



## Users Manual

### Table of Contents:

<b>Introduction to HAICollect</b> . . . . .	2
<b>Log In</b> . . . . .	3
<b>Claims View/Debtor Search</b> . . . . .	4-5
<b>Entering a New Claim (Existing Debtor)</b> . . . . .	6-9
<b>Entering a New Claim (New Debtor)</b> . . . . .	12
<b>Claim Details View</b> . . . . .	13-14
<b>Reports</b> . . . . .	15
<b>Profile</b> . . . . .	16
<b>Advanced Search &amp; Sort Features</b> . . . . .	17
<b>Log Out</b> . . . . .	18



## Introduction to H*ai*Collect

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

**H*ai*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.

**H*ai*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.

**H*ai*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.

**H*ai*Collect:** Changing the way you think about collection agencies!



[www.hamptoncollects.com](http://www.hamptoncollects.com)



## Log-In

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

To log-in, select the **HAiCollect** link from our [www.hamptoncollects.com](http://www.hamptoncollects.com) Web site and **enter your log-in information:**

HAiCollect

Hampton Associates, Inc.  
1-877-862-6340  
contact@hamptoncollects.com

Login Page

Username:\*

Password:\*

(\* Denotes a required field.)

The Login Screen assures that you are an authorized **HAiCollect** user.

Enter your Username and Password then click the  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.

HAiCollect Hampton Associates, Inc. 1-877-862-6340 contact@hamptoncollects.com

Claim Number Search:  Go  
Debtor Name Search:  Search  
Current User: Test Contact

Home New Claim Debtor Search Reports Profile Log Out

Claims View for Test Client: (10 records found) Page 1 of 1

View Claims: Open  
Choose Company: Test Client

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

HAiCollect Hampton Associates, Inc. 1-877-862-6340 contact@hamptoncollects.com

Claim Number Search:  Go  
Debtor Name Search:  Search  
Current User: Test Contact

Home New Claim Debtor Search Reports Profile Log Out

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)

HAiCollect Debtor Database Search:

Please search by debtor name to see if we have had prior claim activity against a debtor:

Enter Name to Search:

If "No Records Were Found" or your search did not find the debtor name requested, [Click Here](#) to enter a new claim against your debtor. Otherwise, select a debtor from the listing below to view summary claim information and place a new claim against the selected debtor.

Debtor Search Results (1 records found) Page 1 of 1

Debtor: ▲ ▼	Address: ▲ ▼	City: ▲ ▼	State: ▲ ▼	Zip: ▲ ▼
Hunter Mold & Manufacturi...	9000 Del Mar Avenue	Montclair	CA	91763

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

Hunter Mold & Manufacturing, Inc. (4 records found)  
Montclair, CA 91763, USA Page 1 of 1

Opened: ▲ ▼	Claim Amount: ▲ ▼	Balance: ▲ ▼	Status: ▲ ▼	Closed: ▲ ▼
9/6/2001	\$3,436.75	\$4,195.37	NACOB	10/30/2001
4/6/2001	\$30,166.42	\$32,024.58	NACOB	11/28/2001
2/7/2001	\$1,326.90	\$1,326.90	NACOB	10/25/2001
10/11/2000	\$44,413.73	\$44,109.96	NACOB	10/23/2001

Hold the mouse pointer over any field and a description 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.

HAiCollect  
Claim Number Search:  Go  
Debtor Name Search:  Search  
Current User: Test Contact  
Hampton Associates, Inc.  
1-877-862-6340  
contact@hamptoncollects.com

Home New Claim Debtor Search Reports Profile Log Out

Hunter Mold & Manufacturing, Inc. (4 records found)  
Montclair, CA 91763, USA

Opened: ▲ ▼	Claim Amount: ▲ ▼	Balance: ▲ ▼	Status: ▲ ▼	CL
9/6/2001	\$3,436.75	\$4,195.37	NACOB	10
4/6/2001	\$30,166.42	\$32,024.58	NACOB	11
2/7/2001	\$1,326.90	\$1,326.90	NACOB	10
10/11/2000	\$48,413.73	\$44,109.96	NACOB	10

Create Claim Back to Search

If you don't want to enter a claim you can click the "Back to Search" button to conduct another search or click a link on the Link Bar

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

Claims Add: Step 1  
Please fill out all required fields.  
If you are inputting a claim for a debtor that is not currently in our database, please choose "Create New Debtor".  
Click "Next" to input additional claim information.

