

— ConServe —

# Client Web Portal<sup>®</sup>

Your Secure, 24/7 Online Access

— ConServe —  
**Client**  
**Web Portal**<sup>®</sup>

Your Secure, 24/7 Online Access

**Customer Service**

**(800) 724-7500**

Monday – Thursday 8am-7pm EST

Friday: 8am - 5pm EST

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# ConServe Client Web Portal®

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The ConServe Client Web Portal® provides our Clients with online access to their consumer's account information and ConServe's FICO Debt Manager system database through a secure login. Web portal access and training will be provided to authorized users identified at the initial Scope of Work (SOW) meeting. Clients may contact our Client Care team for additional web portal support by calling (800) 724-7500 (select option #6) or emailing [clientcare@conserve-arm.com](mailto:clientcare@conserve-arm.com).

## Features Include

- **Manage Accounts**

View, edit, recall, request hold, add/view notes, and transactions

- **Upload Center**

Securely upload files/documents, placements, adjustments, payments, etc.

- **Reports and Documents**

Storage center for downloaded consumer information and reports. Access the Self Service Reporting Application to customize reports that are uploaded daily

- **Resource Center**

Helpful industry resources

## Sample Screenshots

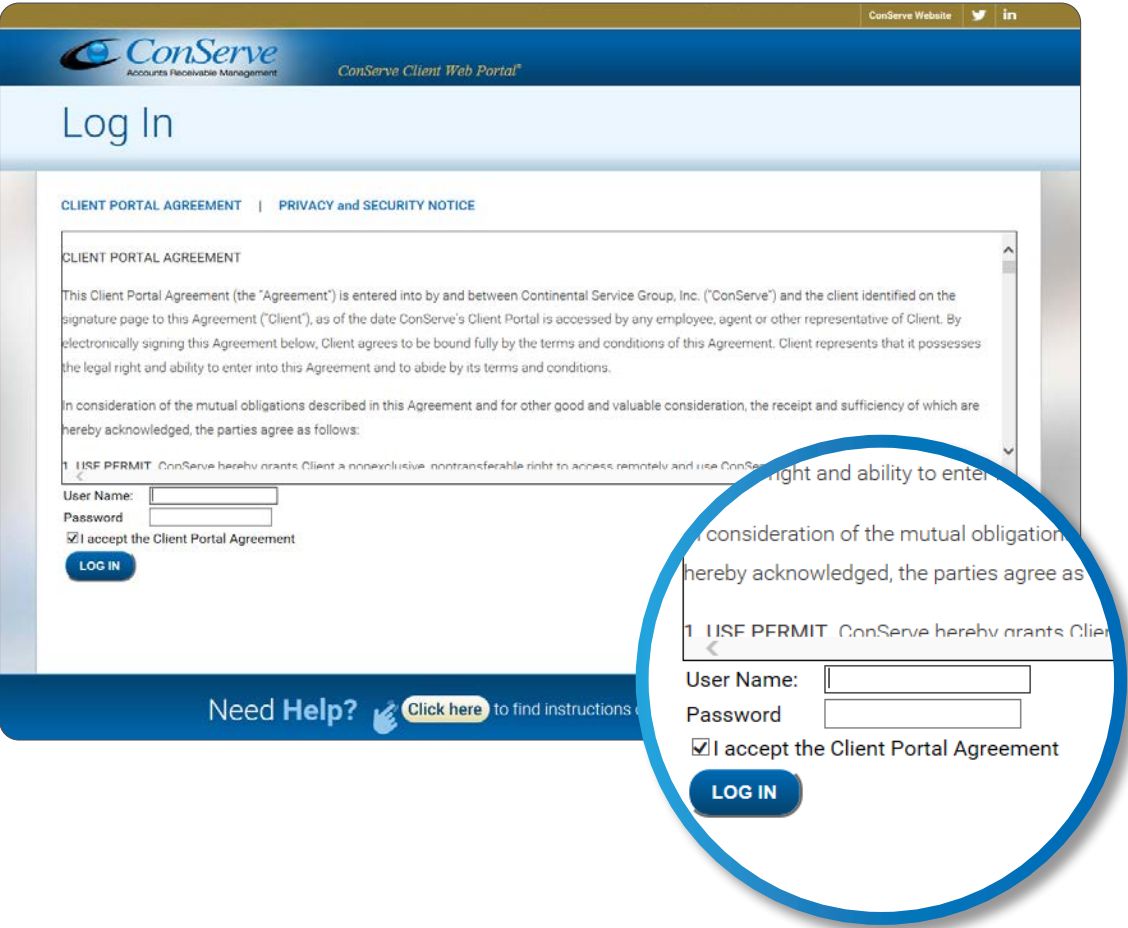
ConServe has included sample screenshots of the ConServe Client Web Portal® in the following pages. The Client Care team is happy to provide navigation assistance upon request.

Please email us at [clientcare@conserve-arm.com](mailto:clientcare@conserve-arm.com) for assistance.

# Client Login Screen

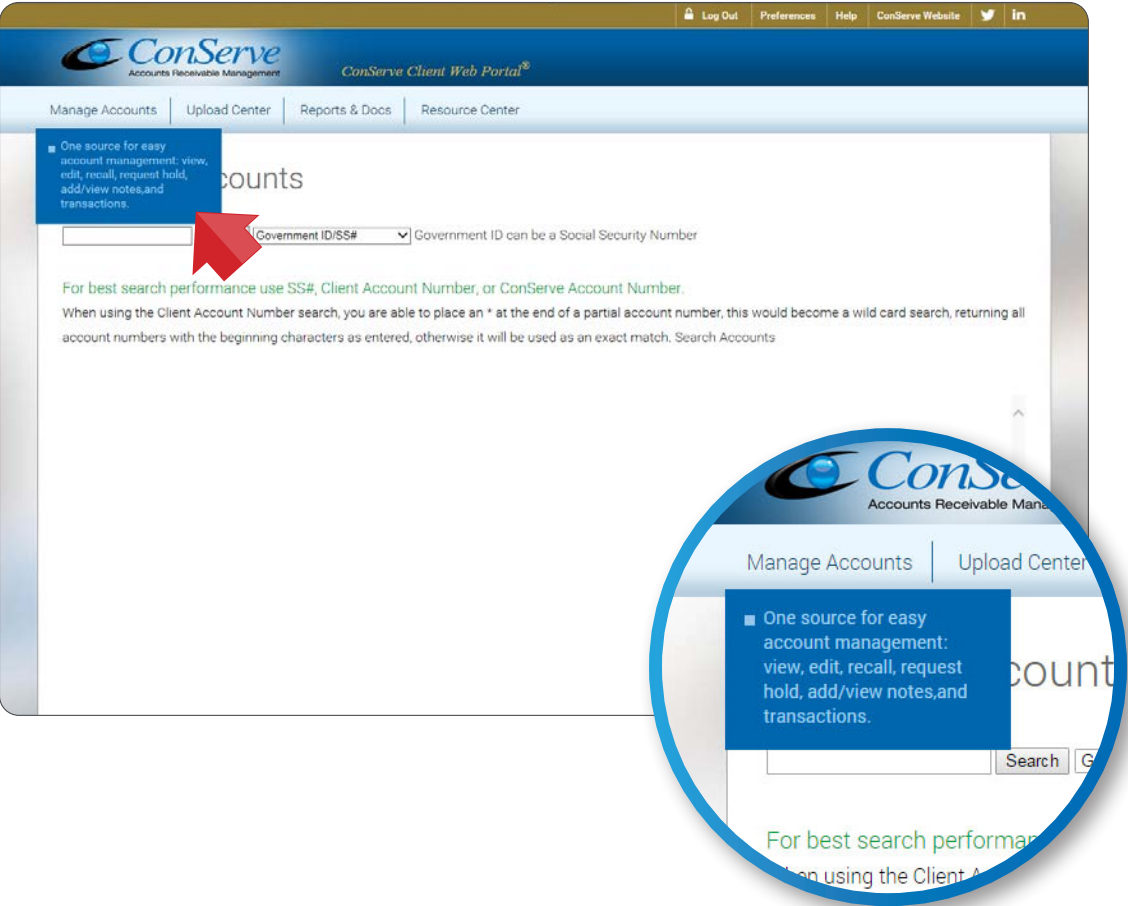
Clients log into the ConServe Client Web Portal® by entering their provided username and password and accepting the Client Portal Agreement.

If you forget your username or password, please contact the Client Care team at [clientcare@conserve-arm.com](mailto:clientcare@conserve-arm.com).



# Manage Accounts Tab

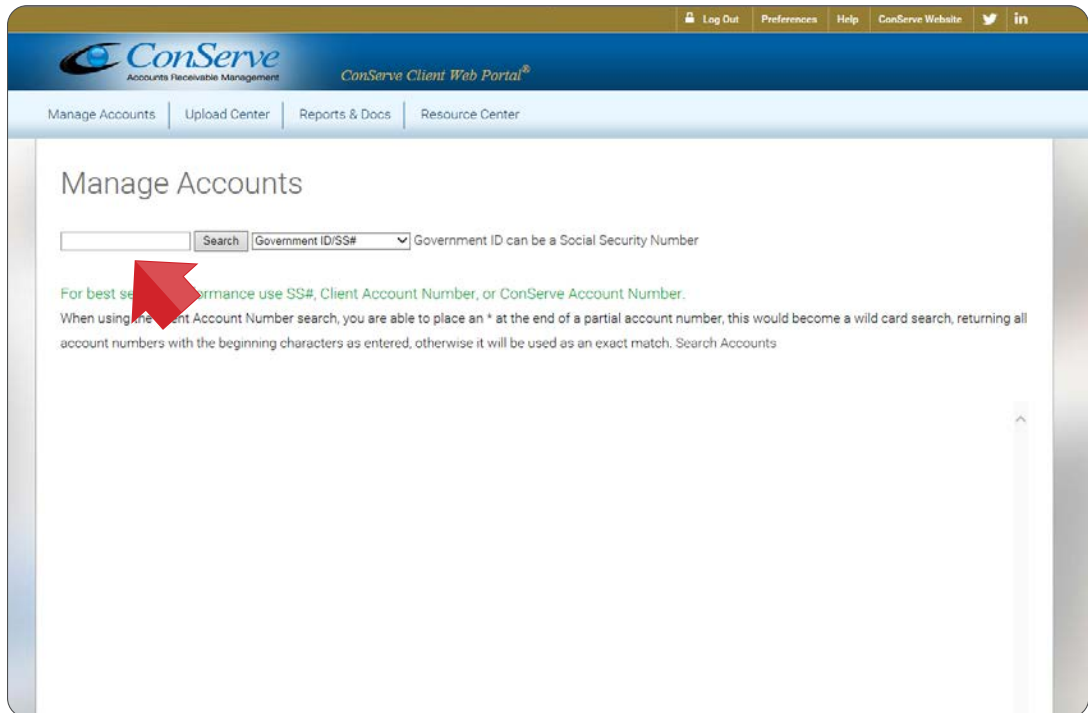
When hovering over the **Manage Accounts tab**, a brief description of the capabilities is provided, allowing for ease of navigation.



