# Fines and Fees Automated Assistant Website User's Manual

### Login Screen

#### Logging into the system

Enter your Username and Password and then click the Log In button

Log In	
User Name:	
Password:	
	Log In

#### Chat live or send a message – Help

Click the Have a question? Or Click to chat live button, a screen will pop up and you can either send a message if no agent is available or you can chat with an agent.



#### English and Spanish

Click English for English translation of the site, click Spanish for Spanish translation of the site.

## English>

### Español≥

Home Click Home to go to the main PBFCM website.

## Home >

#### Email Support

Click on the "CONTACT OUR SUPPORT TEAM", there are two (2) places on the log in screen, to send an email to the PBFCM Support Team.

## Main Menu once logged in

Refer to the Log In screen instructions for "Chat live or send message" to agent, English, Spanish and Home links.

English Español Home User's Guide Search Card Reader Reports Change Password Data File Upload Complaint Tracking Logout

## Search Screen

The search page allows searching for debtors using single or multiple search criteria.

Client	Combined Brazoria		~
Name			
Docket		[	
Address			
Vehicle License Number		Ī	
Driver's License Number			
	Search Clear		

"Client" is a single selection drop down box to choose the client to search data for. The "Name" is for entering a debtor name or partial name to be used in the search. "Docket" is used to enter a docket or partial docket number for use in the search. "Address" is for entering a debtor's address or partial address for use in the search. "Vehicle License Plate" is for entering a license plate number for use in the search. "Driver's License Number" is for entering a debtor driver's license or partial license number for use in the search. Each field entered will filter or narrow he results returned.

Click the "Clear" button to reset/clear the search criteria.

Click the "Search" button to start the search. The results will be displayed under the "Search" and "Clear" buttons.



The results will look similar but with data showing.

Name	\$	License	\$ Address	$\diamond$	City	\$ State	$\diamond$	Zip Code	\$
			5						
				Ĩ					
<ul> <li>✓ 1 to 2 of 2 rows</li> </ul>	► ►>> 1	0 ~				0.1			

Click on the "Name" in the "Name" column to display detailed information.

Back To List

			IOF - A	loot:					
	Driver's License Number: None								
		Date of Birth: Phone Number:			Update I	Debtor Last Seen			
G (D 01.122.00		-			<b>C1</b> <sup>1</sup>				
Client Amount: \$872.0	0				Client: Court:				
PBFCM Amount: \$261	60								
					Pay/D	ismiss Dockets			
Docket 🔷 Date	\$	Description	>Warrant 🔷	Amount 🔷	Client Amount 🔇	PBFCM Amount 🔷			
5/17/2002 1	2:00:00 AM	PUBLIC INTOXICATION		\$275.00	\$220.00	\$55.00			
1/23/2017 1	2:00:00 AM	Additional Charge At Court		\$82.50	\$55.00	\$27.50			
5/17/2002 1	2:00:00 AM	D.O.C. OBSCENE LANGUAGE		\$275.00	\$220.00	\$55.00			
1/23/2017 1	2:00:00 AM	Additional Charge At Court		\$82.50	\$55.00	\$27.50			
5/29/2006 1	2:00:00 AM	PUBLIC INTOXICATION		\$418.60	\$322.00	\$96.60			
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Defendant has no vehic	cles								
Prior Address						\$			
I to 3 of 8 rows	•	≫ 3 ▼							
Defendant has no payer	ent history	»3 T							
Defendant has no paym	ent history	» <u>3</u> ▼							
Defendant has no paym	ent history	>>3 ▼				٥			
Defendant has no paym Date 4/22/2020 8:10:46 AM	Activity Total Paymer	N 3 ▼ A traceived for docket				\$			
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I to 3 of 8 rows           Defendant has no paym           Date           4/22/2020 8:10:46 AM           3/15/2019 11:01:16 AM           2/26/2019 12:22:28 PM           2/26/2019 11:36:44 AM           2/26/2019 11:36:44 AM           2/20/2019 6:08:49 PM           2/20/2019 5:53:14 PM           2/13/2019 4:13:27 PM           12/26/2018 9:48:56 AM           11/15/2018 10:23:39 AM	Activity Total Paymer Letter 1 Print Workflow Re Debtor status Phone #: Letter Printed Workflow Re Letter Printed Workflow Re		ters No Resp NT To NEEL	oonse DS LETTER	SENT	\$1,133.60			
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Question       Question         Date       Question         Question       Question         Question<	Activity Total Paymen Letter 1 Printe Workflow Re Workflow Re Debtor status Phone #: Letter Printee Workflow Re Workflow Re FCM	N 3 ▼ A treceived for docket  A tree for docket  <	ters No Resp NT To NEED	Nonse DS LETTER	SENT	\$1,133.60			

Click the "Update debtor last seen" to update the date the debtor was last seen in court, etc.