Referral Type: \* Quick Collect  
Client: \* Test Client  
Debtor: \* Hunter Mold & Manufacturing, Inc. - Montclair, CA  
Referred Date: \* 2/1/2004  
Claim Amount: \* 1234.56 (Net amount- Do not add Collection fees)

Next -> Cancel (\* Denotes a required field.)



## 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

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		

Client Account Number:

Debtor Contact: \*

Customer Contact: \*

Claim Codes:  
Use [Ctrl] + Click to choose multiple claim codes.

Claim Notes:  
Specific claim issues you may want to make us aware of.

(\* Denotes a required field.)

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**

The screenshot displays the 'Claim Summary for #3827' page. A yellow callout box points to a telephone icon next to the debtor name 'Hunter Mold & Manufacturing, Inc.' with the text: 'You may add or edit existing telephone numbers for debtor or client contacts.' Below the summary, there are buttons for 'Documents', 'Next Claim', and 'Close'. A modal window titled 'Phone Numbers for: Tom Marsh' is open, showing a table with one entry: 'Work' with the number '909-946-6638'. Below the table are 'Add' and 'Close' buttons. A second modal window titled 'Phone Numbers for Tom Marsh: Add' is open, showing a 'Type' dropdown menu set to 'Cell' and a 'Number' text box containing '555-555-1212'. Below the form is a red note: '(\* Denotes a required field.)' and 'Save' and 'Cancel' buttons.

Claim Summary for #3827:

**Thank you for placing this claim with Hampton Associates!**  
Please click on the phone icon next to an item to add any phone numbers that you might have for the debtor and/or a debtor contact.  
Also, please upload any imaged documents that you might have by clicking on the documents button.

Follow Up Date: 2/1/2004  
Referral Type: Quick Collect  
Customer: Test Client  
Customer Contact: Test Contact (CEO)  
Debtor: Hunter Mold & Manufacturing, Inc.  
Client Number: 99999999  
Debtor Contact: Tom Marsh  
Claim Status: CEC - Collection  
Claim Amount: \$1,234.56  
Notes: This is a test not

Documents

Next Claim Close

Phone Numbers for: Tom Marsh

Type: ▲ ▼	Number: ▲ ▼
Work	909-946-6638

Add Close

Phone Numbers for Tom Marsh: Add

Type: Cell ▼

Number: 555-555-1212

(\* Denotes a required field.)

Save Cancel





## 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.

HAiCollect Debtor Database Search:

Please search by debtor name to see if we have had prior claim activity against a debtor:

Enter Name to Search:

If "No Records Were Found" or your search did not find the debtor name requested, [Click Here](#) to enter a new claim against your debtor. Otherwise, select a debtor from the listing below to view summary claim information and place a new claim against the selected debtor.

Debtor Search Results (0 records found)

Debtor: ▲ ▼    Address: ▲ ▼    City: ▲ ▼    State: ▲ ▼    Zip: ▲ ▼

**No Debtors were found.**

When entering a new claim, the Debtor will default to "Create New Debtor". Choose your Referral Type and enter your Claim Amount then click the "Next" button to proceed with your claim entry

Claims Add: Step 1

Please fill out all required fields.  
If you are inputting a claim for a debtor that is not currently in our database, please choose "Create New Debtor".  
Click "Next" to input additional claim information.

Referral Type: \*

Client: \*

Debtor: \*

Referred Date: \*

Claim Amount: \*  (Net amount- Do not add Collection fees)

(\* Denotes a required field.)

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:	<b>Test Client</b>	Date Referred:	2/1/2004
Claim Status:	CEC		

Debtor Name: \*

Address 1: \*

Address 2:

City: \*

State: \*  Zip Code: \*

Email Address:

Country: \*   Foreign?

Default Debtor Contact Information:

Last Name:  First Name:

Contact Title:

(\* Denotes a required field.)