# Manage Accounts Tab (cont.)

Consumer accounts can be located through the Manage Accounts tab. Clients can search for an account by:

- Consumer Name
- Client Account Number
- ConServe Account Number
- Social Security Number (no dashes)



# Manage Accounts Tab (cont.)

Accounts can be sorted by clicking on the individual headers. To access the details of a specific account, click on the "Details" button.

The screenshot shows the 'Manage Accounts' page in the ConServe Client Web Portal. At the top, there is a navigation bar with 'Log Out', 'Preferences', 'Help', 'ConServe Website', and social media icons. Below this is a sub-navigation bar with 'Manage Accounts', 'Upload Center', 'Reports & Docs', and 'Resource Center'. The main content area is titled 'Manage Accounts' and features a search bar with the text '7711' and a dropdown menu set to 'ConServe Account Number'. Below the search bar, there is a green tip: 'For best search performance use SS#, Client Account Number, or ConServe Account Number.' and a paragraph explaining wildcard searches. A table with the following data is displayed:

Fund Number	Fund Name	Client Account Number	ConServe Account Number	Last Name	First Name	NOTES	DETAILS
0109	CONSERVE TEST FUND DNU	0743 97 0545.	7711	TESTING TESTER TEST	TST		

A red arrow points to the 'DETAILS' button in the table row.



# View Account Screen

Clients are able to view detailed account information including:

- Account Information
- Responsible Party Information
- Employment Information
- Spouse Information
- Co-maker Information
- Account Status and Balance

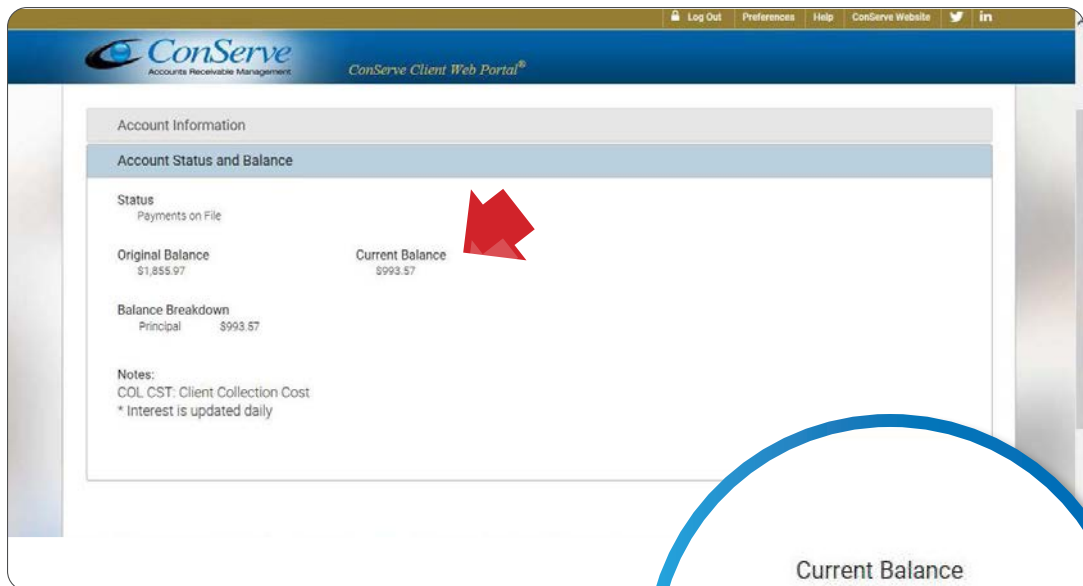
The screenshot displays the ConServe Client Web Portal interface. At the top, there is a navigation bar with links for 'Log Out', 'Preferences', 'Help', 'ConServe Website', and social media icons. Below this is a secondary navigation bar with 'Manage Accounts', 'Upload Center', 'Reports & Docs', and 'Resource Center'. A row of action buttons includes 'VIEW ACCOUNT', 'EDIT ACCOUNT', 'ADD A NOTE', 'RECALL ACCOUNT', 'HOLD ACCOUNT', 'ACCOUNT NOTES', and 'ACCOUNT TRANSACTIONS'. The main content area shows the account name 'View Account: TESTING TESTER TEST, TST (0743 97 0545.)' and a section titled 'Account Information' with a dropdown arrow. A red arrow points to this section. A blue circle highlights a zoomed-in view of the 'Account Information' section, showing the following details:

<b>First Name</b> TST	<b>Last Name</b> TESTING TESTER TEST
<b>Phone Number</b> 585-474-5359	<b>Government ID/SS#</b>
<b>Address Line 1</b> 45 TESTING	<b>City</b> Plano
<b>Address Line 2</b> APT 34	<b>State</b> CA
<b>Placement Date</b> 04/29/2001	<b>Postal Code</b> 75025
	<b>Service Date</b> 03/11/2001

Below the 'Account Information' section, there are expandable sections for 'Responsible Party Information', 'Employment Information', 'Spouse Information', and 'Co-maker Information'.

# View Account Screen (cont.)

While in the View Account screen, the current account status and balance breakdown is provided.



The screenshot displays the ConServe Client Web Portal interface. The top navigation bar includes links for Log Out, Preferences, Help, ConServe Website, and social media icons for Twitter and LinkedIn. The main content area is titled "Account Status and Balance" and contains the following information:

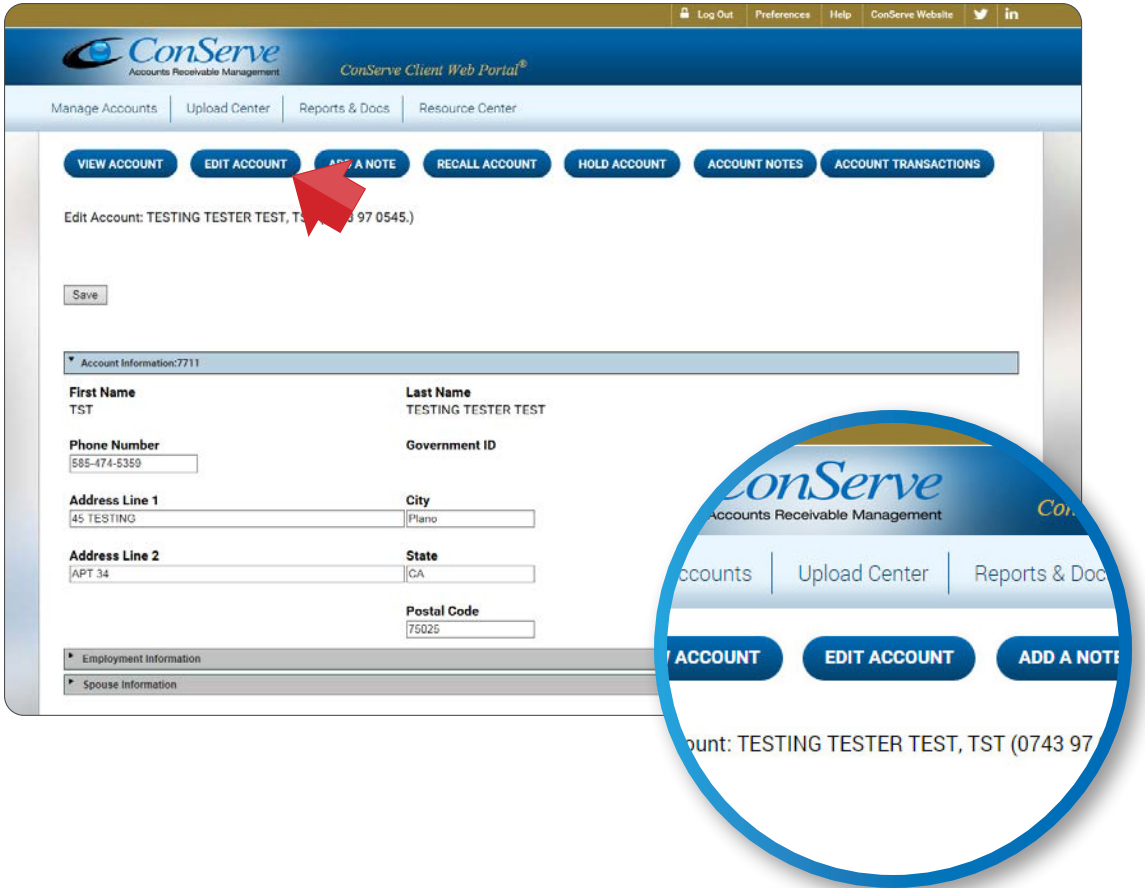
Account Information	
Account Status and Balance	
<b>Status</b>	Payments on File
<b>Original Balance</b>	\$1,855.97
<b>Current Balance</b>	\$993.57
<b>Balance Breakdown</b>	Principal \$993.57
<b>Notes:</b>	COL CST: Client Collection Cost * Interest is updated daily

A red arrow points to the "Current Balance" value of \$993.57. A large blue circle highlights this value, which is also shown in a separate callout box to the right of the screenshot.

