

# MDIS 2.0 WIREFRAME

**Morgan Drexen Integrated System (MDIS)**

Options Accounting Appointment Financial Profile W/S Payment Info Print Credit Report Status RX Mgmt Warranty Refund Log Entries Save & Exit

Client Information

File Number: [ ]  
 Phone #: (###) ###-####  
 Client Name: [ ] [ ]  
 Co-Client Name: [ ] [ ]  
 Mail Address: [ ] [ ] [ ] [ ] [ ] [ ]  
 E-mail ID: [ ]  
 Work #: [ ]  
 Pref. Cont #: [ ]  
 Client Language: English [v]  
 Queue Source: [ ]

Dial..  
 Dial..  
 Notify Client  
 Dial..  
 Dial..

File Assigned To

Initial Contact :  
 Appt Tech:  
 LIS  
 QC Specialist:  
 File Status:  
 Petition Processor:  
 WR Processor:  
 Client Coordinator:  
 Data Entry:  
 Collection Analyst:  
 Resolution Officer:  
 Integrated Support Co:  
 MDIS Pwd :

Follow Up

Account Information

Programs:  Non-Formal  Bankruptcy  LAP  WR  MTG

Support Systems By:  
 Engagement Date:  
 Current Debt To Be Engaged:  
 Bankruptcy Engmnt Fee:  
 Monthly Payment:  
 Monthly Flat Fee:  
**Available EDAF Amt:**  
 ACH Date:  
 Other ACH Info:  
 Next Schedule Pmt:  
 Settlement Status:

Attorney Information | Other Information

Of Counsel/Partner Firm:  
 Non-Formal Law Firm:  
 Non Formal File #:  
 Prev. Non-Formal Firm:  
 Of Counsel/Partner Firm:  
 Bankruptcy Law Firm:  
 Bankruptcy File#:  
 Previous Law Firm:  
 Contract:  
 Formal Local Counsel:  
 Non-Formal LC:  
 LAP Law Firm:

Close & Refresh

# MDIS 1.0



New Client Log Entry View CR Walmart Dir. FedEx Dir. FDCPA Document archive Proof Sheet Staples Dir. Samp Settlement Letters Top 10 banks



FILE VIEW REPORTS

CLIENT LIST

CLIENT NAME

SEARCH: [input] [magnifying glass]

Time: [2 weeks] Temp: [Hot] Date: [6/12/09]

CLIENT INFO CREDIT REPORT BUDGET TERMS DOCUMENTS PAYMENT RECORDING

Active Inactive Enrolled

11 12 13 14 15 16 17

Client List

Appointments

6 min

Status 05/27/09

[check] [check] [check] [check] [check] [check] [warning]
Hardship Budget Payment info Errors
Credit report Signed docs Recording

SUBMIT

Number Assignments

18 NETWORK

3

4

2



1

8

18

# **APPOINTMENTS**

● MDIS 2.0

FILE VIEW OPTIONS



APPOINTMENTS	APPOINTMENTS	
MAY 2009	◀ Monday, May 22 ▶	
Sun Mon Tue Wed Thu Fri Sat 26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6	<div style="background-color: #f4a460; padding: 2px; display: inline-block;">Appointments</div> <div style="background-color: #d3d3d3; padding: 2px; display: inline-block; margin-left: 10px;">Appointment Book</div>	
	<div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;"> <span style="color: green;">☎</span> 5:00 am Joe NoDoe - 949.555.1212 - 52634987 <span style="float: right;">☎</span> </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;"> <span style="color: red;">☎</span> 5:30 am Johnny NoCash - 949.555.1212 - 5263 <span style="float: right;">☎</span> </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           6:00 am Tone Broke - 949.555.1212 - 52634987 <span style="float: right;">☎</span> </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           6:30 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           7:00 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           7:30 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           8:00 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           8:30 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           9:00 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           9:30 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           10:00 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           10:30 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           11:00 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           11:30 am         </div> <div style="background-color: #f4a460; padding: 2px; margin-bottom: 5px;">           12:00 pm         </div>	12:30 pm 1:00 pm 1:30 pm 2:00 pm 2:30 pm 3:00 pm 3:30 pm 4:00 pm 4:30 pm 5:00 pm 5:30 pm Tone Broke - 949.555.1212 6:00 pm 6:30 pm 7:00 pm 7:30 pm 8:00 pm
New		
<input type="checkbox"/> Client List		
<input checked="" type="checkbox"/> Appointments <span style="font-size: 24px; font-weight: bold; margin-left: 10px;">6 min</span>		New

