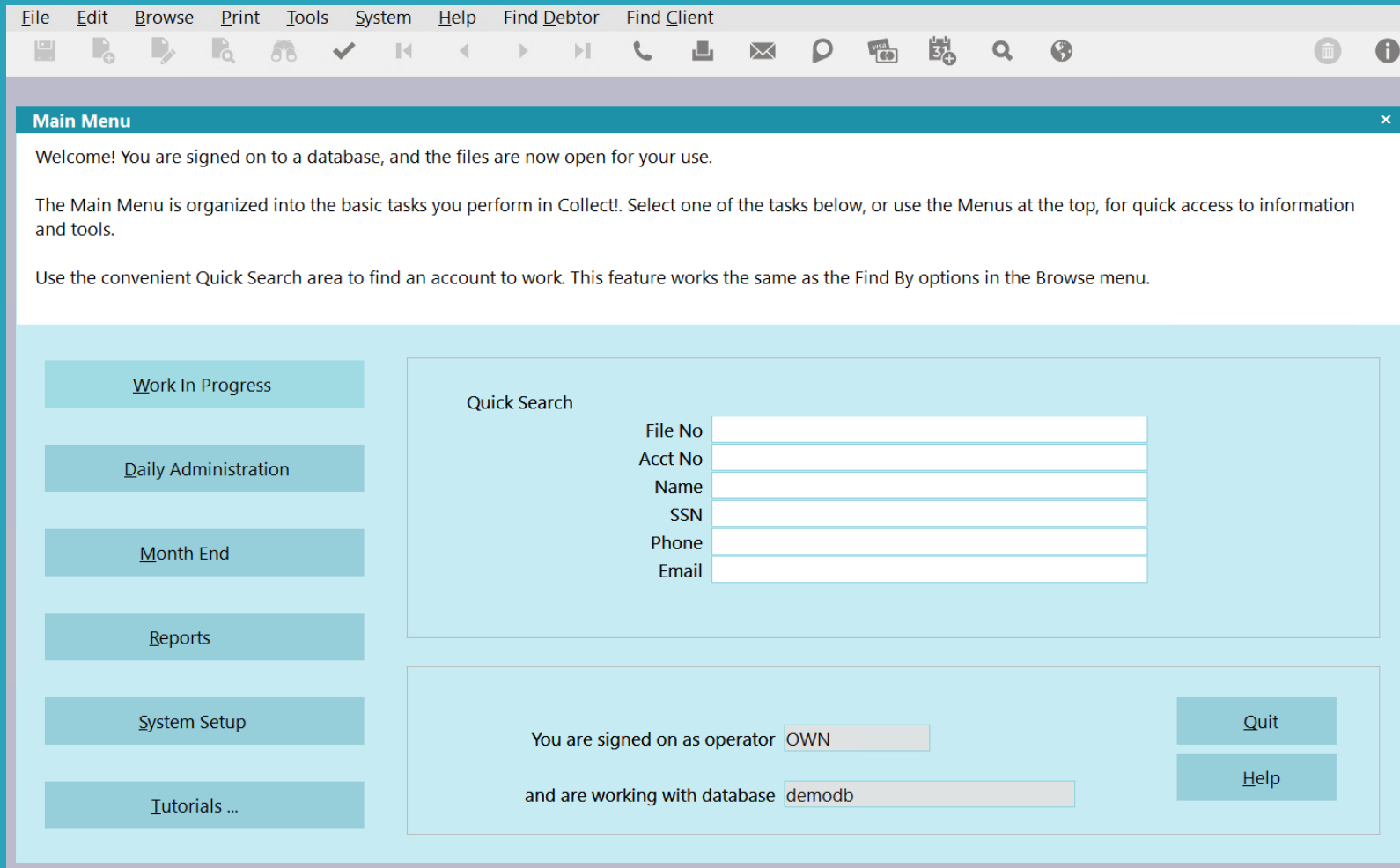




## Collect! Primary Screens



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 industry-standard default settings that Collect! ships with can be reconfigured for your exact needs.

Client 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
Contact	Bruce Flaxion			<input type="checkbox"/> Inactive		Listed	\$109,508.29
Address	10 Cloverdale Ave.			Client listed date	06/12/2021	Paid	\$14,244.19
City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax	N/A	Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell	N/A	Active accounts	11	Interest	
Email				Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
User 3				Commission to date	\$5,599.90	Other charges	
User 4				Success rate	13.555 %	Adjustments	
				Timezone	(-5) Eastern Standard	Run plan	

OK
<< >>
Print
Advanced
Recalc
Cancel
Help

File	Name	Client num	Acct	Listed	Status	Owing	Paid	Group
4427	Legal Sample Debtor	98	234Y67YY789	08/31/2022	LEG	\$4,600.00	\$200.00	
1423	Barclay, Tricia	98	33-01643	10/30/2021	ACT	\$5,250.00	\$6,775.00	
1090	Bernardo, Richard	98	66-75643	07/07/2022	NEW	\$8,875.74	\$50.00	
1397	Crawford, Harold	98	02-16458	09/06/2022	NEW	\$2,151.31	\$125.00	
4415	Dennison, George	98	67-50697	07/11/2022	PPA	\$2,895.81	\$4,054.19	
4425	Kimler, Maude	98	90-35555	09/01/2022	NEW	\$5,203.12	\$340.00	
4418	Mitchell, Mary	98	34-60594	05/22/2022	NEW	\$2,500.00		
4426	Nilley, William	98	99-35465	09/09/2022	NEW	\$7,356.22	\$200.00	7
4419	Rice, Jeffrey	98	23-47890	06/19/2022	NEW	\$2,956.90	\$500.00	

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 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.	Operator		Status		Class	Collections
D.B.A.						Category	Standard
Contact	Bruce Flaxion	<input type="checkbox"/> Inactive		Client listed date	06/12/2021	Listed	\$109,508.29
Address	10 Cloverdale Ave.	Client listed date	10/07/2022	Listed date	10/07/2022	Paid	\$14,244.19
City	Toronto	Worked date	03/05/2023	Worked date	03/05/2023	Closed	
State	ON	Date 2		Date 2		Owing	\$94,689.10
ZIP	M5E 4C9	Active accounts	11	Active accounts	11	Principal	\$109,467.79
Country		Closed accounts		Closed accounts		Interest	
Email		Other accounts		Other accounts		Fees	\$25.00
User 1		Total accounts	11	Total accounts	11	Legal fees	
User 2		Commission to date	\$5,599.90	Commission to date	\$5,599.90	Miscellaneous	
User 3		Success rate	13.555%	Success rate	13.555%	Other charges	
User 4		Timezone	(-5) Eastern Standard	Timezone	(-5) Eastern Standard	Adjustments	
OK							
<< >>							
Print							
Advanced							
Recalc							
Cancel							
Help							

File	Name	Client num	Acct	Listed	Status	Owing	Paid	Group
4427	Legal Sample Debtor	98	234Y67YY789	08/31/2022	LEG	\$4,600.00	\$200.00	
1423	Barclay, Tricia	98	33-01643	10/30/2021	ACT	\$5,250.00	\$6,775.00	
1090	Bernardo, Richard	98	66-75643	07/07/2022	NEW	\$8,875.74	\$50.00	
1397	Crawford, Harold	98	02-16458	09/06/2022	NEW	\$2,151.31	\$125.00	
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4419	Rice, Jeffrey	98	23-47890	06/19/2022	NEW	\$2,956.90	\$500.00	

Going through some key fields:

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 # 98 Alt Client # Owned by client Type Personal Services

### Client Settings

Billing period: Monthly

- Remit as Gross Funds
  - Bill client for negative To Us
- Remit as Combined Funds

- Bill commission to debtor
- Client is tax exempt
- Credit card convenience fees
- ACH convenience fees

Success calculation

- Calculate using all accounts
- Use closed accounts only
- Custom

Report: \_\_\_\_\_

- Only payments for comm to date
- Exclude reversals from Recalc
- No fixed fees
- Charge fee to client
- Charge fee to debtor

Fixed fee: \_\_\_\_\_

Currency: System default  
 Statement currency: System default  
 Itemization date: Last payment (Delinqnt)  
 Variable interest rates file: \_\_\_\_\_  
 Assign sales ID to new accounts: SAL  
 Assign operator ID to accounts: OWN  
 Contact plan for new accounts: NEW

Debtor sort order

- Debtor name  CAW enabled
- Debtor account  Disable metafiles

Credit Bureau Reporting

- Report accounts to bureaus
- Send client detail to bureaus
- Original creditor is in User 1
- Original creditor is in User 2

Delay Days: \_\_\_\_\_

- From today
- From delinquency
- From charged

OK  
<< >>  
Help

Commission Tax		Rate1	Rate2	Rate3	Rate4
Rate 1	33.330%	Principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 2	%	Interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 3	%	Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 4	%	Legal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Misc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate plan		Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4419 Rice, Jeffrey 98 23-47890 06/19/2022 NEW \$2,956.90 \$500.00

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 # 98 Alt Client # Owned by client Type Personal Services

**Client Settings**

Billing period: Monthly

Remit as Gross Funds:  Bill client for negative To Us:  Remit as Combined Funds:

Bill commission to debtor:  Client is tax exempt:

Credit card convenience fees:  ACH convenience fees:

Success calculation:  Calculate using all accounts  Use closed accounts only  Custom

Report:

Only payments for comm to date:  Exclude reversals from Recalc:

No fixed fees  Charge fee to client  Charge fee to debtor

Fixed fee:

Currency: System default

Statement currency: System default

Itemization date: Last payment (Delinqnt)

Variable interest rates file:

Assign sales ID to new accounts: SAL

Assign operator ID to accounts: OWN

Contact plan for new accounts: NEW

Debtor sort order:  Debtor name  Debtor account

CAW enabled:  Disable metafiles:

Credit Bureau Reporting:  Report accounts to bureaus  Send client detail to bureaus  Original creditor is in User 1  Original creditor is in User 2

Delay Days:   From today  From delinquency  From charged

OK << >> Help

	Rate1	Rate2	Rate3	Rate4
Rate 1 33.330 %	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 2 %	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 3 %	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 4 %	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4419 Rice, Jeffrey 98 23-47890 06/19/2022 NEW \$2,956.90 \$500.00

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.