Current Balance  
\$993.57

# Edit Account Screen

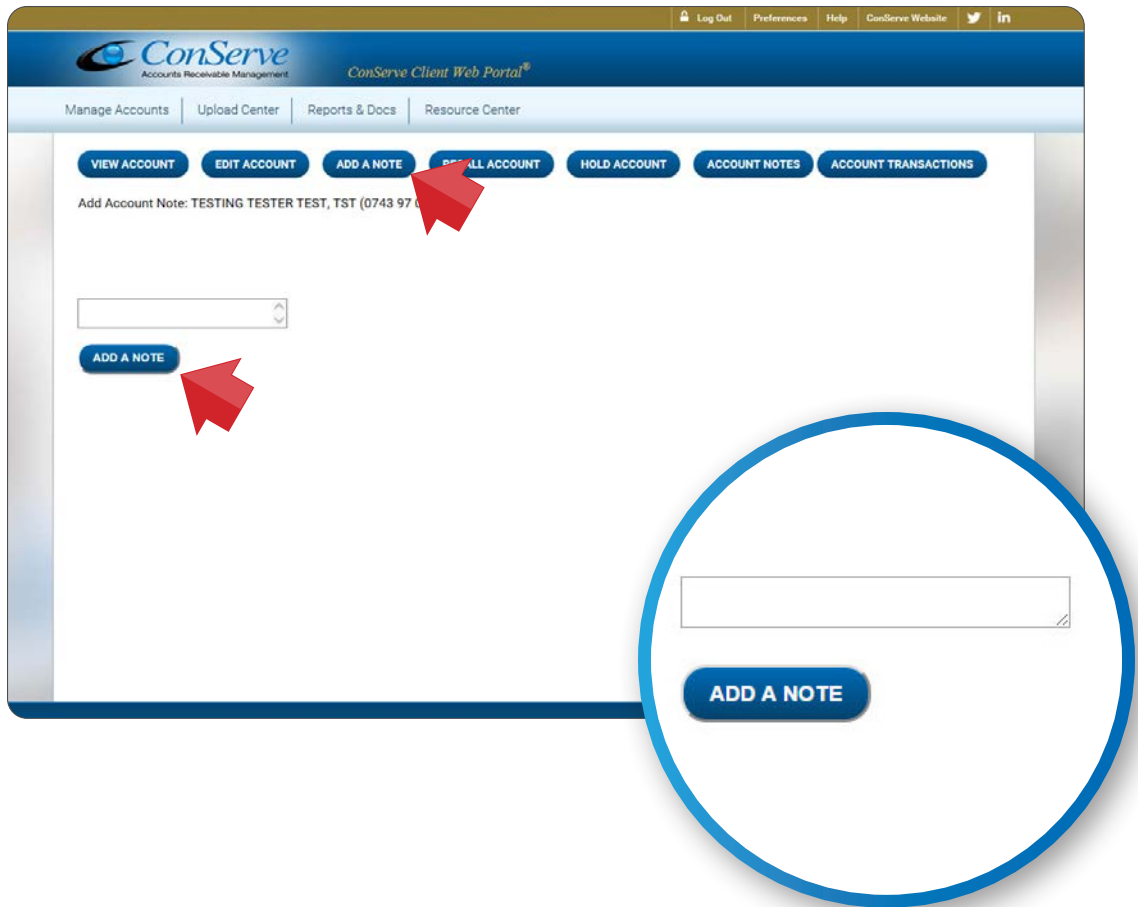
Clients are able to edit demographic information on consumer accounts. ConServe will review each account update that is submitted, and accept or deny the change.



# Add a Note Screen

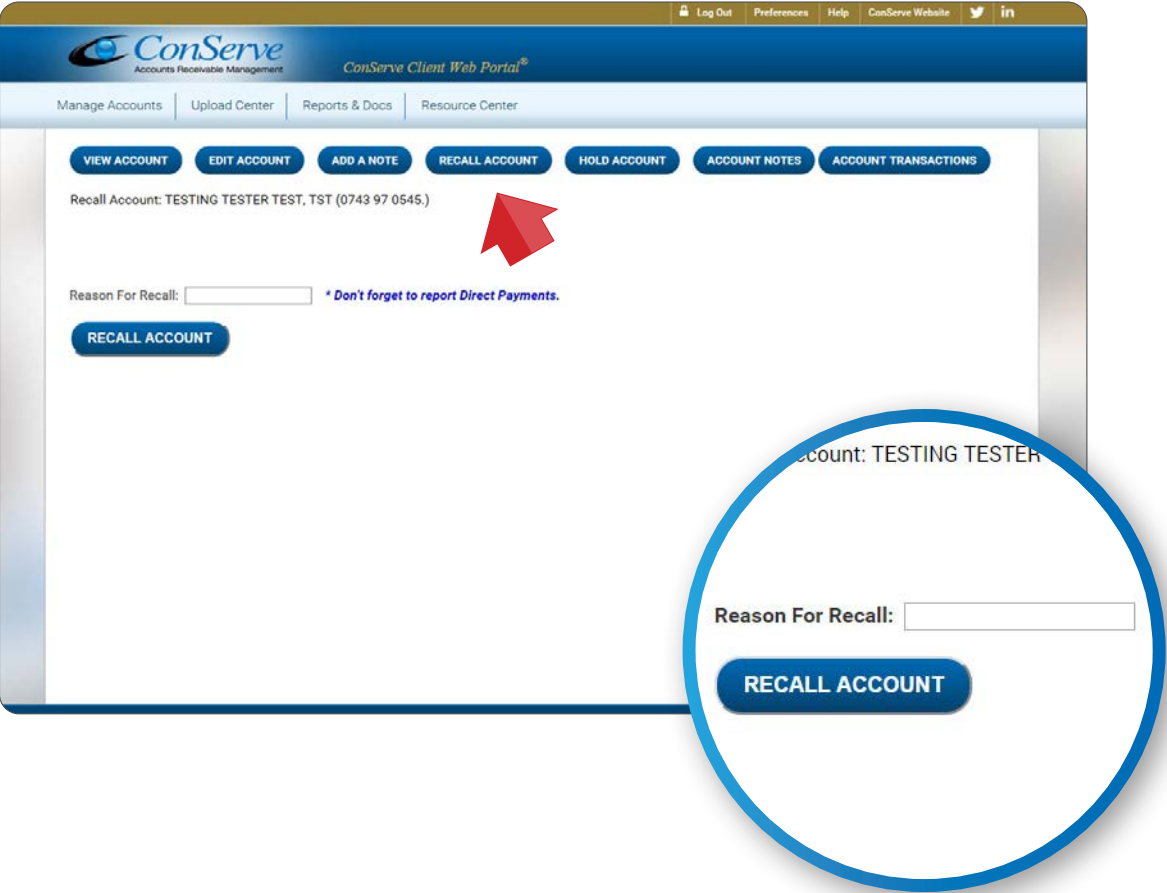
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Clients can add account related notes and information (up to 99 characters) in the "Add a Note" text box. ConServe's Client Care team reviews all submitted notes.



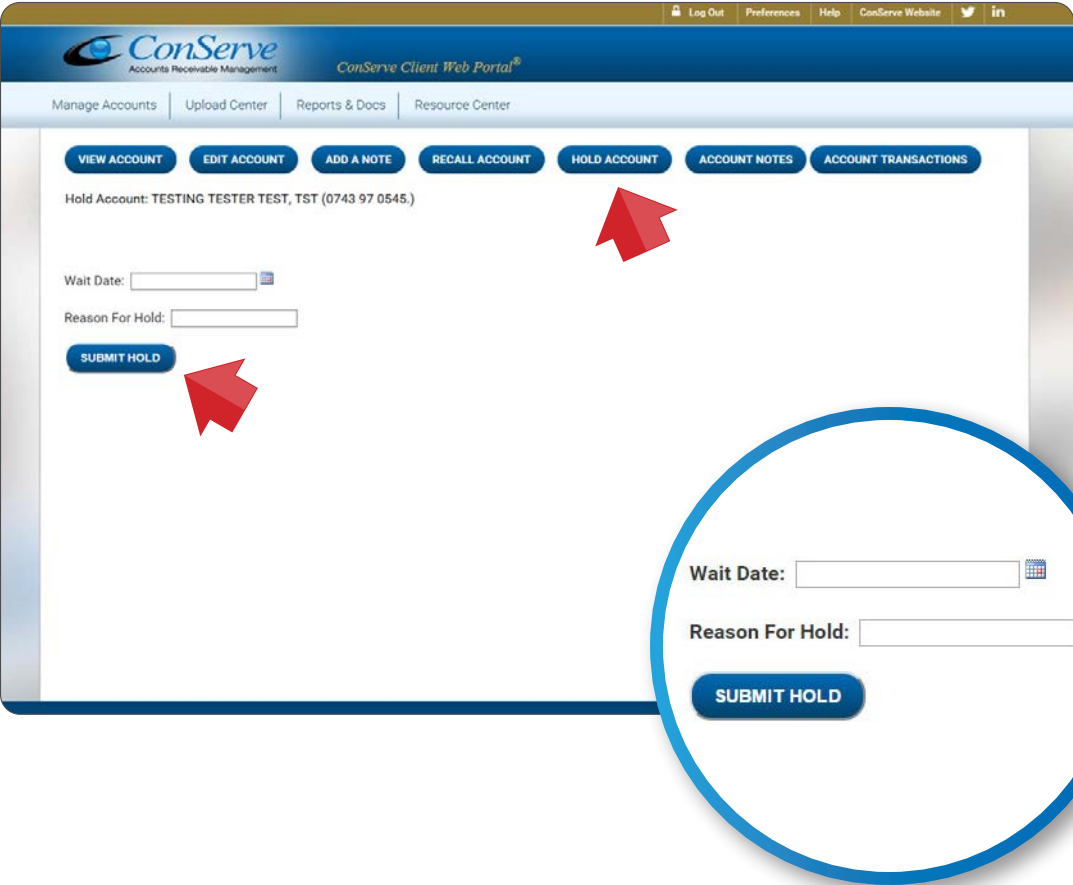
# Recall Account Screen

Account recalls can be requested by providing a detailed explanation in the "Reason for Recall" text box. We will reach out to the Client with any questions.



# Hold Account Screen

Account holds can be requested by providing a detailed explanation in the "Reason for Hold" text box. We will reach out to the Client with any questions.



# Account Notes

From the Manage Account tab, there are two ways in which Clients can view account notes:

**OPTION 1: Select the “Notes” button.**


**OPTION 2: Select the “Account Notes” screen.**

Notes are updated in real-time and displayed in chronological order. Clients are able to access conversation notes between ConServe staff and the consumer.