R

Open  
 Call  
 Block Time

1.1	MDIS FRAMEWORK	Clicking on "Appointments" bar brings up appointments. Clicking on Timer brings up next appointment in "Client Info" window. User can click on "Appointment Book" tab to view custom appointments and notes. On call icon will show when DSP is on call with client. If a call is missed, after 6min. the client is removed from the "Appointments" window, then placed in the "Client List" and marked with a red icon. Double clicking an appointment opens the client in the "Client Info" window.
	Appointments	

● MDIS 2.0

FILE VIEW OPTIONS



APPOINTMENTS	APPOINTMENTS																																																
MAY 2009	◀ Monday, May 22 ▶																																																
Sun Mon Tue Wed Thu Fri Sat 26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 <b>22</b> 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6	<div style="display: flex; justify-content: space-around; margin-bottom: 5px;"> <div style="background-color: #f4a460; padding: 2px 10px; border-radius: 5px;">Appointments</div> <div style="padding: 2px 10px; border-radius: 5px;">Appointment Book</div> </div> <table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; text-align: left;">☎ 5:00 am Joe NoDoe - 949.555.1212 - 52634987</td><td style="width: 5%; text-align: center;">☎</td><td style="width: 45%; text-align: right;">12:30 pm</td></tr> <tr><td style="text-align: left;">5:30 am Johnny NoCash - 949.555.1212 - 526</td><td style="text-align: center;">☎</td><td style="text-align: right;">1:00 pm</td></tr> <tr><td style="text-align: left;">6:00 am Tone Broke - 949.555.1212 - 52634987</td><td style="text-align: center;">☎</td><td style="text-align: right;">1:30 pm</td></tr> <tr><td style="text-align: left;">6:30 am</td><td></td><td style="text-align: right;">2:00 pm</td></tr> <tr><td style="text-align: left;">7:00 am</td><td></td><td style="text-align: right;">2:30 pm</td></tr> <tr><td style="text-align: left;">7:30 am</td><td></td><td style="text-align: right;">3:00 pm <span style="color: red;">Cancel block</span></td></tr> <tr><td style="text-align: left;">8:00 am</td><td style="text-align: center;">⊘</td><td style="text-align: right;">3:30 pm</td></tr> <tr><td style="text-align: left;">8:30 am</td><td></td><td style="text-align: right;">4:00 pm</td></tr> <tr><td style="text-align: left;">9:00 am</td><td></td><td style="text-align: right;">4:30 pm</td></tr> <tr><td style="text-align: left;">9:30 am</td><td></td><td style="text-align: right;">5:00 pm</td></tr> <tr><td style="text-align: left;">10:00 am</td><td></td><td style="text-align: right;">5:30 pm</td></tr> <tr><td style="text-align: left;">10:30 am</td><td></td><td style="text-align: right;">6:00 pm</td></tr> <tr><td style="text-align: left;">11:00 am</td><td></td><td style="text-align: right;">6:30 pm</td></tr> <tr><td style="text-align: left;">11:30 am</td><td></td><td style="text-align: right;">7:00 pm</td></tr> <tr><td style="text-align: left;">12:00 pm</td><td></td><td style="text-align: right;">7:30 pm</td></tr> <tr><td></td><td></td><td style="text-align: right;">8:00 pm</td></tr> </table>	☎ 5:00 am Joe NoDoe - 949.555.1212 - 52634987	☎	12:30 pm	5:30 am Johnny NoCash - 949.555.1212 - 526	☎	1:00 pm	6:00 am Tone Broke - 949.555.1212 - 52634987	☎	1:30 pm	6:30 am		2:00 pm	7:00 am		2:30 pm	7:30 am		3:00 pm <span style="color: red;">Cancel block</span>	8:00 am	⊘	3:30 pm	8:30 am		4:00 pm	9:00 am		4:30 pm	9:30 am		5:00 pm	10:00 am		5:30 pm	10:30 am		6:00 pm	11:00 am		6:30 pm	11:30 am		7:00 pm	12:00 pm		7:30 pm			8:00 pm
☎ 5:00 am Joe NoDoe - 949.555.1212 - 52634987	☎	12:30 pm																																															
5:30 am Johnny NoCash - 949.555.1212 - 526	☎	1:00 pm																																															
6:00 am Tone Broke - 949.555.1212 - 52634987	☎	1:30 pm																																															
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10:30 am		6:00 pm																																															
11:00 am		6:30 pm																																															
11:30 am		7:00 pm																																															
12:00 pm		7:30 pm																																															
		8:00 pm																																															
<input type="checkbox"/> Client List <input checked="" type="checkbox"/> Appointments <span style="font-weight: bold; font-size: 18px;">6 min</span>																																																	

