Users Manual

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Introduction to Ha*i*Collect

Welcome to the most advanced tool available today for commercial credit managers to place collection claims and monitor outsourced collection activity!

Ha*i*Collect allows you to place claims without generating additional paperwork- you can upload documents via scanner or from documents already imaged in your system as a part of the claims entry process.

The database also allows you to communicate with your HAI representative via e-mail from within the claim detail in the database. Report payments, provide information or ask a question and we'll respond immediately.

Ha*i*Collect also allows you to check the status of our collection efforts, on-line in real time. All collection calls and documents are part of our database and available for your review from any location where you have Internet access at any time of the day or night.

Collection status reports are available on line and can be run based on your selected date range.

Ha*i*Collect allows you to search our database for collection placements by other clients for accounts you may be dealing with. Our Debtor Search functionality will show you all claim activity we have had against specific debtors. For the protection of our clients, we will not provide the name of the referring company or other confidential information.

Contact us today to obtain your User ID and Password.

Ha*i*Collect: Changing the way you think about collection agencies!

www.hamptoncollects.com

Log-In

Access to **Ha*i*Collect** begins with a User ID and Password. Every user within your organization has a unique User ID and Password.

To log-in, select the **Ha*i*Collect** link from our www.hamptoncollects.com Web site and **enter your log-in information**:

The Login Screen assures that you are an authorized **Ha*i*Collect** user.

Enter your Username and Password then click the ⬜Login⬜ button to gain access to the database and your claims information.

If you have forgotten your password, we will e-mail you the information if you click on the 🔷 icon.

If you should mistype your User ID or Password, the screen will prompt you to re-enter your information.

To return to the Hampton Associates Web site, simply click on the HAI logo.

Claims View/Debtor Search

Once you are logged in, you will see a listing of all "Open" claims placed with our office.

You may navigate the site using the **links toolbar**

Click the arrows to see additional pages of claims.

Debtor:	Company:	Status:	Amount:	Balance:	Date Referred:
Test 20040201	Test Client	CEC	$100.00	$120.00	2/1/2004
Test 7	Test Client	CEC	$0.01	$0.01	11/5/2002
Test 7	Test Client	CEC	$100.00	$112.00	5/7/2003
Test Debtor	Test Client	LEGAL	$1,000.00	$250.00	7/12/2001
Test Debtor	Test Client	CEC	$100.00	$120.00	8/28/2003
Test Debtor 3	Test Client	LEGAL	$10,000.00	$4,440.00	9/9/2000
Test Debtor 5	Test Client	CEC	$1,000.00	$1,250.00	10/22/2002
Test Debtor 5	Test Client	CEC	$100.00	$120.00	10/23/2002
Test Debtor 5	Test Client	CEC	$100.00	$120.00	10/23/2002
Test Debtor 6	Test Client	CEC	$1,000.00	$1,200.00	10/22/2002

You can change the **View Claims** selector to see All, Open or Closed claims. The default view is "Open" claims.

The functionality of the various links is explained in the following pages.

The top of the page contains a **Claim Number Search** field. Enter the HAI claim number to locate a specific claim.

Enter a debtor name and click **Search** or press the "Enter" key to begin a search by name.
You may also select "Debtor Search" on the links toolbar to search multiple debtor names.

Claims View/Debtor Search (continued)

To view our claim activity in more detail, click on the **Debtor Name** and a **listing of claim(s)** history will appear.

Entering A Claim For an Existing Debtor

After conducting a Debtor Search, you can click on the **Create Claim** button to enter a claim against an existing debtor.

The database automatically fills in the **Debtor field** based on your search result. Enter the **Claim Amount** and click the "Next" button to proceed.

Entering A Claim For an Existing Debtor (continued)

On the next screen you can enter your **Client Account** Number. The default Debtor Contact from previous claim placements will be displayed). You will also need to select a Client Contact to let us know who our primary contact should be for the claim

You can select and enter additional **Claim Codes** and **Claim Notes** that may assist us in pursuing the balance due.