**OPTION 1: Select the “Notes” button.**

For best search performance use SS#, Client Account Number, or ConServe Account Number.  
When using the Client Account Number search, you are able to place an \* at the end of a partial account number, this would become a wild card search, returning all account numbers with the beginning characters as entered, otherwise it will be used as an exact match. Search Accounts

Fund Number	Fund Name	Client Account Number	ConServe Account Number	Last Name	First Name		
0109	CONSERVE TEST FUND DNU	0743 97 0545.	7711	TESTING TESTER TEST	TST	<a href="#">NOTES</a>	<a href="#">DETAILS</a>



**OPTION 2: Select the “Account Notes” screen.**

Log Out | Preferences | Help | ConServe Website |  | 

**ConServe**  
Accounts Receivable Management  
ConServe Client Web Portal®

Manage Accounts | Upload Center | Reports & Docs | Resource Center

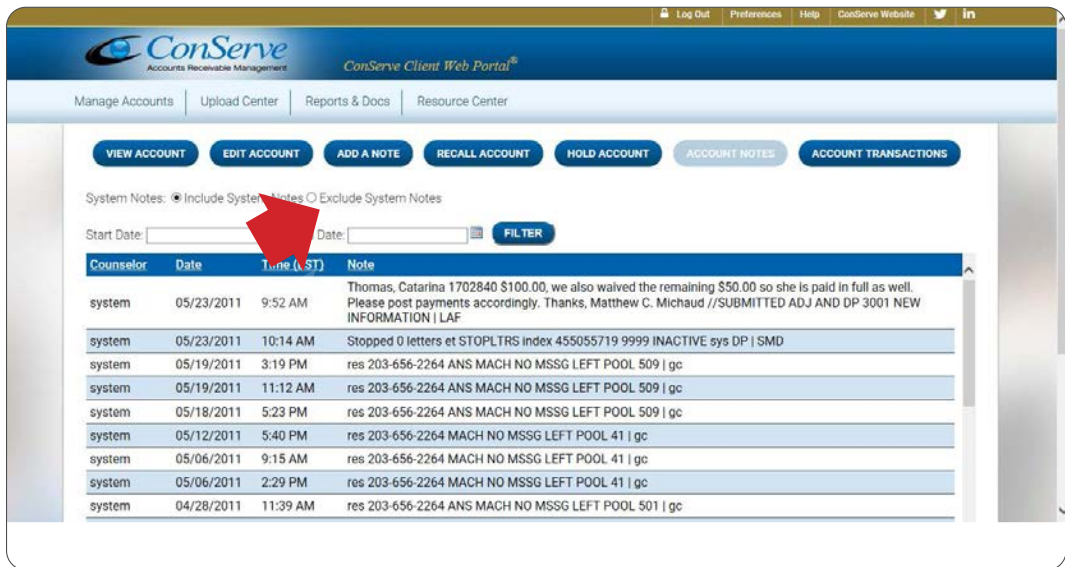
[VIEW ACCOUNT](#) | [EDIT ACCOUNT](#) | [ADD A NOTE](#) | [RECALL ACCOUNT](#) | [HOLD ACCOUNT](#) | [ACCOUNT TRANSACTIONS](#) | [ACCOUNT NOTES](#)

Account Notes: TESTING TESTER TEST, TST (0743 97 0545.)



# Account Notes (cont.)

Clients are able to search through Account Notes using the date range field. The “Exclude System Notes” option allows you to only view notes entered by ConServe staff.



The screenshot displays the ConServe Client Web Portal interface. At the top, there is a navigation bar with the ConServe logo and the text "Accounts Receivable Management" and "ConServe Client Web Portal®". Below this, there are several menu items: "Manage Accounts", "Upload Center", "Reports & Docs", and "Resource Center". A row of buttons includes "VIEW ACCOUNT", "EDIT ACCOUNT", "ADD A NOTE", "RECALL ACCOUNT", "HOLD ACCOUNT", "ACCOUNT NOTES", and "ACCOUNT TRANSACTIONS".

The "ACCOUNT NOTES" section is active, showing a search interface. It includes a "System Notes" section with two radio buttons: "Include System Notes" (selected) and "Exclude System Notes". A red arrow points to the "Exclude System Notes" option. Below this are "Start Date:" and "Date:" input fields, followed by a "FILTER" button.

The main content area displays a table of account notes with the following columns: "Counselor", "Date", "Time (ST)", and "Note".

Counselor	Date	Time (ST)	Note
system	05/23/2011	9:52 AM	Thomas, Catarina 1702840 \$100.00, we also waived the remaining \$50.00 so she is paid in full as well. Please post payments accordingly. Thanks, Matthew C. Michaud //SUBMITTED ADJ AND DP 3001 NEW INFORMATION   LAF
system	05/23/2011	10:14 AM	Stopped 0 letters et STOPLTRS index 455055719 9999 INACTIVE sys DP   SMD
system	05/19/2011	3:19 PM	res 203-656-2264 ANS MACH NO MSSG LEFT POOL 509   gc
system	05/19/2011	11:12 AM	res 203-656-2264 ANS MACH NO MSSG LEFT POOL 509   gc
system	05/18/2011	5:23 PM	res 203-656-2264 ANS MACH NO MSSG LEFT POOL 509   gc
system	05/12/2011	5:40 PM	res 203-656-2264 MACH NO MSSG LEFT POOL 41   gc
system	05/06/2011	9:15 AM	res 203-656-2264 MACH NO MSSG LEFT POOL 41   gc
system	05/06/2011	2:29 PM	res 203-656-2264 MACH NO MSSG LEFT POOL 41   gc
system	04/28/2011	11:39 AM	res 203-656-2264 ANS MACH NO MSSG LEFT POOL 501   gc



# Account Transactions Screen

The Account Transactions screen displays all transactions including:

- Payments
- Corrections
- Non Sufficient Funds (NSFs)
- Adjustments

Account Transactions: TESTING TESTER TEST, TST (0743 97 0545.)

Trans Id	Trans Date	Effective Date	Reference Number	Trans Type Code	Trans Type Desc	Amount	Corrections
1407	05/23/2016		BAL UPD WO66572	CRJ	Credit Adjustment	(\$671.28)	
1406	08/21/2014	08/21/2014	TAX OFFSET	CRJ	Credit Adjustment	(\$25.00)	
1404	07/22/2014	07/22/2014	TEST	VI	VISA	\$100.00	
1405	07/22/2014	07/22/2014	TEST	COR	Correction	(\$100.00)	Correction for Trans Id 1404
1402	03/19/2013	03/19/2013	TEST	CA	Cash	\$100.00	
1403	03/19/2013	03/19/2013	TEST	COR	Correction	(\$100.00)	Correction for Trans Id 1402
1400	09/17/2012	09/17/2012		CK	Check	\$100.00	
1401	09/17/2012	09/17/2012		COR	Correction	(\$100.00)	
1398	03/14/2012	03/14/2012	TEST	DP	Paid Directly		
1399	03/14/2012	03/14/2012	TESR	DP	Paid Directly		

1 2 3 4 5 6 7 8 9 10 ...

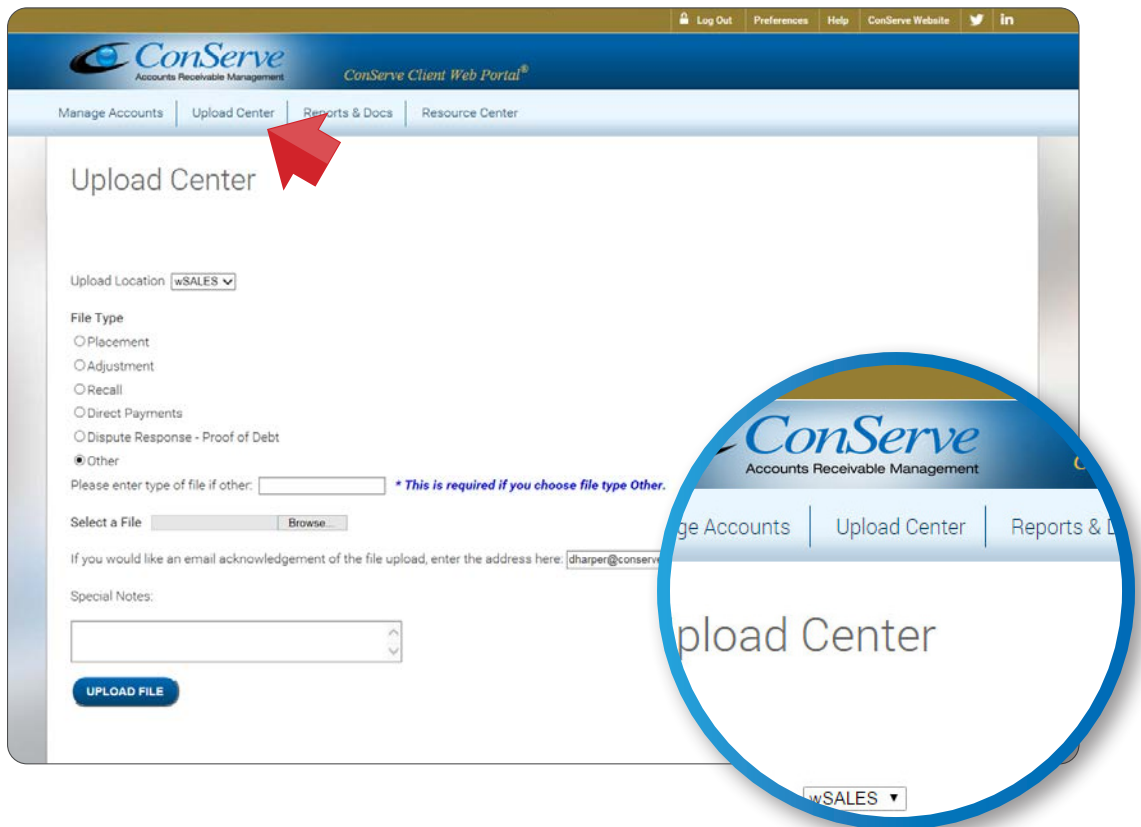
# Upload Center Tab

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The Upload Center tab allows Clients to securely upload:

- Placement Files
- Payment Files
- Reconciliations
- Account Adjustment Files
- Close Request Files
- Consumer Documentation (proof of debt)

