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

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.

Home

Click Home to go to the main PBFCM website.

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

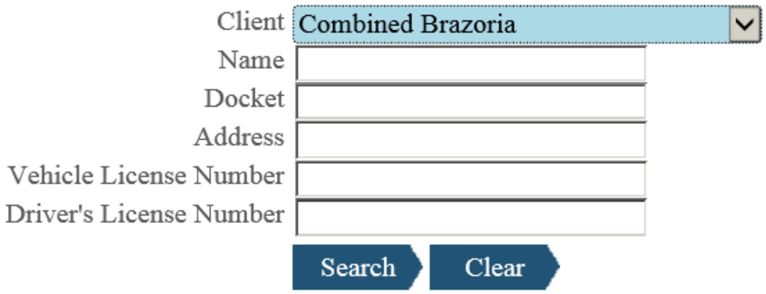
Refer to the Log In screen instructions for “Chat live or send message” to agent, English, Spanish and Home links.

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

Logout

Search Screen

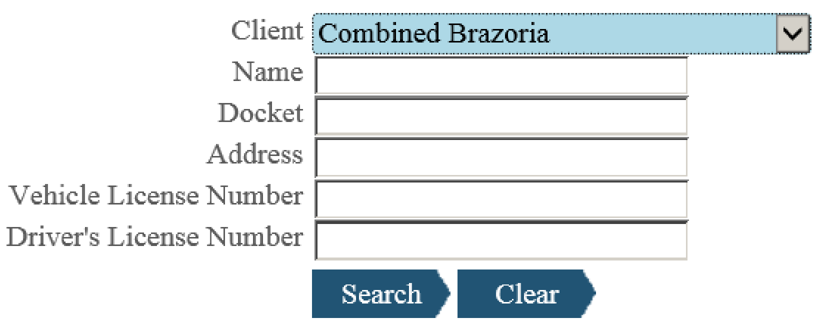
The search page allows searching for debtors using single or multiple search criteria.



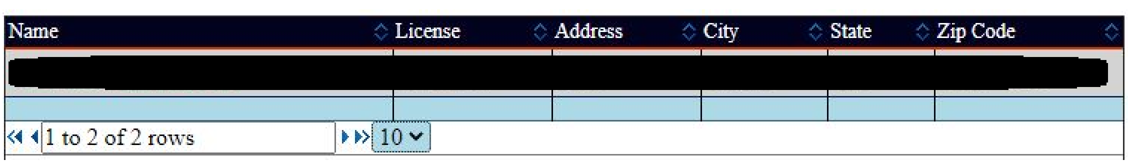
"Client" is a single selection drop down box to choose the client to search data for. The "Name" is for entering a debtor name or partial name to be used in the search. "Docket" is used to enter a docket or partial docket number for use in the search. "Address" is for entering a debtor's address or partial 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.



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

Back To List

[redacted] JOE - Acct: [redacted]

[redacted]

Driver's License Number: [redacted]
Date of Birth: [redacted]
Phone Number: [redacted]

None
Update Debtor Last Seen

Current Due: $1,133.60
Client Amount: $872.00
PBFCM Amount: $261.60

Client: [redacted]
Court: [redacted]

Pay/Dismiss Dockets

Docket	Date	Description	Warrant	Amount	Client Amount	PBFCM Amount
[redacted]	5/17/2002 12:00:00 AM	PUBLIC INTOXICATION	[redacted]	$275.00	$220.00	$55.00
[redacted]	1/23/2017 12:00:00 AM	Additional Charge At Court	[redacted]	$82.50	$55.00	$27.50
[redacted]	5/17/2002 12:00:00 AM	D.O.C. OBSCENE LANGUAGE	[redacted]	$275.00	$220.00	$55.00
[redacted]	1/23/2017 12:00:00 AM	Additional Charge At Court	[redacted]	$82.50	$55.00	$27.50
[redacted]	5/29/2006 12:00:00 AM	PUBLIC INTOXICATION	[redacted]	$418.60	$322.00	$96.60

1 to 5 of 5 rows 10

Defendant has no vehicles

Prior Address
[redacted]
[redacted]
[redacted]