When you are ready to proceed, click the "Save" button for final claim entry processing

Entering A Claim For an Existing Debtor (continued)

Telephone numbers for debtor firms and individual debtor contacts can be submitted by clicking on a corresponding **Telephone Icon**

Entering A Claim For an Existing Debtor (continued)

As a final step, you may choose to upload documents that you would normally mail or fax with your claim referrals. Simply click on the "Documents" button and select **Add**.

	Add		Close

Documents View for Claim 3827

Document Information

To select a document to add:
Click 'Browse' next to the Location textbox.
Locate the file you want to upload on your computer.
Click 'Open' in the dialog box.
Fill out all other required, and then click Save.

Click the "Add" bu
Otherwise, docum

Documents may b
using the free Adol

Date:*   2/1/2004

Location:*   [ ] Browse...

Title:* [ ]

Subject:* [ ]

Type:*   Please Select a Type

Notes: [ ]

Browse your computer to add the file to be uploaded. Assign a document Title, Subject, Type and Date (Click on the Calendar icon to select a date) and enter any free form notes to describe the document Click the **Save** button to complete sending the document to our office

Save		Cancel

Click the "Add" button to upload a document to our database or "Close" if finished. Otherwise, documents may be faxed to (877) 862-6336 for uploading to the claim.
Documents may be viewed by clicking on the 🔲 icon. Images can be viewed using the free Adobe Acrobat reader: Get Acrobat Reader Adobe

We can accept virtually every document type (Word, Excel, BMP, JPG, TIF, PDF, etc.) If we cannot view an uploaded document, we will contact you to determine the document type and attempt to accept your standard file type Any documents that you fax to our office will be uploaded to the database and can be viewed using the free Adobe Acrobat reader.

Entering A Claim for A New Debtor

The process for entering a claim against a new debtor is essentially the same as the process described in the prior section. The difference is that we need information concerning the debtor (name, address, etc.)

If the Debtor Search does not locate the debtor you are inquiring on, you may click on the **Clear Criteria** button to search on another name or you may enter a claim against a new debtor by selecting the **Click Here** link.

The next screen will display all fields related to the debtor.

Entering A Claim for A New Debtor (continued)

Claims Add: Add Debtor

Referral Type:	Quick Collect	Claim Amount:	$1,234.56
Customer:	**Test Client**	Date Referred:	2/1/2004
Claim Status:	CEC		

Debtor Name:* `Test Debtor 20040201`

Address 1:* `123 Any St`

Address 2: ` `

City:* `Indianapolis`

State:* `IN`   Zip Code:* `46112`

Email Address: ` `

Country:* `USA`   ☐ Foreign?

Default Debtor Contact Information:

Last Name: `Debtor`   First Name: `Test`

Contact Title: `President ▾`

(* Denotes a required field.)

[Next ->]   [<- Back]

Complete all required fields (denoted with a *) then click the "Next" button.

Claims Add: Step 2

Referral Type:	Quick Collect	Debtor:	**Hunter Mold & Manufacturing, Inc. - Montclair, CA**
Customer:	Test Client		
Claim Status:	CEC		
Claim Amount:	$1,234.56		
Referred Date:	2/1/2004		

> Complete the claim entry process by entering your Account Number for the debtor, select any claim codes and any notes that you may want to submit. When complete, press the **Save** button

Client Account Number: `99999999`

Debtor Contact:* `Marsh, Tom ▾`

Customer Contact:* `Carrico, Josh ▾`

Claim Codes:
Use [Ctrl] + Click to choose multiple claim codes.
`Bankruptcy`
`Contract Arrangement`
`Disputed Account`

Claim Notes:
Specific claim issues you may want to make us aware of.
`This is a test note`

(* Denotes a required field.)

[Save]   [<- Back]

Entering A Claim for A New Debtor (continued)

You may update any **Client Company** or **Client Contact** numbers by clicking on the telephone icon.

Click on the **Debtor Contact** or **Debtor Firm** telephone to provide any telephone/fax/cellular or other numbers you may have for the debtor.

