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**WebCollect™ Interface**  
*for the*  
InfoLease® Customer Service module

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### **Introducing WebCollect™ Interface**

Goodbye green-screen collector worklist. Hello browser.

Hello efficiency and cost control.

The WebCollect interface introduces browser-based access to collector worklist data for InfoLease® users.

In-house or outsourced collectors can securely access the Customer Service module with the WebCollect presentation-layer application.

WebCollect interface. Nice to meet you.

### **Theoretical Case Study**

*Economic pressures increase past-due accounts at ClearVision Financial. The CFO cannot increase staff or InfoLease session commitments, but will provide incremental funds to reel in delinquent accounts.*

*The Vice President of Portfolio Servicing licenses the WebCollect interface to outsource “textbook” past-due buckets so that staff can prioritize and work the more stressed accounts.*

*After six months, ClearVision Financial releases the contract collection agency. Internal collectors shift to working on the WebCollect interface, which frees up InfoLease sessions for booking new deals in reaction to a growth opportunity.*

## **Benefits**

### *Cost Control*

With the WebCollect™ interface, lessors can pursue collections activity *without* using a dedicated InfoLease session. For every collector typically requiring a static license, lessors have the power to free that session for other critical functions.

More sessions means more control over managing expenses. Expense management provides cost control that goes right to the bottom line.

### *Improved Efficiency*

The WebCollect interface presents a browser-based view of the Collector Worklist configuration. Instead of drilling down with green-screen key strokes, collectors navigate their worklists with typical browser interactivity.

Standard scrolling, left-click, right-click and even *mouse-over* pop-ups give collectors intuitive access to multiple accounts and levels of account data. Navigation tabs offer quick shifts between data categories.

This browser-enabled functionality creates efficiencies of navigation and data access that simply are unattainable in the green-screen environment.

### *Protected Access*

As a SSL-enabled application, the WebCollect interface provides access to InfoLease collections data using the same protocol as your existing web applications. The WebCollect web server can be installed on the company LAN/WAN, enabling users to perform collection activity without requiring implementation of VPN or SSLVPN clearance or exposing additional ports in the firewall.

Isolating collections activity in a protected environment offers a new flexibility for managing whether internal or contract staff performs the collections function.

## Architecture

The WebCollect™ interface leverages the power and flexibility of Adobe® Flex® Builder 3 with Tamarack Consulting's own BridgeWare Integration Framework™ software, a bi-direction middleware tool for InfoLease, to create a web application that runs on in a browser with the Adobe Flash® Player plugin.

### *Adobe® Flex® Builder™ 3*

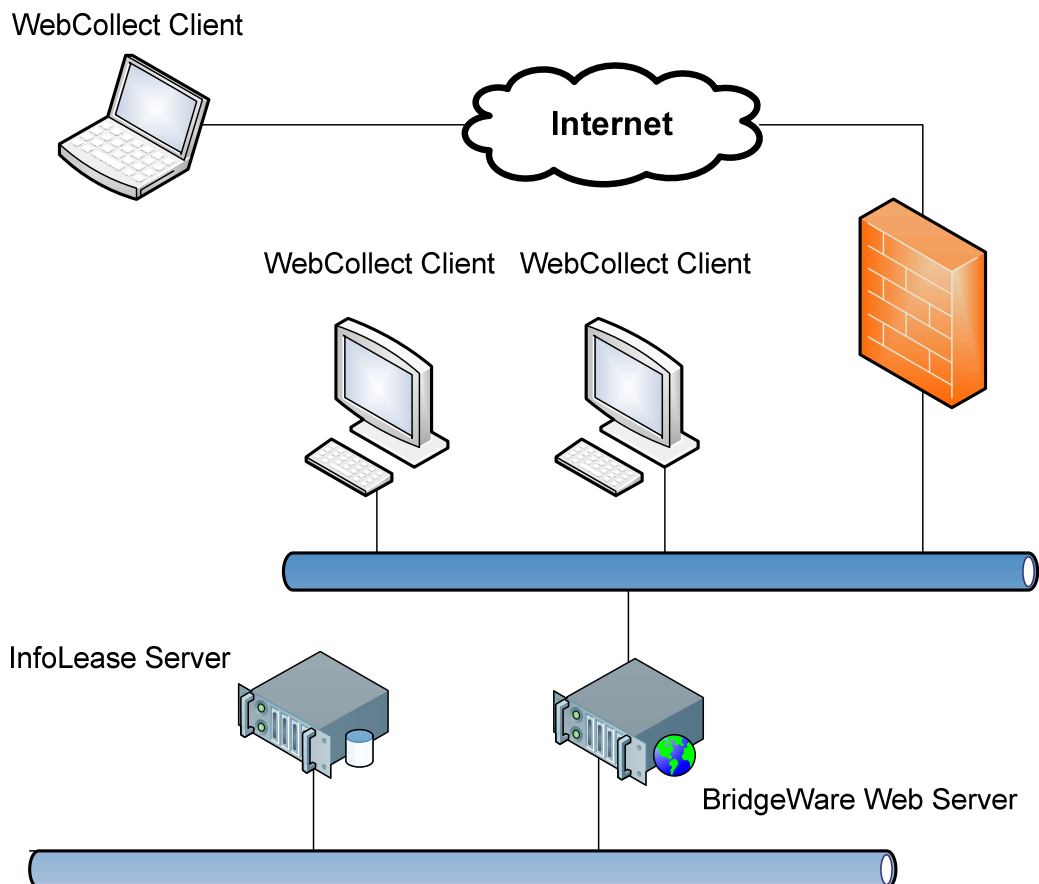
Flex® Builder™ 3 is an open-source framework that facilitates the development of expressive web and desktop applications. Using this platform, developers can breathe life into simplistic applications through full keyboard and mouse support and animation.