1 to 3 of 8 rows 3

Defendant has no payment history

Date	Activity
4/22/2020 8:10:46 AM	Total Payment received for docket [redacted]
3/15/2019 11:01:16 AM	Letter 1 Printed to: [redacted] $1,133.60
2/26/2019 12:22:28 PM	Workflow Research Task [redacted]
2/26/2019 11:36:44 AM	Workflow Research Task Completed: Multiple Letters No Response
2/26/2019 11:36:43 AM	Debtor status changed from LETTER SERIES SENT To NEEDS LETTER SENT
2/20/2019 6:08:49 PM	Phone #: [redacted]
2/20/2019 5:53:14 PM	Phone #: [redacted]
2/13/2019 4:13:27 PM	Letter Printed to: [redacted]
12/26/2018 9:48:56 AM	Workflow Research Task [redacted]
11/15/2018 10:23:39 AM	Workflow Research Task NNI: [redacted]

1 to 10 of 171 rows 10

Court comments to PBFCM

Save

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.

Paid-In-Full/Dismissed-In-Full

[redacted] JOE - Acct: [redacted]

Back To Details | Update

Paid	Dismissed	Total	Client Amt	PBFCM Amt	Docket	Description	Date
☐	☐	$275.00	$220.00	$55.00	[redacted]	PUBLIC INTOXICATION	5/17/2002 12:00:00 AM
☐	☐	$82.50	$55.00	$27.50	[redacted]	Additional Charge At Court	1/23/2017 12:00:00 AM
☐	☐	$275.00	$220.00	$55.00	[redacted]	[redacted]	5/17/2002 12:00:00 AM
☐	☐	$82.50	$55.00	$27.50	[redacted]	Additional Charge At Court	1/23/2017 12:00:00 AM
☐	☐	$418.60	$322.00	$96.60	[redacted]	PUBLIC INTOXICATION	5/29/2006 12:00:00 AM

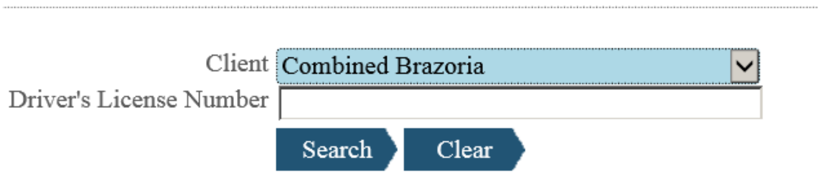
1 to 5 of 5 rows 20

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.

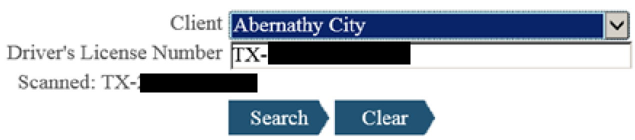
Card Reader

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



"Client" 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.



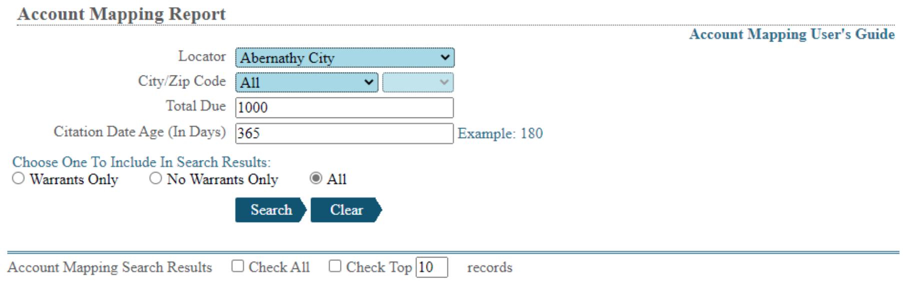
Click the "Clear" button to reset/clear the search criteria.

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.

