Client View

General User Guide

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Welcome to Client View. This Client User Guide has been created to help familiarize you with the Client View application, particularly as it applies to the functions that will help you review your accounts assigned to the agency. The guide will focus on key areas, such as Account Inquiry, Reporting, submission of New Placements and Secure Messaging. Each of these functional areas will be explained in detail, allowing the User to understand the broad capabilities that Client View provides for review of account information and secure interaction with the agency.

Sign in page

Authorized Users to Client View can access key account information by entering their User Name and Password (see fig. 1).

Fig. 1

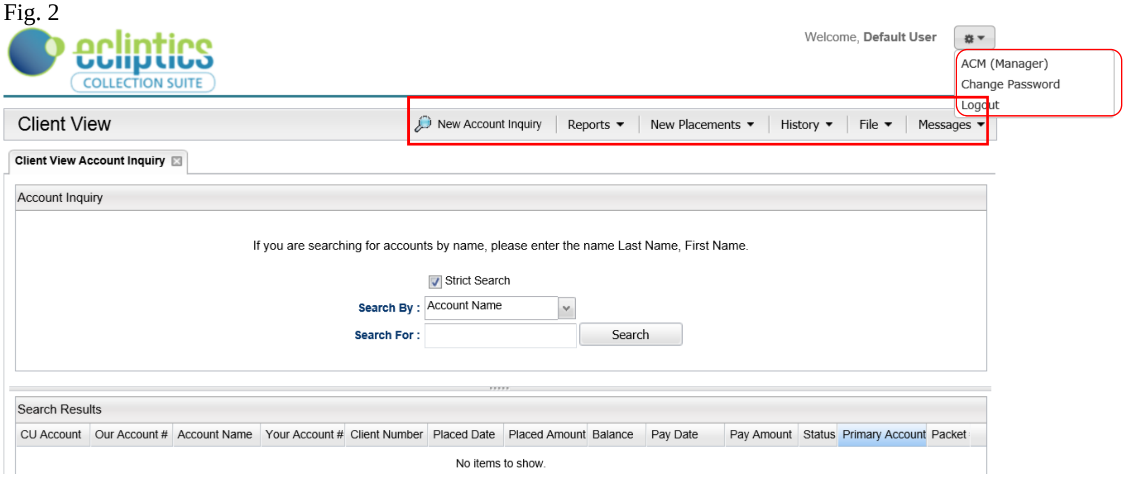
When the Agency Administrator sets up new users in Client View, an email is automatically sent to each new user with their User Name and a temporary password. The first time a user logs into Client View, they will be directed to create a permanent password of their choosing.

In the event a user forgets his password, he can click on the "forgot password" link. After entering his User Name and submitting a request, he will receive an email containing a temporary password that will allow him to log back into Client View and set up a permanent password.

Client View Home Screen

When a client signs into the Client View application, the Home Page (see fig. 2) will be displayed, providing access to Accounts, Reports, Secure Messaging and other functions the client has been granted permissions to access. All users will also have access to *Change Password* and *Logout* capabilities, but **only authorized users** will have the *ACM (Manager)* option, which is used for administrative and configuration purposes.

Fig. 2



The major functional areas of Client View are displayed in the tabs across the header and a brief introduction of each is provided below:

1. **New Account Inquiry:** Provides the capability to search for and view accounts the user has been authorized to see
2. **Reports:** Provides a list of reports the agency has shared with the client
3. **New Placements:** Provides a customizable New Placement form for clients sending the agency small numbers of new accounts. New placements can be reviewed by the agency and automatically uploaded to The Collector System®
4. **History:** Displays up to the most recent 10 accounts the client was reviewing during the current session
5. **File:** Allows the client to securely upload files to the agency (Note: client can also use the Secure Messaging Attachments feature) and to retrieve a report showing the files that have been uploaded to the agency
6. **Messages:** A secure messaging feature that allows the agency and its users to securely send messages and attachments to each other

New Account Inquiry

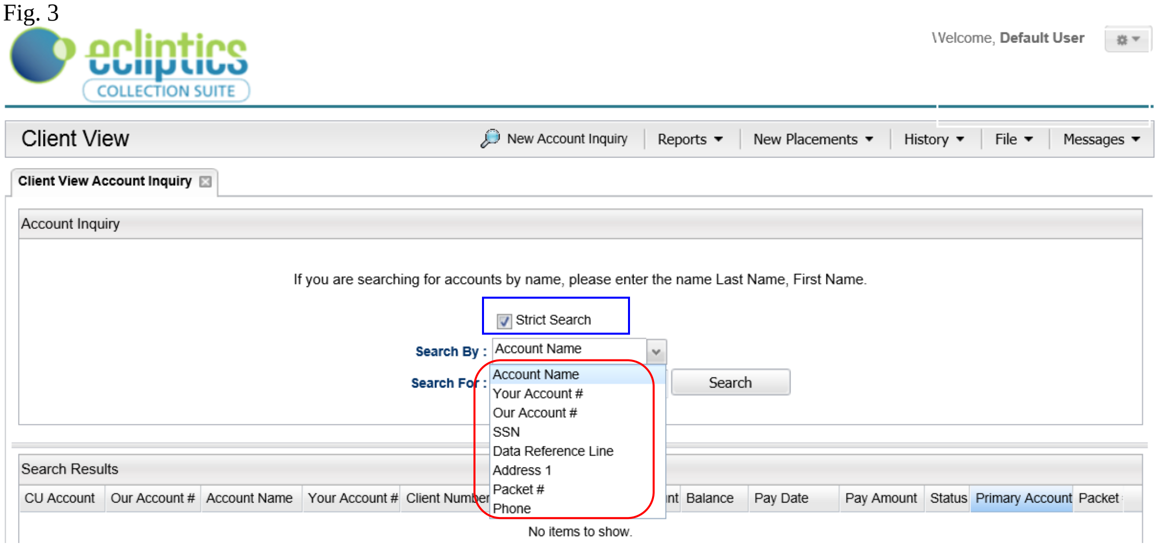
Account Search Options

Clients have several options when searching for specific accounts to review. By clicking on the *Search By* drop-down menu (see Fig. 3), the standard search fields are displayed for selection by the client (Account Name, Your Account #, SSN, Our Account #, Address 1, Packet #, Phone and Data Reference Line). Note that you can only inquire on accounts belonging to clients you have been authorized to view.

Strict v. non-Strict Search

Clients can conduct a *Strict Search* by checking the box (fig. 3) next to this term, meaning the search will be conducted on the *exact* parameters entered by the client. A search for “Jones,” for example, will return all accounts named Jones that the client has access to. If this same client wishes to search for “Jones,” but mistakenly enters “Jpnes,” the search returns *No items to show*. If *Strict Search* is unchecked, the search will take the information entered by the client to display all results that contain the data entered. For example, if *Strict Search* is unchecked and the client enters “Jo,” results are returned for all accounts beginning with “J-O,” such as Jones, Johnson, etc.