At this point you may also upload any documents as described earlier (refer to Page 9 of the Users Manual)

Claim Details View

Ha*i*Collect users can get on-line real-time detailed claim status updates from the Claims View screen (initial screen after log-in).

To view claim details, Click on the **Debtor** record for the account you wish to inquire on:
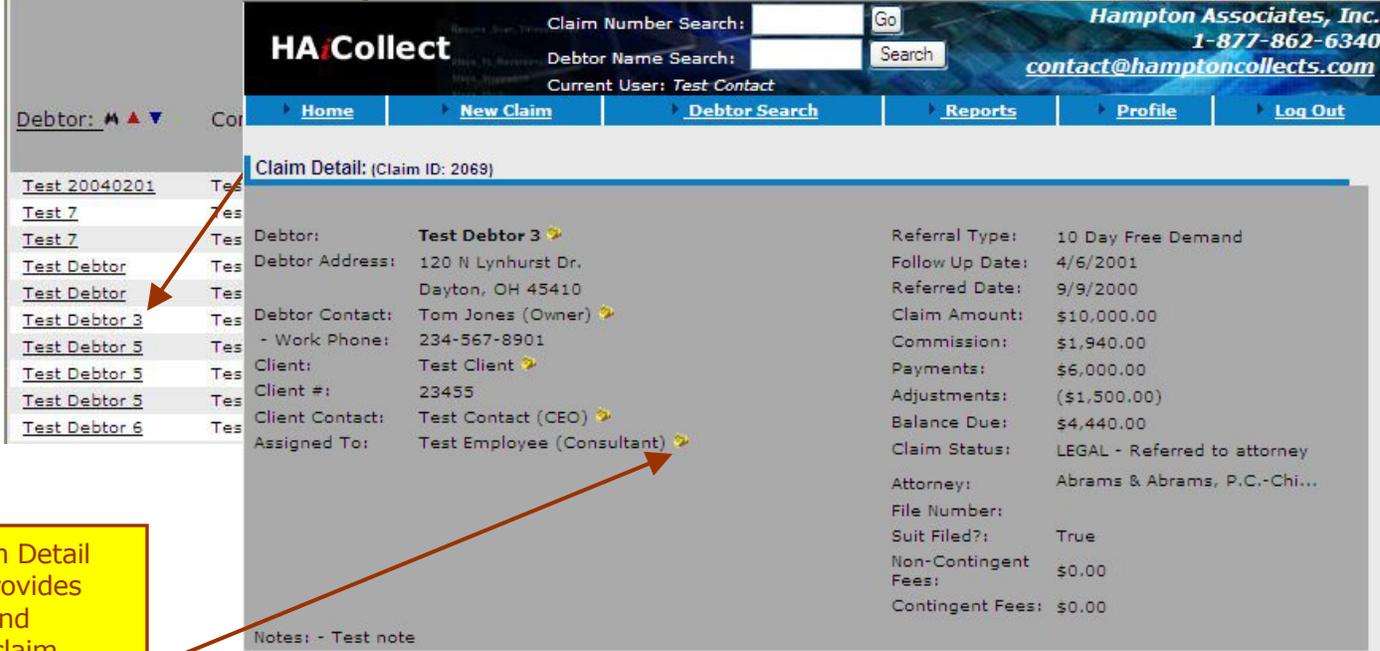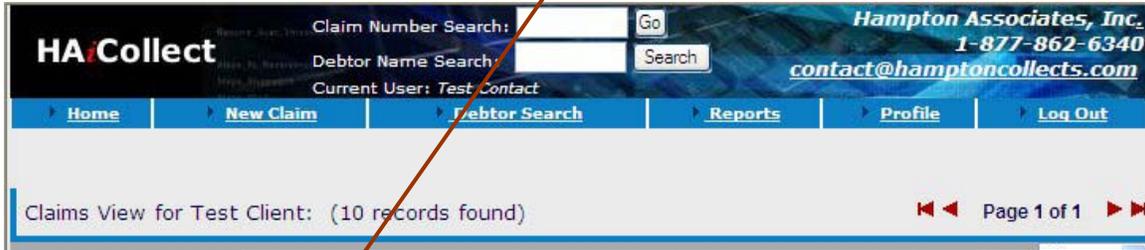
The Claim Detail screen provides specific and detailed claim status information. Click on the **Assigned To** link to call or e-mail the representative assigned to this claim.
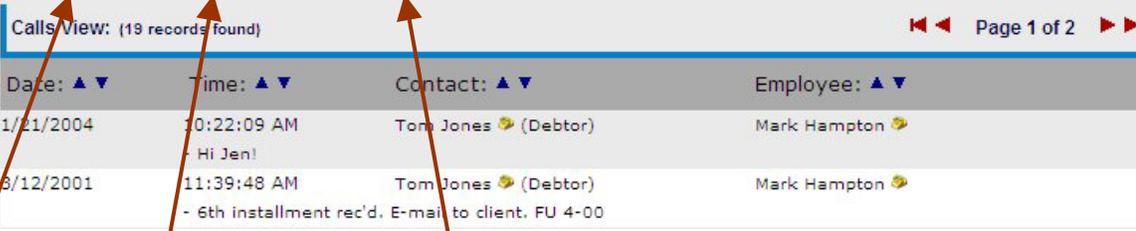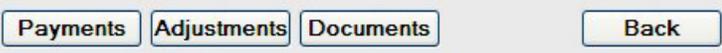
Click on **Payments**, **Adjustments** and **Documents** to see claim related items.