Account Mapping Report

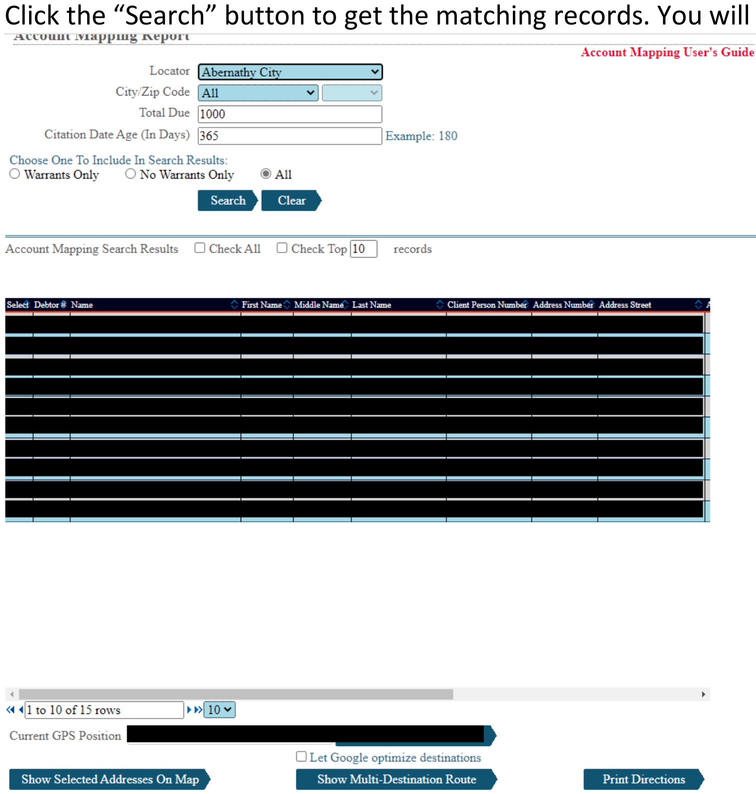
This Account Mapping Report allows the user to search for records for placement on a Google map and will also allow the user to get/print directions to the properties.



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.



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.

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.

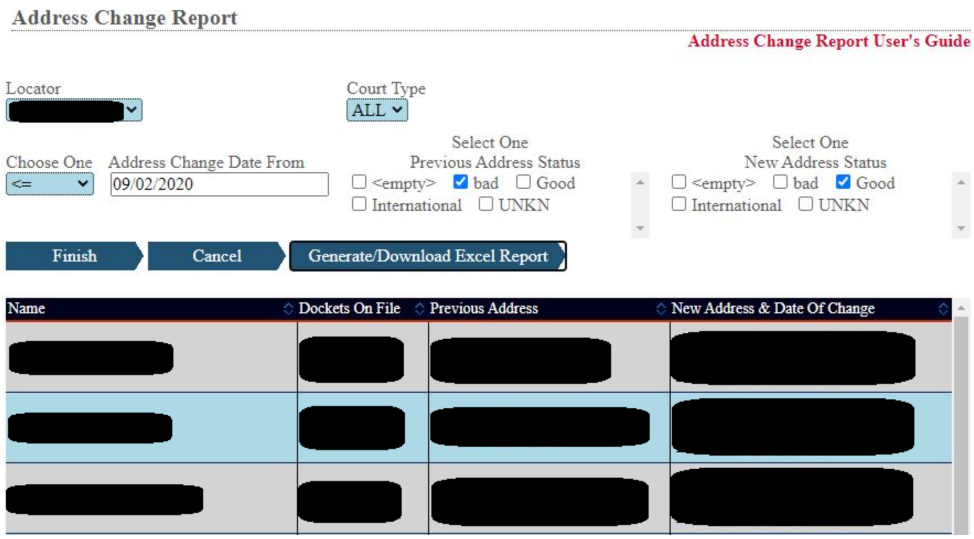
When getting the address points, you may encounter an exception/error in getting location coordinates for mapping purposes, this is usually because there is a PO BOX selected in the grid. Other times it will be because Google could not find the address.

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.