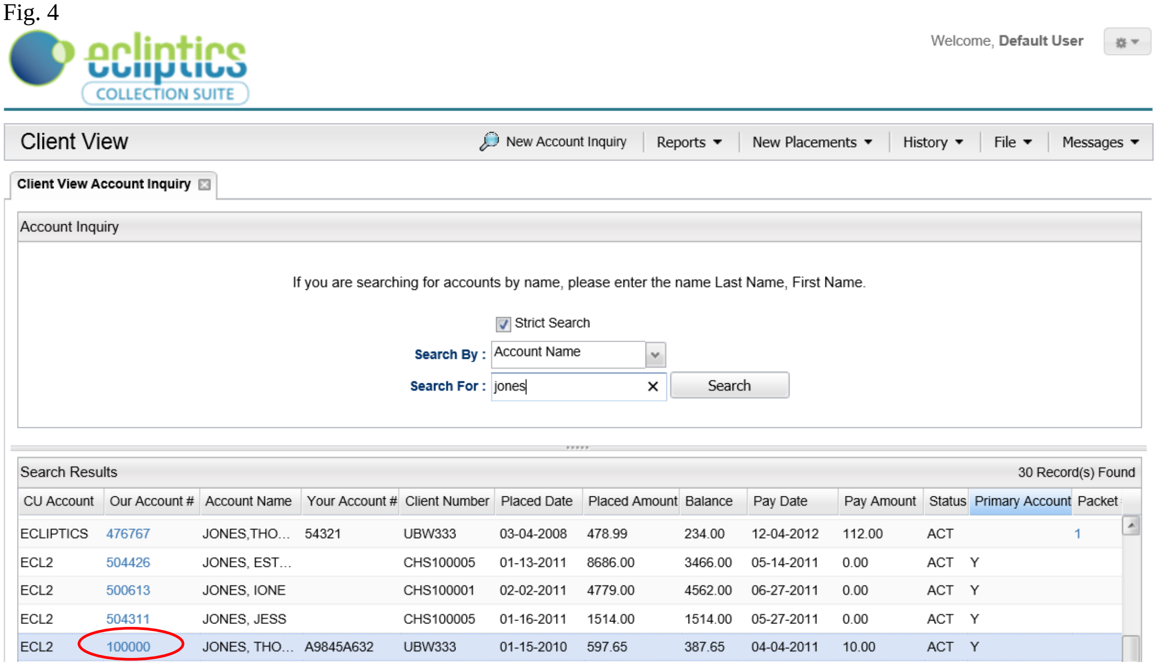
Fig. 3



Search Results

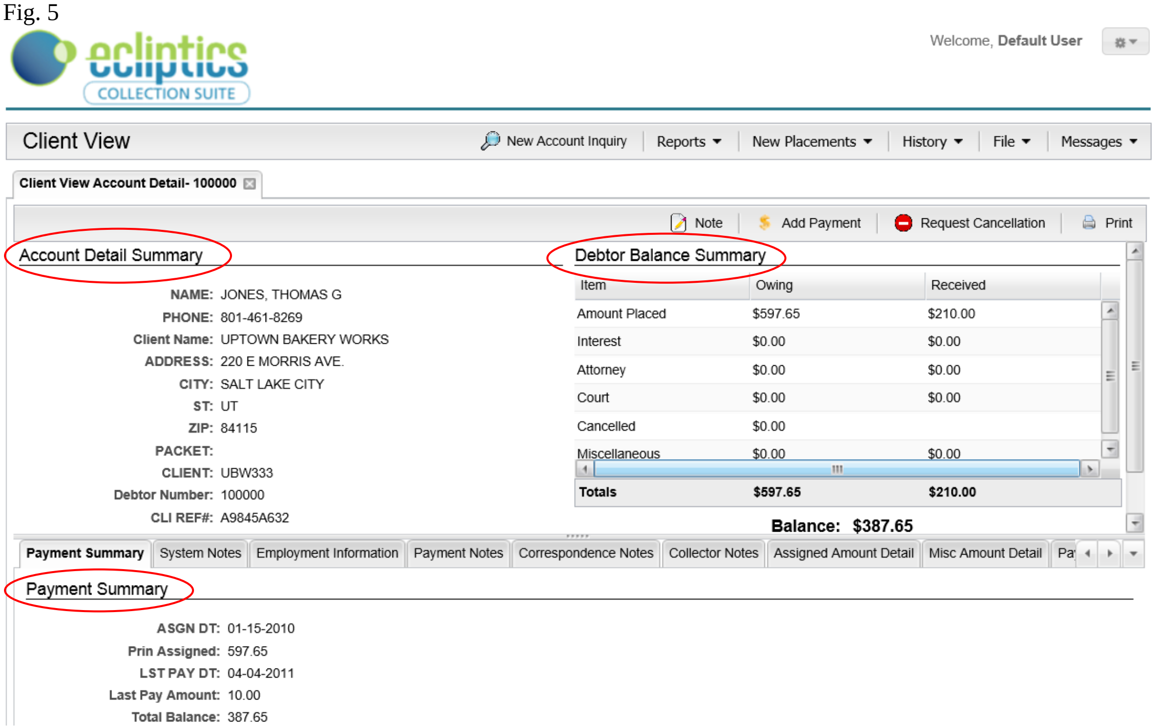
Once search results have been retrieved and displayed, the user selects the account she wishes to review by clicking on the specific account in the *Our Account #* column, which is colored blue to indicate a live link (see fig. 4).

Fig. 4



The account is retrieved and key account information is displayed, such as *Account Detail Summary*, *Debtor Balance Summary* and *Payment Summary* (see Fig. 5)

Fig. 5



Account Inquiry Dashboard – Display Multiple Accounts and Operations

Client View allows users to work with several accounts and/or operations on the dashboard simultaneously. For example, a client can perform multiple account inquiries and can work with numerous accounts on the dashboard at the same time (each account detail appears as a tab and the highlighted tab appears on the screen). Rather than closing an account before performing the next account inquiry, the user can keep the account active in the dashboard. Figure 6 shows an example of four active accounts on the dashboard, allowing the user to return to an account with the click of the mouse. At any time, the user can free up space on the dashboard by closing one tab – or all tabs. The user clears the dash board by individually clicking on the "x" icon next to the Account Detail in each tab or by right clicking one of the *Account Detail* "x" icons and choosing *Close All Tabs*. If an account tab is removed from the dashboard, but later needs to be revisited, the user can access the account via the *History* key, which will provide a link back to the last 10 accounts being reviewed without the need to perform a search (fig. 6a).

Reports and other operations can be accessed without having to close the accounts on the dashboard, allowing for easy and rapid navigation throughout the functional areas of Client View. You will see additional examples of the *History* key function in the *History* section of this user guide.

Fig. 6

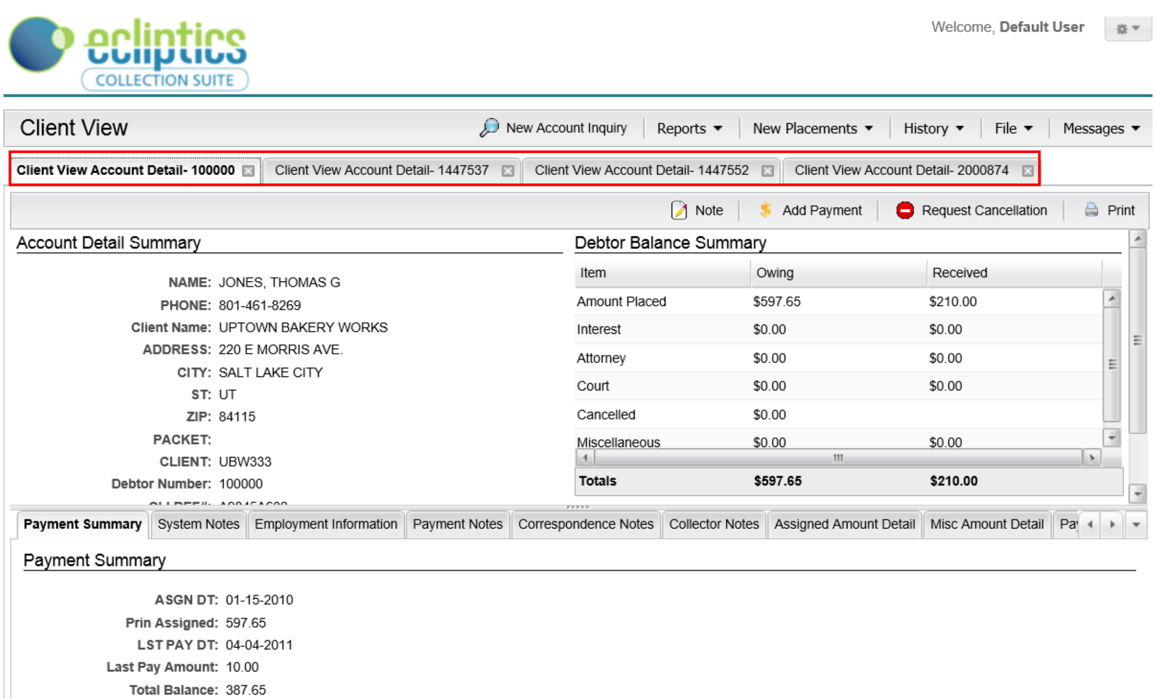
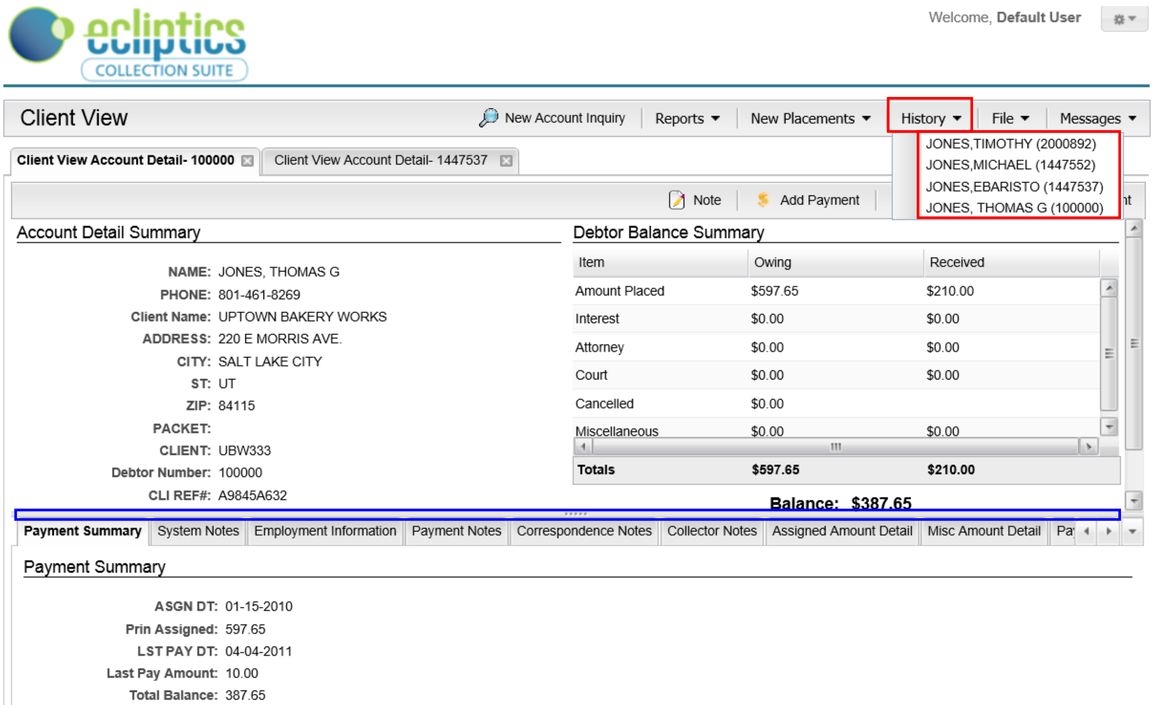