Claim Details View (continued)

Collection call notes appear in descending date order at the bottom of the Claim Detail screen. Scroll down the page to see our collection notes. Additional notes can be displayed by selecting the next **Page** of notes. Click on the **Back** button to return to the Claims View.

Calls View: (19 records found)					Page 1 of 2
Date: ▲ ▼	Time: ▲ ▼	Contact: ▲ ▼		Employee: ▲ ▼	
1/21/2004	10:22:09 AM	Tom Jones (Debtor)		Mark Hampton	
	- Hi Jen!				
3/12/2001	11:39:48 AM	Tom Jones (Debtor)		Mark Hampton	
	- 6th installment rec'd. E-mail to client. FU 4-00				
3/9/2001	11:38:34 AM	Tom Jones (Debtor)		Mark Hampton	
	- Advised debtor of cr issued. He will send $1000 pmt				
	- today.				
3/9/2001	11:37:57 AM	Test Contact (Client)		Mark Hampton	
	- TT client. Sent fax acknowleding credit due. Entered adj to reflect cr issued.				
3/9/2001	11:33:54 AM	Tom Jones (Debtor)		Mark Hampton	
	- Debtor alleging credit due for defective goods. See docs.				
2/9/2001	11:35:58 AM	Tom Jones (Debtor)		Mark Hampton	
	- Rec'd 5th installment. Advised client via e-mail. FU 3-01				
1/9/2001	11:32:00 AM	Tom Jones (Debtor)		Mark Hampton	
	- Rec'd pmt as promised. Advised client via e-mail. FU 2-01				
1/4/2001	11:31:28 AM	Tom Jones (Debtor)		Mark Hampton	
	- Ph'd debtor. Confirmed pmt WBIM today.				
12/19/2000	11:30:04 AM	Tom Jones (Debtor)		Mark Hampton	
	- Rec'd 3rd installment. Advised client via e-mail. FU 1-01.				
12/9/2000	11:29:24 AM	Tom Jones (Debtor)		Mark Hampton	

Click on any **Telephone icon** link to call or e-mail the representative assigned to this claim.

r. Sd $ tight but will get pmt out
k on track by month end.

Client Reports

Now you can get a claims inventory report when you want for the time period you want as often as you want.

Click on the **Reports** link and select the time period you want to cover.