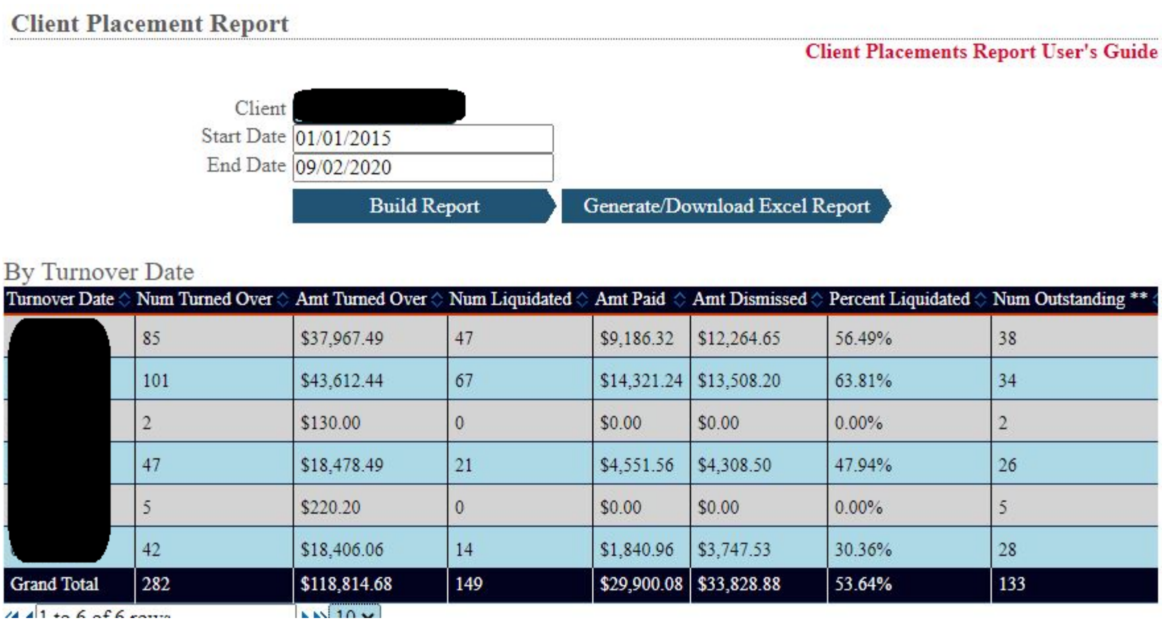


Click the “Cancel” button to reset the page.
Clicking the Generate/Download Excel Report button allows the user to export the data in a spreadsheet.

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 [redacted]
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 **
[redacted]	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

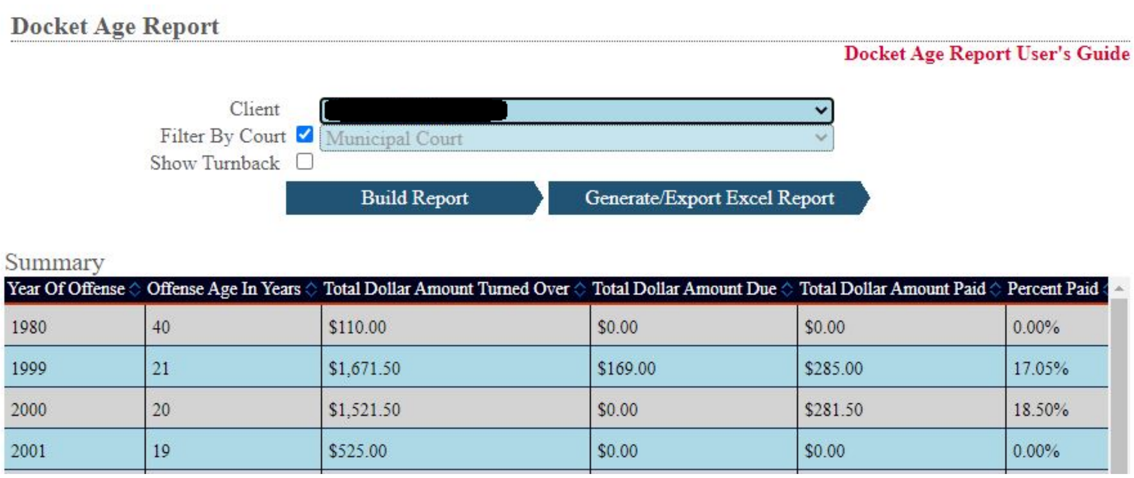
Clicking the Generate/Download Excel Report button allows the user to export the data in a spreadsheet.

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.