### *Adobe® Flash® Player*

Flash® Player is a free cross-platform browser plug-in that delivers breakthrough Web experiences to over 99% of Internet users.

### *BridgeWare Integration Framework™*

The BridgeWare Integration Framework™ gives lessors enterprise-wide real-time access to InfoLease® back office data. It efficiently and easily manipulates, presents and re-files database information while employing the following industry-standard Internet technologies: Java web services, J2EE, Hypertext Transport Protocol (HTTP) and Extensible Markup Language (XML).



# **WebCollect™ Interface**

## **A Walk-through**

## Access collector worklist with drop-down menu

0001 Jay Conway

10 Lease Servicing Dept

Submit

Seq	Contract #	Cust Name	Bal Remainin

0134 Larry Moon

0135 Bert Brisbane

0141 Kyli Shiel

0142 Danika Grigsby

0149 Melissa Larson

Contract Detail | Follow-Up History | Customer Messages | Contacts/Related Parties | Receivables | Pymt History | Ending Deposits

Lessor: Cust Branch  
Contract Cntc Dealer  
L/Worked Tel.

Delin Cd Commenced. Tot Due  
L/Pymt... Cont Term.. Tot P/D  
Paid To.. Term Date.. Net Res  
Due Day.. Asset Data Collat.  
Lead Days Gross Cont Comment  
B/Cycle.. Pymts B/O Msg  
Pymt Amt. Balance...  
PO Num Net Invest  
Inv Desc Sec Dep...

Transferring data from 127.0.0.1...

Select a collector worklist by choosing personnel and department codes from the drop-down lists.

## Select a transaction: scroll customer list or click category headings

The screenshot shows a Mozilla Firefox browser window displaying the 'WEB COLLECT' application. The application interface includes a header with the 'WEB COLLECT' logo and a navigation bar with dropdown menus for '0141 Kyli Shiel' and '10 Lease Servicing Dept', along with a 'Submit' button. Below the header is a table of transactions with the following data:

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
6	550-0071910-000	David Smith Auto	\$50,725.85			* No Action Required *
7	625-0034659-900	Henry Albert Products	\$41,560.97	11/03/2008	CC	Call customer
8	975-0068094-000	David Smith Auto	\$105,035.61	11/02/2008	OFR	Out for Repossession
9	550-0022020-901	Richard Smith Trucking	\$39,989.95	11/01/2008	LMR	Left Message on Recorder
10	550-0051522-000	Eric Ulm Wrecking	\$110,442.16			* No Action Required *
11	900-0036334-900	Thomas Carson Flyers	\$109,120.04	11/01/2008	OFR	Out for Repossession

Below the table, there are several tabs for navigation: 'Contract Detail', 'Follow-Up History', 'Customer Messages', 'Contacts/Related Parties', 'Receivables', 'Pymt History', and 'Ending Deposits'. The 'Contract Detail' tab is active, showing a form with the following fields:

Lessor:	Cust	Branch
Contract	Cntc	Dealer
L/Worked	Tel.	
Delin Cd	Commenced.	Tot Due
L/Pymt...	Cont Term.	Tot P/D
Paid To..	Term Date.	Net Res
Due Day..	Asset Data	Collat.
Lead Days	Gross Cont	Comment
B/Cycle..	Pymts	B/O Msg
Pymt Amt.	Balance...	
PO Num	Net Invest	
Inv Desc	Sec Dep...	