R

- Open
- Call
- Block time
- Unblock

1.2	<p><b>MDIS FRAMEWORK</b></p> <p>Appointments</p>	<p>Users can block an area to show away status. Shift click over multiple times to be blocked. R-click and select "Block time". Times will be outlined with a red box and an icon (cancel) will appear.</p>
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● MDIS 2.0

FILE VIEW OPTIONS

APPOINTMENTS	APPOINTMENTS	
MAY 2009	◀ Monday, May 22 ▶	
Sun Mon Tue Wed Thu Fri Sat 26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 <b>22</b> 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6	<b>Appointments</b>	Appointment Book
	☎ 5:00 am Joe NoDoe - 949.555.1212 - 52634987 5:30 am Johnny NoCash - 949.555.1212 - 526 6:00 am Tone Broke - 949.555.1212 - 52634987 6:30 am 7:00 am 7:30 am 8:00 am Blocked 8:30 am Blocked 9:00 am Blocked 9:30 am Blocked 10:00 am Blocked 10:30 am Blocked 11:00 am Blocked 11:30 am 12:00 pm	☎ 12:30 pm ☎ 1:00 pm ☎ 1:30 pm 2:00 pm 2:30 pm 3:00 pm <b>Approved</b> 3:30 pm 4:00 pm 4:30 pm 5:00 pm 5:30 pm 6:00 pm 6:30 pm 7:00 pm 7:30 pm 8:00 pm
<input type="checkbox"/> Client List <input checked="" type="checkbox"/> Appointments <b>6 min</b>		

1.3	<b>MDIS FRAMEWORK</b> Appointments	A user can block an area to show away status. Click Drag over time to be blocked. R-click and select "Block time". Times will gray out and an icon will appear once approved by manager.
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● MDIS 2.0

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FILE VIEW OPTIONS

APPOINTMENTS

APPOINTMENT BOOK

MAY 2009

◀ Monday, May 22 ▶

Sun Mon Tue Wed Thu Fri Sat  

26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Appointments

Appointment Book

5:15 am	12:45 pm <span style="background-color: black; color: white; padding: 2px;">R</span>
5:45 am	1:15 pm
6:15 am	1:45 pm
☎ 6:45 am MT Pockets - 949 555-1212 - 5555 ☎	2:15 pm
7:15 am	2:45 pm
7:45 am	3:15 pm
8:15 am <input style="width: 100%;" type="text" value="Add a note here."/>	3:45 pm
8:45 am	4:15 pm
9:15 am	4:45 pm
9:45 am	5:15 pm
10:15 am	5:45 pm
10:45 am	6:15 pm
11:15 am	6:45 pm
11:45 am	7:15 pm
12:15 pm	7:45 pm

SEARCH:  🔍  
 VIEW BY: 2 weeks ▾ Warm ▾

☎ Joe NoDoe - 123456789  
 Johnny NoCash - 123456789  
 Tone Broke - 123456789  
 MT Pockets - 123456789  
 Poverty Pete - 123456789

OK

Client List  
 Appointments

6 min

Times are offset

1.4	MDIS FRAMEWORK	Users can use this window to keep track of call-backs. Times are offset. A client can be added by right clicking on an empty time slot. A client list window will pop-up. Selecting a client will insert the client into the time slot. Users can drag a client to anytime on Appointment Book. If needed, users can change the date by dragging the client to a date on the calendar. A user can add a note by Double Clicking on a time slot. Edit box will activate. KB-Enter to enter data. Users can delete an entry by selecting a line item and pressing KB-delete.
		Appointment Book