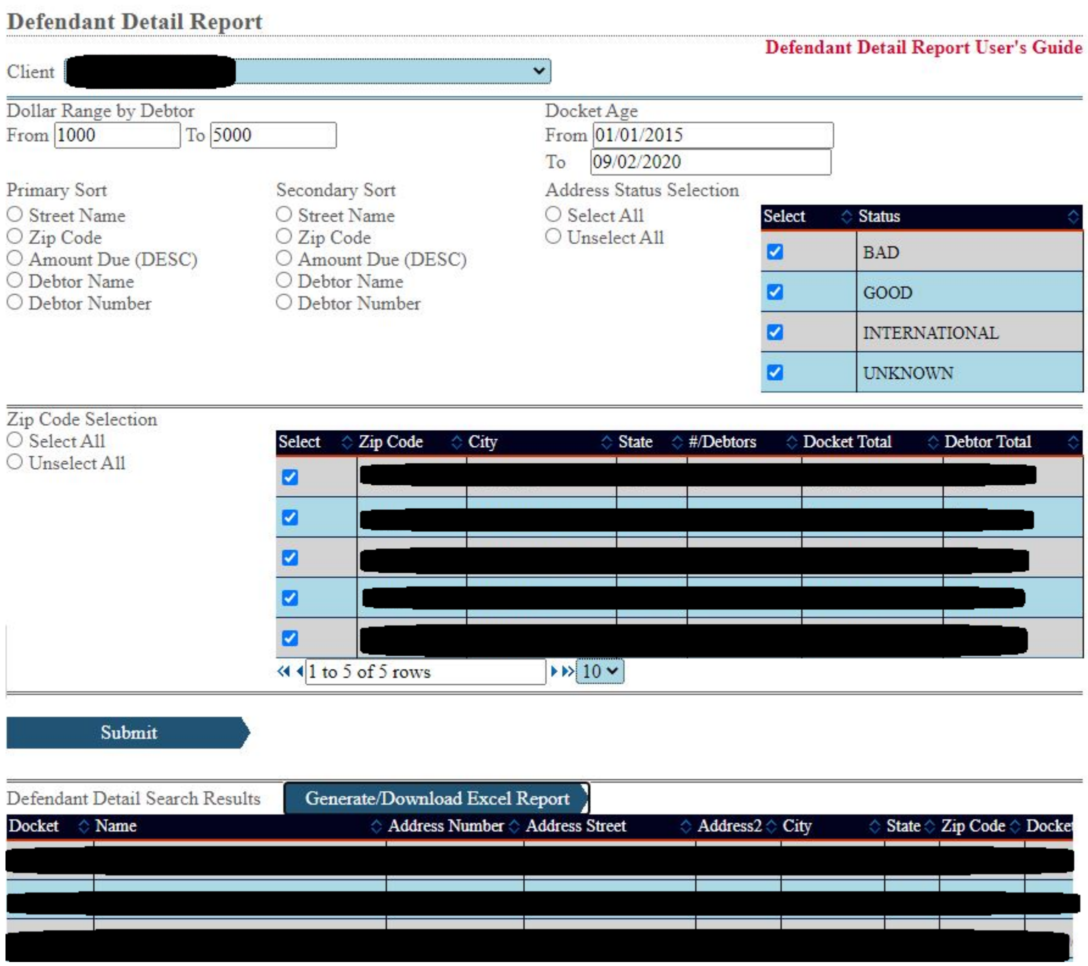
Once the Build Report Button has been pressed there will be an option to Generate and Download the report directly to your computer in an Excel file.



Year Of Offense	Offense Age In Years	Total Dollar Amount Turned Over	Total Dollar Amount Due	Total Dollar Amount Paid	Percent Paid
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.



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.

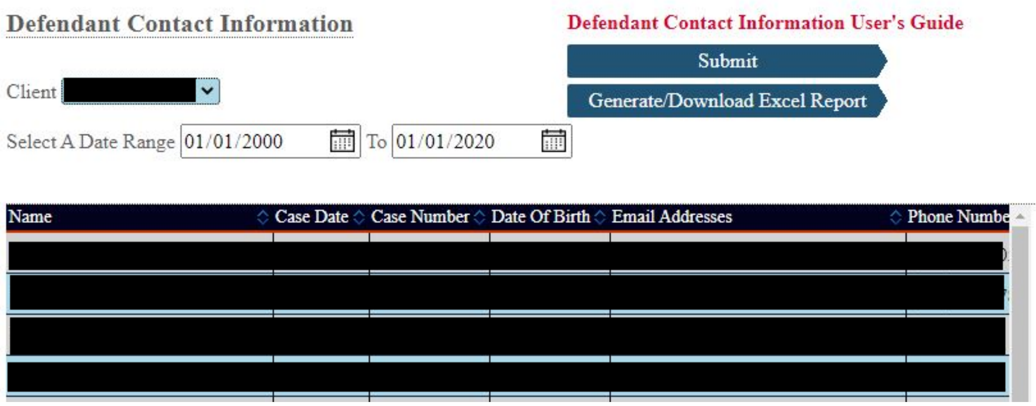
Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.