The status bar at the bottom of the browser window indicates 'Transferring data from 127.0.0.1...'.

Pick and choose the next transaction from the entire worklist by scrolling up and down. No need to page through the list with keyboard number codes. To sort by Customer Name or Balance Remaining, simply click on that column heading.

## Review transaction status: mouse-over for details

Mozilla Firefox

File Edit View History Bookmarks Tools Help

file:///C:/eclipse/workspace/CollectionWorklist/bin-debug/main.html#

Most Visited

# WEB COLLECT

0141 Kyli Shiel | 10 Lease Servicing Dept | Submit

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
6	550-0071910-000	David Smith Auto	\$50,725.85			* No Action Required *
7	625-0034659-900	Henry Albert Products	\$41,560.97	11/03/2008	CC	Call customer
8	975-0068094-000	David Smith Auto	\$105,035.61	11/02/2008	OFR	Out for Repossession
9	550-0022020-901	Richard Smith Trucking	\$39,989.95	11/01/2008	LMR	Left Message on Recorder
10	550-0051522-000	Eric Ulm Wrecking	\$110,442.16			* No Action Required *
11	900-0036334-900	Thomas Carson Flyers	\$109,120.04	11/01/2008	OFR	Out for Repossession

Contract Detail	Follow-Up History	Customer Messages	Contacts/Related Parties	Receivables	Pynt History	Ending Deposits
Lessor: 975		Cust: David Smith Auto	Branch: 00002			
Contract: 0068094-000		Cntc: Hiep M Chau	Dealer: 011017.0000			
LN/Worked: 10/31/2008		Tel: 714-531-1780				
Delin Cd: 61	Commenced: 06/05/2008	Tot Due: \$8,214.65				
L/Pynt...: 09/05/2008	Cont Term: 60	Tot P/D: \$6,013.89				
Paid To...: 08/05/2008	Term Date: 06/05/2013	Net Res: \$0.00				
Due Day...: 5	Asset Data: \$85,103.77	Collat:				
Lead Days: 20	Gross Cont: \$110,563.80	Comm:				
B/Cycle...: YYYYYYYYYY	Pynts: \$5,528.19	B/O M:				
Pynt Amt: \$1,842.73	Balance...: \$105,035.61					
PO Num: South Coast	Net Invest: \$90,973.17					
Inv Desc: (3) Skid Steer	Sec Dep...: \$0.00					

Total Past Due

Pastdue 1-30	\$1,842.73	Interest.....	\$0.00
Pastdue 31-60	\$1,842.73	Taxes.....	
Pastdue 61-90	\$1,842.73	Miscellaneous	\$90.00
Pastdue 91+++	\$0.00	Total Pastdue	\$6,013.89
Late Charges	\$395.70		

Transferring data from 127.0.0.1...

Mouse-over the highlighted fields for additional detail instead of using the 10-key pad to drill down into data.

## Review contract receivables via tab

The screenshot shows the WebCollect application running in a Mozilla Firefox browser. The main interface features a header with the 'WEB COLLECT' logo and navigation controls. Below the header is a table of contracts with columns for sequence number, contract number, customer name, balance remaining, follow-up date, code, and message. The 'Receivables' tab is selected, displaying a detailed table of invoices with columns for sequence, open item, invoice date, due date, invoice number, charge description, amount, and outstanding balance.

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
6	550-0071910-000	George Young Sign Co.	\$50,725.85	11/01/2008	OFR	Out for Repossession
7	625-0034659-900	David Grape Environmental Services	\$41,560.97	11/03/2008	CC	Call customer
8	975-0068094-000	George Young Sign Co.	\$105,035.61	11/02/2008	OFR	Out for Repossession
9	550-0022020-901	Frank Kensington Waste Systems	\$39,989.95	11/01/2008	LMR	Left Message on Recorder
10	550-0051522-000	Victor Brown Transportation	\$110,442.16	11/01/2008	LMR	lmr ca
11	900-0036334-900	Thomas Pine Septic	\$109,120.04	11/01/2008	OFR	Out for Repossession