Client # 98 Alt Client # Owned by client Type Personal Services

**Client Settings**

Billing period: Monthly

Remit as Gross Funds:  Bill client for negative To Us:  Remit as Combined Funds:  Bill commission to debtor:  Client is tax exempt:  Credit card convenience fees:  ACH convenience fees:

Success calculation:  Calculate using all accounts  Use closed accounts only  Custom

Report:

Only payments for comm to date:  Exclude reversals from Recalc:  No fixed fees:  Charge fee to client:  Charge fee to debtor:  Fixed fee:

Currency: System default

Statement currency: System default

Itemization date: Last payment (Delinqnt)

Variable interest rates file:

Assign sales ID to new accounts: SAL

Assign operator ID to accounts: OWN

Contact plan for new accounts: NEW

Debtor sort order:  Debtor name  Debtor account

CAW enabled:  Disable metafiles:

**Commission Tax**

	Rate1	Rate2	Rate3	Rate4
Rate 1: 33.330% Principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 2: % Interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 3: % Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 4: % Legal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Misc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Rate plan:

Credit Bureau Reporting:  Report accounts to bureaus  Send client detail to bureaus  Original creditor is in User 1  Original creditor is in User 2

Delay Days:   From today  From delinquency  From charged

OK << >> Help

4419 Rice, Jeffrey 98 23-47890 06/19/2022 NEW \$2,956.90 \$500.00

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

Itemization Date: Use the drop-down 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.

Client # 98 Alt Client # Owned by client Type Personal Services

**Client Settings**

Billing period: Monthly

Remit as Gross Funds:  Bill client for negative To Us:  Remit as Combined Funds:

Bill commission to debtor:  Client is tax exempt:

Credit card convenience fees:  ACH convenience fees:

Success calculation:  Calculate using all accounts  Use closed accounts only  Custom

Report:

Only payments for comm to date:  Exclude reversals from Recalc:  No fixed fees:  Charge fee to client:  Charge fee to debtor:

Fixed fee:

Currency: System default

Statement currency: System default

Itemization date: Last payment (Delnqnt)

Variable interest rates file:

Assign sales ID to new accounts: SAL

Assign operator ID to accounts: OWN

Contact plan for new accounts: NEW

Debtor sort order:  Debtor name  Debtor account  CAW enabled  Disable metafiles

Credit Bureau Reporting:  Report accounts to bureaus  Send client detail to bureaus  Original creditor is in User 1  Original creditor is in User 2

Delay Days:   From today  From delinquency  From charged

OK << >> Help

Commission	Tax	Rate1	Rate2	Rate3	Rate4
Rate 1	33.330%	Principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 2	%	Interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 3	%	Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 4	%	Legal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Misc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate plan		Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4419 Rice, Jeffrey 98 23-47890 06/19/2022 NEW \$2,956.90 \$500.00

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.



Client # 98    Alt Client #    Owned by client    Type Personal Services

### Client Settings

**Billing period** Monthly

- Remit as Gross Funds
  - Bill client for negative To Us
- Remit as Combined Funds
- Bill commission to debtor
- Client is tax exempt
- Credit card convenience fees
- ACH convenience fees

**Success calculation**

- Calculate using all accounts
- Use closed accounts only
- Custom

**Report** \_\_\_\_\_

- Only payments for comm to date
- Exclude reversals from Recalc
- No fixed fees
- Charge fee to client
- Charge fee to debtor

Fixed fee \_\_\_\_\_

**Currency** System default

**Statement currency** System default

**Itemization date** Last payment (Delinqnt)

**Variable interest rates file** \_\_\_\_\_

**Assign sales ID to new accounts** SAL

**Assign operator ID to accounts** OWN

**Contact plan for new accounts** NEW

**Debtor sort order**

- Debtor name
- Debtor account
- CAW enabled
- Disable metafiles

**Commission Tax**

	Rate1	Rate2	Rate3	Rate4
Rate 1 33.330% Principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 2 % Interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 3 % Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 4 % Legal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Misc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Rate plan** \_\_\_\_\_

**Credit Bureau Reporting**

- Report accounts to bureaus
- Send client detail to bureaus
- Original creditor is in User 1
- Original creditor is in User 2

**Delay Days** \_\_\_\_\_

- From today
- From delinquency
- From charged

OK

<< >>

Help

4419    Rice, Jeffrey    98    23-47890    06/19/2022    NEW    \$2,956.90    \$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** 4:44PM x

Client # 98	Alt Client #	Owned by client	Type Personal Services
Name Relative Measures Corp.		Operator	Class Collections
D.B.A.		Status	Category Standard
Contact Bruce Flaxion		<input type="checkbox"/> Inactive	Listed \$109,508.29
Address 10 Cloverdale Ave.		Client listed date 06/12/2021	Paid \$14,244.19
City Toronto	Phone 803-555-4768	Listed date 10/07/2022	Closed
State ON	Fax	Worked date 03/05/2023	Owing \$94,689.10
ZIP M5E 4C9	Other	Date 2	Principal \$109,467.79
Country	Cell	Active accounts 11	Interest
Email email@company.com		Closed accounts	Fees \$25.00
User 1		Other accounts	Legal fees
User 2		Total accounts 11	Miscellaneous
User 3		Commission to date \$5,599.90	Other charges
User 4		Success rate 13.555%	Adjustments
		Timezone (-5) Eastern Standard	Run plan

OK

File	Name	Client num	Acct	Listed	Status	Owing	Paid	Group
4427	Legal Sample Debtor	98	234Y67YY789	08/31/2022	LEG	\$4,600.00	\$200.00	
1423	Barclay, Tricia	98	33-01643	10/30/2021	ACT	\$5,250.00	\$6,775.00	
1090	Bernardo, Richard	98	66-75643	07/07/2022	NEW	\$8,875.74	\$50.00	
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4425	Kimler, Maude	98	90-35555	09/01/2022	NEW	\$5,203.12	\$340.00	
4418	Mitchell, Mary	98	34-60594	05/22/2022	NEW	\$2,500.00		
4426	Nilley, William	98	99-35465	09/09/2022	NEW	\$7,356.22	\$200.00	7
4419	Rice, Jeffrey	98	23-47890	06/19/2022	NEW	\$2,956.90	\$500.00	

Print  
Advanced  
Recalc  
Cancel  
Help

The following tabs are available on the Client form:

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

Client
4:44PM

Client # 98      Alt Client # <input type="text"/> Name Relative Measures Corp. D.B.A. <input type="text"/> Contact Bruce Flaxion Address 10 Cloverdale Ave. City Toronto      Phone 803-555-4768 State ON      Fax <input type="text"/> ZIP M5E 4C9      Other <input type="text"/> Country <input type="text"/> Cell <input type="text"/> Email email@company.com User 1 <input type="text"/> User 2 <input type="text"/> User 3 <input type="text"/> User 4 <input type="text"/>	Owned by client <input type="text"/> Operator <input type="text"/> Status <input type="text"/> <input type="checkbox"/> Inactive Client listed date 06/12/2021 Listed date 10/07/2022 Worked date 03/05/2023 Date 2 <input type="text"/> Active accounts 11 Closed accounts <input type="text"/> Other accounts <input type="text"/> Total accounts 11 Commission to date \$5,599.90 Success rate 13.555 % Timezone (-5) Eastern Standard	Type Personal Services Class Collections Category Standard Listed \$109,508.29 Paid \$14,244.19 Closed <input type="text"/> Owing \$94,689.10 Principal \$109,467.79 Interest <input type="text"/> Fees \$25.00 Legal fees <input type="text"/> Miscellaneous <input type="text"/> Other charges <input type="text"/> Adjustments <input type="text"/> Run plan <input type="text"/>
--	---	--

Debtors
Invoices
Payments
Notes
Contacts
Attachments
Associates
Phones
Emails
Addresses

OK  
<<    >>  
Print  
Advanced  
Recalc  
Cancel  
Help

Date	Check	Client	Number	Total	30 days	60 days	90 days	Type	Mby
03/01/2023		Relative Measures Corp.	98	\$452.79				Net	99
02/01/2023		Relative Measures Corp.	98	\$1,096.12				Net	99
01/01/2023		Relative Measures Corp.	98	\$619.46				Net	99
12/01/2022		Relative Measures Corp.	98	\$1,186.12				Net	99
11/01/2022		Relative Measures Corp.	98	\$1,191.69			\$361.09	Net	99
10/01/2022		Relative Measures Corp.	98	(\$361.09)		\$747.21		Net	99
09/01/2022		Relative Measures Corp.	98	(\$747.21)	\$1,000.00	\$333.33		Net	99
08/01/2022		Relative Measures Corp.	98	(\$1,333.33)	\$333.33			Net	99
07/01/2022		Relative Measures Corp.	98	(\$333.33)				Net	99

**Invoices:** The invoice history for the Client.

Client 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
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Address	10 Cloverdale Ave.			Client listed date	06/12/2021	Paid	\$14,244.19
City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax		Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell		Active accounts	11	Interest	
Email	email@company.com			Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
User 3				Commission to date	\$5,599.90	Other charges	
User 4				Success rate	13.555%	Adjustments	
				Timezone	(-5) Eastern Standard	Run plan	

[Debtors](#) | [Invoices](#) | [Payments](#) | [Notes](#) | [Contacts](#) | [Attachments](#) | [Associates](#) | [Phones](#) | [Emails](#) | [Addresses](#)

Date	Description	Amount
11/15/2021	Payment by Check	\$361.09

OK  
 << >>  
 Print  
 Advanced  
 Recalc  
 Cancel  
 Help

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

Client 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
Contact	Bruce Flaxion			<input type="checkbox"/> Inactive		Listed	\$109,508.29
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City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax		Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell		Active accounts	11	Interest	
Email	email@company.com			Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
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				Timezone	(-5) Eastern Standard	Run plan	

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[Addresses](#)

07/02/2021 13:25:27 SAL : received signed agreement  
 06/22/2021 14:31:57 SAL : sent proposed contract  
 06/14/2021 08:15:48 SAL : initial call, wants call back on 22nd

OK  
 << >>  
 Print  
 Advanced  
 Recalc  
 Cancel  
 Help

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

**Client** 4:44PM ✕

Client # 98	Alt Client #	Owned by client	Type Personal Services
Name Relative Measures Corp.		Operator	Class Collections
D.B.A.		Status	Category Standard
Contact Bruce Flaxion		<input type="checkbox"/> Inactive	Listed \$109,508.29
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City Toronto	Phone 803-555-4768	Listed date 10/07/2022	Closed
State ON	Fax	Worked date 03/05/2023	Owing \$94,689.10
ZIP M5E 4C9	Other	Date 2	Principal \$109,467.79
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Email email@company.com		Closed accounts	Fees \$25.00
User 1		Other accounts	Legal fees
User 2		Total accounts 11	Miscellaneous
User 3		Commission to date \$5,599.90	Other charges
User 4		Success rate 13.555%	Adjustments
		Timezone (-5) Eastern Standard	Run plan