Click the "Pay/Dismiss Dockets" button to reduce the balances by marking a docket as Paid-In-Full or Dismissed-In-Full.

In the "Court Comments to PBFCM" field, you can enter comments for this debtor and then click the "Save" button and the comments will be saved for this debtor in the PBFCM database.

			_	250		JOE - Acct:	
	Back To D	Oetails					Update
Paid 🗘	Dismissed 🔇	Total 🔷	Client Amt 🔇	PBFCM Amt 🔇	Docket	Oescription	🔷 Date 🗘
		\$275.00	\$220.00	\$55.00		PUBLIC INTOXICATION	5/17/2002 12:00:00 AM
	8	\$82.50	\$55.00	\$27.50		Additional Charge At Court	1/23/2017 12:00:00 AM
		\$275.00	\$220.00	\$55.00			5/17/2002 12:00:00 AM
	Θ	\$82.50	\$55.00	\$27.50		Additional Charge At Court	1/23/2017 12:00:00 AM
		\$418.60	\$322.00	\$96.60		PUBLIC INTOXICATION	5/29/2006 12:00:00 AM
<b>«</b> • 1 ·	to 5 of 5 rov	vs	► ►>	20 •	-		

## Paid-In-Full/Dismissed-In-Full

The Paid/Dismissed-In-Full screen allows the user to mark a docket entry as Paid or Dismissed by checking the appropriate checkbox on the left-hand side of the docket. Only one option per docket entry/charge. Once all entries have been checked Click on the Update button to complete the process.

Click on the Back To Details button to return to the previous Defendant Details page.

## Card Reader

The card reader page allows selecting a client and reading a driver's license magnetic strip.

Client	Combined	Brazoria	~
Driver's License Number			
	Search	Clear	

"Client" is a single selection drop down box to choose the client to search data for. "Driver's License Number" will contain the driver's license number read from using a magnetic strip reader to read a driver's license. You can also manually enter the driver's license number or partial number.

Click "Search" to display detailed information about the debtor as seen in the "Search" page instructions.

Client	Abernathy City
Driver's License Number	TX-
Scanned: TX-2	
	Search Clear

Click the "Clear" button to reset/clear the search criteria.

## Reports

When you click on the "Reports" menu, it will expand to show the reports submenu. Click on the name of a particular report to go to that report's page and collapse the reports submenu. Or click on "Reports" a second time to also collapse the submenu.

Reports <
Account Mapping
Address Change Report
Placement
Docket Age
Defendant Detail
Defendant Contact Information
Client Turnback
Top 10 Percent Descending Roll

#### Account Mapping Report

This Account Mapping Report allows the user to search for records for placement on a Google map and will also allow the user to get/print directions to the properties.

Account Mapping Report		Account Manning Usar's Guide
Locator	Abernathy City	Account Mapping User's Guide
City/Zip Code	A11 V	
Total Due	1000	
Citation Date Age (In Days)	365 Example: 180	
Choose One To Include In Search R O Warrants Only O No Warran	esults: ts Only	
	Search Clear	
Account Mapping Search Results	Check All Check Top 10 records	

Select a "Locator", then choose a "City" or "All", you can choose "Zip code" of you choose a City or All and further refine by entering a Total Due and a Citation Date Age.

Citation Date Age is a number used to determine how many days old the citation is. Choose whether to limit the search to only the records with warrants, records without warrants, or all records. The warrant status is based on the Predue Brandon Fielder Collins and Motts data and may not match court records.

Click the "Clear" button to clear the search contents as well as the grid and map.

Click the "Search" button to get the matching records. You will get a grid of data similar to the following.

