

How to use Collection Bureau Services, Inc. OMS (Online Management System)

Click on OMS Login from our website www.collectionbureau.biz

At the login screen

Put in the Username & Password assigned to you by your salesperson then click on Login

*Note: If you do not have a Username and Password and you would just like to “check it out” put in the Username **demo** and Password **demo**, then click on Login.*

Contact Collection Bureau Services, Inc. to get your own Username and Password to look at your own accounts.

1. The first tab that comes up is the **Client Reports tab**.

This lists all of the consumers you have turned over to Collection Bureau Services, Inc. It lists name, social security number, last payment amount and last payment date and balance.

By using the red arrows by primary name and balance you can sort by name either ascending or descending or you can sort from the smallest to the highest balance or vice-versa.

2. If you double click on a specific consumer name you will then be taken to the **Consumer Info tab**.

This will give you our most current information on the consumer.

There is also a listing of individual accounts you have turned over on that consumer if you have turned over more than one.

You can sort your accounts for the specific consumer in either ascending or descending order by using the red arrows based on:

- DL (date listed with Collection Bureau Services, Inc.),
- LC (date of last charge - this is the date of service or the date of the check),
- LP (date of last payment),
- or balance.

The last column is STAT - these are status codes we use.

If you would like to know what the abbreviation stands for just click on it and a window will appear with a definition.

Just above the individual account listings there is a black bar that says account information. On the right hand side of this bar is a icon that looks like a printer, if you click on the printer you can get a hard copy of the information in this tab.

3. The second tab is **Consumer Payments**.
This tab will let you see when consumer payments were made and to what accounts the payments were applied.

The consumer's name is listed, the original amount you turned over to us, your account number, the payment amount and the date the payment was made.

You can also print a copy of this tab, by clicking on the printer icon.

4. The third tab is the **Client Info tab**.

This lists all of the individual accounts you have turned over to Collection Bureau Services, Inc.

You can sort your accounts in either ascending or descending order by using the red arrows based on:

- name,
- ACT# (your account number),
- DL (date listed with Collection Bureau Services, Inc.),
- LC (date of last charge - this is the date of service or the date of the check),
- LP (date of last payment),
- or balance.

By clicking on the printer icon in this tab, you can create reports. The reports contain our account number, your account number, the consumer's name, the date the account was turned over to Collection Bureau Services, Inc., the amount originally turned over, the current balance, and the status of the account.

If you click on the printer icon, you will get a list of all of your company's numbers with Collection Bureau Services, Inc. You may have a number for checks and one for past due accounts, or you may have different types of accounts that you turn over under different company numbers. All of your company's numbers should be listed.

First you must select which of your company's numbers you would like a report on.

Then, you must select what types of accounts you would like a report on.

Active accounts are the ones which we are currently attempting to collect on.

Purged accounts are accounts that have been paid in full or accounts that are currently uncollectible.

- the STAT field for a particular account will give you more information as to why it may be uncollectible.

Click on Active or Purged for the company number you want.

This will bring up a new window into which you can enter the dates you would like the report to go from and to. Enter the dates in MM/DD/YYYY format or use the calendar that appears when you click in the date range field.

The next field is a selection for the format you would like to have the report built in.

If you choose Adobe Acrobat file, you can open the report you created in Adobe Acrobat reader.

Note: If you do not have Adobe Acrobat reader, you can download it (for free) from our website - www.collectionbureau.biz. Look under Recent News for the icon that says get Acrobat Reader.

If you choose Tab-Delimited you can use other applications to work with the report.

Now, click on Build Report

There will be a momentary delay as the report builds, then the report name will appear below the Build Report button.

All you need to do now is double click on the report name and then save it to your own computer. Then open it on your own computer.

If previous reports have been built for this company number today, the report names will appear below the Build Report button. You may view any of these reports by clicking on them and saving them to your computer and then opening them. These reports will be removed daily.

5. You can also search for a specific consumer from any tab if you have certain information about that consumer (last name, first name, your account number, social security number or our account number).

At the top of the each tab there is a down arrow.

Select the search criteria you want to use from the menu that appears when you click on the down arrow (ie. select Last Name or First Name),

Put the information you have into the next box (ie. John),

Then click on go.

This will show all records that have the selected information. (ie. all accounts you have turned over to us with John in the first name or last name will show).

If you enter your account number, social security number or our account number, you will need to enter the full number.

If you use the name search you must use a minimum of 3 characters and the search will return all records with the pattern you entered in it.