OK

<<   >>

Print

Advanced

Recalc

Cancel

Help

Debtors	Invoices	Payments	Notes	Contacts	Attachments	Associates	Phones	Emails	Addresses
Client	Type	Due date	Priority	Description	Collector	Done			
Relative Measures Corp.	Phone	06/22/2021	30	8035554768	SAL	Yes			
Relative Measures Corp.	Phone	06/14/2021	30	8035554768	SAL	Yes			

**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 Client #	Owned by client	Type Personal Services
Name Relative Measures Corp.		Operator	Class Collections
D.B.A.		Status	Category Standard
Contact Bruce Flaxion		<input type="checkbox"/> Inactive	Listed \$109,508.29
Address 10 Cloverdale Ave.		Client listed date 06/12/2021	Paid \$14,244.19
City Toronto	Phone 803-555-4768	Listed date 10/07/2022	Closed
State ON	Fax	Worked date 03/05/2023	Owing \$94,689.10
ZIP M5E 4C9	Other	Date 2	Principal \$109,467.79
Country	Cell	Active accounts 11	Interest
Email email@company.com		Closed accounts	Fees \$25.00
User 1		Other accounts	Legal fees
User 2		Total accounts 11	Miscellaneous
User 3		Commission to date \$5,599.90	Other charges
User 4		Success rate 13.555%	Adjustments
		Timezone (-5) Eastern Standard	Run plan

Debtors
Invoices
Payments
Notes
Contacts
Attachments
Associates
Phones
Emails
Addresses

OK  
<< >>  
Print  
Advanced  
Recalc  
Cancel  
Help

Client Number	Class	Description
98	Class 1	Agreement

**Attachments:** Any attached document for this Client.

Client 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
Contact	Bruce Flaxion			<input type="checkbox"/> Inactive		Listed	\$109,508.29
Address	10 Cloverdale Ave.			Client listed date	06/12/2021	Paid	\$14,244.19
City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax		Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell		Active accounts	11	Interest	
Email	email@company.com			Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
User 3				Commission to date	\$5,599.90	Other charges	
User 4				Success rate	13.555 %	Adjustments	
				Timezone	(-5) Eastern Standard	Run plan	

Debtors Invoices Payments Notes Contacts Attachments Associates Phones Emails Addresses

Class	Type	Name	Contact	Phone	Fax	Client Name
President	Other	Smith, John	John Smith	803-555-4760		Relative

OK  
 <<   >>  
 Print  
 Advanced  
 Recalc  
 Cancel  
 Help

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



**Client** 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
Contact	Bruce Flaxion			<input type="checkbox"/> Inactive		Listed	\$109,508.29
Address	10 Cloverdale Ave.			Client listed date	06/12/2021	Paid	\$14,244.19
City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax		Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell		Active accounts	11	Interest	
Email	email@company.com			Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
User 3				Commission to date	\$5,599.90	Other charges	
User 4				Success rate	13.555%	Adjustments	
				Timezone	(-5) Eastern Standard	Run plan	

Debtors Invoices Payments Notes Contacts Attachments Associates **Phones** Emails Addresses

Phone number	Extension	Active	Position	Owner	RPC	Date
803-555-4768		Yes	Phone	Self		

OK  
 << >>  
 Print  
 Advanced  
 Recalc  
 Cancel  
 Help

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

Client 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
Contact	Bruce Flaxion			<input type="checkbox"/> Inactive		Listed	\$109,508.29
Address	10 Cloverdale Ave.			Client listed date	06/12/2021	Paid	\$14,244.19
City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax		Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell		Active accounts	11	Interest	
Email	email@company.com			Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
User 3				Commission to date	\$5,599.90	Other charges	
User 4				Success rate	13.555 %	Adjustments	
				Timezone	(-5) Eastern Standard	Run plan	

Debtors Invoices Payments Notes Contacts Attachments Associates Phones Emails Addresses

Email Address	Active	Source
email@company.com	Yes	Client

OK  
 <<    >>  
 Print  
 Advanced  
 Recalc  
 Cancel  
 Help

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

Client 4:44PM x

Client #	98	Alt Client #		Owned by client		Type	Personal Services
Name	Relative Measures Corp.			Operator		Class	Collections
D.B.A.				Status		Category	Standard
Contact	Bruce Flaxion			<input type="checkbox"/> Inactive		Listed	\$109,508.29
Address	10 Cloverdale Ave.			Client listed date	06/12/2021	Paid	\$14,244.19
City	Toronto	Phone	803-555-4768	Listed date	10/07/2022	Closed	
State	ON	Fax		Worked date	03/05/2023	Owing	\$94,689.10
ZIP	M5E 4C9	Other		Date 2		Principal	\$109,467.79
Country		Cell		Active accounts	11	Interest	
Email	email@company.com			Closed accounts		Fees	\$25.00
User 1				Other accounts		Legal fees	
User 2				Total accounts	11	Miscellaneous	
User 3				Commission to date	\$5,599.90	Other charges	
User 4				Success rate	13.555 %	Adjustments	
				Timezone	(-5) Eastern Standard	Run plan	

Debtors Invoices Payments Notes Contacts Attachments Associates Phones Emails Addresses

Address	City	State	Type
10 Cloverdale Ave.	Toronto	ON	Personal

OK  
 << >>  
 Print  
 Advanced  
 Recalc  
 Cancel  
 Help

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

**Debtor** 2:45PM x

Name: Aubin, Kevin		Client: Relative Measures Corp.		98		View		
File: 1423	Group: 8	3	<= Group >=	Acct: 33-01643	Operator: JC			
Contact: Kevin Aubin		Timezone: (-8) Pacific Standard Time		Sales: TM				
Address: 1101-703 Eastwood Crescent		Master: [dropdown]		Type: [dropdown]		Rate: 33.330 %		
<input checked="" type="checkbox"/> OK			Forward: [dropdown]		Mode: Active		Principal: \$12,000.00	
City: Princeton	Home: 619-555-0100			Legal: [dropdown]		Status: ACT		
State: CA	POE#: 619-555-0102	260	Charged: 03/03/2021		Score: [dropdown]		Interest: [dropdown]	
ZIP: 98975-0016	Cell: 619-555-0103			Delinq: [dropdown]		Worked: 07/12/2029		
Country: United States	Other: [dropdown]			Listed: 10/30/2021		Validation: 12/09/2021		
Speech: [dropdown]	Email: aubin@example.com			Closed: [dropdown]		Payment: 02/02/2022		
SSN: 735-40-2471	POE: Global Auto Ltd			Time-bar: 01/11/2027		Next: [dropdown]		
DL: 3256RP63Q	User 1: [dropdown]	# attempts: [dropdown]		Promise: [dropdown]		Paid: \$2,000.00		
DOB: 11/02/1978	User 2: [dropdown]	# RPC: [dropdown]		Date1: [dropdown]		Owing: \$10,000.00		
Summary: [dropdown]				Date2: [dropdown]		Settle: [dropdown]		
						Run plan: [dropdown]		

Notes | Contacts | Attachments | Cosigners | Transactions | Detail | A1 | A2 | A3 | CBR | Group | Misc | Phones | Group notes | Emails | Addresses

12/18/2022 13:07:12 ACT OWN : Post transaction 101 Payment By Check \$250.00 Owing \$5,250.00

10/04/2022 08:03:09 ACT OWN : Post transaction 101 1000.00

07/18/2022 08:03:09 ACT OWN : Post transaction 101 1000.00

07/13/2022 07:59:05 ACT MGR : Fee paid. Had an accident. Will bring account to current soon.

07/10/2022 07:32:18 ACT OWN : Phone about NSF Check and Fee.

07/10/2022 07:31:11 ACT ACT : Post transaction 105 -1000.00

06/28/2022 08:50:29 ACT OWN : Post transaction 101 1000.00

05/25/2022 08:21:46 ACT ACM : Post transaction 101 1000.00

04/03/2022 10:43:34 NEW ACM : Post transaction 101 1000.00

03/04/2022 09:28:30 NEW OWN : Post transaction 101 1000.00

02/02/2022 09:16:25 NEW OWN : Post transaction 101 1000.00

01/02/2022 10:05:22 NEW OWN : Post transaction 101 1000.00

OK

<= >=

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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 sub-records.

**Debtor** 2:45PM x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<u>V</u> iew
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Rate	33.330 %
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Princeton	Home	619-555-0100	Legal		Status	ACT
State	CA	POE#	619-555-0102 260	Charged	03/03/2021	Score	
ZIP	98975-0016	Cell	619-555-0103	Delinqnt		Worked	07/12/2029
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021
Speech		Email	aubin@example.com	Closed		Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Next	
DL	3256RP63Q	User 1		# attempts		Promise	
DOB	11/02/1978	User 2		# RPC		Date1	
Summary				Date2			

Run plan

Notes | Contacts | Attachments | Cosigners | Transactions | Detail | A1 | A2 | A3 | CBR | Group | Misc | Phones | Group notes | Emails | Addresses

12/18/2022 13:07:12 ACT OWN : Post transaction 101 Payment By Check \$250.00 Owing \$5,250.00  
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 06/28/2022 08:50:29 ACT OWN : Post transaction 101 1000.00  
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 02/02/2022 09:16:25 NEW OWN : Post transaction 101 1000.00  
 01/02/2022 10:05:22 NEW OWN : Post transaction 101 1000.00

OK  
 << >>  
 Credit Card  
 ACH  
 Recalc  
 Print  
 Action  
 Advanced  
 Cancel  
 Help

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** 2:45PM x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	View	
File	1423	Group	8 3	Acct	33-01643	Operator	JC	
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM	
Address	1101-703 Eastwood Crescent			Master		Rate	33.330 %	
<input checked="" type="checkbox"/> OK	City	Princeton	Home	619-555-0100	Legal		Principal	\$12,000.00
	State	CA	POE#	619-555-0102	Charged	03/03/2021	Interest	
	ZIP	98975-0016	Cell	619-555-0103	Delnqnt		Fees	
	Country	United States	Other		Listed	10/30/2021	Legal fees	
	Speech		Email	aubin@example.com	Closed		Miscellaneous	
	SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Other charges	
	DL	3256RP63Q	User 1		# attempts		Adjustments	
	DOB	11/02/1978	User 2		# RPC		Paid	\$2,000.00
Summary						Date1		
						Date2		
						Payment	02/02/2022	
						Next		
						Promise		
						Validation	12/09/2021	

Notes | Contacts | Attachments | Cosigners | Transactions | Detail | A1 | A2 | A3 | CBR | Group | Misc | Phones | Group notes | Emails | Addresses

12/18/2022 13:07:12 ACT OWN : Post transaction 101 Payment By Check \$250.00 Owing \$5,250.00  
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 01/02/2022 10:05:22 NEW OWN : Post transaction 101 1000.00