Seq	Open Item	Inv Date	Due Date	Invoice Nbr	Chrg Desc	Chrg Amt	Amt Invd	Pymts Rcvd	Outstanding Balan	Aging
1	343439	07/16/2008	08/05/2008	212582	Rental	\$1,080.19	\$1,146.08	\$600.99	\$545.09	P81
2	353845	08/16/2008	09/05/2008	219106	Rental	\$1,080.19	\$1,146.08	\$0.00	\$1,146.08	P31
3	361748	09/05/2008	09/05/2008	231224	Late Charge	\$54.01	\$54.01	\$0.00	\$54.01	P1
4	364777	09/15/2008	10/05/2008	233762	Rental	\$1,080.19	\$1,145.00	\$0.00	\$1,145.00	P1
5	371726	10/05/2008	10/05/2008	238791	Late Charge	\$54.01	\$54.01	\$0.00	\$54.01	P1
6	376446	10/16/2008	11/05/2008	240495	Rental	\$1,080.19	\$1,145.00	\$0.00	\$1,145.00	CUR

The supporting tabs offer complete history of all *Follow Ups*, *Customer Messages*, *Contacts/Related Parties*, detailed *Payment History* and, as illustrated here, unpaid *Receivables*.

## Review payment history: mouse-over for details

**WEB COLLECT** 0141 Kyli Shiel 10 Lease Servicing Dept Submit

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
6	550-0071910-000	George Young Sign Co.	\$50,725.85	11/01/2008	OFR	Out for Repossession
7	625-0034659-900	David Grape Environmental Services	\$41,560.97	11/03/2008	CC	Call customer
8	975-0068094-000	George Young Sign Co.	\$105,035.61	11/02/2008	OFR	Out for Repossession
9	550-0022020-901	Frank Kensington Waste Systems	\$39,989.95	11/01/2008	LMR	Left Message on Recorder
10	550-0051522-000	Victor Brown Transportation	\$110,442.16	11/01/2008	LMR	lmr ca
11	900-0036334-900	Thomas Pine Septic	\$109,120.04	11/01/2008	OFR	Out for Repossession

Contract Detail Follow-Up History Customer Messages Contacts/Related Parties Receivables **Pymt History** Ending Deposits

Seq	Hist ID	Date Rcvd	Date Posted	Pymt Type	Pymt Method	Pymt Amt	Rental	Late Charges	Taxes	Total Misc F
1	140873	10/23/2008	11/01/2008	Standard	Unapplied Suspense	\$1,646.08	\$1,080.19	\$0.00	\$65.89	\$50.00
2	146703	12/05/2008	12/05/2008	Standard	ACH Payment	\$1,146.08	\$1,080.19	\$0.00	\$65.89	\$50.00
3	152702	01/05/2007	01/08/2007	Standard	ACH Payment	\$1,146.08	\$1,080.19	\$0.00	\$65.89	\$50.00
4	157817	02/05/2007	02/06/2007	Standard	ACH Payment	\$1,146.08				
5	163115	03/05/2007	03/05/2007	Standard	ACH Payment	\$1,146.08				
6	169308	04/05/2007	04/05/2007	Standard	ACH Payment	\$1,146.08				
7	175252	05/07/2007	05/07/2007	Standard	ACH Payment	\$1,146.08				
8	181100	06/05/2007	06/05/2007	Standard	ACH Payment	\$1,146.08	\$1,080.19	\$0.00	\$65.89	\$50.00
9	187660	07/05/2007	07/05/2007	Standard	ACH Payment	\$1,146.08	\$1,080.19	\$0.00	\$65.89	\$50.00
10	189419	07/09/2007	07/10/2007	Return Check: NSF	ACH Payment	\$-1,146.08	\$-1,080.19	\$0.00	\$-65.89	\$50.00
11	189871	07/12/2007	07/12/2007	Standard	Check	\$1,255.09	\$1,080.19	\$54.01	\$65.89	\$50.00

Future 91 \$ 0.00 Past 1 \$ 0.00  
 Future 61 \$ 0.00 Past 31 \$ 0.00  
 Future 31 \$ 0.00 Past 61 \$ 0.00  
 Current \$ 1,080.19 Past 91+ \$ 0.00  
 Total Rental \$ 1,080.19 Total PD \$ 0.00

Transferring data from 127.0.0.1...

Use the mouseover feature to view supporting detail behind highlighted tabbed fields.