Fig. 6a



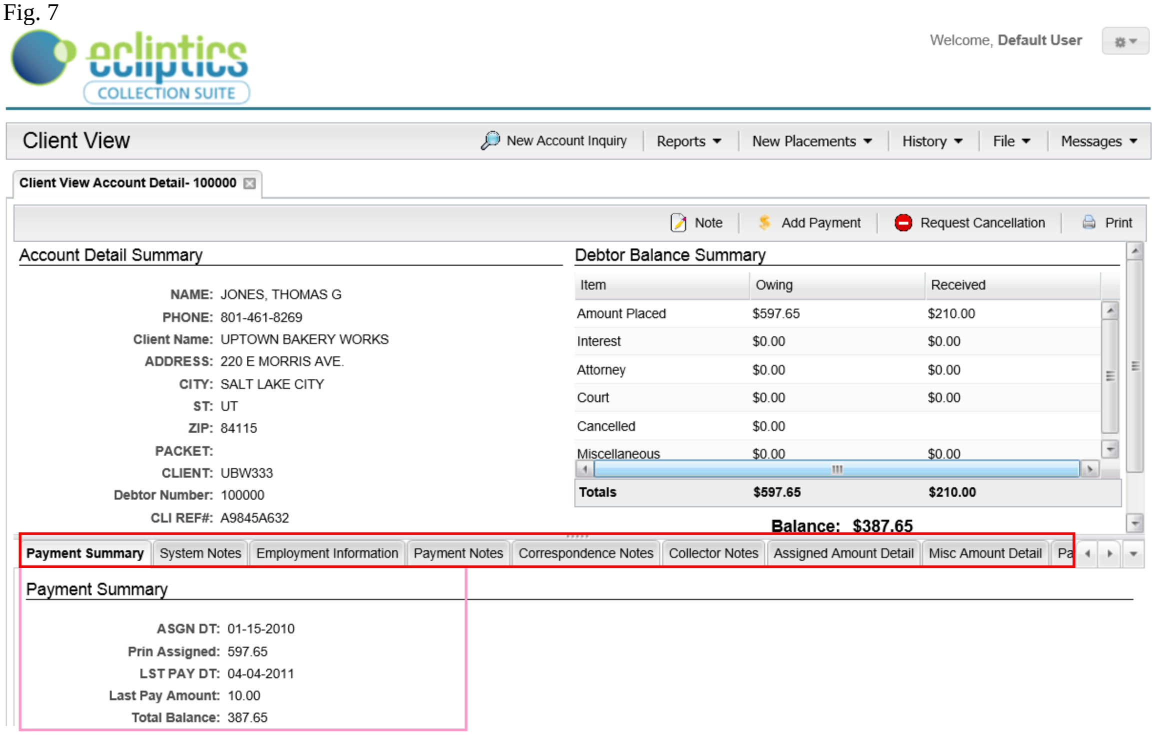
Screen Sizing

Based on user preference, the Client View screen can be easily sized to highlight the fields of interest. By placing the cursor on the screen dividing line (see bold blue line at the bottom half of the screen in Figure 6a) and by clicking or dragging the line, the user can expand or shrink the viewing area.

Additional Account Information available to the Client

Client View also provides users the ability to review other account-specific information by clicking on each of the tabs at the bottom of the screen. As each tab is selected, the information pertaining to the tab is displayed in the Payment Summary space (fig. 7).

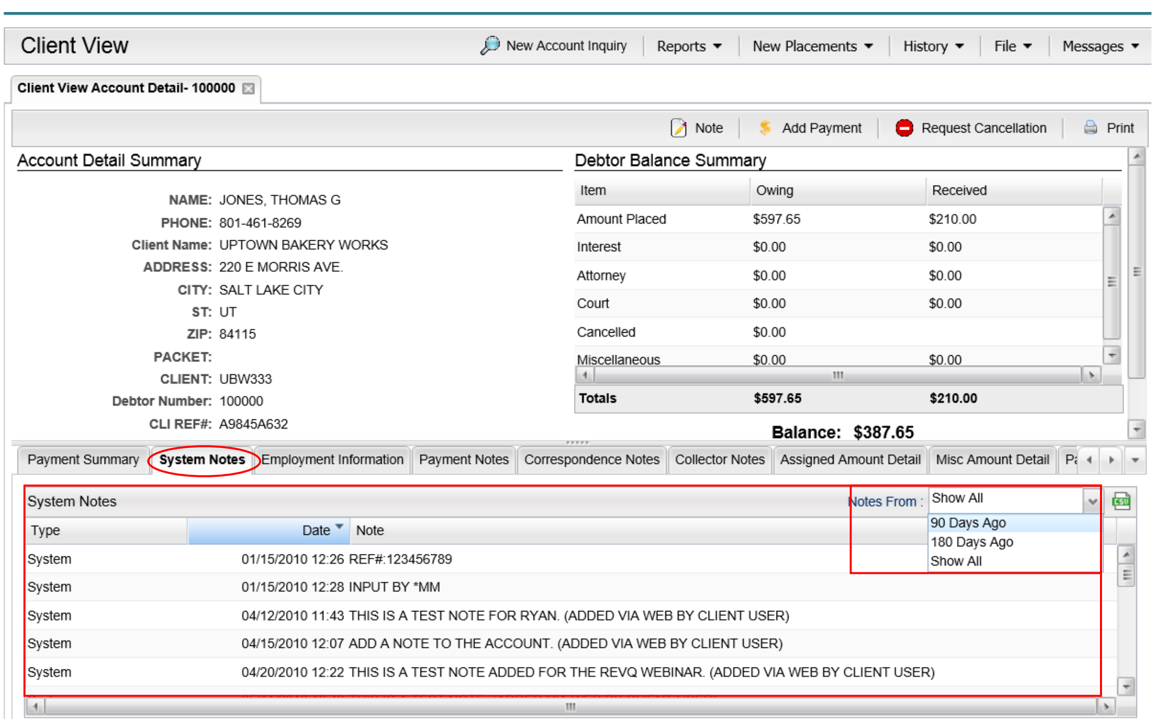
Fig. 7



Reviewing Notes: Ability for Client to see Notes associated with the Account

If permission is granted, the client can see account notes and can see them from any of the following timeframes: 90 Days Ago, 180 Days Ago or Show All (Fig. 8)

Fig. 8



Adding Client Notes to the Account

Permission can also be granted allowing the Client to add notes to an account, which are automatically updated in real-time to The Collector System. The client simply clicks on the *Note* button (fig. 9) and enters the note in the template provided (fig. 10). Upon the addition of a note by the Client, agency designee(s) are notified automatically via email that a note has been added to a specific account.

Fig. 9

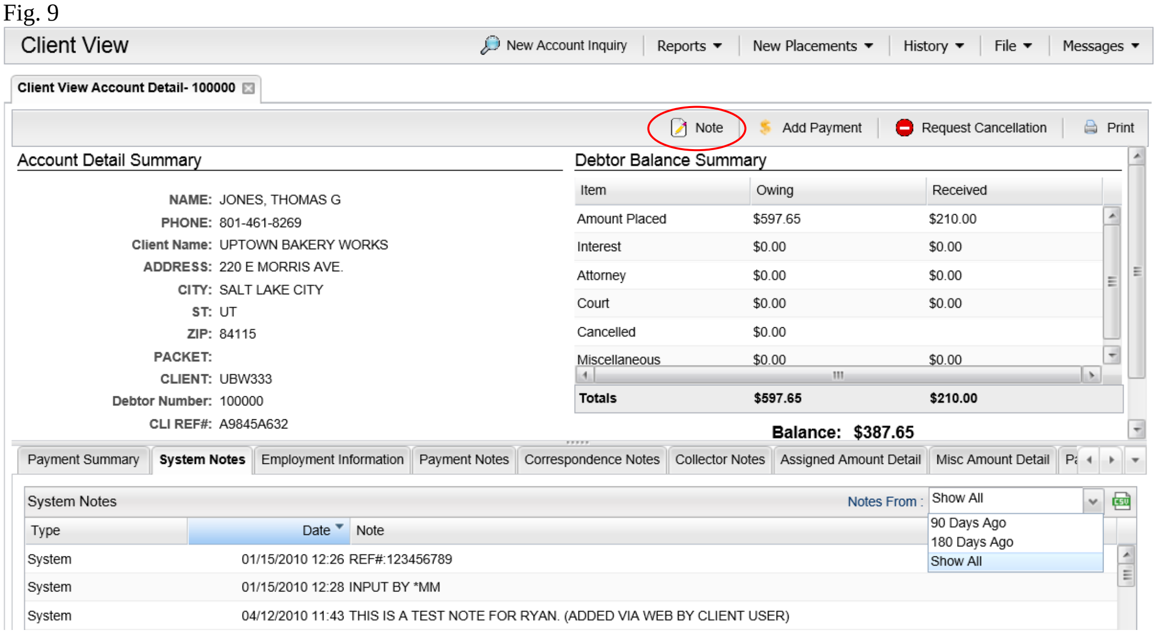
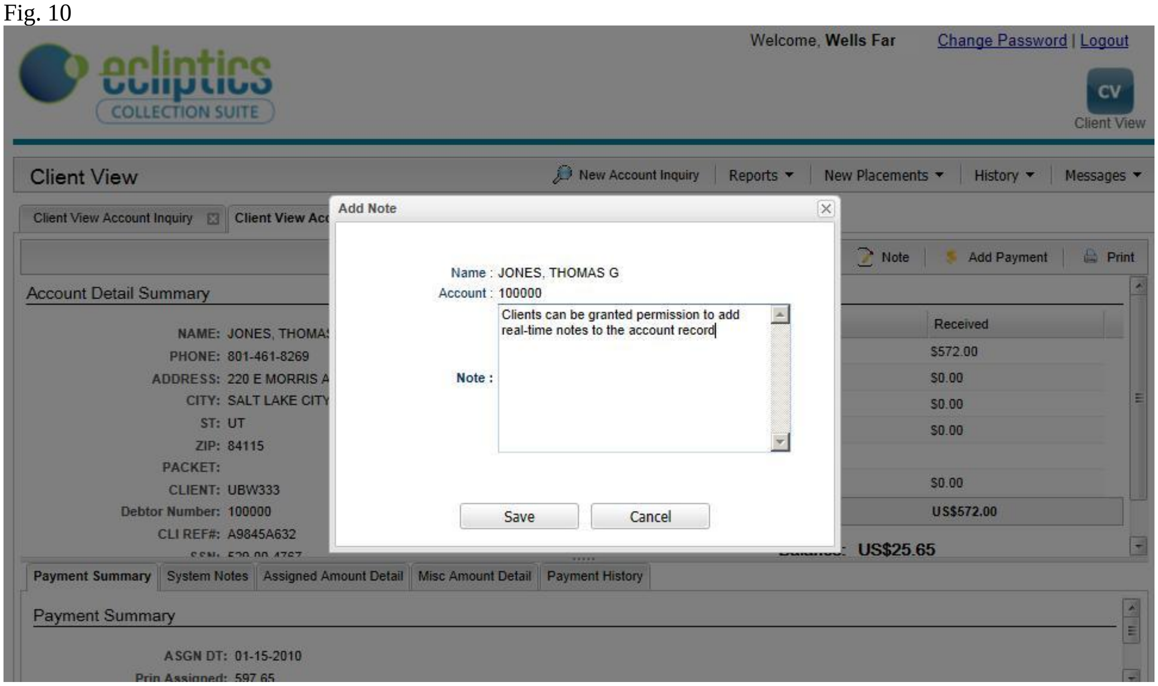