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.

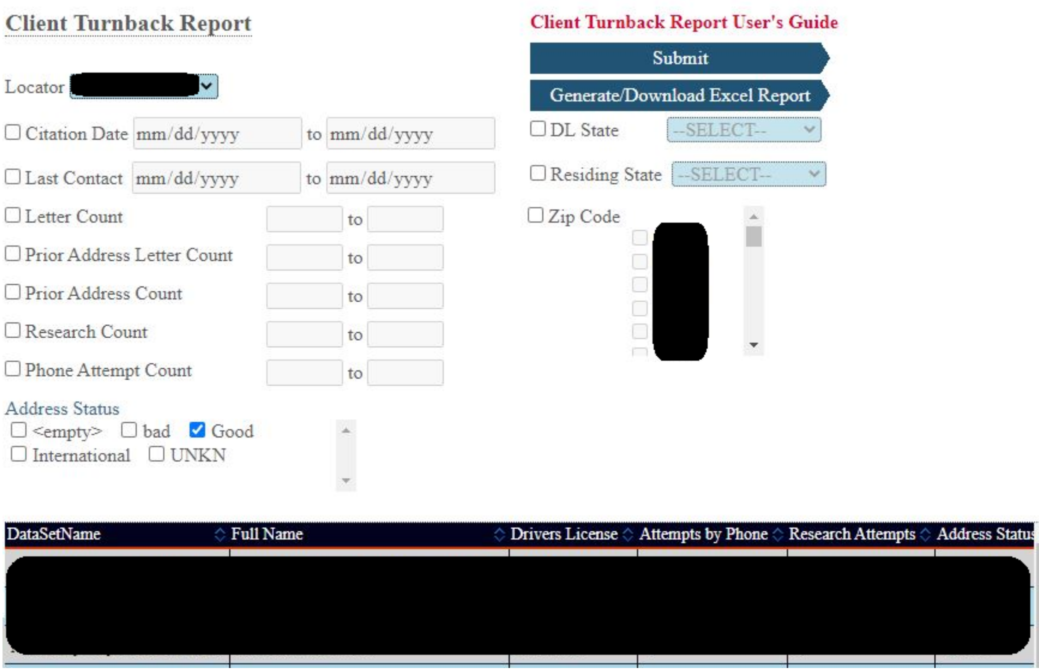
Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.



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.

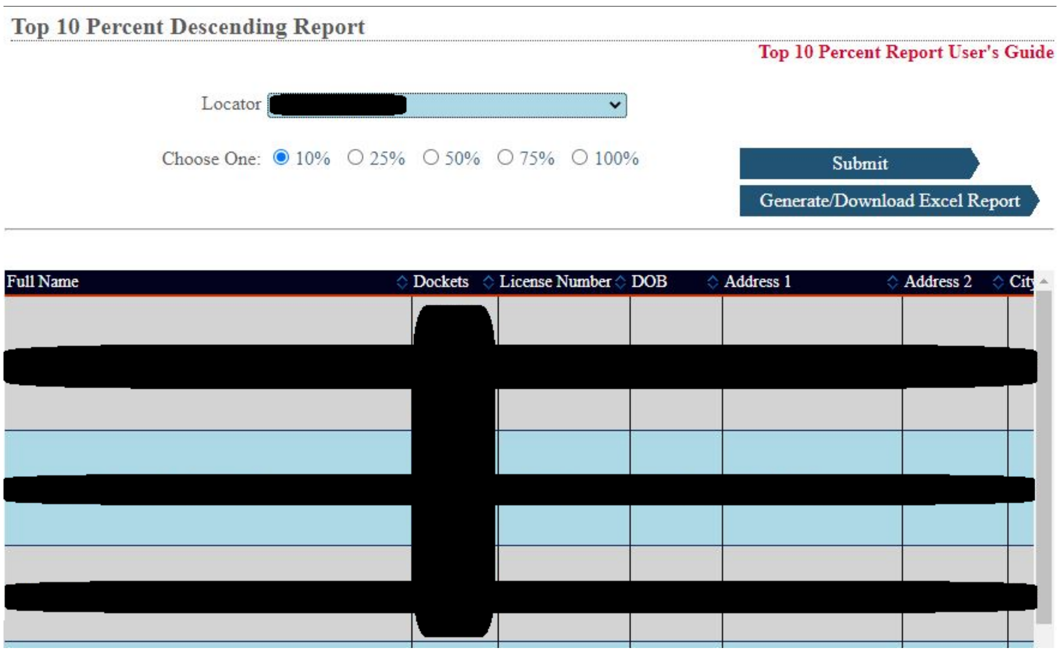
Use the Checkboxes the left of each option in order to activate the option and enter your criteria of the records you want to be returned. Once submitted there will be an option to Generate and Download the report directly to your computer in an Excel file.



