact (Action) Plans provide great scope for automating your collections. Most logical changes and routine decisions can be automated using Contact Plans, thereby ensuring that your workflow design is implemented, avoiding operator error and saving large amounts of operator time.

| Debtor  |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | 6:13PM ×                           |
|---------|--------------------|--------------------------|-------------|----------|----|---------------|---------------------------|-----------|----------|----------|------------|----------|----------|-------|---------------|---------------|------------------------------------|
| Name    | Nadeau, Pierre     |                          |             |          |    |               | ▽                         | Client    | Retail   | Cli      | ent        |          |          | •     | 92 🔹          |               | <u>V</u> iew                       |
| File    | 4408               | Group                    |             |          |    | <u>&lt;</u> ( | <u>∃</u> roup <u>&gt;</u> | Acct      | 44411    | 1        |            |          |          |       | Operator      | OWN           | •                                  |
| Contact | Pierre Nadeau      |                          |             |          |    | ▽             | Timezone                  | (-5) East | tern Sta | and      | ard Time   |          | 7        | 7     | Sales         | OWN           | •                                  |
| Address | 3895 Place de Ste. | Jean                     |             |          |    |               | Master                    |           |          | •        | Туре       |          | 7        | 7     | Rate          |               | 40.000 %                           |
| OK      |                    |                          |             |          |    |               | Forward                   |           |          | •        | Mode       | Active   | ▽        |       | Principal     |               | \$5,210.00                         |
| City    | Pointe Claire      | Home                     |             |          |    |               | Legal                     |           |          | •        | Status     | NEW      |          |       | Interest      |               | \$274.24                           |
| State   | PQ                 | POE#                     | 514-555-0   | 0122     | ر  |               | Charged                   | 09/04/20  | 021      | 2        | Score      |          |          |       | Fees          |               |                                    |
| ZIP     | Q4E 3Q2            | Cell                     |             |          |    |               | Delnqnt                   |           |          | <u>ا</u> | Worked     | 03/04/20 | 023      | Ľ.    | Legal fees    |               |                                    |
| Country | Canada 🤜           | Other                    |             |          |    |               | Listed                    | 07/25/20  | 022      | 崖        | Validation |          |          |       | Miscellaneous |               |                                    |
| Speech  |                    | Email                    |             |          |    |               | Closed                    |           |          | ίΠ.      | Payment    |          |          |       | Other charges |               |                                    |
| SSN     |                    | POE                      | La Petite I | Patisser | ie |               | Time-bar                  |           |          |          | Next       |          |          |       | Adjustments   |               |                                    |
| DL      |                    | User 1                   |             |          |    |               | # attempts                |           |          |          | Promise    |          |          |       | Paid          |               |                                    |
| DOB     | Ê                  | User 2                   |             |          |    |               | # RPC                     |           |          |          | Date1      |          |          | 1     | Owing         |               | \$5,484.24                         |
| Summary |                    |                          |             |          |    |               |                           |           |          |          | Date2      |          | 6        | 1     | Settle        | -             |                                    |
|         |                    |                          |             |          |    |               | 50 OWN Ho                 |           |          |          |            |          |          |       | Run plan      | 101           |                                    |
| Notes   | Contacts Attachme  | ents <mark>Cosigr</mark> | ners Trans  | actions  | De | etail   A1    | A2 A3 CB                  | RGroup    | Misc     | Ph       | iones      | E        | Emails , | Addre | esses         |               |                                    |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               | -             | OK                                 |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | <u>O</u> K                         |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               | < <u>&lt;</u> | > <u>&gt;</u><br>edi <u>t</u> Card |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               | CI            | ACH                                |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | Recalc                             |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | Print                              |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | Action                             |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | dvanced                            |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | <u>C</u> ancel                     |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       |               |               | <u>H</u> elp                       |
|         |                    |                          |             |          |    |               |                           |           |          |          |            |          |          |       | _             |               | Пер                                |

Now on this third account, let's say that your collectors are becoming more familiar with the system, and they want to improve efficiency.