					Account Mapping Us	er's Guid
Locator	Abernathy Ci	ity	~			
City/Zip Code	A11	<b>~</b> ]	~			
Total Due	1000					
Citation Date Age (In Days)	365		Example: 180			
Choose One To Include In Search R ○ Warrants Only ○ No Warrar	iesults: its Only © Search	All Clear				
Account Mapping Search Results	Check All	Check Top	10 records			
elect Debtor∉ Name	🔷 First Na	ıme 🔷 Middle Namé	Last Name 🔷 Clier	nt Person Numbér Address N	Numbér Address Street	
	N [10 + 1					F
I to 10 of 15 rows	₩[10 <b>v</b> ]			_		
Current GPS Position						

Let Google optimize destinati
 Show Multi-Destination Ro

Show Selected Addresses On Map

The "Check All" check box will check all the records in the grid. The "Check Top" using the text box next to it on the right to check a custom number of records in the grid. Enter the desired number of records in the grid and then check the "Check Top" button. Un-checking the "Check All" check box will uncheck all the records in the grid. Unchecking the "Check Top" check box will uncheck the records in the grid.

Print Directions

Clicking the "Refresh Geo Location" button will refresh the Geo Location coordinates, this is if you are moving around, such as driving. These location coordinates are used as the starting and ending location for the route display.

Click the "Show Selected Addresses On Map" button to show the destinations on the map, but with no route.

Click the "Show Multi-Destination Route" button to show the destinations on the map but with the route drawn to each destination from your current location.

When getting the address points, you may encounter an exception/error in getting location coordinates for mapping purposes, this is usually because there is a PO BOX selected in the grid. Other times it will be because Google could not find the address.

Click the "Print Directions" to print the directions on a printer.

#### Address Change Report

The Address Change Report allows the user to search for records where the New Address for the debtor has changed within a certain date range.

Select a Locator and the screen will populate more search criteria settings such as Court Types and Previous Address Status and New Address Status.

Address Change Report		
		Address Change Report User's Guide
Locator	Court Type	
Choose One Address Change Date From	Select One Previous Address Status <pre>cempty&gt;</pre>	Select One New Address Status
Finish Cancel	Generate/Download Excel Report	
Name 🔷 1	Dockets On File 🔷 Previous Address	🔷 New Address & Date Of Change 🛛 🔷

Click the "Cancel" button to reset the page.

Clicking the Generate/Download Excel Report button allows the user to export the data in a spreadsheet.

#### Client Placement Report

The Client Placement Report allows the user to search for data loads within a date range by file date.

Select a "Client" and a "Start Date" and "End Date" then click the "Build Report". The information returned includes: Amount Outstanding and Percent Outstanding (not shown).

#### Client Placement Report Client Placements Report User's Guide Client Start Date 01/01/2015 End Date 09/02/2020 Build Report Generate/Download Excel Report

By Turnover Date

Turnover Date <	Num Turned Over 🗘	Amt Turned Over 🗘	Num Liquidated 🗘	Amt Paid 🔷	Amt Dismissed 🔷	Percent Liquidated 🗘	Num Outstanding ** (
	85	\$37,967.49	47	\$9,186.32	\$12,264.65	56.49%	38
	101	\$43,612.44	67	\$14,321.24	\$13,508.20	63.81%	34
	2	\$130.00	0	\$0.00	\$0.00	0.00%	2
	47	\$18,478.49	21	\$4,551.56	\$4,308.50	47.94%	26
	5	\$220.20	0	\$0.00	\$0.00	0.00%	5
	42	\$18,406.06	14	\$1,840.96	\$3,747.53	30.36%	28
Grand Total	282	\$118,814.68	149	\$29,900.08	\$33,828.88	53.64%	133
	Personal Sector						

Clicking the Generate/Download Excel Report button allows the user to export the data in a spreadsheet.

#### Docket Age Report

The Docket Age Report shows the users a breakdown (turned over, amount due, amount paid, etc.) of dockets based on the age of the case.

Select a "Client". Checking the box labeled "Filter By Court" allows you to select a court type to further filter the results and if desired, check the "Show Turnback" check box. Then click the "Build Report" button and you should get a grid similar to the following.

Once the Build Report Button has been pressed there will be an option to Generate and Download the report directly to your computer in an Excel file.