## Review message histories: use mouse-over and right click functionality

The screenshot shows a Mozilla Firefox browser window displaying the 'WEB COLLECT' application. The application interface includes a header with the 'WEB COLLECT' logo and navigation tabs for 'Contract Detail', 'Follow-Up History', 'Customer Messages', 'Contacts/Related Parties', 'Receivables', 'Pymt History', and 'Ending Deposits'. The 'Customer Messages' tab is active, showing a table of messages. A mouse-over tooltip is visible over the message dated 10/30/2008, displaying the full message text.

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
6	550-0071910-000	David Smith Auto	\$50,725.85			* No Action Required *
7	625-0034659-900	Henry Albert Products	\$41,560.97	11/03/2008	CC	Call customer
8	975-0068094-000	David Smith Auto	\$105,035.61	11/02/2008	OFR	Out for Repossession
9	550-0022020-901	Richard Smith Trucking	\$39,989.95	11/01/2008	LMR	Left Message on Recorder
10	550-0051522-000	Eric Ulm Wrecking	\$110,442.16			* No Action Required *
11	900-0036334-900	Thomas Carson Flyers	\$109,120.04	11/01/2008	OFR	Out for Repossession

Date	Name	Message	Userid
10/31/2008	Kyli Shiel	1780 no answer	kshiel
10/30/2008	Kyli Shiel	tt Grey claims working with John to track down equipment sd will know something in a few days	kshiel
10/30/2008	Kyli Shiel	one skid steer repossessed.	kshiel
10/29/2008	Kyli Shiel	no ans 1780	kshiel
10/29/2008	Kyli Shiel	I called repo agent and advised Sean may help us with locating equipmeent	kshiel
10/29/2008	Kyli Shiel	tt Sean sd may know where equipment is. sd will do some research and will cb	kshiel
10/29/2008	Kyli Shiel	I lm for Sean to call me to discuss finders fees	kshiel
10/29/2008	Kyli Shiel	Sean called in lm that will help us for cash. Sd leave offer on his phone and will return our calls	kshiel
10/28/2008	Kyli Shiel	called Sean lm will offer reward for location of equipment	kshiel
10/28/2008	Kyli Shiel	lm for Sean	kshiel

After clicking on Customer Messages tab to access messages, mouse-over a specific message to view it in entirety or right click to print the message history.

## Add message history

The screenshot shows a Mozilla Firefox browser window displaying the 'WEB COLLECT' application. The application interface includes a header with the 'WEB COLLECT' logo and a search bar. Below the header is a table of contracts with the following data:

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
6	350-0071910-000	David Smith Auto	\$50,725.85			* No Action Required *
7	625-0034659-900	Henry Albert Products	\$41,560.97	11/03/2008	CC	Call customer
8	975-0068094-000	David Smith Auto	\$105,035.61	11/02/2008	OFR	Out for Repossession
9	350-0022020-901	Richard Smith Trucking	\$39,989.95	11/01/2008	LMR	Left Message on Recorder
10	350-0051522-000	Eric Ulm Wrecking	\$110,442.16			* No Action Required *
11	900-0036334-900	Thomas Carson Flyers	\$109,120.04	11/01/2008	OFR	Out for Repossession

Below the table is a navigation bar with tabs for 'Contract Detail', 'Follow-Up History', 'Customer Messages', 'Contacts/Related Parties', 'Receivables', 'Pyent History', and 'Ending Deposits'. The 'Customer Messages' tab is selected, showing a list of messages with columns for Date, Name, Message, and Userid. A pop-up window titled 'Add Message' is open, allowing the user to enter a message. The message type is set to 'Customer' and the message text is 'Left Mr. Smith a voice mail messages on both office and cell phone.' The user 'Kylli Shiel' is logged in. The pop-up window has 'Cancel' and 'Add' buttons. The status bar at the bottom of the browser window shows 'Transferring data from 127.0.0.1...'.

Use right click functionality for easy access to the *Add Message* pop-up for entering comments or customer correspondence.

## Waive late charges via right click feature

The screenshot shows the WebCollect software interface within a Mozilla Firefox browser window. The browser address bar displays the URL: `http://127.0.0.1:8080/BridgeWare/WebCollect/index.html`. The software interface features a header with the 'WEB COLLECT' logo, user information '0141 Kyb Shiel', and department '10 Lease Servicing Dept'. Below the header is a table of receivables with columns: Seq, Contract #, Cust Name, Bal Remaining, F/U Date, Code, and Message. The table contains six rows of data. Below this is a 'Receivables' tab with a detailed table of items, including columns for Seq, Open Item, Inv Date, Due Date, Invoice Nbr, Chrg Desc, Chrg Amt, Amt Invoic, Pymts Rcvd, Outstanding Balan, and Aging. A 'Waive Late Charge' dialog box is open over the table, showing 'Adjustment Code: \* 02 | Waive late fee' and buttons for 'Cancel' and 'Waive'. The status bar at the bottom indicates 'Transferring data from 127.0.0.1...'.