Rather than clicking the action button, they can type the 3 or 4 character code into the Run Plan field, then press Enter.

| Debtor    |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | 6:13PM ×          |
|-----------|-------------------|--------------|-----------|-------------|------|---------------------|------------|----------------|------------|------------|-----------|--------------------|--------|--------------|---------------|-------------------|
| Name      | Nadeau, Pierre    |              |           |             |      |                     | ▽          | Client Reta    | il Cli     | ent        |           |                    | • 9    | 2 -          |               | <u>V</u> iew      |
| File      | 4408              | Group        |           |             | 4    | <u>&lt; G</u>       | roup ≥     | Acct 444       | 111        |            |           |                    |        | Operator     | OWN           | •                 |
| Contact   | Pierre Nadeau     |              |           |             |      | $\overline{\nabla}$ | Timezone   | (-5) Eastern S | tand       | lard Time  |           | $\bigtriangledown$ |        | Sales        | OWN           | •                 |
| Address   | 3895 Place de Ste | e. Jean      |           |             |      |                     | Master     |                | •          | Туре       |           | ~                  |        | Rate         |               | 40.000 %          |
| OK        |                   |              |           |             |      |                     | Forward    |                | •          | Mode       | Active    | ~                  |        | Principal    |               | \$5,210.00        |
| City      | Pointe Claire     | Home         |           |             |      |                     | Legal      |                | •          | Status     | ACT       | •                  |        | Interest     |               | \$274.24          |
| State     | PQ                | POE#         | 514-555   | 5-0122      | e.   |                     | Charged    | 09/04/2021     |            | Score      |           |                    |        | Fees         |               |                   |
| ZIP       | Q4E 3Q2           | Cell         |           |             |      |                     | Delnqnt    |                | <u>iii</u> | Worked     | 02/22/202 | 2 🕮                |        | Legal fees   |               |                   |
| Country   | Canada            |              |           |             |      |                     | Listed     | 07/25/2022     | 翧          | Validation |           |                    | Mi     | iscellaneous |               |                   |
| Speech    | ~                 | Email        |           |             |      | 24                  | Closed     |                | 11         | Payment    |           |                    | Ot     | her charges  |               |                   |
| SSN       |                   | POE          | La Petite | e Patisseri | e    |                     | Time-bar   |                |            | Next       |           |                    | 1      | Adjustments  |               |                   |
| DL        |                   | User 1       |           |             |      |                     | # attempts |                |            | Promise    |           |                    |        | Paid         |               |                   |
| DOB       |                   | User 2       |           |             |      |                     | # RPC      |                |            | Date1      |           | m                  |        | Owing        |               | \$5,484.24        |
| Summary   |                   |              |           |             |      |                     |            |                |            | Date2      |           | (iii)              |        | Settle       |               |                   |
|           |                   |              |           |             |      | -                   | 50 OWN Ho  |                |            |            | _         |                    |        | Run plan     |               |                   |
|           | Contacts Attachn  |              |           |             |      |                     | A2 A3 CB   | R Group Mis    | c Ph       | nones      | Em        | nails Ad           | dresse | es           |               |                   |
|           | 22 15:14:52 ACT O |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               |                   |
| 02/22/202 | 22 15:14:52 NEW 0 | WN : Iel Hor | ne - Lett | Message     | on r | machin              | e          |                |            |            |           |                    |        |              |               | <u>O</u> K        |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              | < <u>&lt;</u> | > <u>&gt;</u>     |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              | Ci            | edi <u>t</u> Card |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | AC <u>H</u>       |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | <u>R</u> ecalc    |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | <u>P</u> rint     |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | <u>A</u> ction    |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | dvanced           |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | <u>C</u> ancel    |
|           |                   |              |           |             |      |                     |            |                |            |            |           |                    |        |              |               | <u>H</u> elp      |

The plan will do the same action of writing the notes and setting the status.

The fewer keystrokes and mouse clicks means the more accounts per hour a collector can work.