Fig. 10



Reporting Payments made directly to the Client

Client View provides a mechanism for Clients to report payments made directly to them. By selecting *Add Payment* (fig. 11) the client can notify the agency of the amount, transaction type and date of the payment in the form provided (fig. 12). Once reported, designee(s) at the agency are automatically notified via email that a payment has been reported for "X account." The agency can also print out all payments reported by the client for use in the agency's posting routines.

Fig. 11

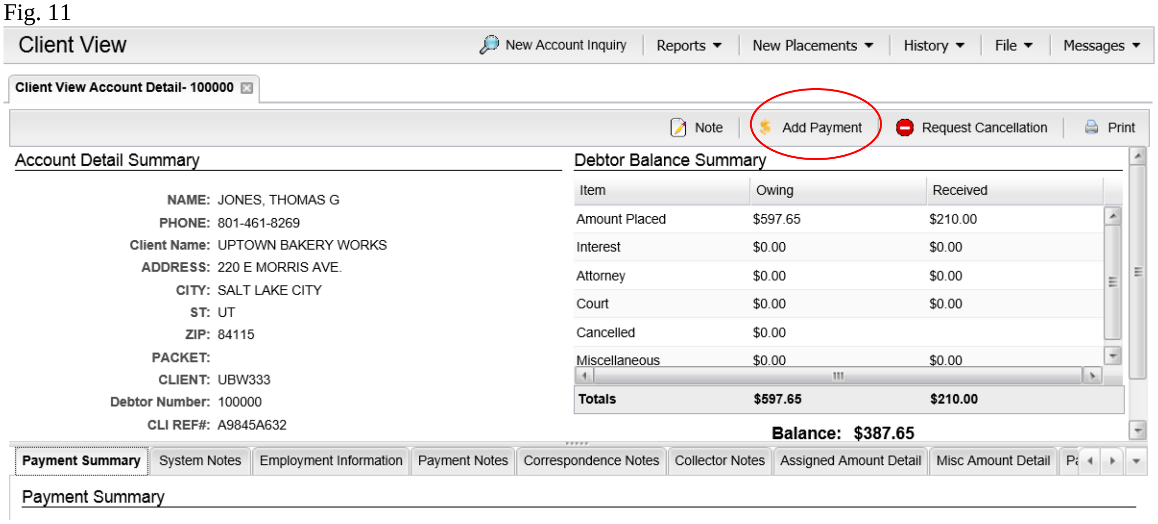
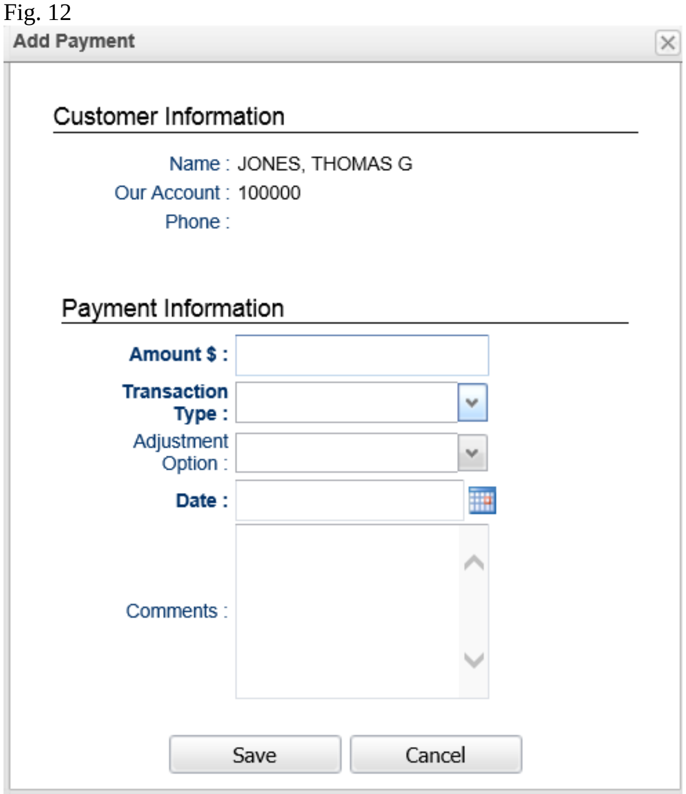


Fig. 12



Request Cancellation

Client View provides an easy mechanism for Clients to request cancellation on the account they are reviewing. By selecting *Request Cancellation* (fig. 13) the client can submit the request, accompanied by Cancellation Details for the agency (fig. 14). Once submitted, the designee(s) at the agency are automatically notified via email that an Account Cancellation has been requested.

Fig. 13

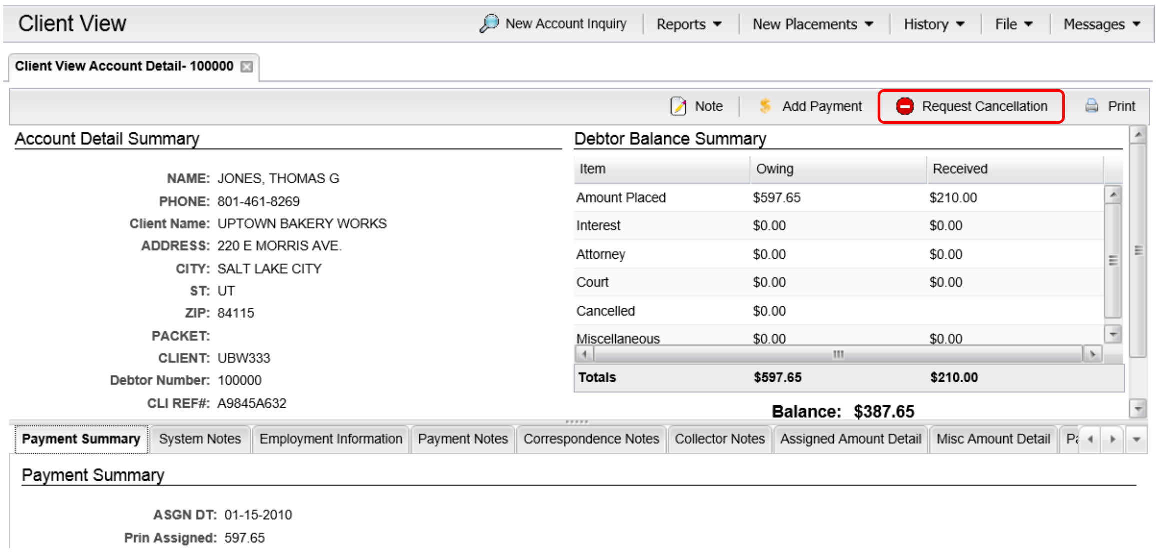
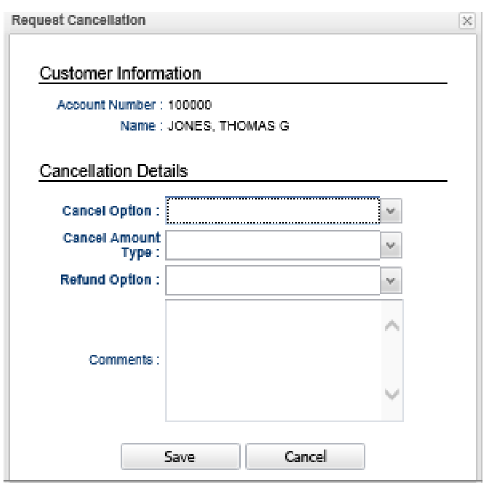