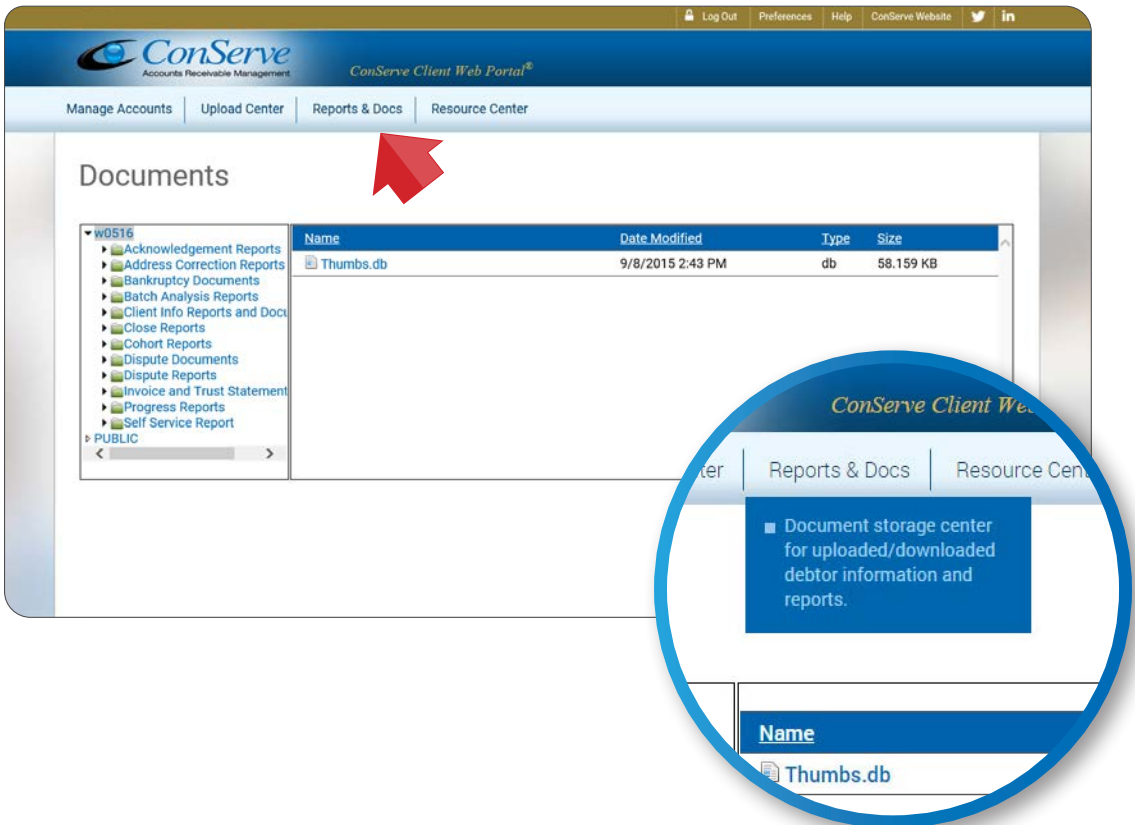
Clients can select the appropriate web portal folder (if associated with more than one).



# Reports & Docs Tab

The Reports & Docs tab is the document storage center for downloaded consumer information, documents and reports. Clients can view the "Public Folder" as well as specifically assigned private folders.

Detailed steps on how to navigate the Self Service Reporting Application, which allows Clients to customize reports that are updated daily, can be found on page 23.



# Public Folder View

The Public Folder contains web navigation documents and public announcements. This folder cannot be modified in any way by the Client as it is provided as a resource tool.

The screenshot shows the ConServe Client Web Portal interface. At the top, there is a navigation bar with links for "Log Out", "Preferences", "Help", and "ConServe Website". Below this is a secondary navigation bar with "Manage Accounts", "Upload Center", "Reports & Docs", and "Resource Center". The main content area is titled "Documents" and displays a table of files. A red arrow points to the "PUBLIC" folder in the left-hand navigation pane.

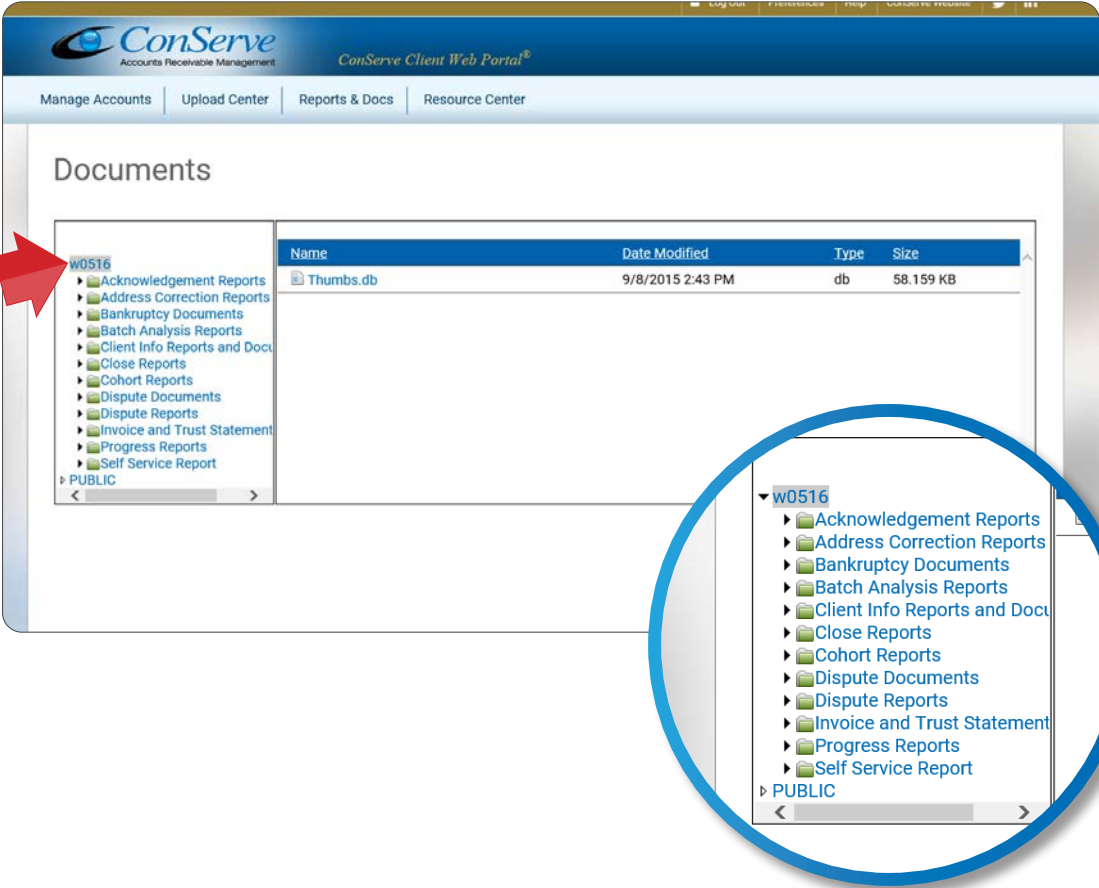
Name	Date Modified	Type	Size
~\$CONSERVE CHARGE OFF COLLECTION PLACEMENT TEMPLATE_with REGARDING_011819.xlsx	5/28/2020 9:52 AM	xlsx	.016 KB
2020 Client Web Portal Booklet.pdf	8/14/2020 8:07 AM	pdf	1395.429 KB
2020 ConServe Client Web Portal® Training Webinar.mp4	1/23/2020 2:13 PM	mp4	7860.433 KB
Adjustment_Template.xlsx	5/28/2019 5:34 PM	xlsx	5.241 KB
Client Care Contact Sheet.pdf	9/2/2020 2:39 PM	pdf	1.016 KB
ConServe 2019 Compliance Letter for Perkins.pdf	5/22/2020 11:00 AM	pdf	1.016 KB
CONSERVE CHARGE OFF COLLECTION			

A circular callout provides a magnified view of the "PUBLIC" folder in the left-hand navigation pane. The folder contains the following sub-items:

- Acknowledgement Reports
- Address Correction Reports
- Bankruptcy Documents
- Batch Analysis Reports
- Client Info Reports and Documents
- Close Reports
- Cohort Reports
- Dispute Documents
- Dispute Reports
- Invoice and Trust Statement
- Progress Reports
- Self Service Report
- PUBLIC

# Client Web Folder View

Web Folders store Client specific consumer documentation and reports.

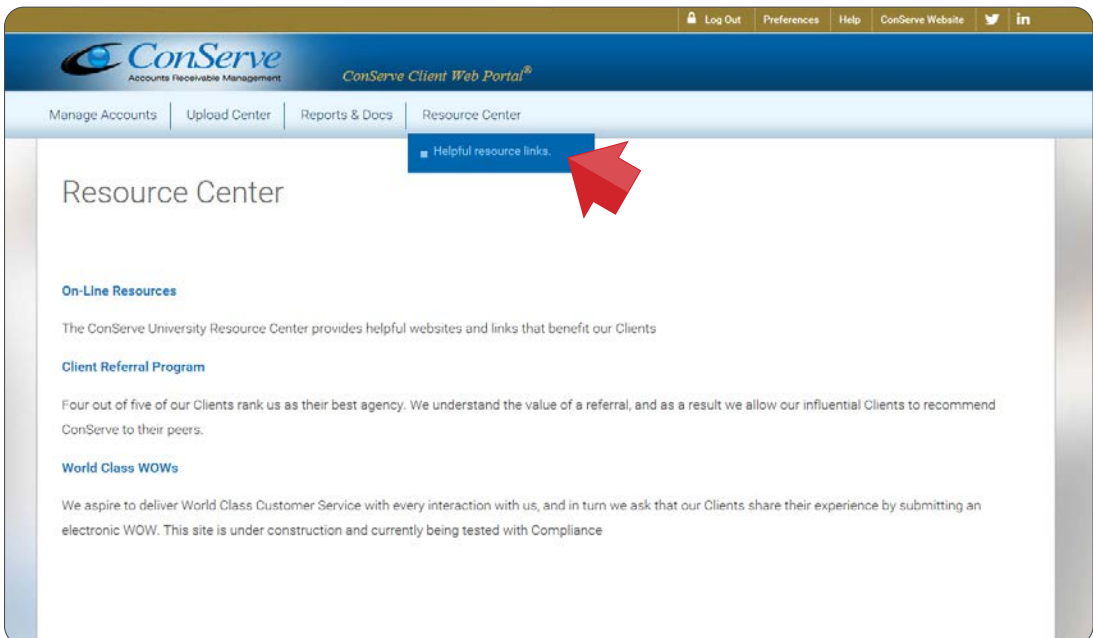


# Resource Center Tab

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ConServe University® Resource Center: provides helpful links to websites that benefit our Clients

- Compliance and Regulations
- Higher Education Federal Loans
- Financial Literacy Resources
- Tools & Resources
- National Administrations
- National Education, Training, Webinars, Events & Conferences
- National Associations
- State Associations
- National Credit Bureaus
- Servicers
- Client Referral Program: submit your referrals
- World Class WOWs: submit your experience with ConServe staff



# Preferences - Change a Password

Changing a password is easy and can be managed in the Preferences tab at the top of the screen.

## Screen 1: Preferences Tab, Change Password

Log Out | Preferences | Help | ConServe Website | |

Manage Accounts | Upload Center | Reports & Docs | Resource Center

### Change Password

Use the form below to change your password.