**MDIS 2.0**  
FILE VIEW

### CLIENT LIST

SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	<span style="color: red;">●</span>	
Johnny NoCash		
Tone Broke	<span style="color: orange;">●</span>	
MT Pockets	<span style="color: blue;">●</span>	
Poverty Pete		

**R**

- Open
- Call
- Copy
- Set temp
- Goto

Client List

Appointments **6 min**

◀ Monday, May 22 ▶

Appointments
**Appointment Book**

5:15 am	12:45 pm
5:45 am	1:15 pm
6:15 am	1:45 pm
6:45 am	2:15 pm
7:15 am	2:45 pm
7:45 am	3:15 pm
8:15 am	3:45 pm
8:45 am	4:15 pm
9:15 am	4:45 pm
9:45 am	5:15 pm
10:15 am	5:45 pm
10:45 am	6:15 pm
11:15 am	6:45 pm
11:45 am	7:15 pm
12:15 pm	7:45 pm

**R**

- Open
- Call
- Paste
- Add Client
- Add Note
- Delete

# **CLIENT LIST**

## CLIENT LIST

SEARCH:

2 weeks Warm

	John NoDoe - 1234567		
	Johnny NoCash - 1234567		
	Tone Broke - 1234567		
	MT Pockets - 1234567		
	Poverty Pete - 1234567		

On call icon

Search

History icon. Drop down window will show history of clients cached for one day.

Filter by time: 1day, 1 week, 2weeks, 1 month, 90 days, All  
Filter by temp: Hot, warm, cold.

Returned document status icon.

User can right click this icon to change "temp" of client.

Double click client to view in Client info tab.

- Hot
- Warm
- Cold

Client list in focus.

Click on timer to view next appointment.  
Click on Appointments to bring Appointments into focus.

223/2000

<input type="checkbox"/>	<b>Client List</b>
<input type="checkbox"/>	<b>Appointments</b>