OK  
 << >>  
 Credit Card  
 ACH  
 Recalc  
 Print  
 Action  
 Advanced  
 Cancel  
 Help

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** [X]

Referral Rate  %

Currency

Show 30/60/90  
 Tax exempt

Commission to date   
Principal paid to date

**Judgement** | Commission | Tax | Fees

	Rate1	Rate2	Rate3	Rate4
Rate 1 <input type="text" value="33.330"/> %	Principal <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 2 <input type="text"/> %	Interest <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 3 <input type="text"/> %	Fees <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate 4 <input type="text"/> %	Legal <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Misc <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rate plan <input type="text"/>	Other <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add commission to owing

**Assignment** | Interest | Payment Plan

Last statement <input type="text"/>	Original principal <input type="text" value="\$12,000.00"/>	Req valid amt <input type="text"/>
Transaction (Charged) <input type="text" value="03/03/2021"/>	Original interest <input type="text"/>	Req clt backup <input type="text"/>
Last payment (Delinqnt) <input type="text"/>	Original fees <input type="text"/>	Sent valid amt <input type="text"/>
Charge-off <input type="text"/>	Original legal <input type="text"/>	
Itemization date <input type="text" value="Last payment (Delinqnt)"/>	Original misc <input type="text"/>	Req orig cred info <input type="text"/>
Balance at itemization <input type="text"/>	Original other <input type="text"/>	Sent orig cred info <input type="text"/>
Validation end <input type="text" value="12/09/2021"/>	Original paid <input type="text"/>	
	Assigned amount <input type="text" value="\$12,000.00"/>	Orig last pay amt <input type="text"/>
		Orig last pay date <input type="text"/>

OK  
Transactions  
Summary  
Cancel  
Calculators  
Help

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** 2:45PM x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<u>V</u> iew																
File	1423	Group	8	3	≤ Group ≥	Acct	33-01643																
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time																		
Address	1101-703 Eastwood Crescent			Master		Type																	
<input checked="" type="checkbox"/> OK		Forward		Mode	Active																		
City	Princeton	Home	619-555-0100	Legal		Status	ACT																
State	CA	POE#	619-555-0102	260	Charged	03/03/2021	Score																
ZIP	98975-0016	Cell	619-555-0103		Delinqt		Worked	07/12/2029															
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021																
Speech		Email	aubin@example.com		Closed		Payment	02/02/2022															
SSN	735-40-2471	POE	Global Auto Ltd		Time-bar	01/11/2027	Next																
DL	3256RP63Q	User 1		# attempts		Promise																	
DOB	11/02/1978	User 2		# RPC		Date1																	
Summary																							
<table border="1"> <tr> <td>Notes</td><td>Contacts</td><td>Attachments</td><td>Cosigners</td><td>Transactions</td><td>Detail</td><td>A1</td><td>A2</td><td>A3</td><td>CBR</td><td>Group</td><td>Misc</td><td>Phones</td><td>Group notes</td><td>Emails</td><td>Addresses</td> </tr> </table>								Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses
Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses								
<p>12/18/2022 13:07:12 ACT OWN : Post transaction 101 Payment By Check \$250.00 Owing \$5,250.00</p> <p>10/04/2022 08:03:09 ACT OWN : Post transaction 101 1000.00</p> <p>07/18/2022 08:03:09 ACT OWN : Post transaction 101 1000.00</p> <p>07/13/2022 07:59:05 ACT MGR : Fee paid. Had an accident. Will bring account to current soon.</p> <p>07/10/2022 07:32:18 ACT OWN : Phone about NSF Check and Fee.</p> <p>07/10/2022 07:31:11 ACT ACT : Post transaction 105 -1000.00</p> <p>06/28/2022 08:50:29 ACT OWN : Post transaction 101 1000.00</p> <p>05/25/2022 08:21:46 ACT ACM : Post transaction 101 1000.00</p> <p>04/03/2022 10:43:34 NEW ACM : Post transaction 101 1000.00</p> <p>03/04/2022 09:28:30 NEW OWN : Post transaction 101 1000.00</p> <p>02/02/2022 09:16:25 NEW OWN : Post transaction 101 1000.00</p> <p>01/02/2022 10:05:22 NEW OWN : Post transaction 101 1000.00</p>																							
<table border="1"> <tr><td>OK</td></tr> <tr><td>&lt;&lt;</td><td>&gt;&gt;</td></tr> <tr><td>Credit Card</td></tr> <tr><td>ACH</td></tr> <tr><td>Recalc</td></tr> <tr><td>Print</td></tr> <tr><td>Action</td></tr> <tr><td>Advanced</td></tr> <tr><td>Cancel</td></tr> <tr><td>Help</td></tr> </table>								OK	<<	>>	Credit Card	ACH	Recalc	Print	Action	Advanced	Cancel	Help					
OK																							
<<	>>																						
Credit Card																							
ACH																							
Recalc																							
Print																							
Action																							
Advanced																							
Cancel																							
Help																							

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 free-form notes to this field.

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



**Debtor** 2:45PM x

Name: Aubin, Kevin		Client: Relative Measures Corp.		98	<u>V</u> iew
File: 1423	Group: 8	3	≤ Group ≥	Acct: 33-01643	Operator: JC
Contact: Kevin Aubin		Timezone: (-8) Pacific Standard Time		Sales: TM	
Address: 1101-703 Eastwood Crescent		Master: [v]	Type: [v]	Rate: 33.330%	
<input checked="" type="checkbox"/> OK		Forward: [v]	Mode: Active	Principal: \$12,000.00	
City: Princeton	Home: 619-555-0100	Legal: [v]	Status: ACT	Interest: [v]	
State: CA	POE#: 619-555-0102	Charged: 03/03/2021	Score: [v]	Fees: [v]	
ZIP: 98975-0016	Cell: 619-555-0103	Delinq: [v]	Worked: 07/12/2029	Legal fees: [v]	
Country: United States	Other: [v]	Listed: 10/30/2021	Validation: 12/09/2021	Miscellaneous: [v]	
Speech: [v]	Email: aubin@example.com	Closed: [v]	Payment: 02/02/2022	Other charges: [v]	
SSN: 735-40-2471	POE: Global Auto Ltd	Time-bar: 01/11/2027	Next: [v]	Adjustments: [v]	
DL: 3256RP63Q	User 1: [v]	# attempts: [v]	Promise: [v]	Paid: \$2,000.00	
DOB: 11/02/1978	User 2: [v]	# RPC: [v]	Date1: [v]	Owing: \$10,000.00	
Summary: [v]		Date2: [v]		Settle: [v]	
Run plan: [v]					

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
Review	03/16/2023	30	Review file...	JC	No
Phone	03/13/2023	30	Home	JC	No
Review	03/08/2023	30	Rcvd - Experian Pull - View Attachments	JC	No
Review	03/07/2023	30	Rcvd - Equifax Pull - View Attachments	JC	No
Review	03/05/2023	30	Review file...	99	No
Letter	11/26/2022		Letter 1 Merge Template	99	Yes
Phone	07/11/2022	30	Home	OWN	Yes
Letter	12/29/2021	10	No Response Threat of Action	SC	Yes
Letter	11/29/2021	10	Letter 2	SC	Yes

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

**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** 2:45PM x

Name: Aubin, Kevin		Client: Relative Measures Corp.		98		View		
File: 1423	Group: 8	3	< Group >	Acct: 33-01643	Operator: JC			
Contact: Kevin Aubin		Timezone: (-8) Pacific Standard Time		Sales: TM				
Address: 1101-703 Eastwood Crescent		Master: [dropdown]		Type: [dropdown]		Rate: 33.330 %		
<input checked="" type="checkbox"/> OK			Forward: [dropdown]		Mode: Active		Principal: \$12,000.00	
City: Princeton	Home: 619-555-0100	Legal: [dropdown]		Status: ACT		Interest:		
State: CA	POE#: 619-555-0102	Charged: 03/03/2021		Score:		Fees:		
ZIP: 98975-0016	Cell: 619-555-0103	Delinqnt: [calendar]		Worked: 07/12/2029		Legal fees:		
Country: United States	Other: [dropdown]	Listed: 10/30/2021		Validation: 12/09/2021		Miscellaneous:		
Speech: [dropdown]	Email: aubin@example.com	Closed: [calendar]		Payment: 02/02/2022		Other charges:		
SSN: 735-40-2471	POE: Global Auto Ltd	Time-bar: 01/11/2027		Next: [calendar]		Adjustments:		
DL: 3256RP63Q	User 1: [dropdown]	# attempts: [dropdown]		Promise: [calendar]		Paid: \$2,000.00		
DOB: 11/02/1978	User 2: [dropdown]	# RPC: [dropdown]		Date1: [calendar]		Owing: \$10,000.00		
Summary:		Date2: [calendar]		Run plan:				

Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses
-------	----------	-------------	-----------	--------------	--------	----	----	----	-----	-------	------	--------	-------------	--------	-----------

Class	Type	Description	Index 1
Financial	1	2300.00/mth	Secretary
CBPull	1	Equifax Pull	
CBPull	3	Trans Union Pull	
CBPull	2	Experian Pull	
Assets	2	Condominium	

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

**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, user-defined forms to store information like Health Insurance, Court Dates, and Disputes.