**Your Password will expire on: 12/1/2020 4:48:56 PM**

Current Password:   1 Numeric value  
 1 Lower case character  
New Password:   1 Upper case character  
 1 Special character  
Confirm Password:   Length should be between 12-20 characters

**CHANGE PASSWORD**

## Screen 2: Confirm Change Password

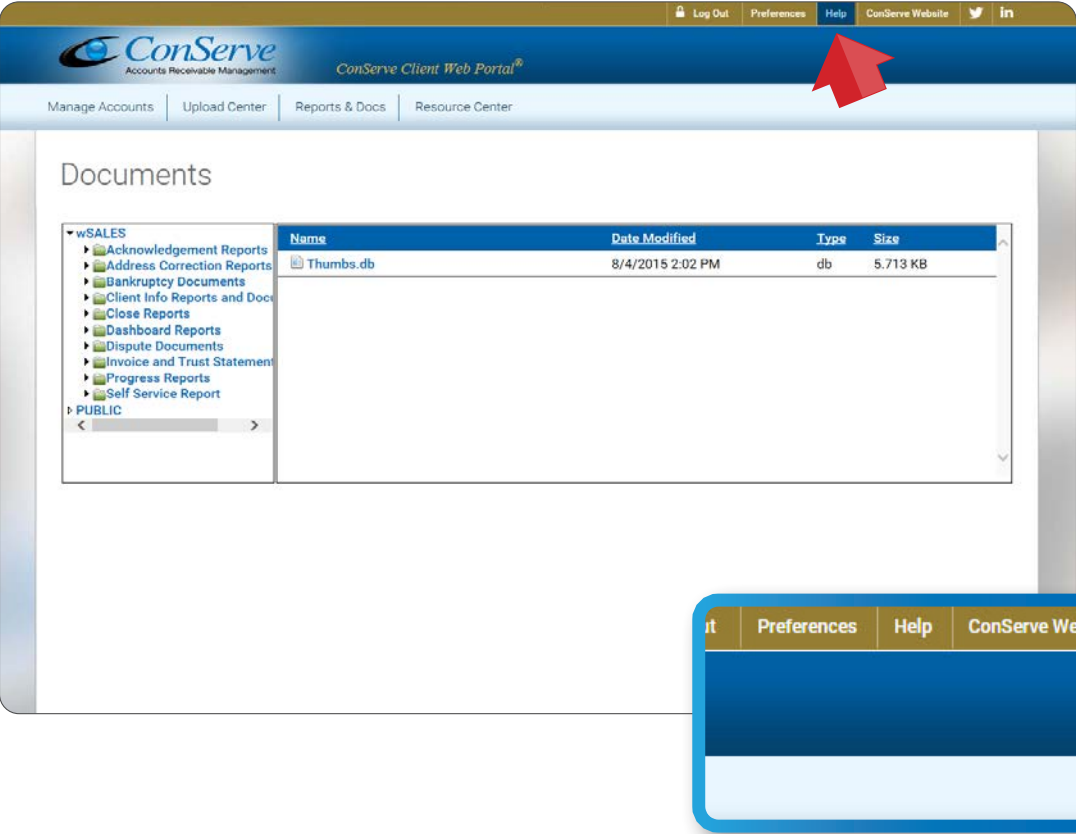
**Your Password will expire on: 12/1/2020 4:48:56 PM**

Current Password:   1 Numeric value  
 1 Lower case character  
New Password:   1 Upper case character  
 1 Special character  
Confirm Password:   Length should be between 12-20 characters

**CHANGE PASSWORD**

# Help Tab

The Help tab is a convenient way to access helpful tools for navigation.

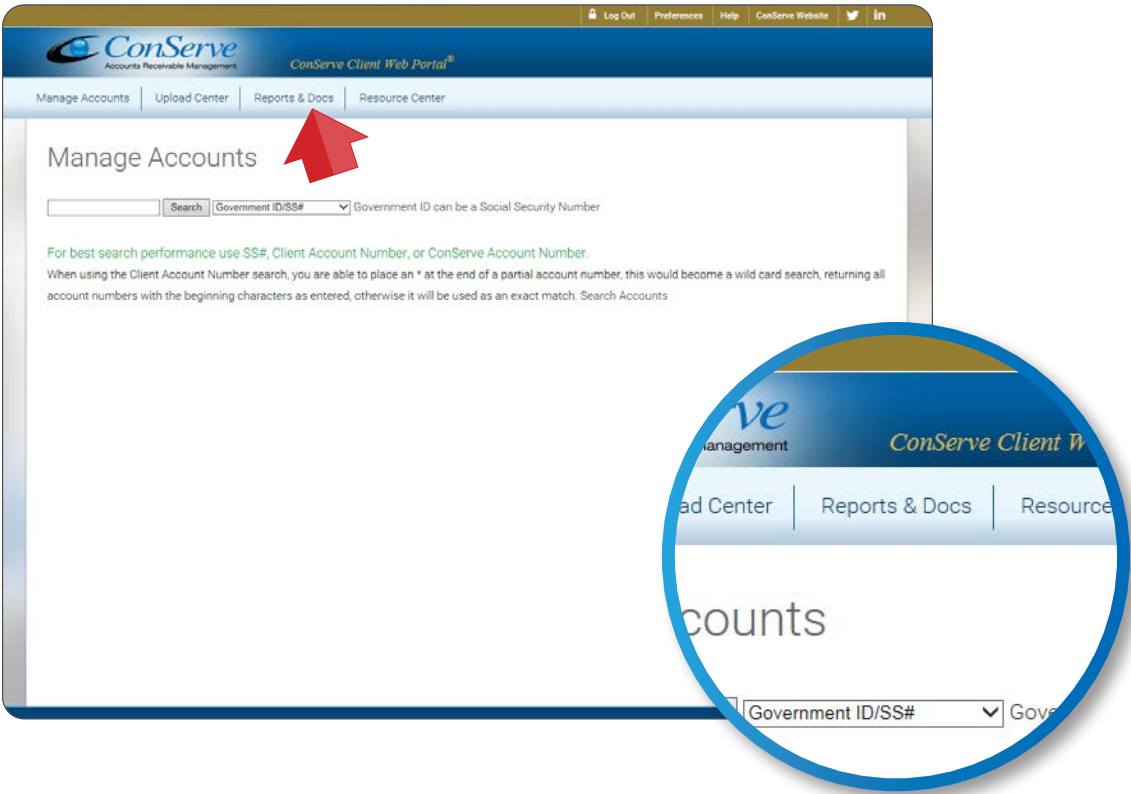




# Self Service Reporting Application

The Self Service Reporting Application (app) allows Clients to customize reports that are updated daily. The following pages outline detailed steps on how to navigate the app.

## Step One: Click on the “Reports & Docs” tab.



# App (cont.)

Step Two: Click on the black triangle (4) next to "Self Service Report" to expand the options.



# App (cont.)

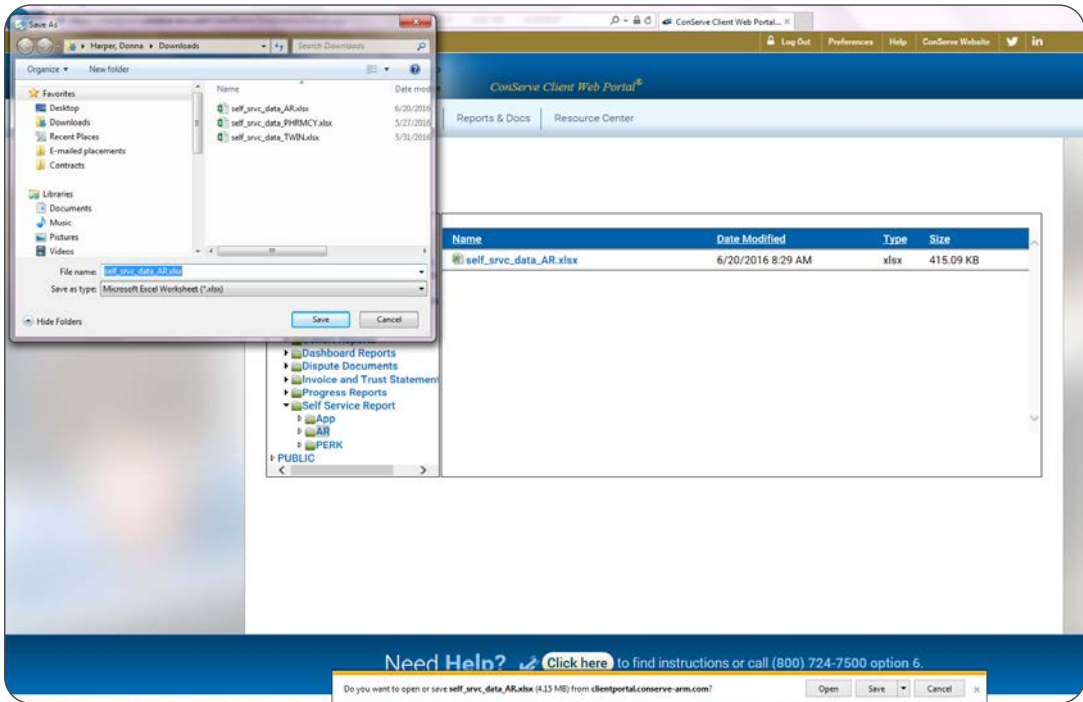
## Step Three: Click on your preferred instance.

Note - the instance name will be specific to how your Standard Monthly Reports run for you. This report is created daily, and is reflective of the prior day's activities. Each time you want to review your inventory, you will need to save the newest report to your computer and follow the instructions outlined below.



# App (cont.)

Step Four: Save the “self\_srvc-data” report to your computer. You will need to save the individual report for each instance (group of data) if applicable.



# App (cont.)

Step Five: Once the report has been saved, click on “app.” Click on “Client Self Service Reporting” and then select “open.”