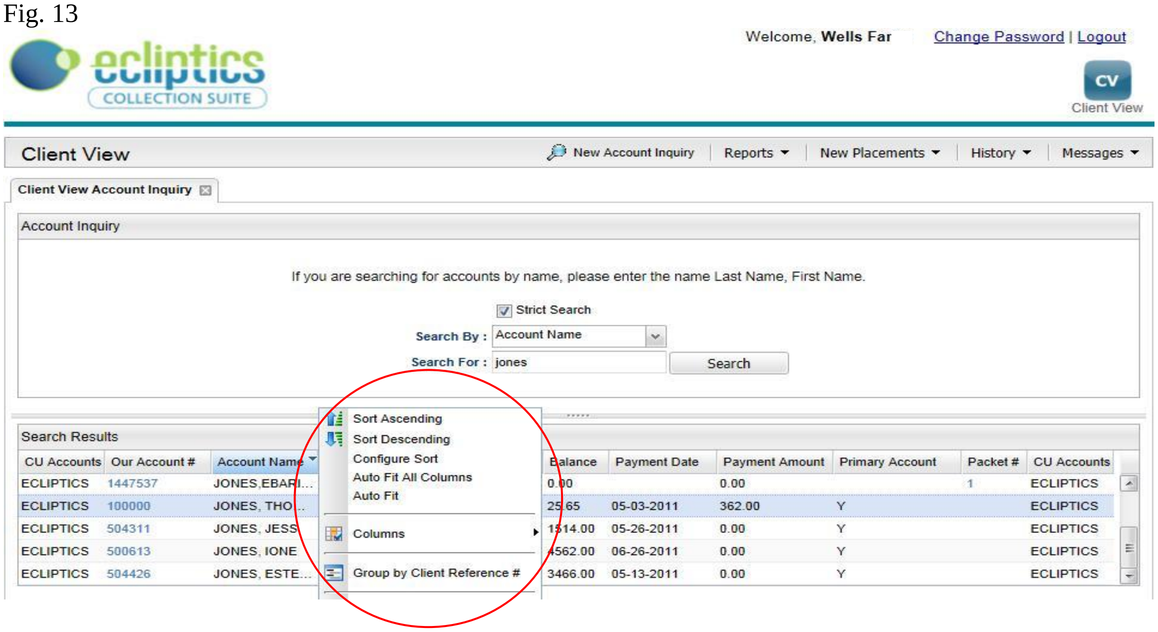
Fig. 14



Search Result Column Sizing

Client View allows each user to customize his screen viewing experience. For example, let's look again at the information returned in the "Search Results" portion of the Client View screen. Each of these columns is expandable manually by placing the cursor on the column header, finding the edge of the column (to the right of the drop down in each column) and holding down the left click of the mouse while dragging to expand or shrink the column to the desired width. The columns can also be sorted in a variety of ways. When the client passes the cursor over the column header, a drop down appears that displays the Sorting options available (see fig. 13).

Fig. 13



Column Sorting Options

Columns can be highlighted and then sorted as follows:

- Ascending order
- Descending order
- Configure Sort: The user can choose to sort the data in different columns and can be used to check for duplicate debtor numbers across logons, etc. Single or multiple columns can be sorted.

Column Sizing Options

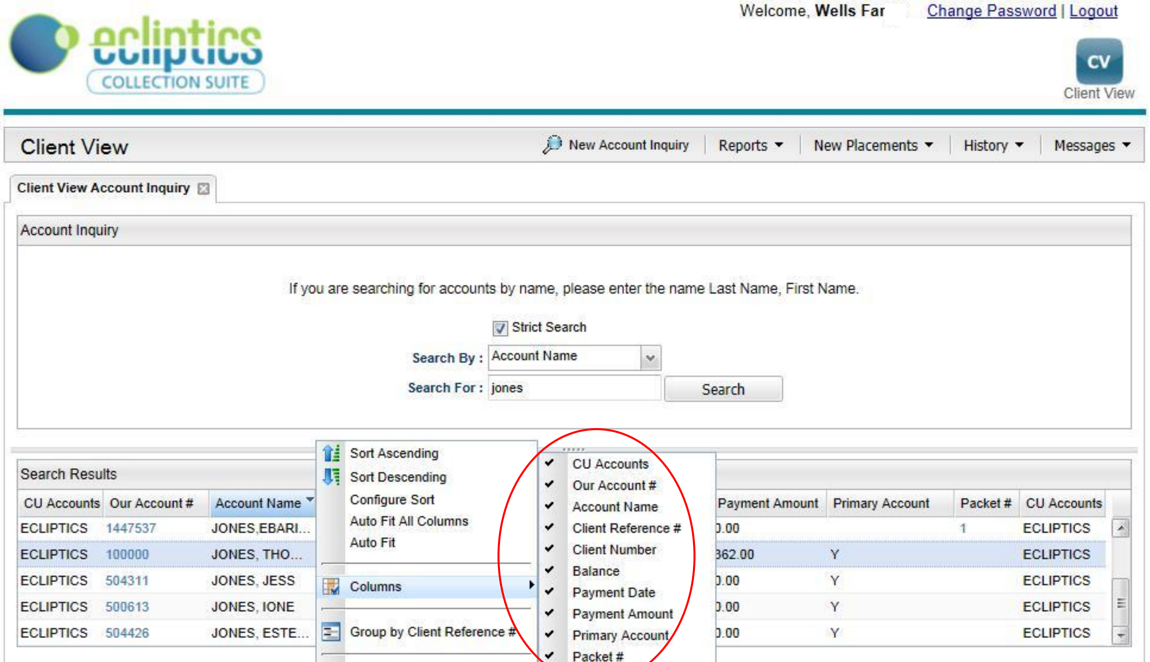
- Auto Fit: This option shrinks the column to the width needed only to accommodate the largest value in the column
- Auto Fit All Columns: This option shrinks all columns to the width needed only to accommodate the largest value in the column

Other Column Options

- Column Hide or Display: This expandable menu option allows users to choose which columns to display in the Search Results section. When the user clicks the column option, a checkmark appears next to the selection signifying that the selection will be displayed. Clicking the column option again will de-select and hide the column (see fig. 14)

- Group By: Allows the user to group accounts by CU Logon, Client Number, Payment Date or other criteria
- Ungroup: Reverses the grouping decisions made previously
- Freeze: Locks a column in a certain position in the Search Results field such that other columns can only be sorted to the right of the frozen column(s)

Fig. 14



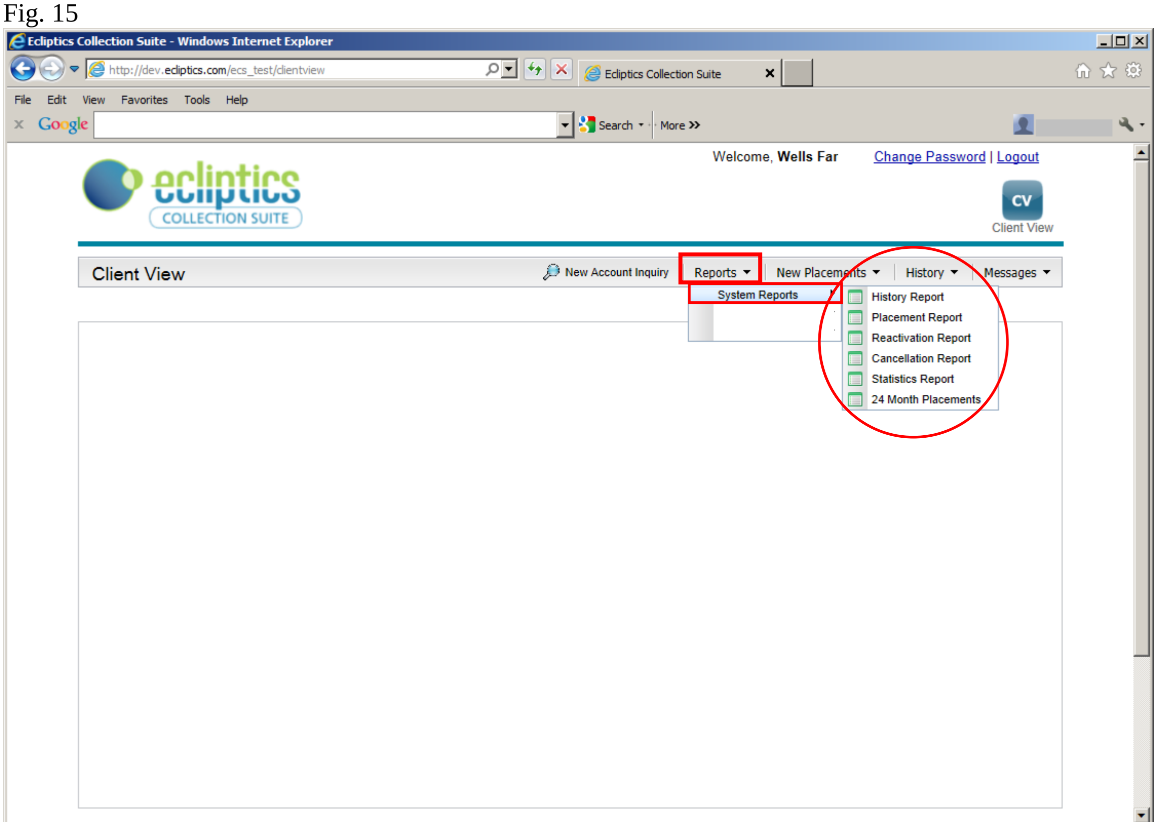
Reports

Client View provides the user a number of enhanced The Collector System® reports (see fig. 15) for review, export to CSV and printing. The available reports are

- History Report
- Placement Report
- Cancellation Report
- Reactivation Report
- Statistics Report
- 24 Month Placements Report

These reports can be viewed as a combined report including all clients the user has been authorized to access, by business type or by individual client. Client View also allows the agency to share any custom reports they have developed for the client.