Collect!'s optional built-in clickto-dial module can save time by having the system dial the number for you.

| Debtor  |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | 3:15PM ×                 |
|---------|------------------|----------------|----------|-----------|------|----------|------------------|--------------|----------|-------------|------------|------------|--------|-----------|----------------|--------------------------|
| Name    | Nilley, William  |                |          |           |      |          | ▽                | Client R     | elative  | Measures Co | orp.       |            | - 98   | -         |                | <u>V</u> iew             |
| File    | 4426             | Group          | 7        | 1         | _    | <u> </u> | roup <u>&gt;</u> | Acct 9       | 9-3546   | 5           |            |            |        | Operator  | OWN            | •                        |
| Contact | William Nilley   |                |          |           |      | $\nabla$ | Timezone         | (-8) Pacific | Standa   | ard Time    |            | ~          |        | Sales     |                | •                        |
| Address | 4 - 102 Hollywoo | d Cres.        |          |           |      |          | Master           |              | •        | Туре        |            | ▽          |        | Rate      |                | 33.330 %                 |
| OK      |                  |                |          |           |      |          | Forward          |              | •        | Mode        | Active     | ~          |        | Principal |                | \$7,556.22               |
| City    | Victoria         | Home           | 250-55   | 5-0166    | L.   |          | Legal            |              | •        | Status      | NEW        | •          |        | Interest  |                |                          |
| State   | BC               | POE#           | 250-55   | 5-0100    | ι,   |          | Charged          | 06/29/202    | 2 岗      | Score       |            |            |        | Fees      |                |                          |
|         | V5T 0K0          | Cell           |          |           |      |          | Delnqnt          | 07/18/202    | 2 前      | Worked      | 03/04/2023 | 2          |        | egal fees |                |                          |
| Country | Canada           |                |          |           |      |          |                  | 09/09/202    | 2 🛍      | Validation  |            |            |        | llaneous  |                |                          |
| Speech  |                  |                |          | i@examp   | e.co | m 📼      | Closed           |              | <u></u>  | Payment     |            |            |        | charges   |                |                          |
| SSN     | 000-777-111      | POE            |          |           |      |          | Time-bar         |              |          | Next        |            |            | Adji   | ustments  |                |                          |
| DL      | 3948545-WS       | User 1         |          |           |      |          | # attempts       |              |          | Promise     |            |            |        | Paid      |                |                          |
| DOB     | 03/27/1986       | User 2         |          |           |      |          | # RPC            |              |          | Date1       |            | iii        |        | Owing     |                | \$7,556.22               |
| Summary |                  |                |          |           |      |          |                  |              |          | Date2       |            | <u>iii</u> |        | Settle    |                |                          |
|         |                  |                |          |           |      |          | 30 OWN Ho        |              |          |             | _          |            |        | Run plan  | pra            |                          |
| Notes   | Contacts Attachm | nents   Cosigr | ners Tra | nsactions | Det  | ail A1   | A2 A3 CBI        | R Group N    | /lisc Pl | nones       | Ema        | ils Ado    | resses |           |                |                          |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | <u>O</u> K               |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           | < <u> &lt;</u> | <u>U</u> K > <u>&gt;</u> |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | redi <u>t</u> Card       |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           | C              | AC <u>H</u>              |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | Recalc                   |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | Print                    |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | Action                   |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | Advanced                 |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | Cancel                   |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                | <u>H</u> elp             |
|         |                  |                |          |           |      |          |                  |              |          |             |            |            |        |           |                |                          |

On this last account, let's say we got a hold of the Debtor and they want to make a payment arrangement.

In the Run Plan field, we will type in the code for our payment arrangement plan.