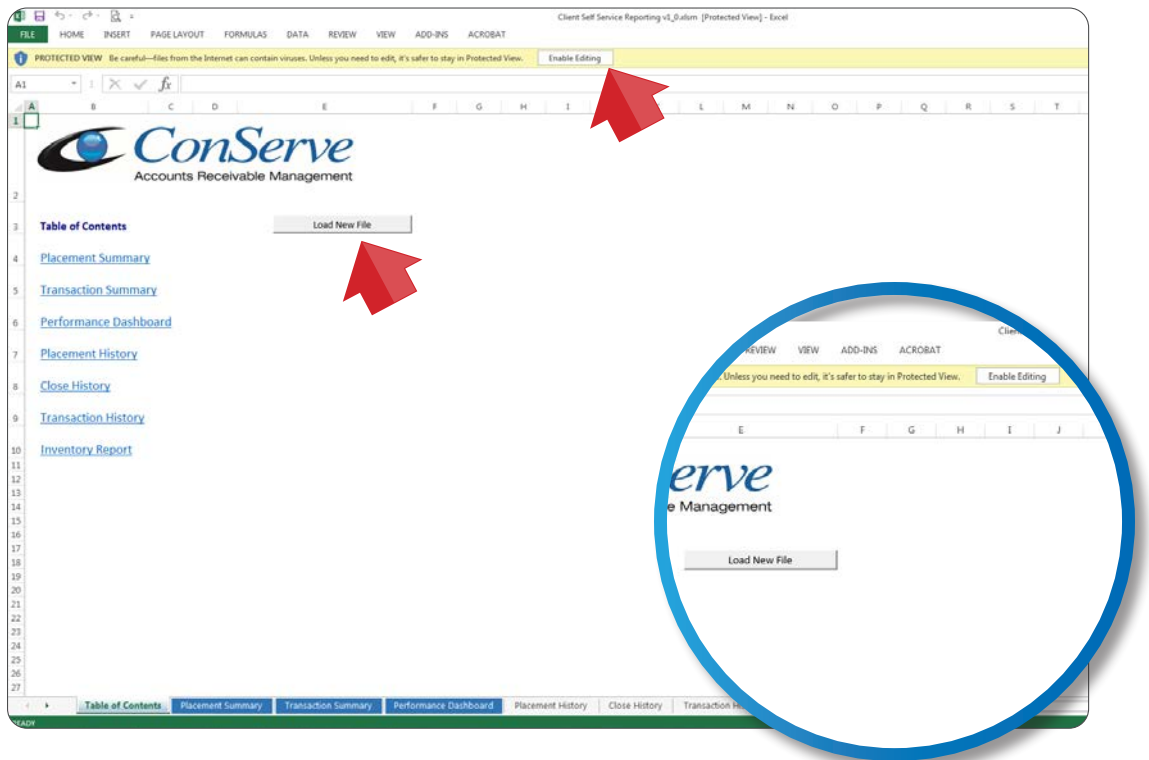
The screenshot displays the ConServe Client Web Portal interface. The top navigation bar includes links for Log Out, Preferences, Help, ConServe Website, and social media icons. Below this, a secondary navigation bar contains Manage Accounts, Upload Center, Reports & Docs, and Resource Center. The main content area is titled 'Documents' and features a file browser. On the left, a sidebar lists various report categories, with 'App' highlighted under the 'Self Service Report' folder. A red arrow points to this 'App' option. The main table lists files, with 'Client Self Service Reporting v1\_0.xlsm' selected. A red arrow points to this file. At the bottom, a file dialog box is open, showing the file name and size, with the 'Open' button highlighted by a red arrow. A 'Need Help?' link is visible at the bottom of the page.

Name	Date Modified	Type	Size
Client Self Service Reporting v1_0.xlsm	9/15/2016 2:03 PM	xlsm	31.794 KB

# App (cont.)

**Step Six:** Click on “Load New File” and select the applicable “self srvc-data” report that has been saved to your computer. (Once the blue circle disappears, the file has been loaded to the app.)

Note - remember to select “Enable Editing” at the top of the screen, if shown.



# App (cont.)

**Step Seven: Select the specific link under the Table of Contents for the report you would like to view and filter.**

Note - while in the specific report, "home" will take you back to the Table of Contents.

The screenshot shows an Excel spreadsheet titled "Client Self Service Reporting v1.0.xlsx (Protected View) - Excel". The spreadsheet content includes the ConServe logo and the text "Accounts Receivable Management". Below this is a "Table of Contents" section with a "Load New File" button. A list of report links is provided: Placement Summary, Transaction Summary, Performance Dashboard, Placement History, Close History, Transaction History, and Inventory Report. A red arrow points to the "Table of Contents" link. A blue circle highlights the list of report links, which are numbered 3 through 10 in the original image.

Report Name
Table of Contents
Placement Summary
Transaction Summary
Performance Dashboard
Placement History
Close History
Transaction History
Inventory Report

# App (cont.)

Step Eight: The tabs to the right of the ConServe logo allow you to filter for the specifics of that report type. Just click on the specific data element(s) you want included in your report.

The screenshot displays the ConServe Accounts Receivable Management application interface. The main window shows the 'Inventory Report' with various filter options on the right side. A red arrow points to the 'Year Listed' filter, which is currently set to 2016. Other filters include 'Month Listed', 'Status', 'Phase', and 'Fund Name'. The main data table below the filters shows columns for Year, Month, Date Listed, Current Bal, Principal Bal, Interest Bal, Call Cost Bal, Agency Int Bal, Mfrs Bal, Initial Balance, Last Paid Date, Account Paid, Status, and Phase. The table contains data for various months from December 2015 to August 2016.

Year Listed	Month Listed	Status	Phase	Fund Name
2010	Jan	BEGIN REG COLLECT	Closed	4256 - CONSERVE
2011	Apr	GOOD PHONE	Full Collect	4617 - CONSERVE
2013	May	INACTIVE		
2014	Jun	MAIL RETURN RCVD		
2015	Jul	NEW INFO OBTAINED		
2016	Aug			
2016	Oct			
2016	Nov			
2016	Dec			



# App (cont.)

Step Nine: If you want to hide specific columns, press the control key on your keyboard, then click on each column with your mouse. Once all of the columns you want to hide are selected, click "Hide Selected."

The screenshot displays the ConServe Accounts Receivable Management web portal. The interface includes a navigation menu at the top, a filter section, and a data table. A red arrow points to the "Hide Selected" button in the "Hide Selected" section. A blue circle highlights the "Hide Selected" button and the "Show All" button in the "Select Visible" section. The data table shows columns for Client Account Number, SSN, Last Name, First Name, Date Listed, Current Bal, Principal Bal, Interest Bal, Call Cost Bal, Agency Ind Bal, Misc Bal, Holded Balance, Last Post Date, Amount Paid, Status, Phase, and Fund Name.

Client Account Number	SSN	Last Name	First Name	Date Listed	Current Bal	Principal Bal	Interest Bal	Call Cost Bal	Agency Ind Bal	Misc Bal	Holded Balance	Last Post Date	Amount Paid	Status	Phase	Fund Name	Service Date	
12/16/2016	398.87	489.00	-	149.87	-	-	-	398.87	-	-	-	8/13/2016	-	-	REG REG COLLECT	Full Collect	ADSE - CONSERVE	8/13/2016
12/16/2016	16,923.28	2,299.97	-	4,293.33	-	-	-	16,923.28	-	-	-	8/13/2016	-	-	GOOD PHONE	Full Collect	ADSE - CONSERVE	8/13/2016
12/16/2016	2,483.71	1,862.78	-	620.93	-	-	-	2,483.71	-	-	-	10/12/2016	-	-	GOOD PHONE	Full Collect	ADSE - CONSERVE	10/12/2016
12/16/2016	5,329.27	8,996.95	-	8,332.32	-	-	-	5,329.27	-	-	-	1/13/2017	-	-	POK ON FILE	Full Collect	ADSE - CONSERVE	1/13/2017
12/16/2016	26,955.32	18,715.56	-	6,237.83	-	-	-	26,955.32	-	-	-	3/10/2017	-	-	PAYMENT PROMISED	Full Collect	ADSE - CONSERVE	3/10/2017
12/16/2016	714.58	555.94	-	176.65	-	-	-	714.58	-	-	-	2/15/2017	-	-	NEW INFO OBTAINED	Full Collect	ADSE - CONSERVE	2/15/2017
12/16/2016	355.95	415.46	-	138.49	-	-	-	355.95	-	-	-	9/13/2016	-	-	MAIL RETURN RCVD	Full Collect	ADSE - CONSERVE	9/13/2016
12/12/2016	523.93	121.00	-	39.33	-	-	-	523.93	-	-	-	4/12/2017	-	-	REG REG COLLECT	Full Collect	ADSE - CONSERVE	4/12/2017
9/13/2016	1,207.97	543.48	-	314.49	-	-	-	1,307.97	12/21/2016	36.00	-	POST DATED CC	-	-	Full Collect	ADSE - CONSERVE	12/21/2016	
9/13/2016	7,810.40	5,707.80	-	1,902.60	-	-	-	7,810.40	-	-	-	10/13/2016	-	-	POST MILITARY DEBTOR	Full Collect	ADSE - CONSERVE	10/13/2016
9/13/2016	1,679.96	2,299.97	-	1,679.96	-	-	-	1,679.96	-	-	-	3/29/2017	-	-	SKOP ACCOUNT	Full Collect	ADSE - CONSERVE	3/29/2017
9/13/2016	260.00	195.00	-	65.00	-	-	-	260.00	-	-	-	10/15/2016	-	-	POST MILITARY DEBTOR	Full Collect	ADSE - CONSERVE	10/15/2016
8/12/2016	6,032.97	4,534.73	-	1,508.24	-	-	-	6,032.97	-	-	-	10/13/2016	-	-	REG REG COLLECT	Full Collect	ADSE - CONSERVE	10/13/2016
8/12/2016	776.19	583.34	-	194.85	-	-	-	776.19	-	-	-	9/13/2016	-	-	SKOP ACCOUNT	Full Collect	ADSE - CONSERVE	9/13/2016
8/12/2016	18,147.20	13,615.47	-	4,531.80	-	-	-	18,147.20	-	-	-	9/13/2016	-	-	PROOF OF DEBT TO DTR	Full Collect	ADSE - CONSERVE	9/13/2016
8/12/2016	86,709.96	27,512.47	-	9,177.49	-	-	-	86,709.96	-	-	-	1/13/2017	-	-	SKOP ACCOUNT	Full Collect	ADSE - CONSERVE	1/13/2017
8/12/2016	11,863.15	8,991.51	-	2,965.84	-	-	-	11,863.15	-	-	-	9/13/2016	-	-	GOOD PHONE	Full Collect	ADSE - CONSERVE	9/13/2016
8/12/2016	9,427.44	7,076.58	-	2,356.88	-	-	-	9,427.44	-	-	-	5/15/2017	-	-	REG REG COLLECT	Full Collect	ADSE - CONSERVE	5/15/2017
8/12/2016	1,233.17	504.88	-	308.29	-	-	-	1,233.17	-	-	-	12/16/2016	-	-	VERIFIED POKE	Full Collect	ADSE - CONSERVE	12/16/2016
8/12/2016	29,798.29	14,480.72	-	4,833.37	-	-	-	29,798.29	-	-	-	9/13/2016	-	-	GOOD PHONE	Full Collect	ADSE - CONSERVE	9/13/2016

# App (cont.)

Step Ten: If you would like to take the report and save it on a new Microsoft Excel sheet, you can click on "Select Visible" and then "Control + C."