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

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

**Claims Add: Step 2**

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

Client Account Number:

Debtor Contact: \*

Customer Contact: \*

Claim Codes:  
Use [Ctrl] + Click to choose multiple claim codes.

Claim Notes:  
Specific claim issues you may want to make us aware of.

(\* Denotes a required field.)



## Entering A Claim for A New Debtor (continued)

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

Claim Summary for #3827:

**Thank you for placing this claim with Hampton Associates!**  
Please click on the phone icon next to an item to add any phone numbers that you might have for the debtor and/or a debtor contact.  
Also, please upload any imaged documents that you might have by clicking on the documents button.

Follow Up Date:	2/1/2004
Referral Type:	Quick Collect
Customer:	Test Client ☎
Customer Contact:	Test Contact (CEO) ☎
Debtor:	Hunter Mold & Manufacturing, Inc. ☎
Client Number:	99999999
Debtor Contact:	Tom Marsh ☎
Claim Status:	CEC - Collection Efforts Continue
Claim Amount:	\$1,234.56
Notes:	This is a test note

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

Claim Summary for #3827:

**Thank you for placing this claim with Hampton Associates!**  
Please click on the phone icon next to an item to add any phone numbers that you might have for the debtor and/or a debtor contact.  
Also, please upload any imaged documents that you might have by clicking on the documents button.

Follow Up Date:	2/1/2004
Referral Type:	Quick Collect
Customer:	Test Client ☎
Customer Contact:	Test Contact (CEO) ☎
Debtor:	Hunter Mold & Manufacturing, Inc. ☎
Client Number:	99999999
Debtor Contact:	Tom Marsh ☎
Claim Status:	CEC - Collection Efforts Continue
Claim Amount:	\$1,234.56
Notes:	This is a test note

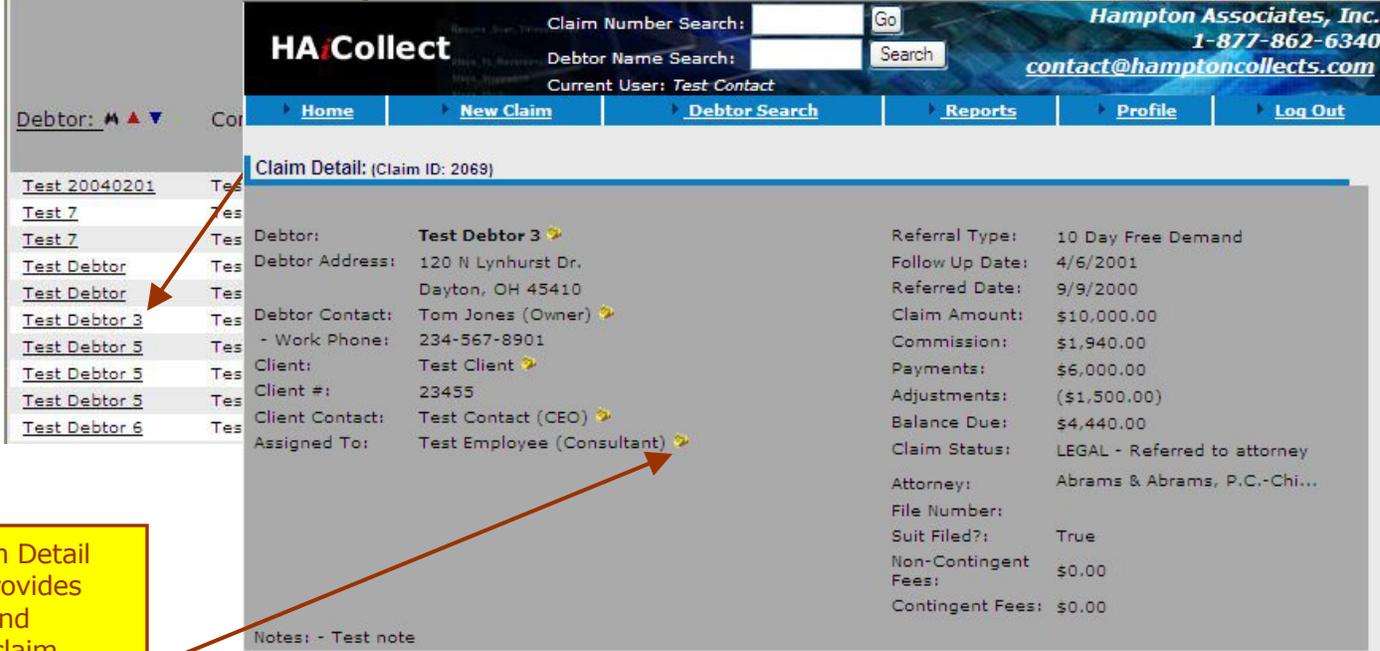
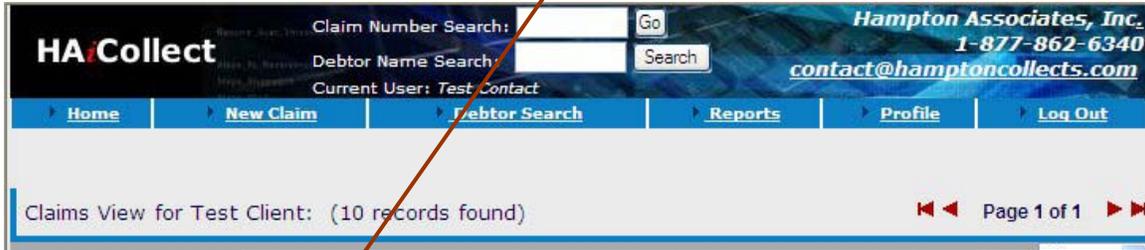
At this point you may also upload any documents as described earlier (refer to Page 9 of the Users Manual)