**Debtor** 2:45PM ✕

Name: Aubin, Kevin		Client: Relative Measures Corp.		98	View
File: 1423	Group: 8	3	≤ Group ≥	Acct: 33-01643	Operator: JC
Contact: Kevin Aubin		Timezone: (-8) Pacific Standard Time		Sales: TM	
Address: 1101-703 Eastwood Crescent		Master	Type	Rate: 33.330%	
<input checked="" type="checkbox"/> OK		Forward	Mode: Active	Principal: \$12,000.00	
City: Princeton	Home: 619-555-0100	Legal	Status: ACT	Interest:	
State: CA	POE#: 619-555-0102	Charged: 03/03/2021	Score:	Fees:	
ZIP: 98975-0016	Cell: 619-555-0103	Delinqnt:	Worked: 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:	Paid: \$2,000.00	
DOB: 11/02/1978	User 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

Class	Type	Name	Home	Work
Cosigner		Dawson, Thomas		719-555-0101

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

**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 x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	View
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Rate	33.330%
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Princeton	Home	619-555-0100	Legal		Status	ACT
State	CA	POE#	619-555-0102 260	Charged	03/03/2021	Score	
ZIP	98975-0016	Cell	619-555-0103	Delinqnt		Worked	07/12/2029
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021
Speech		Email	aubin@example.com	Closed		Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Next	
DL	3256RP63Q	User 1		# attempts		Promise	
DOB	11/02/1978	User 2		# RPC		Date1	
Summary				Date2			

Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses
-------	----------	-------------	-----------	--------------	--------	----	----	----	-----	-------	------	--------	-------------	--------	-----------

Type	To us	Direct Description	Payment date	Posted date	Commission amount
101	\$1,000.00	Payment By Check	01/11/2023	01/11/2023	\$333.33
101	\$250.00	Payment By Check	12/18/2022	12/18/2022	\$83.33
101	\$500.00	Payment By Check	10/04/2022	10/04/2022	\$166.67
101	\$1,000.00	Payment By Check	07/18/2022	07/18/2022	\$333.33
106	\$25.00	Payment of Agency	07/13/2022	07/13/2022	\$25.00
301	(\$25.00)	NSF Charge Due Ac	07/10/2022	07/10/2022	
105	(\$1,000.00)	Returned NSF Chec	07/10/2022	07/10/2022	(\$333.33)
101	\$1,000.00	Payment By Check	06/28/2022	06/28/2022	\$333.33
101	\$1,000.00	Payment By Check	04/03/2022	04/03/2022	\$333.33
101	\$1,000.00	Payment By Check	03/03/2022	03/04/2022	\$333.33

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

**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** 2:52PM x

Name	Aubin, Kevin	Client	Relative Measures Corp.	98	View
File	1423	Group	8	3	< Group >
Contact	Kevin Aubin	Acct	33-01643	Operator	JC
Address	1101-703 Eastwood Crescent	Timezone	(-8) Pacific Standard Time	Sales	TM
<input checked="" type="checkbox"/> OK		Master		Rate	33.330 %
City	Princeton	Forward		Mode	Active
State	CA	Legal		Status	ACT
ZIP	98975-0016	Charged	03/03/2021	Score	
Country	United States	Delinqnt		Worked	07/12/2029
Speech		Listed	10/30/2021	Validation	12/09/2021
SSN	735-40-2471	Closed		Payment	02/02/2022
DL	3256RP63Q	Time-bar	01/11/2027	Next	
DOB	11/02/1978	# attempts		Promise	
Summary		# RPC		Date1	
				Date2	

Interest  
 Fees  
 Legal fees  
 Miscellaneous  
 Other charges  
 Adjustments  
 Paid \$2,000.00  
 Owing \$10,000.00  
 Settle  
 Run plan

Notes | Contacts | Attachments | Cosigners | Transactions | **Detail** | A1 | A2 | A3 | CBR | Group | Misc | Phones | Group notes | Emails | Addresses

Acct holder	Kevin Aubin	<input type="checkbox"/> Don't use debtor contact name
Bank	Sample Bank	<input type="checkbox"/> Use cosigner for recurring
Branch		
Account	123456789	Clerk SC
ABA	111111118	Access
Detail 1	612 Franklin Road	
Detail 2	Brampton, California 98567	
Detail 3		
Detail 4	Savings	

Help

OK  
 << >>  
 Credit Card  
 ACH  
 Recalc  
 Print  
 Action  
 Advanced  
 Cancel  
 Help

**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 x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<a href="#">View</a>
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Type	
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Princeton	Home	619-555-0100	Legal		Status	ACT
State	CA	POE#	619-555-0102	Charged	03/03/2021	Score	
ZIP	98975-0016	Cell	619-555-0103	Delinqnt		Worked	07/12/2029
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021
Speech		Email	aubin@example.com	Closed		Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Next	
DL	3256RP63Q	User 1		# attempts		Promise	
DOB	11/02/1978	User 2		# RPC		Date1	
Summary				Date2		Date2	

<a href="#">Notes</a>	<a href="#">Contacts</a>	<a href="#">Attachments</a>	<a href="#">Cosigners</a>	<a href="#">Transactions</a>	<a href="#">Detail</a>	<a href="#">A1</a>	<a href="#">A2</a>	<a href="#">A3</a>	<a href="#">CBR</a>	<a href="#">Group</a>	<a href="#">Misc</a>	<a href="#">Phones</a>	<a href="#">Group notes</a>	<a href="#">Emails</a>	<a href="#">Addresses</a>
-----------------------	--------------------------	-----------------------------	---------------------------	------------------------------	------------------------	--------------------	--------------------	--------------------	---------------------	-----------------------	----------------------	------------------------	-----------------------------	------------------------	---------------------------

Reporting industry	None Specified	<input type="checkbox"/> Report to credit bureau	
Account type	None Specified	<input type="checkbox"/> Control account manually	
Status code	Delete entire account from credit bureau		
* Payment rating	None specified	Start reporting	03/29/2022
Portfolio	Open Account (30 or 90 days)	Report cosigner	No
Special comments	None Specified		
Association code (ECOA)	Individual		
Condition code	None Specified	<a href="#">Cosigner</a>	
Country code	United States	<a href="#">Defaults</a>	
Indicator	None Specified		

OK
<< >>
Credit Card
ACH
Recalc
Print
Action
Advanced
Cancel
Help

**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 x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<a href="#">View</a>
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Type	
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Princeton	Home	619-555-0100	Legal		Status	ACT
State	CA	POE#	619-555-0102	Charged	03/03/2021	Score	
ZIP	98975-0016	Cell	619-555-0103	Delnqnt		Worked	07/12/2029
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021
Speech		Email	aubin@example.com	Closed		Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Next	
DL	3256RP63Q	User 1		# attempts		Promise	
DOB	11/02/1978	User 2		# RPC		Date1	
Summary				Date2		Date2	

Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses
Total accounts	6	Principal		\$74,819.51						Paid	\$2,450.00				<a href="#">Edit Member</a>
Active accounts	6	Interest								Active Owing	\$72,369.51				<a href="#">Member Setup</a>
Closed accounts		Fees/Legal								Closed Owing					<a href="#">Contact Plan</a>
Other/Misc		Adjustments								Total Owing	\$72,369.51				<a href="#">Edit Group</a>

Group Members							
File	Name	Client num	Acct	Listed	Status	Owing	Paid
1400	Aubin, Kevin	98	18-77564	10/07/2022	NEW	\$50,000.00	
1287	Aubin, Kevin	99	126-88546-A	06/02/2022	ACT	\$350.00	
1423	Aubin, Kevin	98	33-01643	10/30/2021	ACT	\$10,000.00	\$2,000.00

<a href="#">OK</a>
<a href="#">&lt;&lt;</a> <a href="#">&gt;&gt;</a>
<a href="#">Credit Card</a>
<a href="#">ACH</a>
<a href="#">Recalc</a>
<a href="#">Print</a>
<a href="#">Action</a>
<a href="#">Advanced</a>
<a href="#">Cancel</a>
<a href="#">Help</a>

**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** 2:52PM x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<u>V</u> iew
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Rate	33.330 %
<input checked="" type="checkbox"/> OK		Forward		Mode	Active	Principal	\$12,000.00
City	Princeton	Home	619-555-0100	Legal		Interest	
State	CA	POE#	619-555-0102	Charged	03/03/2021	Fees	
ZIP	98975-0016	Cell	619-555-0103	Delinqnt		Legal fees	
Country	United States	Other		Listed	10/30/2021	Miscellaneous	
Speech		Email	aubin@example.com	Closed		Other charges	
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Adjustments	
DL	3256RP63Q	User 1		# attempts		Paid	\$2,000.00
DOB	11/02/1978	User 2		# RPC		Owing	\$10,000.00
Summary				Date1		Settle	
				Date2		Run plan	

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

Number 1		Estimated Time		User 1		<input type="checkbox"/> Switch 1
Number 2		Elapsed Time		User 2		<input type="checkbox"/> Switch 2
Date 1		Process Id		User 3		<input type="checkbox"/> Switch 3
Date 2		Process Step		User 4		<input type="checkbox"/> Switch 4
Amount 1		Percent 1	%	User 5		<input type="checkbox"/> Switch 5
Amount 2		Percent 2	%	User 6		<input type="checkbox"/> Switch 6
		Risk Score	%	User 7		<input type="checkbox"/> Switch 7
				User 8		<input type="checkbox"/> Switch 8

OK  
 << >>  
 Credit Card  
 ACH  
 Recalc  
 Print  
 Action  
 Advanced  
 Cancel  
 Help

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



**Debtor** 2:52PM x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<u>V</u> iew
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Rate	33.330%
<input checked="" type="checkbox"/> OK		Forward		Legal		Mode	Active
City	Princeton	Home	619-555-0100	Charged	03/03/2021	Status	ACT
State	CA	POE#	619-555-0102	Delinqnt		Score	
ZIP	98975-0016	Cell	619-555-0103	Listed	10/30/2021	Worked	07/12/2029
Country	United States	Other		Closed		Validation	12/09/2021
Speech		Email	aubin@example.com	Time-bar	01/11/2027	Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	# attempts		Next	
DL	3256RP63Q	User 1		# RPC		Promise	
DOB	11/02/1978	User 2		Date1		Date2	
Summary							

Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses
Phone number	Extension	Active	Position	Owner	RPC	Date									
619-555-0103		Yes	Cell	Self											
619-555-0102	260	Yes	Fax	Self											
619-555-0100		Yes	Phone	Self											
719-555-0102	260	Yes	Fax	Employer											
812-555-0103		No	Cell	Self											
916-555-0100		No	Phone	Self	X										

OK
<< >>
Credit Card
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Action
Advanced
Cancel
Help

**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** 2:52PM x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<u>V</u> iew
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Rate	33.330%
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Princeton	Home	619-555-0100	Legal		Status	ACT
State	CA	POE#	619-555-0102 260	Charged	03/03/2021	Score	
ZIP	98975-0016	Cell	619-555-0103	Delnqnt		Worked	07/12/2029
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021
Speech		Email	aubin@example.com	Closed		Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Next	
DL	3256RP63Q	User 1		# attempts		Promise	
DOB	11/02/1978	User 2		# RPC		Date1	
Summary				Date2		Run plan	

Notes Contacts Attachments Cosigners Transactions Detail A1 A2 A3 CBR Group Misc Phones Group notes **Emails** Addresses

Email Address	Active	Source
aubin@example.com	Yes	Client

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

**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 x

Name	Aubin, Kevin			Client	Relative Measures Corp.	98	<u>V</u> iew
File	1423	Group	8 3	Acct	33-01643	Operator	JC
Contact	Kevin Aubin			Timezone	(-8) Pacific Standard Time	Sales	TM
Address	1101-703 Eastwood Crescent			Master		Rate	33.330 %
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Princeton	Home	619-555-0100	Legal		Status	ACT
State	CA	POE#	619-555-0102 260	Charged	03/03/2021	Score	
ZIP	98975-0016	Cell	619-555-0103	Delnqnt		Worked	07/12/2029
Country	United States	Other		Listed	10/30/2021	Validation	12/09/2021
Speech		Email	aubin@example.com	Closed		Payment	02/02/2022
SSN	735-40-2471	POE	Global Auto Ltd	Time-bar	01/11/2027	Next	
DL	3256RP63Q	User 1		# attempts		Promise	
DOB	11/02/1978	User 2		# RPC		Date1	
Summary				Date2			

Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Group notes	Emails	Addresses
Address		City	State	Type											
1101-703 Eastwood Crescent		Princeton	CA	Personal											

OK
<< >>
Credit Card
ACH
Recalc
Print
Action
Advanced
Cancel
Help

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

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

**Work In Progress** x

Priority  
 All  
 High  
 Medium  
 Low

Type All   
 Client   
 Status

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

	Total	Today	Past	Done
Promise	1		1	
Phone	23		23	3
Review	4		4	
Other				

Exit

Reload

---

**To Do List For: OWN** x

Type	Priori	Name	Status	Description	Date	Client	Owing Score	Time Zone	Days since last payment
Phone	50	Mitchell, Mary	NEW	Home	01/01/2022	98	\$2,500.00	(-6) Central Stand	
Phone	50	Murdoch, Roger S.	NEW	Home	01/01/2022	97	\$7,362.30	(-5) Eastern Stand	-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 Stand	-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	(-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 Stand	-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	
Promise	30	Schneider, Arthur	JDG	judgment to pay	01/01/2022	95	\$6,600.00	(-8) Pacific Stand	-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	

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.

WIP Filters	<input checked="" type="radio"/> Contacts for today and past	Time From	<input type="text"/>	OK
WIP Options	<input type="radio"/> Contacts for today only	Time To	<input type="text"/>	Save as Default
Load Spreading	<input type="radio"/> Search all dates			Cancel
	<input type="radio"/> Search by range ...			Help
	Load contacts for operator	OWN	<input type="text"/>	
	Load contacts for client		<input type="text"/>	

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.

- Automatically display dialer
- Always show next contact when
- Force feed contacts
  - WIP Sort
- Enable elapsed time counter
- Automatically mark contacts done
- Schedule contacts on weekends
- Future contact not required
- Cache contact plans
- Analyze completed contacts
- No automatic resort

Default new contact	Review
Priority	30
Days delay	
Minutes delay	
Scan back days when loading WIP	

- Load contacts for group
- Auto reload WIP
- Show all modes
- Enable Shared WIP List
- Include plan contacts
- Next contact based on filter

OK

WIP Filters

Dialer Setup

Save as Default

Cancel

Help

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 Required:** 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.

- Automatically display dialer
- Always show next contact when
- Force feed contacts
  - WIP Sort
- Enable elapsed time counter
- Automatically mark contacts done
- Schedule contacts on weekends
  
- Future contact not required
- Cache contact plans
- Analyze completed contacts
- No automatic resort

Default new contact

Priority

Days delay

Minutes delay

Scan back days when loading WIP

- Load contacts for group
- Auto reload WIP
- Show all modes
- Enable Shared WIP List
- Include plan contacts
- Next contact based on filter

OK

WIP Filters

Dialer Setup

Save as Default

Cancel

Help

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  
 High  
 Medium  
 Low

Type All  
 Client  
 Status

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

	Total	Today	Past	Done
Promise	1		1	
Phone	23		23	3
Review	4		4	
Other				

Exit  
Reload

---

**To Do List For: OWN**

Type	Priority	Name	Edit...	Description	Date	Client	Owing Score	Time Zone	Days since last payment
Phone	50	Mit	Move...	me	01/01/2022	98	\$2,500.00	(-6) Central Stand	
Phone	50	Mu		me	01/01/2022	97	\$7,362.30	(-5) Eastern Stand	-262
Phone	50	Nac	Insert Field...	me	01/01/2022	92	\$6,477.78	(-5) Eastern Stand	
Phone	50	Par	Remove Field...	me	01/01/2022	94	\$3,067.50	(-8) Pacific Stand	-148
Phone	50	Pet		me	01/01/2022	96	\$4,389.12	(-7) Mountain Sta	-126
Phone	30	Bra	Restore Default	me	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
Phone	30	Nilley, William	NEW	Home	01/01/2022	98	\$7,356.22	(-8) Pacific Stand	-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	
Phone	30	Scott, Sandra R.	NEW	Home	01/01/2022	92	\$1,560.70	(-5) Eastern Stand	
Phone	30	Selinas, Christopher	NEW	Home	01/01/2022	92	\$5,680.00	(-7) Mountain Sta	
Phone	30	Stanfield, Rachael	JDG	Home	01/01/2022	98	\$5,500.00	(-5) Eastern Stand	
Phone	30	Stockton, Sammy	NEW	Home	01/01/2022	99	\$3,457.90	(-8) Pacific Stand	
Phone	30	Stutt, Jane H.	NEW	Home	01/01/2022	97	\$4,734.80	(-6) Central Stand	-358
Phone	30	Taylor, Elizabeth	NEW	Home	01/01/2022	104	\$6,112.00	Local Time	-249
Phone	30	Tessier, Petre	NEW	Home	01/01/2022	99	\$1,975.78	(-8) Pacific Stand	-358

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.



**Debtor** 5:00PM x

Name	Mitchell, Mary	Client	Relative Measures Corp.	98	View	
File	4418	Group	Acct 34-60594	Operator	OWN	
Contact	Mary Mitchell	Timezone	(-6) Central Standard Time	Sales		
Address	2203 Amanda Drive	Master		Rate	33.330%	
<input checked="" type="checkbox"/> OK		Forward		Judgement	\$2,500.00	
City	Fort Wayne	Legal		Interest		
State	IN	Charged	01/13/2022	Fees		
ZIP	19685	Delinqt		Legal fees		
Country	United States	Listed	05/22/2022	Miscellaneous		
Speech		Closed		Other charges		
SSN	777-12-4857	Time-bar	02/08/2043	Adjustments		
DL	DL103847563	# attempts		Paid		
DOB	02/01/1985	# RPC		Owing	\$2,459.50	
Summary	01/01/2022 50 OWN Home				Settle	
Run plan						

Type	Due date	Priority	Description	Collector	Done
Letter	06/21/2022	10	Letter 2	SC	Yes
Phone	05/25/2022	30	Home	SC	Yes
Letter	05/22/2022	10	Letter 1	SC	Yes
Phone	01/01/2022	50	Home	OWN	No

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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 x

Name	Mitchell, Mary	Client	Relative Measures Corp.	98	View
File	4418	Acct	34-60594	Operator	OWN
Contact	Mary Mitchell	Timezone	(-6) Central Standard Time	Sales	
Address	2203 Amanda Drive	Master		Rate	33.330 %
<input checked="" type="checkbox"/> OK		Forward		Judgement	\$2,500.00
City	Fort Wayne	Legal		Interest	
State	IN	Charged	01/13/2022	Fees	
ZIP	19685	Delinqnt		Legal fees	
Country	United States	Listed	05/22/2022	Miscellaneous	
Speech		Closed		Other charges	
SSN	777-12-4857	Time-bar	02/08/2043	Adjustments	
DL	DL103847563	# attempts		Paid	
DOB	02/01/1985	# RPC		Owing	\$2,459.50
Summary				Settle	
	01/01/2022 50 OWN Home			Run plan	

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

**Debtor Notes**

02/22/2022 15:01:34 NEW OWN : called home, and left a message

Line: 1 Col: 62

OK  
 << >>  
 Credit Card  
 ACH  
 Recalc  
 Print  
 Action  
 Advanced  
 Cancel  
 Help

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 x

Name Mitchell, Mary Client Relative Measures Corp. 98 View

File 4418 Group ≤ Group ≥ Acct 34-60594 Operator OWN

Contact Mary Mitchell Sales

Address 2203 Amanda Drive Rate 33.330%

OK Judgement **\$2,500.00**  
 City Fort Wayne Interest  
 State IN PO  
 ZIP 19685 C  
 Country United States Other  
 Speech Em  
 SSN 777-12-4857 PO  
 DL DL103847563 Use  
 DOB 02/01/1985 Use

Summary

Notes Contacts Attachments Cos

02/22/2022 15:01:34 NEW OWN : call

**?** What would you like to do with this phone contact event?

Owner : Mitchell, Mary  
 Type : Phone  
 Description : Home  
 Date and Time : 01/01/2022  
 Operator : OWN

You can select "Leave in WIP list" to keep the contact in your To Do to go back to it later.

- You can select "Mark it done" to mark the current contact event as completed.
- If you want to stay on the account for the moment and decide later, you can select "Stay on account."

Which action would you like to take?

Run plan

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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 x

Name	Mitchell, Mary	Client	Relative Measures Corp.	98	View																																				
File	4418	Group	≤ Group ≥	Acct	34-60594																																				
Contact	Mary Mitchell	Timezone	(-6) Central Standard Time	Operator	OWN																																				
Address	2203 Amanda Drive	Master	Type	Sales																																					
OK		Forward	Mode	Rate	33.330%																																				
City	Fort Wayne	Legal	Status	Judgement	\$2,500.00																																				
Home	219-555-0133			Interest																																					
State	IN	<b>Schedule Next Contact - New</b> x																																							
ZIP	19685	The Schedule Next Contact form is displayed in several situations where Collect! expects you to confirm details for a next contact. The Schedule Next Contact title bar will let you know which type of situation you are handling. You can confirm and/or edit the details. Press the NEXT button to schedule the contact as displayed.																																							
Country	United States																																								
Speech																																									
SSN	777-12-4857																																								
DL	DL103847563																																								
DOB	02/01/1985																																								
Summary																																									
<table border="1"> <tr> <td>Type</td> <td>Phone</td> <td>Repeat</td> <td>No Repeat</td> </tr> <tr> <td>Class</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Date</td> <td>02/22/2022</td> <td></td> <td></td> </tr> <tr> <td>Time</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Priority</td> <td>30</td> <td></td> <td></td> </tr> <tr> <td>Description</td> <td>Home</td> <td></td> <td></td> </tr> <tr> <td>Data</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Attachment</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Operator</td> <td>OWN</td> <td></td> <td></td> </tr> </table>						Type	Phone	Repeat	No Repeat	Class				Date	02/22/2022			Time				Priority	30			Description	Home			Data				Attachment				Operator	OWN		
Type	Phone	Repeat	No Repeat																																						
Class																																									
Date	02/22/2022																																								
Time																																									
Priority	30																																								
Description	Home																																								
Data																																									
Attachment																																									
Operator	OWN																																								

Notes | Contacts | Attach

02/22/2022 15:01:34 NEV

OK

<=> >=>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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 x

Name	Murdoch, Roger S.	Client	Price Shields	97	<u>V</u> iew	
File	4351	Group	≤ Group ≥	Acct	AA03922	
Contact	Roger Murdoch	Timezone	(-5) Eastern Standard Time	Operator	OWN	
Address	450 Cedar Stands Road	Master		Sales	TM	
<input checked="" type="checkbox"/> OK		Forward		Rate	20.000%	
City	Hempstead	Legal		Principal	\$8,112.30	
State	NY	Charged	04/07/2022	Interest		
ZIP	14890	Delnqnt		Fees		
Country	United States	Listed	07/26/2022	Legal fees		
Speech		Closed		Miscellaneous		
SSN		Time-bar	11/11/2028	Other charges		
DL	DL25734829	# attempts		Adjustments		
DOB	09/24/1975	# RPC		Paid		
Summary					Owing	\$8,112.30
	01/01/2022 50 OWN Home				Settle	
					Run plan	

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

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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

File: 4351      **100 - Tel Home - No Answer**

Contact: Roger Murdoc      101 - Tel Home - Left Message on Machine

Address: 450 Cedar Star      102 - Tel Home - Left message with person

OK      103 - Tel Home - Debtor not in, will call back. No message left.