Fig. 15

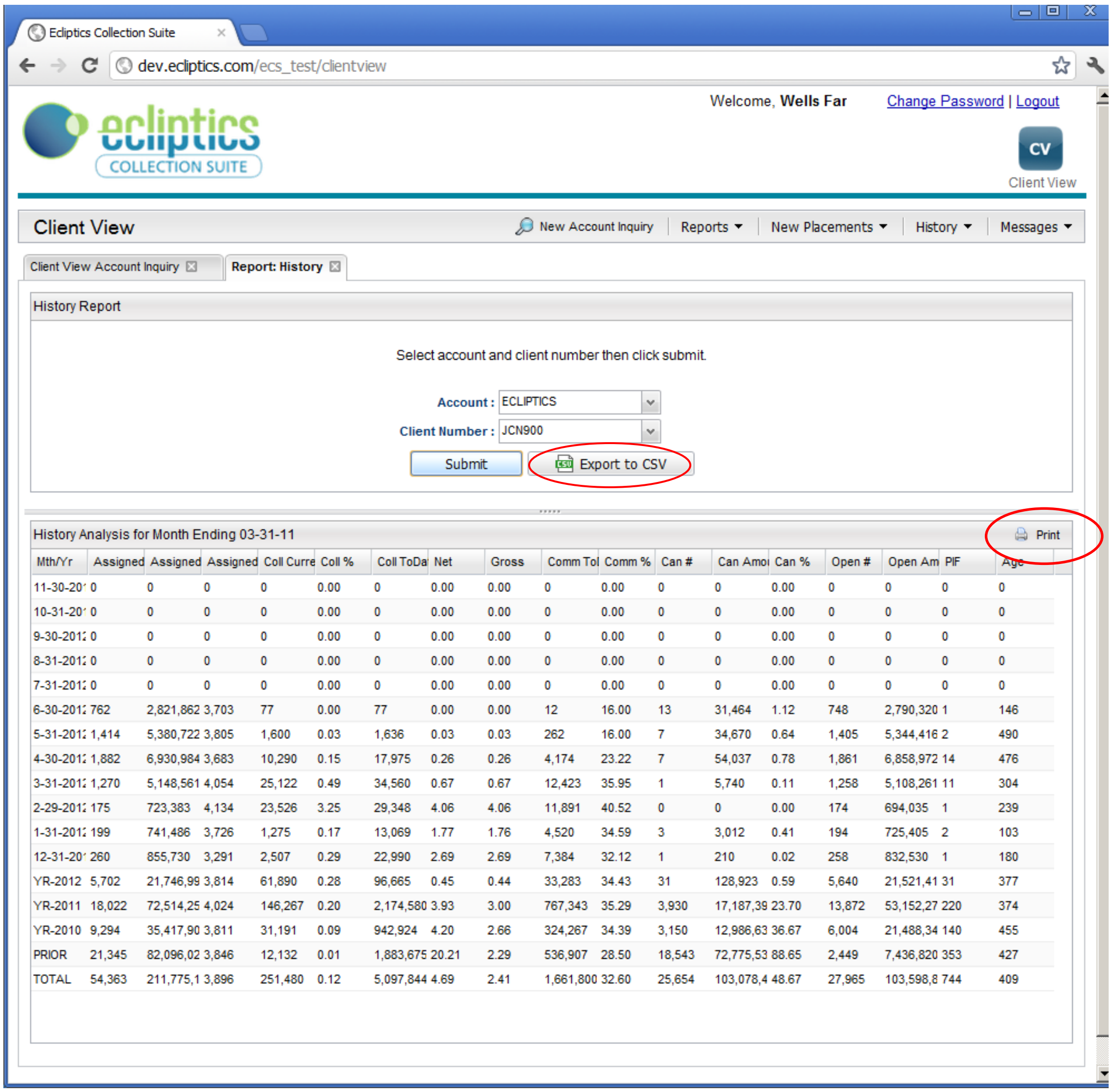


History Report: The information included on the History Report (fig. 16) represents a comprehensive view, by client, of amounts collected during the last month.

All of the columns can be expanded or contracted manually by placing the cursor on the column header, finding the edge of the column (to the right of the drop down in each column) and holding down the left click of the mouse while dragging to expand or shrink the column to the desired width. The columns are also configurable as explained in the Column Sorting and Sizing sections of this manual.

All reports can be printed by selecting the print function (see fig. 16). Reports can also be exported to CSV.

Fig. 16



Placement Report: The information included on the Placement Report represents accounts placed in the current or previous month for selected clients. The report contains information on the date of placement and the placement amount.

Cancellation Report: The information included on the Cancellation Report represents a summary, by client, of accounts that have been cancelled and includes the date placed, the assigned amount, cancelled amount and reason for cancelation.

Reactivation Report: The information included on the Reactivation Report provides information (cancelled date, placed amount and reactivation amount) on accounts that have been reactivated.

Statistics Report: The information included on the Statistics Report represents a breakdown of the month-to-date, year-to-date and total-to-date amounts collected.

24 Month Placements Report: The information included in the 24 Month Placements Report provides a rolling 24-month look at amount placed and amount collected, by client.

New Placements

Users can easily add new placements for submission to the agency by clicking the New Placements tab on the main menu. If you have multiple logons, an automatic drop down menu will appear so you can choose the appropriate CU logon (fig. 17). Once the logon has been determined, select a client from the "Client Number" drop down menu provided in fig. 18.