**6 min**

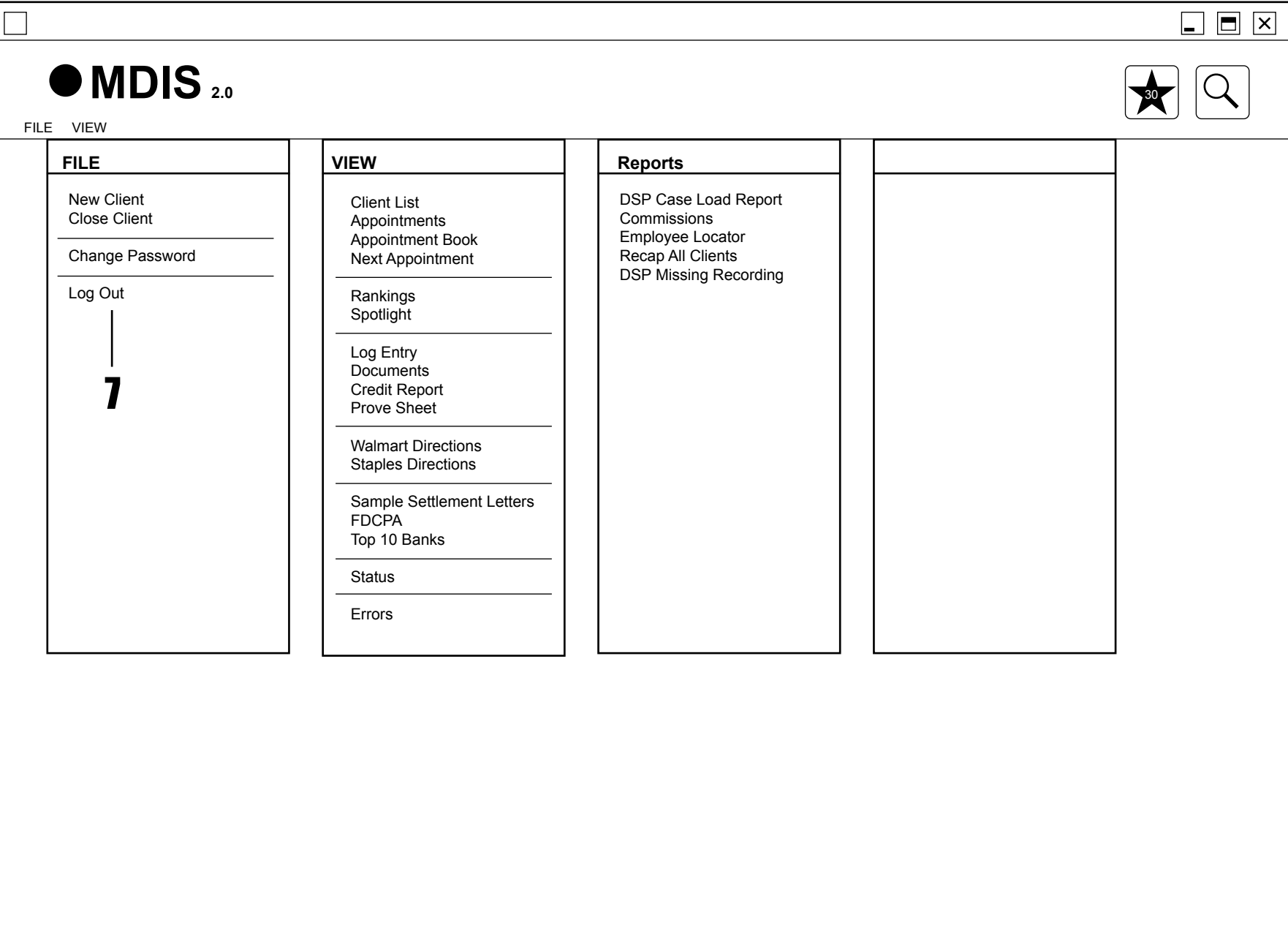
Missed Appointment 05/27/09

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
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**SUBMIT**



**MENU**



**TOOLS**

● MDIS 2.0

FILE VIEW

Toolbar - Create New Client

### CLIENT LIST

SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	●	
Johnny NoCash		
Tone Broke	●	
MT Pockets	●	
Poverty Pete		

JOHN NODOE

### Create New Client

(Modal dialog window)

\* Phone number:

\* First Name:

\* Last Name:

\* Mail Address:

Work number:

Preferred number:

Email:

Fax number:

\*Items marked with an asterisk are mandatory.

New slider window

Client List
   
 Appointments 6 min

Missed Appointment
05/27/09



● MDIS 2.0

30
🔍

FILE VIEW
Toolbar - Log Entry Window

### CLIENT LIST

SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	●	📦
Johnny NoCash	●	📧
Tone Broke	●	👤
MT Pockets	●	📁
Poverty Pete		

### JOHN NODOE

(Modales dialog window) ✕

#### Log Entry

Calling now ▾
Email to: All ▾
Send ▶▶

Calling client now

- Client hung up
- Client not interested
- Called client LM
- Client picks up the phone but does not respond
- Phone disconnected
- Wrong number
- Phones down
- Informing client running late

Refresh
Sort by: Date ▾

06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.
06/22/09	03:21pm	Mail Room	Prelim contract received and uploaded to file.

Export Log Entries
Cancel
Save
Save & Close

Client List
   
 Appointments

6 min

Missed Appointment 05/27/09

✓ ✓ ✓ ✓ ✓ ✓ ⚠

SUBMIT

● MDIS 2.0

30 🔍

FILE VIEW
Toolbar - View documents

### CLIENT LIST

SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	●	📧
Johnny NoCash	●	👤
Tone Broke	●	📧
MT Pockets	●	📧
Poverty Pete		

## JOHN NODOE

(Modaless dialog window)
🔍

### Documents

SEARCH:  Sort by: Date Refresh

File ID	Title	Uploded by	Date
942151	Contract recording	John Doe	06/01/09
942151	Contract recording	John Doe	06/01/09
942151	Contract recording	John Doe	06/01/09