				Docket Age Report User's Guide
	Client		~	
	Filter By Court	Municipal Court	~	
	Show Turnback			
		Build Report	Generate/Export Excel Report	
Summary				
Year Of Offense 🛇	Offense Age In Year	s 🔷 Total Dollar Amount Turn	ed Over 🔷 Total Dollar Amount Due 🔷 Total	l Dollar Amount Paid 🔷 Percent Paid 🕋

ical Of Offciise	Offense Age in Tears	Total Donal Amount Turned Over	Total Donal Allount Duc		I CICCIII I alu
1980	40	\$110.00	\$0.00	\$0.00	0.00%
1999	21	\$1,671.50	\$169.00	\$285.00	17.05%
2000	20	\$1,521.50	\$0.00	\$281.50	18.50%
2001	19	\$525.00	\$0.00	\$0.00	0.00%

#### Defendant Detail Report

The Defendant Detail Report was produced for courts, marshals, warrant officers, sheriffs, and other constables who want to research defendants using exact perimeters so they could either call or go make arrest. The court can go in and enter the perimeters as they desire, usually keying off zip codes and then make calls or go out and attempt arrest.

Defendant Det	all Report	t <mark>.</mark>				
Client				~	Deten	dant Detail Report User's Gu
Collar Range by De	ahtor			Docket Age		
rom 1000	To 5000			From 01/01/2015	(	
				To 09/02/2020		1
rimary Sort		Secondary So	ort	Address Status Se	election	
) Street Name		O Street Nan	ne	O Select All	Select	Status
) Zip Code		○ Zip Code		○ Unselect All		DAD
Amount Due (D	ESC)	O Amount D	hue (DESC)			BAD
Debtor Name		O Debtor Na	ume			GOOD
5 Deolor Humber		O Debior rid				INTERNATIONAL
						UNKNOWN
						CINEIOWIN
		☑	5 rows	►>> 10 <b>~</b>		
Submit						
Defendant Detail S	earch Results	Generate/	Download Excel I	Report		
Docket 🔷 Name		\$	> Address Number 🔷	Address Street	Address2  City	♦ State ♦ Zip Code ♦ Dock
					-	

Select a "Client" and then select other search criteria. "Select All" and "Unselect All" for "Address Status". "Dollar Range by Debtor" From and To. "Docket Age" From and To. You can select a field to be the primary sort by field by selecting a field under the "Primary Sort". You can select a field to be the secondary sort by field by selecting a field under the "Secondary Sort".

As you select/enter search criteria, the "Zip Code Selection" grid will populate. With the "Zip Code Selection" area, you can "Select All" or "Unselect All" Zip codes in the grid

Once you have your Zip Codes selected, you click the "Submit" button to submit the selected zip code(s) and you should get a grid similar to the following.

Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.

### Defendant Contact Information

The Defendant Contact Information Report reveals cases which are active and placed with the firm within the selected date range.

Select the Client Name, Start Date, and End Date then click the submit button.

Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.

Defendant Contact Info	ndant Contact Information Defendant Contact Information User'			1 User's Guide	
				Submit	
Client			G	enerate/Download Excel Rep	port
Select A Date Range 01/01/20	00 🛗	To 01/01/202	0 📅		
Name	Case Date 🔷	Case Number 🔷	Date Of Birth 🛇	Email Addresses	◇ Phone Numbe ~
				1	<u> </u>
			<i>b</i>	1	· · · · · · · · · · · · · · · · · · ·

#### Client Turnback Report

The Client Turnback Report reflects the firm's collection efforts by displaying the number of calls made and letters sent. It is designed to empower our clients with the information necessary to recall/turnback cases.

Use the Checkboxes the left of each option in order to activate the option and enter your criteria of the records you want to be returned. Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.

ddress Sta

<b>Client Turnback Report</b>		Client Turnback Report User's Guide		
		Submit		
Locator		Generate/Download Excel Report		
Citation Date mm/dd/yyyy	to mm/dd/yyyy	DL StateSELECT		
Last Contact mm/dd/yyyy	to mm/dd/yyyy	Residing State		
Letter Count	to	□ Zip Code		
Prior Address Letter Count	to			
Prior Address Count	to			
Count	to			
Phone Attempt Count	to			
Address Status □ <empty> □ bad ☑ Good □ International □ UNKN</empty>	*			
Data Cathlanna 💧 Euli N		△ Deitsen Lissee △ Attemate by Blace △ Desseek Attemate △		
Datasetvanie VIII N	anne	Drivers License V Altempts by Phone V Research Attempts V		

#### Top 10% Descending Order Report

The Top 10% report shows the top X percent of cases with a balance based on the total amount owed per docket depending on which option the user selects. It is ordered by the amount owed with the most owed being at the top of the list.