| Debtor  |                 |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               | 3:15                   | PM ×          |
|---------|-----------------|--------------|--------|----------------------|-----|---------------|--------------------|-----------|------------|----------------|-----------|---------------------|----------------------------|-----------|---------------|------------------------|---------------|
| Name    | Nilley, William |              |        |                      |     |               | $\bigtriangledown$ | Client    | Relative I | Measures Co    | orp.      |                     | • 98                       | -         |               | <u>V</u> iew           |               |
| File    | 4426            | Group        | 7      | 1                    |     | <u>&lt; G</u> | roup <u>&gt;</u>   | Acct      | 99-35465   | 5              |           |                     | C                          | Operator  | OWN           |                        | •             |
| Contact | William Nilley  |              |        |                      |     | ~             | Timezone           | (-8) Paci | fic Standa | rd Time        |           | $\overline{\Delta}$ |                            | Sales     |               |                        | •             |
| Address | 4 - 102 Hollyw  | ood Cres.    |        |                      |     |               | Master             |           | •          | Туре           |           | ~                   |                            | Rate      |               | 33.                    | 330 %         |
| OK      |                 |              | _      |                      |     |               | Forward            |           | •          | Mode           | Active    | ~                   | F                          | Principal |               | \$7                    | ,556.22       |
| City    | Victoria        | Home         | 250-   | -555-0166            | ¢   | •             | Legal              |           | •          | Status         | NEW       | •                   |                            | Interest  |               |                        |               |
| State   | BC              | Schedule Ne  | ext Co | ontact - Conf        | irn | n Details     |                    |           |            |                |           |                     |                            | ×         |               |                        |               |
| ZIP     | V5T 0K0         |              |        | xt Contact forr      |     |               |                    |           |            |                |           |                     |                            |           |               |                        |               |
| Country | Canada          |              |        | Schedule Nex         |     |               |                    |           |            | 21             | ,         | are handl           | ling. You c                | an        |               |                        |               |
| Speech  | ~               | confirm and, | /or ec | dit the details.     | Pr  | ess the N     | IEX I button       | to sched  | ule the co | intact as disp | blayed.   |                     |                            |           |               |                        |               |
|         | 000-777-111     |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               |                        |               |
|         | 3948545-WS      |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               |                        |               |
|         | 03/27/1986      |              |        | romise               |     | ~             |                    |           |            | Repeat         | No Repeat | t                   |                            | ~         |               | \$7                    | ,556.22       |
| Summary |                 | Cla          |        |                      | -   |               |                    |           |            |                |           |                     |                            |           |               |                        |               |
|         |                 |              |        | 3/01/2022            | 1   |               |                    |           |            |                | Advance   |                     |                            |           | PRA           |                        |               |
| Notes   | Contacts Attac  | Tin          |        |                      |     |               | Amoun              | t         |            |                | Do not a  |                     |                            |           |               |                        |               |
|         |                 | Priori       | ty 80  | )                    |     |               |                    |           |            |                | No auto   |                     |                            |           |               | 01/                    | _             |
|         |                 | Description  |        | na maila a di Davima |     |               |                    |           |            |                | No auto   |                     | •                          |           |               | <u>O</u> K             |               |
|         |                 |              |        | romised Paym         | en  | ι             |                    |           | - 0        |                | Create o  |                     |                            |           | < <u>&lt;</u> | a dit Ca               | > <u>&gt;</u> |
|         |                 | Da           |        |                      |     |               |                    |           |            |                | Log repe  |                     |                            |           | Cr            | edi <u>t</u> Ca<br>ACH | ira           |
|         |                 | Attachme     | n      |                      |     |               |                    |           |            |                |           | _                   | <u>l</u> ext > ><br>Cancel |           |               | Recald                 |               |
|         |                 | Operat       |        | WN -                 |     |               |                    |           |            |                |           | <u>_</u>            |                            |           |               | Print                  |               |
|         |                 | Operate      |        | VVIN T               |     |               |                    |           |            |                |           |                     | <u>H</u> elp               |           |               | <u>Print</u><br>Action |               |
|         |                 |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               | dvance                 |               |
|         |                 |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               | Cancel                 | u             |
|         |                 |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               | <u>H</u> elp           |               |
|         |                 |              |        |                      |     |               |                    |           |            |                |           |                     |                            |           |               | Help                   |               |

On the pop-up form, let's fill in the applicable details of the arrangement.

For our example, this Debtor wants to do monthly payments on the first of each month for \$100.