City: Hempstead      104 - Tel Home - spoke to debtor. Verified right party. Details to follow:

State: NY      105 - Tel Home - Wrong number / debtor unknown.

ZIP: 14890      106 - Tel Home - NIS

Country: United States      107 - Tel Home - Comment:

Speech:      200 - Tel POE - No Answer

SSN:      201 - Tel POE - Left Message on Machine

DL: DL25734829      202 - Tel POE - Left message with person

DOB: 09/24/1975      203 - Tel POE - Debtor not in, will call back. No message left.

Summary:      204 - Tel POE - spoke to debtor. Verified right party. Details to follow:

Notes      205 - Tel POE - Wrong number / debtor unknown.

Contacts      206 - Tel POE - NIS

Attac      207 - Tel POE - Comment:

300 - Tel Cell - No Answer

301 - Tel Cell - Left Message on Machine

302 - Tel Cell - Left message with person

303 - Tel Cell - Debtor not in, will call back. No message left.

304 - Tel Cell - spoke to debtor. Verified right party. Details to follow:

305 - Tel Cell - Wrong number / debtor unknown.

306 - Tel Cell - NIS

307 - Tel Cell - Comment:

400 - Tel Other - No Answer

Print      <<      >>      Cancel      Select

View

OWN

TM

20.000%

\$8,112.30

OK

<<      >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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

**Debtor** 6:03PM x

Name	Murdoch, Roger S.	Client	Price Shields	97	<u>V</u> iew
File	4351	Group	Acct AA03922	Operator	OWN
Contact	Roger Murdoch	Timezone	(-5) Eastern Standard Time	Sales	TM
Address	450 Cedar Stands Road	Master	Type	Rate	20.000 %
<input checked="" type="checkbox"/> OK		Forward	Mode Active	Principal	\$8,112.30
City	Hempstead	Legal	<b>Status ACT</b>	Interest	
Home	516-555-0141	Charged	Score	Fees	
State	NY	Delnqnt	Worked 02/22/2022	Legal fees	
ZIP	14890	Listed	Validation	Miscellaneous	
Country	United States	Closed	Payment	Other charges	
Speech		Time-bar	Next	Adjustments	
SSN		# attempts	Promise	Paid	
DL	DL25734829	# RPC	Date1	Owing	\$8,112.30
DOB	09/24/1975		Date2	Settle	
Summary	01/01/2022 50 OWN Home				
<span>Notes</span> <span>Contacts</span> <span>Attachments</span> <span>Cosigners</span> <span>Transactions</span> <span>Detail</span> <span>A1</span> <span>A2</span> <span>A3</span> <span>CBR</span> <span>Group</span> <span>Misc</span> <span>Phones</span> <span>Emails</span> <span>Addresses</span>					
<div style="border: 1px solid red; padding: 5px;"> <p>02/22/2022 15:05:24 ACT OWN : Changed status from NEW to ACT.</p> <p>02/22/2022 15:05:24 NEW OWN : Tel Home - Left Message on machine</p> </div>					

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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 x

Name	Nadeau, Pierre			Client	Retail Client	92	View
File	4408	Group		Acct	444111	Operator	OWN
Contact	Pierre Nadeau			Timezone	(-5) Eastern Standard Time	Sales	OWN
Address	3895 Place de Ste. Jean			Master		Rate	40.000%
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Pointe Claire	Home		Legal		Status	NEW
State	PQ	POE#	514-555-0122	Charged	09/04/2021	Score	
ZIP	Q4E 3Q2	Cell		Delnqnt		Worked	03/04/2023
Country	Canada	Other		Listed	07/25/2022	Validation	
Speech		Email		Closed		Payment	
SSN		POE	La Petite Patisserie	Time-bar		Next	
DL		User 1		# attempts		Promise	
DOB		User 2		# RPC		Date1	
Summary				Date2		Settle	

01/01/2022 50 OWN Home

Run plan

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

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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 x

Name	Nadeau, Pierre			Client	Retail Client	92	<u>V</u> iew
File	4408	Group		Acct	444111	Operator	OWN
Contact	Pierre Nadeau			Timezone	(-5) Eastern Standard Time	Sales	OWN
Address	3895 Place de Ste. Jean			Master		Rate	40.000 %
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Pointe Claire	Home		Legal		Status	ACT
State	PQ	POE#	514-555-0122	Charged	09/04/2021	Score	
ZIP	Q4E 3Q2	Cell		Delnqnt		Worked	02/22/2022
Country	Canada	Other		Listed	07/25/2022	Validation	
Speech		Email		Closed		Payment	
SSN		POE	La Petite Patisserie	Time-bar		Next	
DL		User 1		# attempts		Promise	
DOB		User 2		# RPC		Date1	
Summary				Date2		Date1	
01/01/2022 50 OWN Home							
<span>Notes</span> <span>Contacts</span> <span>Attachments</span> <span>Cosigners</span> <span>Transactions</span> <span>Detail</span> <span>A1</span> <span>A2</span> <span>A3</span> <span>CBR</span> <span>Group</span> <span>Misc</span> <span>Phones</span> <span>Emails</span> <span>Addresses</span>							
02/22/2022 15:14:52 ACT OWN : Changed status from NEW to ACT. 02/22/2022 15:14:52 NEW OWN : Tel Home - Left Message on machine							

Principal	\$5,210.00
Interest	\$274.24
Fees	
Legal fees	
Miscellaneous	
Other charges	
Adjustments	
Paid	
Owing	\$5,484.24
Settle	
Run plan	

OK
<< >>
Credit Card
ACH
Recalc
Print
Action
Advanced
Cancel
Help

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 click-to-dial module can save time by having the system dial the number for you.

**Debtor** 3:15PM x

Name	Nilley, William			Client	Relative Measures Corp.	98	<a href="#">View</a>
File	4426	Group	7 1	Acct	99-35465	Operator	OWN
Contact	William Nilley			Timezone	(-8) Pacific Standard Time	Sales	
Address	4 - 102 Hollywood Cres.			Master		Rate	33.330%
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Victoria	Home	250-555-0166	Legal		Status	NEW
State	BC	POE#	250-555-0100	Charged	06/29/2022	Score	
ZIP	V5T 0K0	Cell		Delnqnt	07/18/2022	Worked	03/04/2023
Country	Canada	Other		Listed	09/09/2022	Validation	
Speech		Email	willinilli@example.com	Closed		Payment	
SSN	000-777-111	POE		Time-bar		Next	
DL	3948545-WS	User 1		# attempts		Promise	
DOB	03/27/1986	User 2		# RPC		Date1	
Summary	01/01/2022 30 OWN Home						
<a href="#">Notes</a> <a href="#">Contacts</a> <a href="#">Attachments</a> <a href="#">Cosigners</a> <a href="#">Transactions</a> <a href="#">Detail</a> <a href="#">A1</a> <a href="#">A2</a> <a href="#">A3</a> <a href="#">CBR</a> <a href="#">Group</a> <a href="#">Misc</a> <a href="#">Phones</a> <a href="#">Emails</a> <a href="#">Addresses</a>							

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

Help

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** 3:15PM

Name Nilley, William Client Relative Measures Corp. 98 View

File 4426 Group 7 1 ≤ Group ≥ Acct 99-35465 Operator OWN

Contact William Nilley Timezone (-8) Pacific Standard Time Sales

Address 4 - 102 Hollywood Cres. Master Type Rate 33.330%

OK Forward Mode Active Principal \$7,556.22

City Victoria Home 250-555-0166 Legal Status NEW Interest

State BC

ZIP V5T 0K0

Country Canada

Speech

SSN 000-777-111

DL 3948545-WS

DOB 03/27/1986

Summary

Notes Contacts Attachments

**Schedule Next Contact - Confirm Details**

The Schedule Next Contact form is displayed in several situations where Collect! expects you to confirm details for a next contact. The Schedule Next Contact title bar will let you know which type of situation you are handling. You can confirm and/or edit the details. Press the NEXT button to schedule the contact as displayed.