Fig. 17

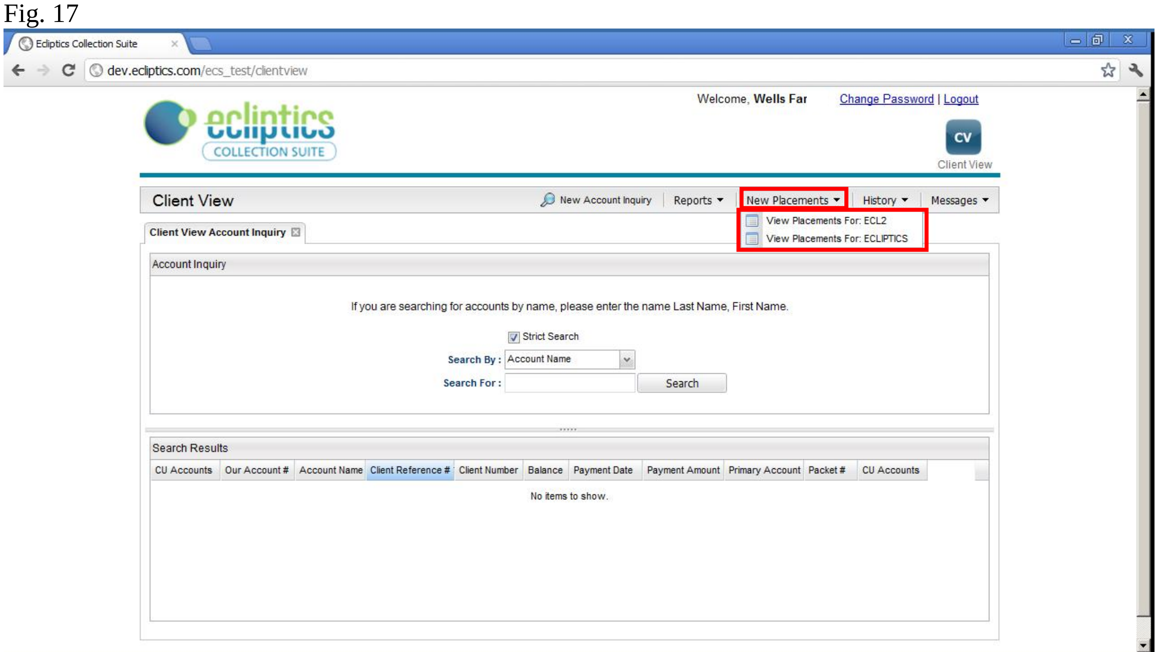
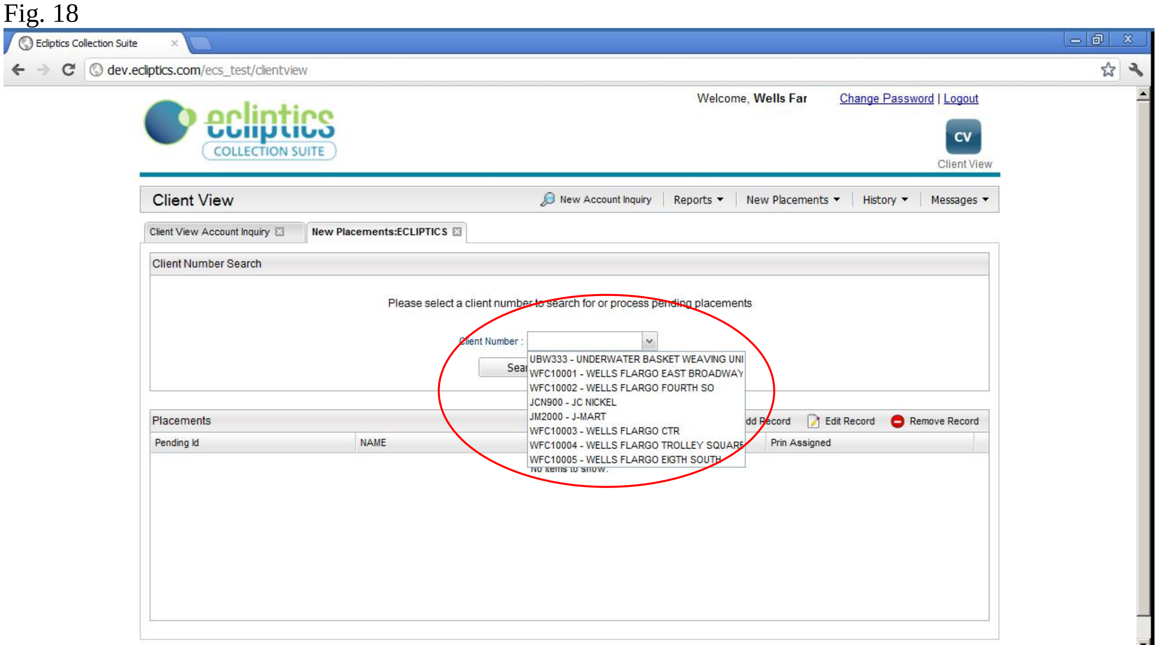
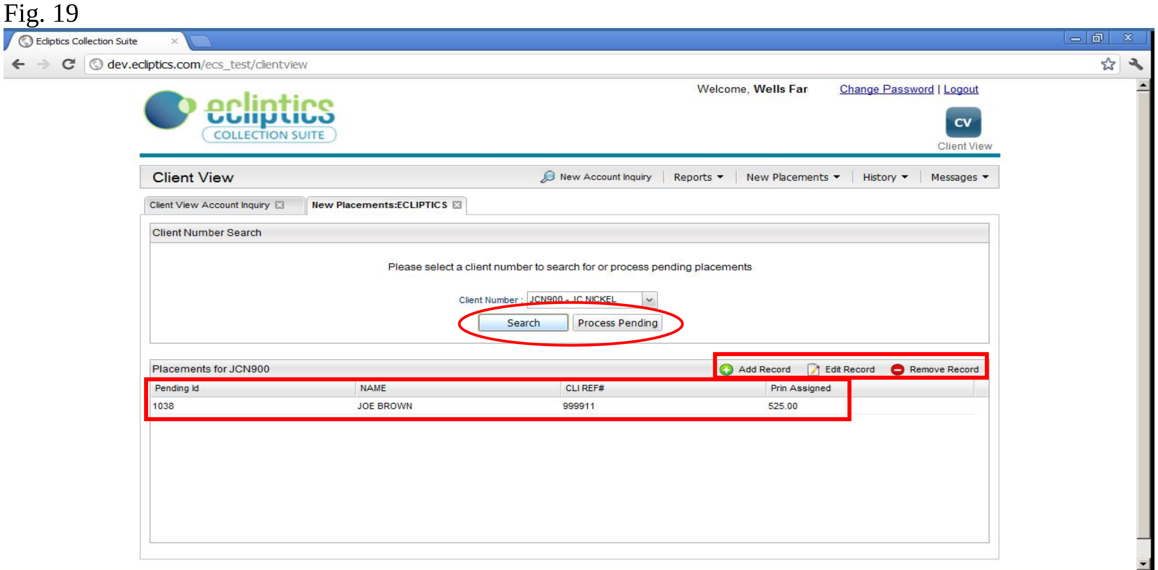


Fig. 18



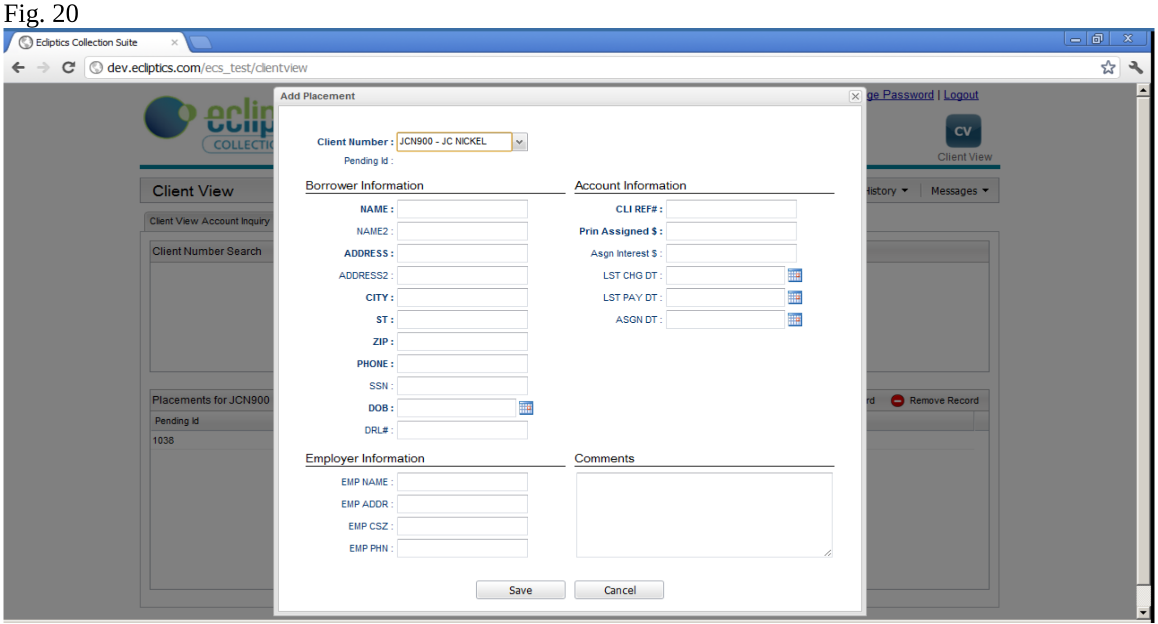
If you have added new accounts previously for this client number without clicking "Process Pending" (which sends the accounts to the agency), the "Search" icon will retrieve those accounts and will display them in the Pending ID column (see fig. 19).

Fig. 19



To enter additional accounts for submission to the agency, simply click the "Add Record" icon (see fig. 19) and fill out the New Placement form (fig. 20)

Fig. 20



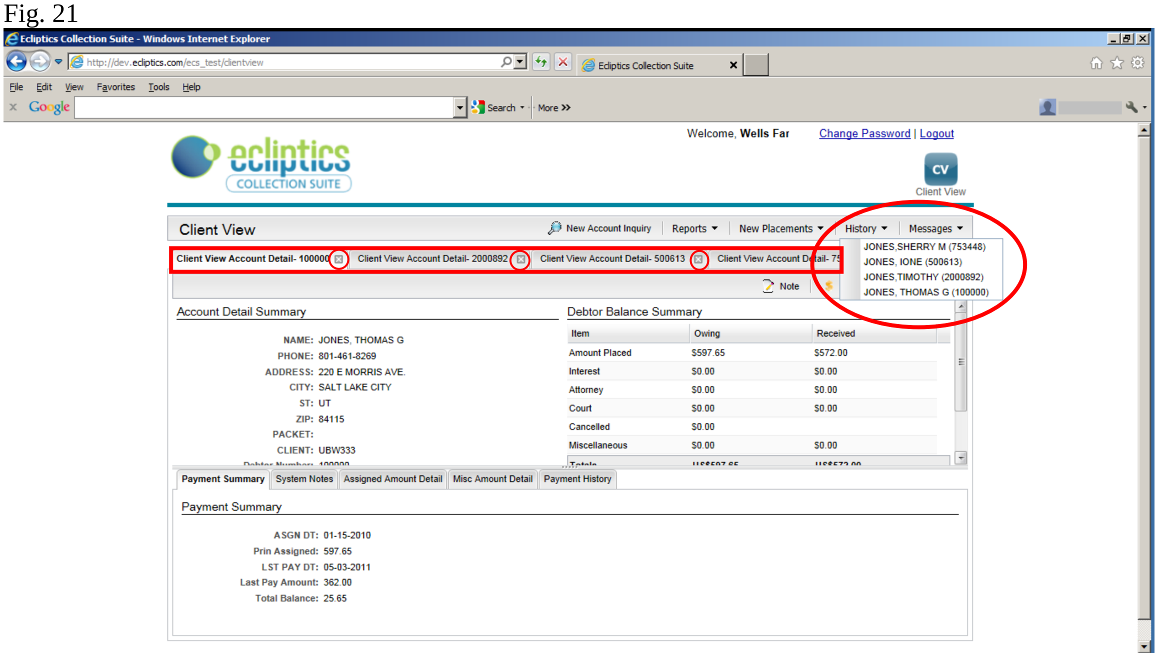
Enter the information and Save the new accounts for submission to the agency. If you desire to "Edit" or "Remove" an account prior to submission, highlight the account you wish to edit or delete and click the appropriate icons ("Edit Record" / "Remove Record"). When all new accounts for the selected client number have been entered and saved, click the "Process Pending" key to submit the new accounts to the agency.