| Debtor    |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | 3:15PM                      | ×   |
|-----------|-------------------|-------------|------------|------------|------|-----------|------------------|-----------------|------|-------------|------------|-------|--------|-----------|-----------------------------|-----|
| Name      | Nilley, William   |             |            |            |      |           | ▽                | Client Rela     | tive | Measures Co | orp.       | -     | 98     | -         | <u>V</u> iew                |     |
| File      | 4426              | Group       | 7          | 1          | _    | <u> G</u> | roup <u>&gt;</u> | Acct 99-3       | 5465 | 5           |            |       | (      | Operator  | OWN                         | •   |
| Contact   | William Nilley    |             |            |            |      | ~         | Timezone         | (-8) Pacific St | anda | ird Time    |            | ~     |        | Sales     |                             | •   |
| Address   | 4 - 102 Hollywoo  | d Cres.     |            |            |      |           | Master           |                 | •    | Туре        |            | ~     |        | Rate      | 33.330                      | %   |
| OK        |                   |             |            |            |      |           | Forward          |                 | •    | Mode        | Active 🔻   |       | I      | Principal | \$7,556                     | .22 |
| City      | Victoria          | Home        | 250-555    | -0166      | e.   |           | Legal            |                 | •    | Status      | PRA        | -     |        | Interest  |                             |     |
| State     | BC                | POE#        | 250-555    | -0100      | e.   |           | Charged          | 06/29/2022      | 29   | Score       |            |       |        | Fees      |                             |     |
| ZIP       | V5T 0K0           | Cell        |            |            |      |           | Delnqnt          | 07/18/2022      | 18   | Worked      | 02/22/2022 | 趐     | Le     | egal fees |                             |     |
| Country   | Canada            |             |            |            |      |           | Listed           | 09/09/2022      | 9    | Validation  |            |       | Misce  | llaneous  |                             |     |
| Speech    | ~                 | Email       | willinilli | @exampl    | e.co | m 📼       | Closed           |                 |      | Payment     |            |       | Other  | charges   |                             |     |
| SSN       | 000-777-111       | POE         |            |            |      |           | Time-bar         |                 |      | Next        |            |       | Adju   | ustments  |                             |     |
| DL        | 3948545-WS        | User 1      |            |            |      |           | # attempts       |                 |      | Promise     | 03/01/2022 |       |        | Paid      |                             |     |
| DOB       | 03/27/1986        | 🖄 User 2    |            |            |      |           | # RPC            |                 |      | Date1       |            | 11    |        | Owing     | \$7,556                     | .22 |
| Summary   |                   |             |            |            |      |           |                  |                 |      | Date2       |            | 11    |        | Settle    |                             |     |
|           |                   |             |            |            |      |           | 30 OWN Ho        |                 |      |             |            |       |        | Run plan  |                             |     |
|           | Contacts Attachm  |             |            |            |      |           | A2 A3 CB         | R Group Mis     | c Ph | iones       | Email      | s Add | resses |           |                             |     |
|           | 22 15:16:43 PRA O |             |            |            |      |           |                  |                 |      |             |            |       |        |           |                             |     |
| 02/22/202 | 22 15:16:43 NEW C | WN : Agreed | d to Prom  | ise of Pay | /mer | nt        |                  |                 |      |             |            |       |        |           | <u>O</u> K                  |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | < <u>&lt;</u> > <u>&gt;</u> |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | Credi <u>t</u> Card         |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | АС <u>Н</u>                 |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | <u>R</u> ecalc              |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | <u>P</u> rint               |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | <u>A</u> ction              |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | A <u>d</u> vanced           |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | <u>C</u> ancel              |     |
|           |                   |             |            |            |      |           |                  |                 |      |             |            |       |        |           | <u>H</u> elp                |     |

Once submitted, the plan will write the note lines and update the status.