Type Promise Repeat No Repeat

Class

Date 03/01/2022

Time

Priority 80

Amount

Description Promised Payment

Data

Attachment

Operator OWN

Advance on overpayment

Do not autodelete

No autocomplete

No autocomplete promise

Create copy on repeat

Log repeat to notes

Next >>

Cancel

Help

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

Cancel

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 x

Name	Nilley, William			Client	Relative Measures Corp.	98	<u>V</u> iew		
File	4426	Group	7 1	Acct	99-35465	Operator	OWN		
Contact	William Nilley			Timezone	(-8) Pacific Standard Time	Sales			
Address	4 - 102 Hollywood Cres.			Master		Rate	33.330%		
<input checked="" type="checkbox"/> OK				Forward		Mode	Active		
City	Victoria	Home	250-555-0166	Legal		Status	PRA		
State	BC	POE#	250-555-0100	Charged	06/29/2022	Score			
ZIP	V5T 0K0	Cell		Delinqnt	07/18/2022	Worked	02/22/2022		
Country	Canada	Other		Listed	09/09/2022	Validation			
Speech		Email	willinilli@example.com	Closed		Payment			
SSN	000-777-111	POE		Time-bar		Next			
DL	3948545-WS	User 1		# attempts		Promise	03/01/2022		
DOB	03/27/1986	User 2		# RPC		Date1			
Summary				Date2		Owing	\$7,556.22		
				01/01/2022 30 OWN Home				Settle	
								Run plan	

Notes | **Contacts** | Attachments | Cosigners | **Transactions** | Detail | A1 | A2 | A3 | CBR | **Group** | Misc | **Phones** | Emails | Addresses

02/22/2022 15:16:43 PRA OWN : Changed status from NEW to PRA.  
 02/22/2022 15:16:43 NEW OWN : Agreed to Promise of Payment

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

**Debtor** 3:15PM x

Name	Nilley, William			Client	Relative Measures Corp.	98	<u>View</u>
File	4426	Group	7 1	Acct	99-35465	Operator	OWN
Contact	William Nilley			Timezone	(-8) Pacific Standard Time	Sales	
Address	4 - 102 Hollywood Cres.			Master		Rate	33.330%
<input checked="" type="checkbox"/> OK				Forward		Mode	Active
City	Victoria	Home	250-555-0166	Legal		Status	PRA
State	BC	POE#	250-555-0100	Charged	06/29/2022	Score	
ZIP	V5T 0K0	Cell		Delnqnt	07/18/2022	Worked	02/22/2022
Country	Canada	Other		Listed	09/09/2022	Validation	
Speech		Email	willinilli@example.com	Closed		Payment	
SSN	000-777-111	POE		Time-bar		Next	
DL	3948545-WS	User 1		# attempts		Promise	03/01/2022
DOB	03/27/1986	User 2		# RPC		Date1	
Summary				Date2		Owing	\$7,556.22
	01/01/2022 30 OWN Home			Run plan		Settle	

Notes	Contacts	Attachments	Cosigners	Transactions	Detail	A1	A2	A3	CBR	Group	Misc	Phones	Emails	Addresses
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Type	Due date	Priority	Description	Collector	Done
Metro	09/17/2022		TTA UI0 SC@@ RI1 AS93 AT48 CCUS AC1	OWN	No
Promise	03/01/2022	80	Promised Payment	OWN	No
Letter	02/22/2022	10	Promise Payment Acknowledgement	OWN	No
Phone	01/01/2022	30	Home	OWN	Yes
Letter	09/09/2021	10	Letter 1	SC	Yes

OK

<< >>

Credit Card

ACH

Recalc

Print

Action

Advanced

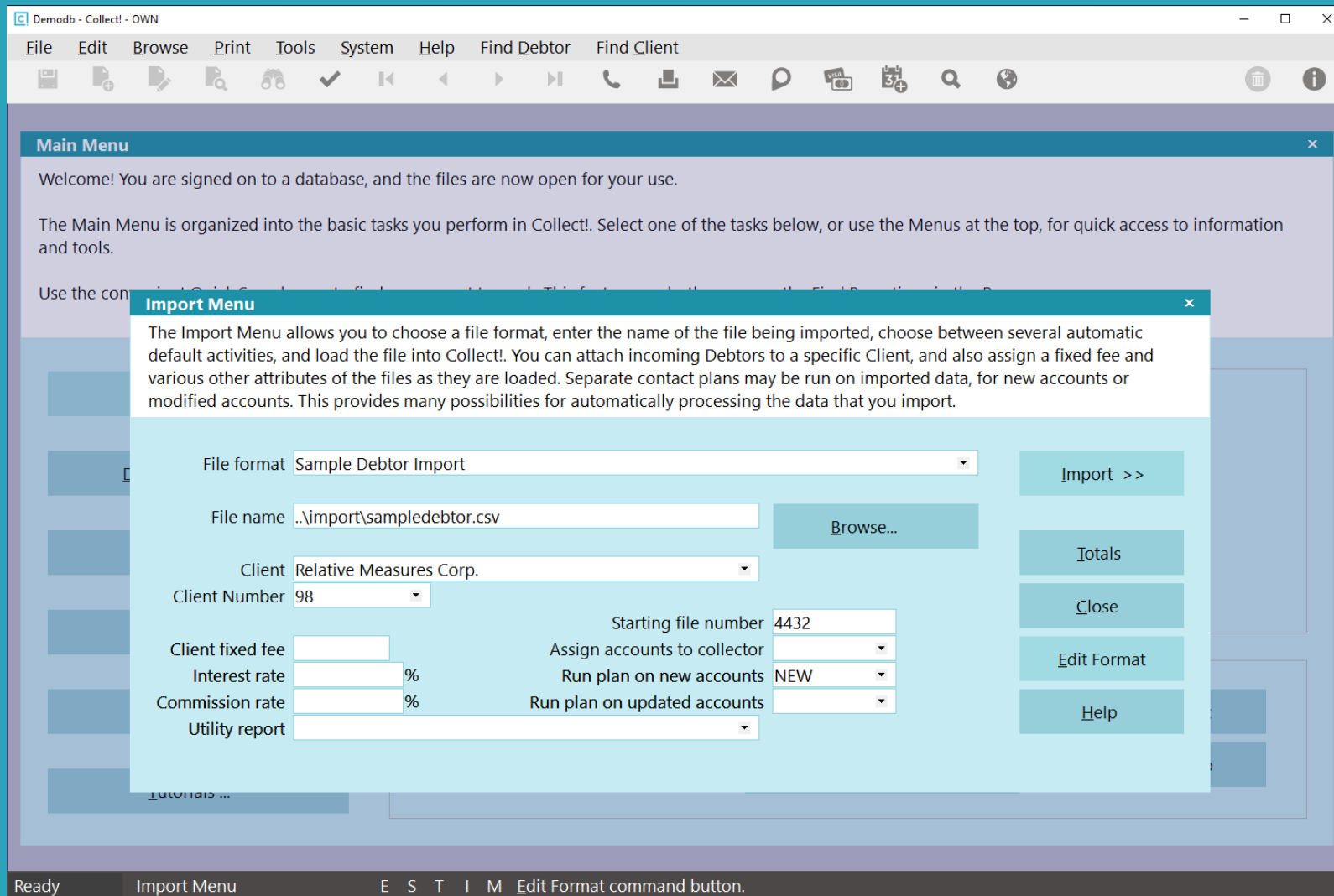
Cancel

Help

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.



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 and 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.

**Main Menu**

**Scheduler**

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

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

Start Scheduler   Help   Settings   View Log   Quit

**Scheduler Tasks**

Task	ID	Interval	Day of week	Date	Time
Batch processing		Daily	Wednesday	02/23/2022	02:00:00
Recalculate totals		Daily	Wednesday	02/23/2022	02:30:00
Import routine		Daily	Wednesday	02/23/2022	01:00:00
Letter service		Daily	Wednesday	02/23/2022	04:00:00
Generate statements		Monthly	Saturday	03/05/2022	06:00:00
Credit bureau reporting		Monthly	Thursday	03/10/2022	06:00:00
Print a report		Daily	Wednesday	02/23/2022	05:00:00

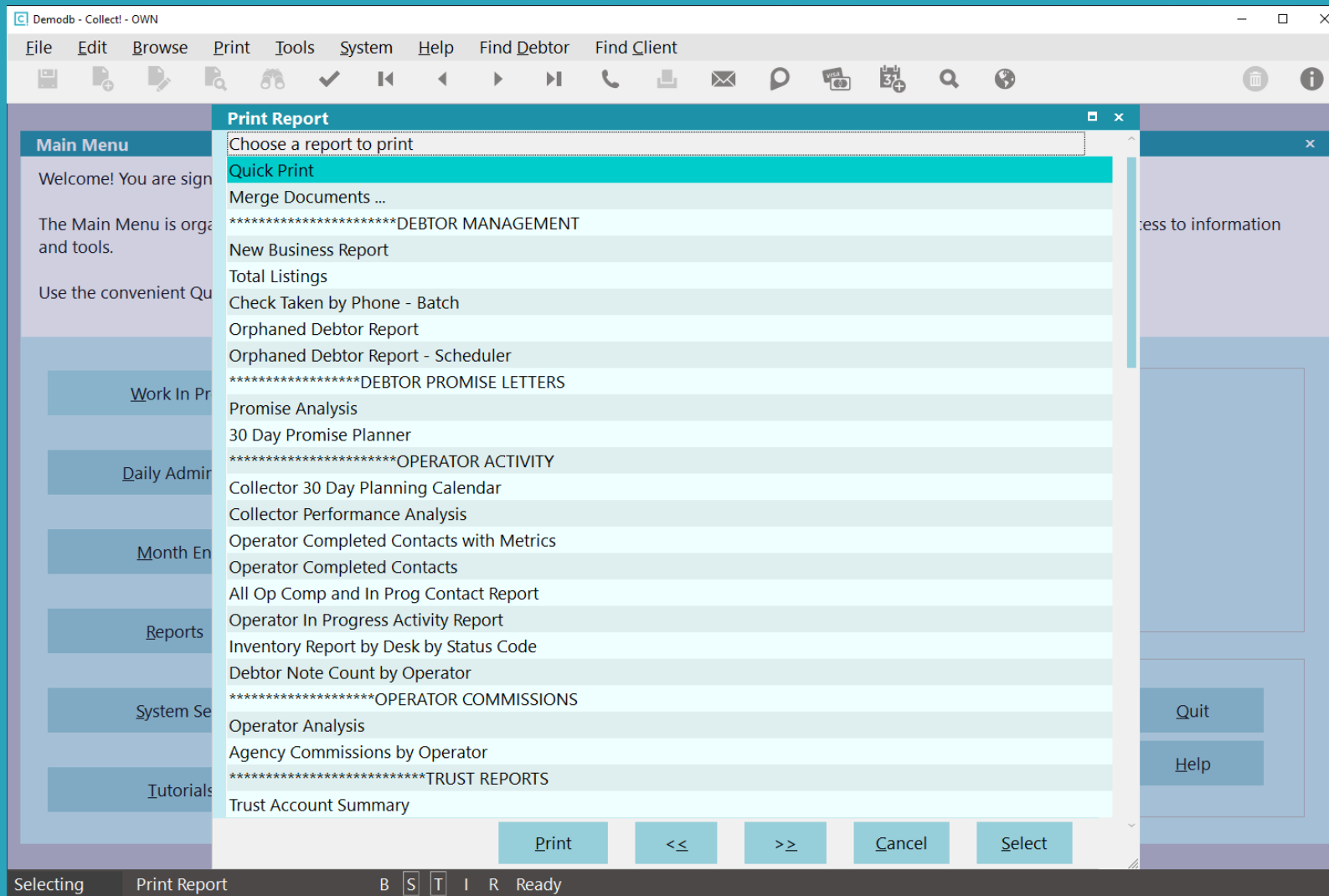
Ready Scheduler E S T I M Start Scheduler command button.

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.



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