The screenshot shows the ConServe Accounts Receivable Management application interface overlaid on an Excel spreadsheet. The application interface includes a top navigation bar with buttons for Home, Print, and Contact ConServe. Below this is a section titled 'Inventory Report' with buttons for Hide Selected, Show All, and Select Visible. A red arrow points to the 'Select Visible' button. A blue circle highlights the 'Home', 'Print', 'Contact ConServe', 'Help', and 'Clear Filters' buttons, as well as the 'Select Visible' button and the table below it. The table contains columns for Client Account Number, SSN, Last Name, First Name, Date Listed, Current Bal, Principal Bal, Interest Bal, Coll Coll Bal, Agency Bal, Misc Bal, Unpaid Balance, Last Post Date, Amount Paid, Status, Phase, Fund Name, and Service Date. The table data includes rows for various dates from 12/26/2016 to 8/12/2016, with corresponding balance and status information.

# App (cont.)

Step Eleven: To bring all of the hidden columns back, click on "Show All."

The screenshot displays the ConServe Accounts Receivable Management application. The main window shows an 'Inventory Report' with a table of data. The table has columns for Client Account Number, SSN, Last Name, First Name, Date Entered, Current Bal, Original Bal, Entered Bal, Call Cost, Agency Bal, Mile Bal, Total Balance, Last Paid Date, Amount Paid, and Status. The 'Show All' button is highlighted with a red arrow. A blue circle highlights the 'Show All' button and its description: 'Click the Show All button to unhide all hidden columns.'

Client Account Number	SSN	Last Name	First Name	Date Entered	Current Bal	Original Bal	Entered Bal	Call Cost	Agency Bal	Mile Bal	Total Balance	Last Paid Date	Amount Paid	Status
12/26/2016	598.67	489.00	-	149.67	-	4,230.32	-	398.67	-	-	16,921.28	-	-	4/13/2016
12/16/2016	2,483.71	1,862.78	-	620.93	-	2,483.71	-	-	-	-	2,483.71	-	-	10/12/2016
12/16/2016	3,329.27	1,996.95	-	1,332.32	-	5,329.27	-	-	-	-	5,329.27	-	-	1/13/2016
12/16/2016	24,951.33	18,733.50	-	6,217.83	-	24,951.33	-	-	-	-	24,951.33	-	-	3/13/2016
12/16/2016	714.59	535.94	-	178.65	-	714.59	-	-	-	-	714.59	-	-	2/13/2016
12/16/2016	553.95	415.46	-	138.49	-	553.95	-	-	-	-	553.95	-	-	10/13/2016
11/21/2016	157.13	110.00	-	47.13	-	157.13	-	-	-	-	157.13	-	-	10/13/2016
9/13/2016	1,257.97	943.48	-	314.49	-	1,257.97	-	-	-	-	1,257.97	-	-	10/13/2016
9/13/2016	7,610.40	5,707.80	-	1,902.60	-	7,610.40	-	-	-	-	7,610.40	-	-	10/13/2016
9/13/2016	1,679.96	1,293.97	-	385.99	-	1,679.96	-	-	-	-	1,679.96	-	-	10/13/2016
9/13/2016	260.00	195.00	-	65.00	-	260.00	-	-	-	-	260.00	-	-	10/13/2016
8/12/2016	6,032.97	4,534.73	-	1,508.24	-	6,032.97	-	-	-	-	6,032.97	-	-	10/13/2016
8/12/2016	776.19	582.14	-	194.05	-	776.19	-	-	-	-	776.19	-	-	10/13/2016
8/12/2016	18,147.20	13,640.40	-	4,506.80	-	18,147.20	-	-	-	-	18,147.20	-	-	10/13/2016
8/12/2016	36,709.96	27,532.47	-	9,177.49	-	36,709.96	-	-	-	-	36,709.96	-	-	10/13/2016
8/12/2016	11,863.35	8,897.51	-	2,965.84	-	11,863.35	-	-	-	-	11,863.35	-	-	10/13/2016
8/12/2016	9,427.44	7,075.18	-	2,352.26	-	9,427.44	-	-	-	-	9,427.44	-	-	10/13/2016
8/12/2016	1,231.17	924.88	-	306.29	-	1,231.17	-	-	-	-	1,231.17	-	-	10/13/2016
8/12/2016	19,784.29	14,800.72	-	4,983.57	-	19,784.29	-	-	-	-	19,784.29	-	-	10/13/2016

# App (cont.)

**Step Twelve: The radio buttons under the ConServe logo will allow you to go back to the Table of Contents (home).**

- Print - Print the report you just created
- Contact ConServe - Contact ConServe's Client Care team for assistance
- Help - Go directly to the work instructions
- Clear Filters - Clear all of the filters you may have selected

The screenshot displays the ConServe Accounts Receivable Management interface. At the top, there are navigation buttons: Home, Print, Contact ConServe, Help, and Clear Filters. Below these is the 'Inventory Report' section, which includes a table with columns for Client Account Number, SSN, Last Name, First Name, and various financial metrics. A red arrow points to the navigation buttons, and a blue circle highlights them with a text box explaining the 'Hide Selected', 'Show All', and 'Select Visible' options.

**ConServe**  
Accounts Receivable Management

Home Print Contact ConServe  
Help Clear Filters

**Inventory Report**

Hide Selected Select the titles of the columns you would like to hide then click the Hide Selected button.  
Show All Click the Show All button to unhide all hidden columns.  
Select Visible Click the Select Visible button to select the visible data in the table below. Once you have clicked here to make the selection, you can copy by typing Ctrl + C.

Client Account Number	SSN	Last Name	First Name	Outlet Listed	Current Bal	Principal Bal	Interest Bal	Call Coll Bal	Agency Bal	Misc Bal	Initial Balance	Last Paid Date	Assessment	Service Date
12/18/2016	098.87			489.00	-	149.67	-	-	-	-	398.67			4/15/2016
12/18/2016	16,522.28			12,696.96	-	4,226.32	-	-	-	-	16,522.28			6/15/2016
12/18/2016	2,483.71			3,863.78	-	620.93	-	-	-	-	2,483.71			6/15/2016
12/18/2016	5,329.27			3,996.95	-	1,332.32	-	-	-	-	5,329.27			6/15/2016
12/18/2016	24,951.33			18,713.50	-	6,237.83	-	-	-	-	24,951.33			6/15/2016
12/18/2016	714.59			515.94	-	178.65	-	-	-	-	714.59			6/15/2016
12/18/2016	553.95			413.46	-	138.49	-	-	-	-	553.95			6/15/2016
11/22/2016	157.33			118.00	-	39.33	-	-	-	-	157.33			6/15/2016
9/13/2016	1,257.97			945.48	-	314.49	-	-	-	-	1,257.97			6/15/2016
9/13/2016	7,615.40			5,707.80	-	1,907.60	-	-	-	-	7,615.40			6/15/2016
9/13/2016	1,679.96			1,259.97	-	419.99	-	-	-	-	1,679.96			6/15/2016
9/13/2016	260.00			195.00	-	65.00	-	-	-	-	260.00			6/15/2016
8/12/2016	6,012.97			4,524.79	-	1,508.24	-	-	-	-	6,012.97			6/15/2016
8/12/2016	776.19			582.14	-	194.05	-	-	-	-	776.19			6/15/2016
8/12/2016	18,147.00			13,616.40	-	4,530.60	-	-	-	-	18,147.00			6/15/2016
8/12/2016	36,705.96			27,532.47	-	9,173.49	-	-	-	-	36,705.96			6/15/2016
8/12/2016	9,427.44			7,070.58	-	2,356.86	-	-	-	-	9,427.44			6/15/2016
8/12/2016	1,231.17			924.88	-	306.29	-	-	-	-	1,231.17			6/15/2016
8/12/2016	15,734.29			14,800.72	-	933.57	-	-	-	-	15,734.29			6/15/2016

# Abbreviations Used on the Client Web Portal

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AKA	Also Known As	PD	Paid
ATTY	Attorney	PIF	Paid in Full
AWG	Wage Garnishment	POA	Power of Attorney
BIF	Balance in Full	POE	Place of Employment
BKY	Bankruptcy	POSS	Possible
BRW	Borrower	PT	Part Time
BRO	Brother	PYMNT	Payment
BUS	Business	PROM NOTE	Promissory Note
BZ	Busy	RES	Residence
CB	Call Back	REL	Relative
CBR	Credit Report	REQ	Requested
CC	Credit Card	RTP	Refuse to Pay
CHK	Check	SD	Said
COMP	Compromise	SIF	Settlement in Full
CONS	Consolidation	SIS	Sister
CORR	Correspondence	SP	Spouse
DAD	Father	SW	Spoke With
DEA	Death	TO	Telephoned Other
DBTR	Debtor	TPOE	Telephoned POE
DIS	Disability	TR/TRES	Telephoned Residence
DISP	Dispute	TLD	Told
DISCO	Disconnected	TC	Turn Call
DWP	Down Payment	TT	Talked To
ED	Department of Education	WN	Wrong Number
FED EX	Federal Express	WU	Western Union
FNC	Financial Statement	LMOM	Left Message on Machine
FT	Full Time	PROM NOTE	Promissory Note
FU	Follow Up	CI	Called In
FWD	Forward	ADDY	Address
INCAR	Incarcerated	ACCR	Accurint
LM	Left Message	CLD	Called
LMTCB	Left Message to Call Back		
LMOVM	Left Message on Voice Mail		
LTR	Letter		
MI	Mail In		
MM/GMM	Mini Miranda		
MO	Money Order		
MOM	Mother		
NA	No Answer		

# Our Mission

ConServe is dedicated to satisfying the needs of our Clients in a manner consistent with improving the human condition, and that will foster the development of long term mutually beneficial relationships with our Clients, our Employees, our Suppliers and Business Partners and the Community as a whole.

## Customer Service

Call: **(800) 724-7500**

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Monday – Thursday 8am-7pm EST

Friday: 8am - 5pm EST