| Debtor  |                  |          |     |            |          |          |           |          |            |                |         |             |         |        |       |               |               | 3:15P            | M ×    |
|---------|------------------|----------|-----|------------|----------|----------|-----------|----------|------------|----------------|---------|-------------|---------|--------|-------|---------------|---------------|------------------|--------|
| Name    | Nilley, William  |          |     |            |          |          |           |          | ▽          | Client Rela    | ative   | Measures Co | orp.    |        | •     | 98 🔹          |               | <u>V</u> iew     |        |
| File    | 4426             | Group    |     | 7          | 1        |          | <u> </u>  | <u>G</u> | roup ≥     | Acct 99-       | 3546    | 5           |         |        |       | Operator      | OWN           |                  | •      |
| Contact | William Nilley   |          |     |            |          |          |           | ~        | Timezone   | (-8) Pacific S | tanda   | ard Time    |         | ~      | ~     | Sales         |               |                  | •      |
| Address | 4 - 102 Hollywoo | od Cres. |     |            |          |          |           |          | Master     |                | •       | Туре        |         | ~      | ~     | Rate          |               | 33.3             | 30 %   |
| OK      |                  |          |     |            |          |          |           |          | Forward    |                | •       | Mode        | Active  | ~      |       | Principal     |               | \$7,5            | 556.22 |
| City    | Victoria         | Ho       | me  | 250-555    | -0166    | ٩        | -         |          | Legal      |                | •       | Status      | PRA     | •      | •     | Interest      |               |                  |        |
| State   | BC               | PO       | E#  | 250-555    | -0100    | ٩        | -         |          | Charged    | 06/29/2022     | 趱       | Score       |         |        |       | Fees          |               |                  |        |
| ZIP     | V5T 0K0          | C        | ell |            |          |          |           |          | Delnqnt    | 07/18/2022     | 雦       | Worked      | 02/22/2 | .022 🖡 | 2     | Legal fees    |               |                  |        |
| Country | Canada           |          | ner |            |          |          |           |          | Listed     | 09/09/2022     | 10      | Validation  |         |        |       | Miscellaneous |               |                  |        |
| Speech  | ~                | Em       | ail | willinilli | @examp   | le.c     | om        |          | Closed     |                | <u></u> | Payment     |         |        |       | Other charges |               |                  |        |
| SSN     | 000-777-111      | P        | OE  |            |          |          |           |          | Time-bar   |                |         | Next        |         |        |       | Adjustments   |               |                  |        |
| DL      | 3948545-WS       | Use      | r 1 |            |          |          |           |          | # attempts |                |         | Promise     | 03/01/2 | 022    |       | Paid          |               |                  |        |
| DOB     | 03/27/1986       | 🛍 Use    | r 2 |            |          |          |           |          | # RPC      |                |         | Date1       |         | Ê      | 1     | Owing         |               | \$7,5            | 556.22 |
| Summary |                  |          |     |            |          |          |           |          |            |                |         | Date2       |         | Ê      | 1     | Settle        |               |                  |        |
|         |                  |          |     |            |          | <u> </u> |           | _        | 30 OWN Ho  |                |         |             |         |        |       | Run plan      |               |                  |        |
|         | Contacts Attachn |          | _   |            |          | D        | etail   / | A1       | A2 A3 CBF  | Coroup Mis     |         | iones       |         | Emails | Addre | esses         |               |                  |        |
| Туре    | Due date         | Priority |     | escriptio  |          |          |           |          |            | Collector      | Doi     |             |         |        |       |               |               |                  |        |
| Metro   | 09/17/2022       |          |     |            |          |          | S93 A     | T48      | CCUS AC1   |                | No      |             |         |        |       |               |               | <u>O</u> K       |        |
| Promise | 03/01/2022       | 80       |     | romised    |          |          |           |          |            | OWN            | No      |             |         |        |       |               | < <u>&lt;</u> |                  | >>     |
| Letter  | 02/22/2022       | 10       |     | romise P   | ayment / | Ack      | cnowle    | edge     | ement      | OWN            | No      |             |         |        |       |               | Cr            | edi <u>t</u> Car | d      |
| Phone   | 01/01/2022       | 30       |     | lome       |          |          |           |          |            | OWN            | Yes     |             |         |        |       |               |               | АС <u>Н</u>      |        |
| Letter  | 09/09/2021       | 10       | Ŀ   | etter 1    |          |          |           |          |            | SC             | Yes     |             |         |        |       |               |               | <u>R</u> ecalc   |        |
|         |                  |          |     |            |          |          |           |          |            |                |         |             |         |        |       |               |               | <u>P</u> rint    |        |
|         |                  |          |     |            |          |          |           |          |            |                |         |             |         |        |       |               |               | <u>A</u> ction   |        |
|         |                  |          |     |            |          |          |           |          |            |                |         |             |         |        |       |               |               | dvanced          | 1      |
|         |                  |          |     |            |          |          |           |          |            |                |         |             |         |        |       |               |               | <u>C</u> ancel   |        |
|         |                  |          |     |            |          |          |           |          |            |                |         |             |         |        |       |               |               | <u>H</u> elp     |        |

The plan will also remove any queued-up dunning letters so they don't get sent.

In their place will be an acknowledgement letter and the promise contact that will manage this arrangement.