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.

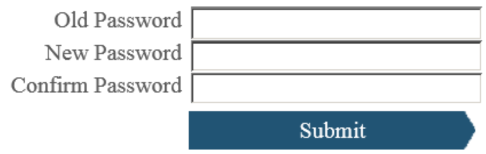
Other information displayed on this report includes Full Address, Address Status and Total Due (not shown here).



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

Change Password

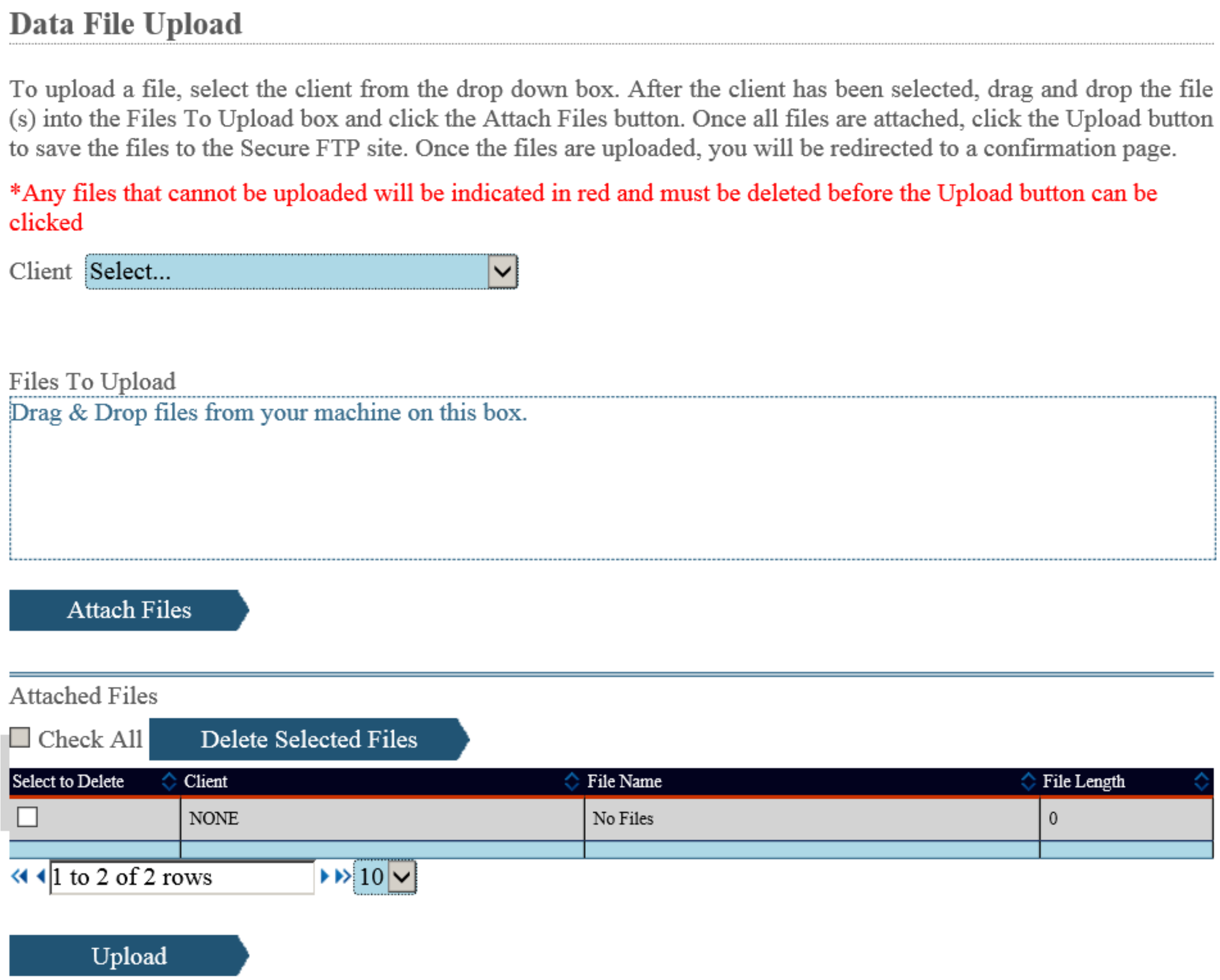
Use the change password page to change your password.