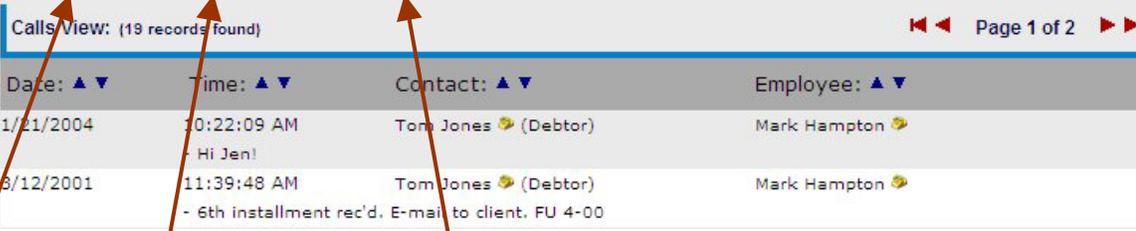
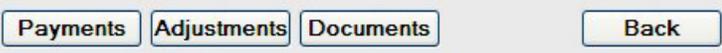
### Claim Details View

**HAICollect** 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 acknowledging 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 ☎
	- r. Sd \$ tight but will get pmt out on track by month end.		

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



## 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.

The screenshot displays the HAICollect web application interface. At the top, there is a navigation bar with the following elements: the HAICollect logo, search fields for Claim Number and Debtor Name, a 'Go' button, a 'Search' button, and contact information for Hampton Associates, Inc. (1-877-862-6340, contact@hamptoncollects.com). Below the navigation bar is a menu with links for Home, New Claim, Debtor Search, Reports, Profile, and Log Out. The 'Reports' link is highlighted with a red arrow. Below the menu is the 'Reports Menu' section, which contains the following fields: Company (Test Client), Referred From (2/1/2003), Referred To (2/29/2004), and Claims (All). A 'Run Report' button is located below these fields, with a red arrow pointing to it. Below the button, there is a note: 'The report will open up in a new window. To Print the report, please change your page setup to "Landscape" mode.'

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

**HAiCollect** 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.

HAiCollect

Claim Number Search:

Debtor Name Search:

Current User: *Test Contact*

Hampton Associates, Inc.  
1-877-862-6340  
[contact@hamptoncollects.com](mailto:contact@hamptoncollects.com)

[Home](#) | [New Claim](#) | [Debtor Search](#) | [Reports](#) | [Profile](#) | [Log Out](#)

Change Password for Test Contact:

Password:<sup>+</sup>

New Password:<sup>+</sup>

Verify New Password:<sup>+</sup>

(\* Denotes a required field.)