The actions of this and any other Contact Plan, along with most aspects of the system, are completely customizable to suit your needs.

| C Democ      | lb - Collect! | - OWN          |               |               |                                  |              |                     |        |          |         |   |            |                |   |   | - |   | × |
|--------------|---------------|----------------|---------------|---------------|----------------------------------|--------------|---------------------|--------|----------|---------|---|------------|----------------|---|---|---|---|---|
| <u>F</u> ile | <u>E</u> dit  | <u>B</u> rowse | <u>P</u> rint | <u>T</u> ools | <u>S</u> ystem                   | <u>H</u> elp | Find <u>D</u> ebtor | Find C | lient    |         |   |            |                |   |   |   |   |   |
|              | ÷             | D,             | Pq.           | <i>.</i>      | <ul> <li>✓</li> <li>I</li> </ul> |              |                     | ٤.     | <b>.</b> | $\succ$ | ρ | Wish<br>CD | 3 <del>0</del> | Q | • | Ō | ( | 0 |

#### Main Menu

Welcome! You are signed on to a database, and the files are now open for your use.

The Main Menu is organized into the basic tasks you perform in Collect!. Select one of the tasks below, or use the Menus at the top, for quick access to information and tools.

| Use the con | Import Menu                                    | - C - 1                             |                                   |  |                                   | - () - <del>(</del> * )  | ·         | ·                               |          | >                   |   |
|-------------|--|-------------------------------------|-----------------------------------|--|-----------------------------------|--------------------------|-----------|---------------------------------|----------|---------------------|---|
|             | default activities, an<br>various other attrib | nd load the fil<br>outes of the fil | e into Collect!<br>es as they are | ormat, enter the name<br>. You can attach inco<br>loaded. Separate con<br>lities for automatical | ming Debtors t<br>ntact plans may | to a speci<br>/ be run c | fic Clier | nt, and also a<br>rted data, fo | assign a | fixed fee and       |   |
| ]           | File format                                    | Sample Debto                        | or Import                         |  |                                   |                          |           | •                               |          | Import >>           |   |
|             |  | \import\sam                         |                                   |  |                                   | B                        | rowse     |                                 |          | <u>T</u> otals      |   |
|             | Client Number                                  |                                     | •                                 | Startin  | g file number                     | 4432                     |           |                                 |          | <u>C</u> lose       |   |
| _           | Client fixed fee<br>Interest rate              |                                     | %                                 | •  | new accounts                      | NEW                      | •         |                                 |          | <u>E</u> dit Format |   |
|             | Commission rate<br>Utility report              |                                     | %                                 | Run plan on upda   | ated accounts                     |                          | •         |                                 | ÷        | <u>H</u> elp        |   |
|             | <u>1</u> utoriais                              |                                     |                                   |  |                                   |                          |           |                                 |          |                     | ) |
| _           | _  | -                                   |                                   |  |                                   |                          |           |                                 |          |                     |   |
| eady        | Import Menu                                    | E                                   | STIM                              | <u>E</u> dit Format comma  | and button.                       |                          |           |                                 |          |                     |   |

New business files are brought into Collect! using the import module.

A range of activities are available to you when importing data including:

- Importing clients and debtors
- Updating existing accounts
- Assigning operators
- Running contact plans on new an updated accounts
- Adding fees, interest rates, and commission rates

The functions available in the import module are the first aspect of Collect!'s many automation possibilities.

| C Den        | odb - Colle  | t! - OWN       |               |               |             |      |              |                       |              |        |       |         |   |           |   |   |   | - | × |
|--------------|--------------|----------------|---------------|---------------|-------------|------|--------------|-----------------------|--------------|--------|-------|---------|---|-----------|---|---|---|---|---|
| <u>F</u> ile | <u>E</u> dit | <u>B</u> rowse | <u>P</u> rint | <u>T</u> ools | <u>S</u> ys | stem | <u>H</u> elp | Find <u>D</u>         | <u>ebtor</u> | Find C | lient |         |   |           |   |   |   |   |   |
|              |              |                | Pq.           | <b>6</b> 6    | ~           |      |              | $\blacktriangleright$ | ►            | 5      |       | $\succ$ | ρ | visa<br>C | 3 | Q | • | 0 | Ð |