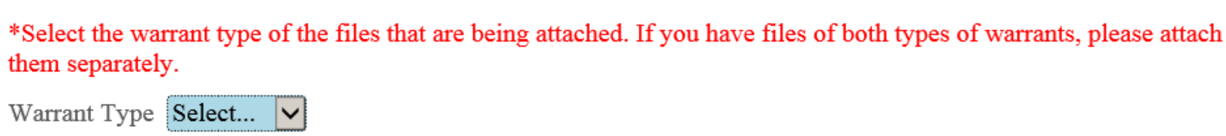
Enter your Old Password, New Password and new password word in Confirm Password, then click the "Submit" button to update/change your password.

Data File Upload

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



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.



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

Upload

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.xml	594	**Success**
Abernathy City	Test_Text_Document.txt	15	**Success**
Abernathy City	This_is_test.pdf	180223	**Success**

1 to 3 of 3 rows 10

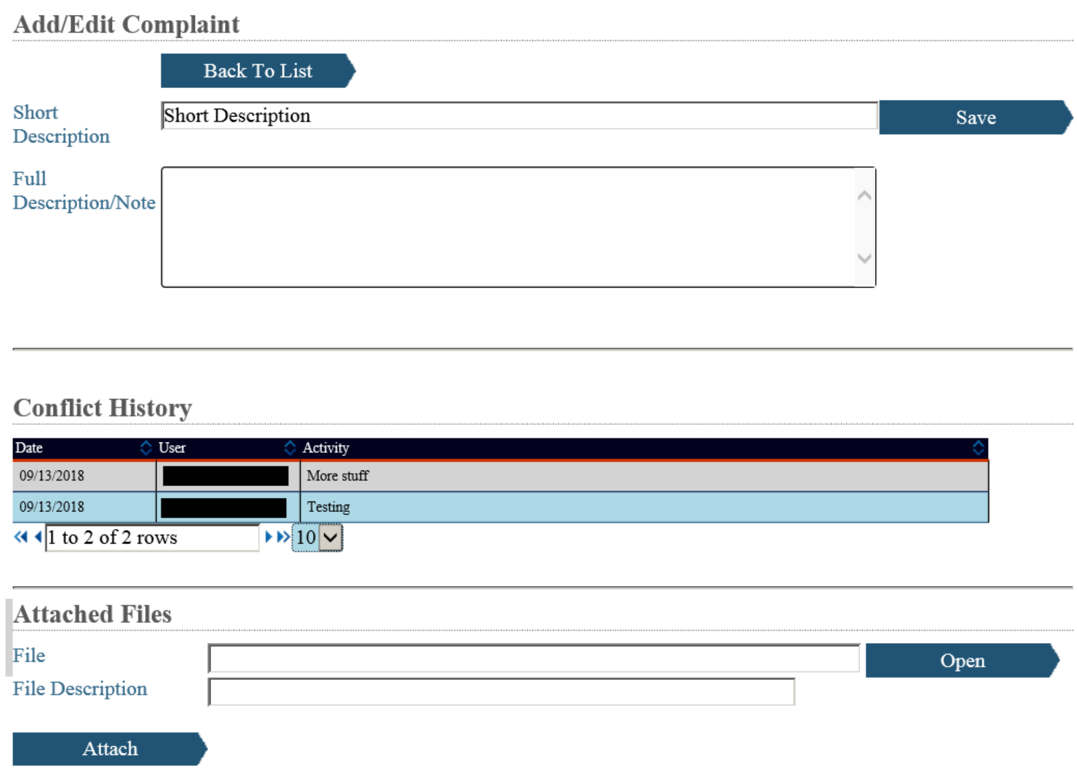
Done

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.

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.



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.

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.