Click on **Run Report** after selecting your date range. Remember to change your printer to Landscape mode if you want to retain a paper copy. When finished, close the Report browser window and you will be returned to the Report screen. Select the "Home" link to return to your Claims View.

Profile

Ha*i*Collect was designed with your security in mind. All access is protected by your User ID and Password. You can change your password by clicking on the **Profile** link.

You can change your Password as often as you like. We can assign a specific User ID to your security profile if you contact our office. We will e-mail any User ID changes to our e-mail address of record to protect any security breach. Please keep your Log-in information confidential.

Advanced Search & Sort Features

The **Ha*i*Collect** database allows you to Filter and sort records.
Wherever you see the **Up/Down Arrows** you can click to sort in
Ascending or Descending order.

The **Binoculars** icon allows filtering for specific debtor records. If you
want to locate a particular claim, without using the paging
functionality, click on the binoculars the Filter window will pop up.
Enter the first letter of the claim you want to locate and then search
the list for the specific claim you want to view then hit the **Save**
button to proceed to the Claim Detail View.

Log Out

Clicking the **<u>Log Out</u>** button will sign you out of the system.

After logging out, you will be returned to the Log In screen. You can return to the **<u>Hampton Associates Web site</u>** by clicking on the globe logo
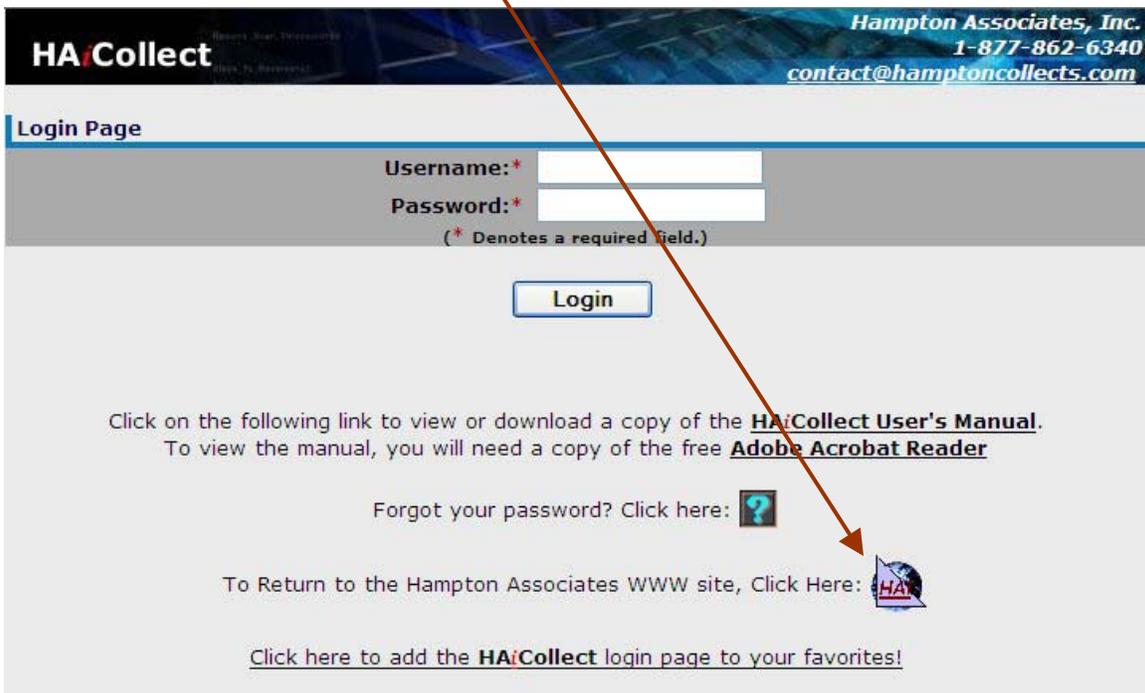
Please contact us with any questions you may have by e-mailing us at contact@hamptoncollects.com or call, toll free, at (877) 862-6340.

Ha*i*Collect: Changing the way you think about collection agencies!

www.hamptoncollects.com