### Main Menu

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 Schedule | r        | <u>H</u> elp       | S <u>e</u> ttings | Viev           | v Log          | Quit |
|-------------------------|----------------|----------|--------------------|-------------------|----------------|----------------|------|
|                         |                |          |                    |                   |                |                |      |
| Scheduler Tasks         |                |          |                    |                   |                |                |      |
| Task                    | .∎ ID          | Interval | <sub>∢</sub> Day c |                   | <b></b> ■ Date | <b></b> ∎ Time | 4    |
| Batch processing        |                | Daily    | Wedr               | nesday            | 02/23/2022     | 02:00:00       |      |
| Recalculate totals      |                | Daily    | Wedr               | nesday            | 02/23/2022     | 02:30:00       |      |
| Import routine          |                | Daily    | Wedr               | nesday            | 02/23/2022     | 01:00:00       |      |
| Letter service          |                | Daily    | Wedr               | nesday            | 02/23/2022     | 04:00:00       |      |
| Generate statements     |                | Monthly  | Satur              | day               | 03/05/2022     | 06:00:00       |      |
| Credit bureau reporting |                | Monthly  | Thurs              | day               | 03/10/2022     | 06:00:00       |      |
| Print a report          |                | Daily    |                    | nesday            | 02/23/2022     | 05:00:00       |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
| <u>1</u> utoriais       |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |
|                         |                |          |                    |                   |                |                |      |

Batch processes can be scheduled to run unattended according to the frequency, day of week, and time you determine.

## The most common batch processes include:

- Data imports
- Printing batch letters or sending files to a letter service
- Generating statements
- Credit bureau reporting
- Reconciling ACH or credit card transactions
- System-wide recalculations.

Along with Contact Plans, batch processes are key parts of Collect!'s automation potential.

| C Demodb - Collect! - OWN   |   | - 0                | × |
|---|---|--------------------|---|
| <u>File Edit B</u> rowse <u>F</u>   | 2rint <u>T</u> ools <u>S</u> ystem <u>H</u> elp Find <u>D</u> ebtor Find <u>C</u> lient |                    |   |
|   | ↓ /% ✓ H ◀ ▶ H ୯ ≞ ⊠ Ω ™ Β₀ Q છ   | Ô                  | 0 |
|   | Print Report 🗖 🗵  |                    |   |
| Main Menu   | Choose a report to print  |                    | × |
| Welcome! You are sign   | Quick Print   |                    |   |
| J   | Merge Documents   |                    |   |
| The Main Menu is orga   | **************************************  | ess to information |   |
| and tools.  | New Business Report   |                    |   |
| Use the convenient Qu   | Total Listings  |                    |   |
| Use the convenient Qu   | Check Taken by Phone - Batch  |                    |   |
|   | Orphaned Debtor Report  |                    |   |
|   | Orphaned Debtor Report - Scheduler  |                    |   |
| <u>W</u> ork In Pr  | *********DEBTOR PROMISE LETTERS   |                    |   |
|   | Promise Analysis  |                    |   |
|   | 30 Day Promise Planner  |                    |   |
| <u>D</u> aily Admir   | ******************OPERATOR ACTIVITY   |                    |   |
|   | Collector 30 Day Planning Calendar  |                    |   |
|   | Collector Performance Analysis  |                    |   |
| <u>M</u> onth En  | Operator Completed Contacts with Metrics  |                    |   |
|   | Operator Completed Contacts   |                    |   |
|   | All Op Comp and In Prog Contact Report  |                    |   |
| <u>R</u> eports   | Operator In Progress Activity Report Inventory Report by Desk by Status Code            |                    |   |
|   | Debtor Note Count by Operator   |                    |   |
|   | ******************OPERATOR COMMISSIONS  |                    |   |
| <u>S</u> ystem Se   | Operator Analysis   | <u>Q</u> uit       |   |
|   | Agency Commissions by Operator  |                    |   |
| the second se | **********************TRUST REPORTS   | <u>H</u> elp       |   |
| <u>T</u> utorials   | Trust Account Summary   |                    |   |
|   | Print <≤ >≥ <u>C</u> ancel Select   |                    |   |
|   | $\underline{Print} <\underline{<} >\underline{C}ancel \underline{S}elect$               |                    |   |
| Selecting Print Repor   | rt B S T I R Ready  |                    |   |

Collect! comes with a large number of industry standard reports that you can use as is, add your own branding, or edit for your more specific purposes.

Some reports are simple, others, such as the spin-down report and the interest reports, are very complex. All will save you time.

Report categories include:

- debtor letters, summons, checks
- promise management letters and reports
- operator analysis reports
- financial analysis reports
- client analysis reports
- month end statements and checks
- custom, user-defined reports

# Additional Learning Resources

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