History

The History tab provides the user easy retrieval of accounts being reviewed during the current session and displays up to the most recent 10 accounts the client was reviewing. As an example, the user may retrieve four accounts for review, displaying these accounts on the dashboard (see fig. 21). As the dashboard becomes populated with additional accounts or reports, the user may want to clear the dashboard of one or all accounts. The user can clear the dash board by individually clicking on the x icon next to the account number Account Detail in each tab (see fig. 21) or by right clicking one of the x icons and choosing “Close all tabs.”

To return to an account that was being reviewed during this session, simply click on the “History” Menu Item and up to the last 10 accounts being reviewed will be displayed. Select the desired account and Account Detail on that account will be immediately displayed.

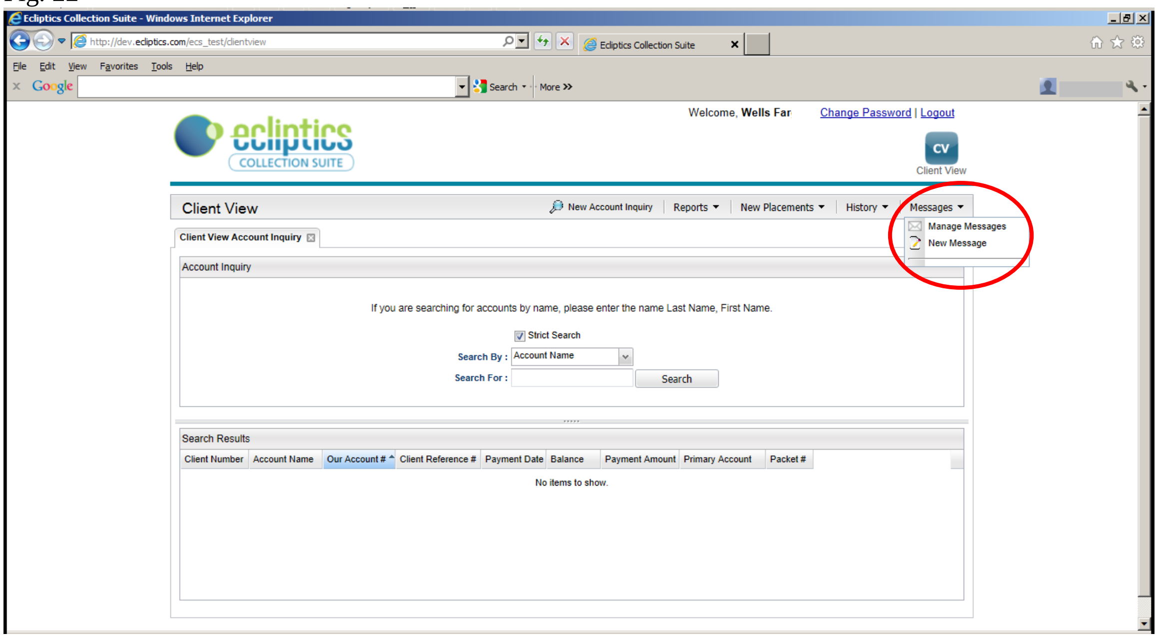
Fig. 21



Secure Messaging

Client View allows agency personnel and authorized users to send each other secure messages with attachments. Client View's secure messaging feature is protected via SSL encryption and avoids the security pitfalls associated with email. Secure messaging is divided into two primary functions; Management of messages received and the Sending of new messages (fig. 22).

Fig. 22

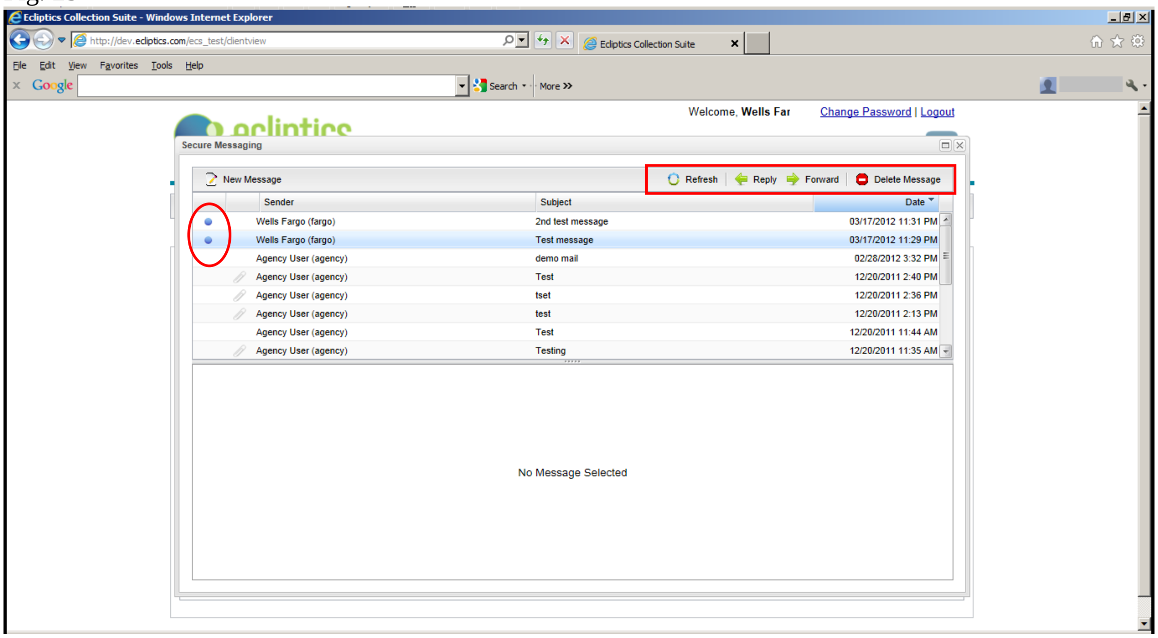


Manage Messages

When a new message is sent to a Client View user, the user is notified in a number of ways:

1. When a user logs into Client View, they are immediately shown a pop-up Notification in the left-hand corner of the user's screen containing a list of new messages with the sender's name and the Subject line. This pop-up remains on screen for approximately five seconds. If desired, the user can immediately go to the Messages tab, open "Manage Messages" and retrieve the new message(s). "Manage Messages" contains all messages, current and previous, sent to the user. New messages are identified with a blue dot in the left-hand column. Once read, a message can be replied to, saved in "Manage Messages," forwarded to other members of the user group or deleted by highlighting the message and clicking the "Delete Message" icon (see fig. 22).
2. If the user is already logged into Client View, a pop-up Notification appears in the left-hand corner of the user's screen containing a list of new messages with the sender's name and the Subject line. This pop-up remains on screen for approximately five seconds. If desired, the user can immediately go to the Messages tab, open "Manage Messages" and retrieve the new message(s).

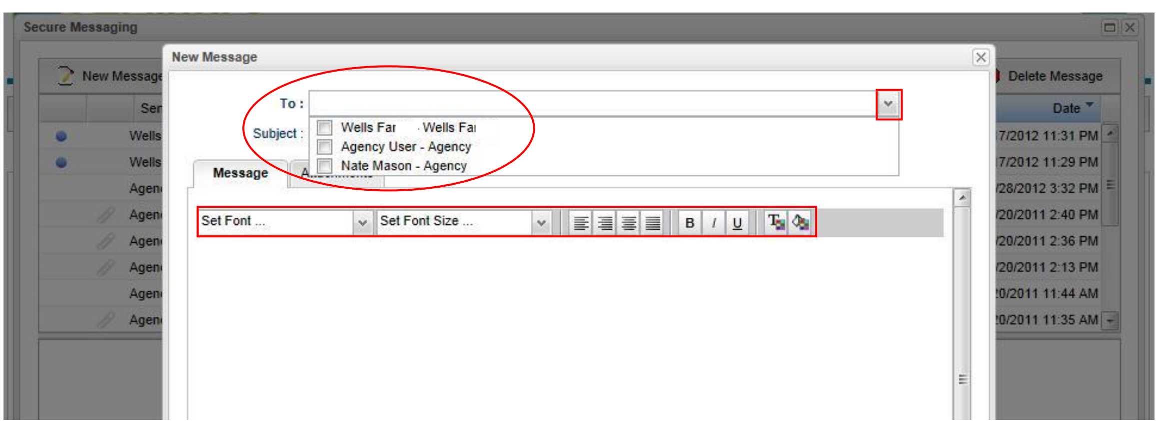
Fig. 23



3. Email alert: whenever a user receives a secure message in Client View, an email message alert is also sent to their email address, informing them that a secure message awaits them in Client View. The user can then log into Client View to retrieve the secure message and any attachments it may contain.

New Message

To send a secure message through Client View, the user clicks on the New Message tab in the main menu and selects "New Message." The New Message screen appears and using the drop down menu provided, the user selects the individuals within his or her user group or at the agency with whom he/she wishes to communicate (see fig. 23). After identifying the recipients, the user types in a Subject line, chooses set font, font size and any other options desired (if different from default settings), and types the body of the message (fig. 23)



As shown in fig. 24, the user will select “Message” to type the body of the text, followed by “Attachments” to attach desired files to the message. When attaching files to the message, the user selects the “Select Files” tab from the bottom of the screen and attaches the files desired. If selected by mistake, files can be deleted prior to clicking the “Confirm Attachments” icon, which will send the message with attachments to the recipients. It is recommended that individual attachments not exceed 5 MB in size.