Other information displayed on this report includes Full Address, Address Status and Total Due (not shown here).



Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.

## Change Password

Use the change password page to change your password.

Old Password	
New Password	
Confirm Password	
	Submit

Enter your Old Password, New Password and new password word in Confirm Password, then click the "Submit" button to update/change your password.

## Data File Upload

The Data File Upload page is used to upload data files for import into the PBFCM system.

#### **Data File Upload**

To upload a file, select the client from the drop down box. After the client has been selected, drag and drop the file (s) into the Files To Upload box and click the Attach Files button. Once all files are attached, click the Upload button to save the files to the Secure FTP site. Once the files are uploaded, you will be redirected to a confirmation page.

\*Any files that cannot be uploaded will be indicated in red and must be deleted before the Upload button can be clicked

Client	Select	~
	•	

Files To Upload	
Drag & Drop files from your machine on this box.	
Attach Files	

Attached Files			
Check All	Delete Selected Files		
Select to Delete	🔷 Client	🔷 File Name	🔷 File Length 🛛 🔷
	NONE	No Files	0
≪ <b>1</b> to 2 of 2	rows		

Upload

Select "Client", there may or may not be another dropdown box displayed for Warrant Type, if Warrant Type dropdown box is displayed, selected the desired warrant type.

\*Select the warrant type of the files that are being attached. If you have files of both types of warrants, please attach them separately.

Warrant Type Select... 🗸

Drag your files to the "Drag & Drop files from your machine on this box." area and then click the "Attach Files" button, you should get a grid similar to the following.

Attached Files			
□ Check All	Delete Selected Files		
Select to Delete 🛛 🔷	Client	🔷 File Name	🔷 File Length 🛛 🔷
	Abernathy City	Fines_SFTP_Download.xml	594
	Abernathy City	Empty.xml	0
	Abernathy City	Test_Text_Document.txt	15
	Abernathy City	This_is_test.pdf	180223

1 to 4 of 4 rows	▶ ▶ 10	$\sim$
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Any files marked in RED must be deleted. Check the checkbox under the "Select to Delete" column for any files to be deleted and then click the "Deleted Selected Files" button and the files will be deleted.

Once you are satisfied with the files you wish to upload, click the "Upload" button. A success/failure page will be displayed with the status of the file upload. If any file fails, then the batch job is canceled in total.

#### **Data File Upload Results**

Your files were successfully uploaded. See below for confirmation.

Client	File Name	File Length 🔷	Upload Status 🔷
Abernathy City	Fines_SFTP_Download.xm1	594	Success
Abernathy City	Test_Text_Document.txt	15	Success
Abernathy City	This_is_test.pdf	180223	Success
<ul> <li>&lt; 1 to 3 of 3 rows</li> <li>▶&gt;&gt; 10 ∨</li> </ul>			

Done

Clicking the "Done" button will take you back to the Data File Upload page.

## **Complaint Tracking**

The Complaint Tracking page is used for tracking complaints by users/clients.

Client Select... V New Complaint

Select a client, then a list of complaints based on that client will be displayed, if any exist. You can click on an existing complaint by clicking on the Short Description in the Short Description column for a given complaint, this will take you to the Add/Edit Complaint page where that you can add a full description, view Conflict History records and attach files.

Back To List	
Short Short Description	Save
Full Description/Note	^
	~

#### **Conflict History**

Date 🔷 User	Activity		\$
09/13/2018	More stuff		
09/13/2018	Testing		
1 to 2 of 2 rows	► ►>> 10 🗸		
Attached Files			
File			Open
File Description			
P			

Clicking the "Back To List" button will take you back to the list of complaints. Clicking the "Save" button will save any changes for this complaint.

For attaching files, click the "Open" button to display a file open dialog to select a file from. Click the "Attach" button to attach the file to this complaint.

Client	Select 🔽	New Complaint

Clicking the "New Complaint" button will take you to the Add/Edit Complaint page. The page will be empty and ready to enter a new complaint. Once you enter the desired data you click the "Save" button to save this new complaint. It will now appear on the Complaint Tracking page.