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
1	001-0050750-001	Denver Filbert Sales and Service	\$163,954.16	11/01/2008	PTP	9/0
2	004-0028475-900	Henry Einstein Transportation	\$87,741.23			* No Action Required *
3	100-0065057-000	Thomas Grape Excavating	\$189,221.88			* No Action Required *
4	275-0037398-900	Michael Albert Wrecking	\$61,504.00	11/01/2008	PD	cbp 1458.88+30
5	390-0017553-900	Michael Brown Trucking	\$19,979.25	08/06/2008	NJS	Flagged by NJS
6	550-0071910-000	George Young Sign Co.	\$50,725.85	11/01/2008	OFR	Out for Repossession

Seq	Open Item	Inv Date	Due Date	Invoice Nbr	Chrg Desc	Chrg Amt	Amt Invoic	Pymts Rcvd	Outstanding Balan	Aging
1	342085	07/16/2008	08/05/2008	211361	Rental	\$3,492.28	\$3,685.40	\$193.12	\$3,492.28	P01
2	363104	08/16/2008	08/06/2008	232476	Repo Fees	\$240.00	\$240.00	\$0.00	\$240.00	P31
3	352435	08/16/2008	08/05/2008	217935	Rental	\$3,492.28	\$3,685.40	\$0.00	\$3,685.40	P31
4	361442	09/05/2008	09/05/2008						\$174.61	P1
5	363346	09/15/2008	09/15/2008						\$3,690.50	P1
6	371416	10/05/2008	10/05/2008						\$174.61	P1
7	375984	10/16/2008	10/16/2008						\$3,690.50	CUR

Simply right click on a specific line-item receivable to access the option to waive late charges.

## Add follow ups via right click feature

The screenshot displays a web browser window with the following elements:

- Browser:** Mozilla Firefox, address bar showing a file path.
- Page Header:** "WEB COLLECT" logo, user "0141 Kyli Shiel", department "10 Lease Servicing Dept", and a "Submit" button.
- Table 1 (Main Worklist):**

Seq	Contract #	Cust Name	Bal Remaining	F/U Date	Code	Message
11	900-0036334-900	Thomas Carson Flyers	\$109,120.04	11/01/2008	OFR	Out for Repossession
12	650-0032939-900	Cody Filbert Crane Service	\$44,639.87	11/01/2008	OFR	Out for Repossession
13	375-0034977-900	Ethan Lloyd Enterprizes	\$95,377.34	11/01/2008	CC	Call customer
14	001-0048118-901	Norman Brown Enterprizes	\$35,516.14	11/01/2008	CC	Call customer
15	001-0070985-000	Henry Hughes Septic	\$80,686.63	11/01/2008	OFR	Out for Repossession
16	004-0030439-900	Frank Carson Digging	\$73,101.94	11/01/2008	CC	Call customer
- Table 2 (Follow-Up History):**

Date	Name	Message	Code
11/01/2008	Kyli Shiel	Out for Repossession	OFR
10/31/2008	Kyli Shiel	Out for Repossession	OFR
10/30/2008	Kyli Shiel	Out for Repossession	OFR
10/31/2008	Kyli Shiel	Out for Repossession	OFR
10/29/2008	Kyli Shiel	Out for Repossession	OFR
10/28/2008	Kyli Shiel	Out for Repossession	OFR
10/27/2008	Kyli Shiel	Out for Repossession	OFR
10/25/2008	Kyli Shiel	Out for Repossession	OFR
10/24/2008	Kyli Shiel	Out for Repossession	OFR
10/23/2008	Kyli Shiel	Out for Repossession	OFR
- Modal Dialog: Add Message**
  - F/U Date: \* 05/12/2009
  - F/U Code: \* 81 | F/u on sign docs
  - F/U Msg: \* F/u on sign docs
  - Buttons: Cancel, Add
- Footer:** "Add Follow-Up" button and status bar "Transferring data from 127.0.0.1..."

The *Add Follow Up* button will remove the contract from the current worklist until a future date.