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 **HAiCollect** 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 screenshot shows the HAI Collect web application interface. At the top, there are search fields for Claim Number and Debtor Name, along with a 'Go' button and a 'Search' button. The current user is identified as 'Test Contact'. Below the search fields is a navigation menu with options: Home, New Claim, Debtor Search, Reports, Profile, and Log Out. The main content area displays 'Claims View for Test Client: (10 records found)' and 'Page 1 of 1'. There are controls for 'View Claims: Open' and 'Choose Company: Test Client'. A table of claims is shown with columns: Debtor, Company, Status, Amount, Balance, and Date Referred. Each column header has a sorting arrow (up or down). A binoculars icon is located next to the 'Debtor' column header. An arrow points from the text above to the binoculars icon.

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

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.

The screenshot shows a dialog box titled 'Filter Claim List on Debtor:'. It contains the text 'Choose a Debtor to filter your claims:'. Below this is a dropdown menu for 'Debtor Name:' with 'Hunter Mold & Manufacturing, Inc.' selected. At the bottom of the dialog are two buttons: 'Save' and 'Close'. An arrow points from the text above to the 'Save' button.

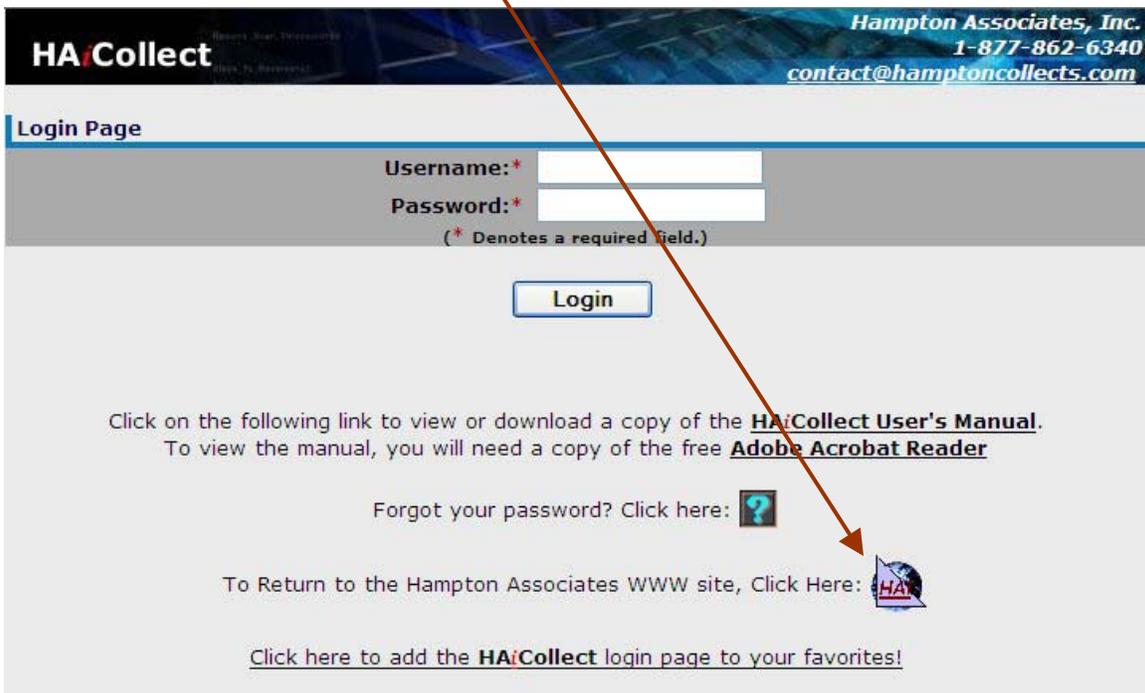


## Log Out

Clicking the **Log Out** 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 **Hampton Associates Web site** by clicking on the globe logo



Please contact us with any questions you may have by e-mailing us at [contact@hamptoncollects.com](mailto:contact@hamptoncollects.com) or call, toll free, at (877) 862-6340.

**HAiCollect:** Changing the way you think about collection agencies!



[www.hamptoncollects.com](http://www.hamptoncollects.com)