Show deleted files only

OK

Client List

Appointments 6 min

Missed Appointment 05/27/09

SUBMIT

● MDIS 2.0

30 🔍

FILE VIEW
Toolbar - Credit Report

### CLIENT LIST

SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	●	📧
Johnny NoCash	●	👤
Tone Broke	●	👤
MT Pockets	●	📧
Poverty Pete		

## JOHN NODOE

Credit Report

(Modal dialog window)

REF:1-08394-30349-0000 05/11/2009      TID:1-08394-37569 05/11/2009 10:51:28

Advisory      Acct: 3408534

Prepared for: DCG HOME LOANS INC      Notes:

Requested: XPN - J      Delivered: XPN

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App: LASVEGAS, NEVADA      Ssn: 565-65-0000

Cap: SACRAMENTO, CALIFORNIA      Ssn: 123-45-6789

Curr Addr: 1600 DOUGLAS SUIT 10, ANAHEIM, CA 92806 US

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ANTHEM NON-TRADITIONAL CREDIT ALERT

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Attention: The Applicant/Co-applicant has no credit history on file at the national credit bureau(s), lacks sufficient credit history to generate a credit score, or includes a credit score based on limited credit history. The Applicant/Co-applicant may qualify as a Non-Traditional Credit Consumer.

An ANTHEM Report, which can document and verify the Applicant/Co-applicant's non-traditional credit history, is available from CREDCO. For more information or to order an Anthem Report, go online at CREDCO.com or call 800 523 0233.

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Client List
  Appointments 6 min

Missed Appointment    05/27/09





FILE VIEW

CLIENT LIST

JOHN NODOE



SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	<span style="color: red;">●</span>	
Johnny NoCash		
Tone Broke	<span style="color: orange;">●</span>	
MT Pockets	<span style="color: blue;">●</span>	
Poverty Pete		

Nearest Walmart location based on clients address

(Modal dialog window)

**Wal-Mart Store #2206**  
 27470 Alicia Pkwy  
 Laguna Niguel, CA 92677  
 (949) 360-0758

Distance 4.43 miles

Store Hours  
 Monday-Sunday:  
 8:00 am - 10:00 pm

1. Go SOUTH on MERCANTILE WAY
2. Turn LEFT onto WINDMILL AVE.
3. Turn LEFT onto ANTONIO PKWY.
4. Turn LEFT onto OSO PKWY.
5. OSO PKWY becomes PACIFIC PARK DR.
6. Turn LEFT onto ALICIA PKWY.



Email to Client

Prev Next OK

Client List

Appointments **6 min**

Missed Appointment 05/27/09



SUBMIT





● MDIS 2.0

New

30

FILE VIEW
Toolbar - FDCPA 806

**CLIENT LIST**

SEARCH:

VIEW BY: 2 weeks Warm

John NoDoe	●	FeDEX
Johnny NoCash		✉
Tone Broke	●	☹
MT Pockets	●	📄
Poverty Pete		

**JOHN NODOE**

(Modal dialog window)

**FDCPA 806 Harassment or Abuse**

A debt collector may not engage in any conduct the natural consequence of which is to harass, oppress, or abuse any person in connection with the collection of a debt. Without limiting the general application of the foregoing, the following conduct is a violation of this section:

1. The use or threat of use of violence or other criminal means to harm the physical person, reputation, or property of any person.
2. The use of obscene or profane language or language the natural consequence of which is to abuse the hearer or reader.
3. The publication of a list of consumers who allegedly refuse to pay debts, except to a consumer reporting agency or to persons meeting the requirements of section 603(f) or 604(3)1 of this Act.
4. The advertisement for sale of any debt to coerce payment of the debt.
5. Causing a telephone to ring or engaging any person in telephone conversation repeatedly or continuously with intent to annoy, abuse, or harass any person at the called number.
6. Except as provided in section 804, the placement of telephone calls without meaningful disclosure of the caller's identity.

View Complete Document
OK

Client List

Appointments 6 min

Missed Appointment 05/27/09

**SUBMIT**





# **DSP TOOLS**



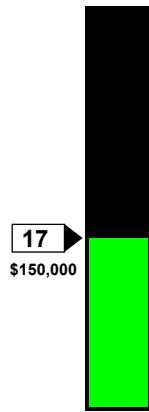
Rankings

15 Days left

(Modal dialog window)

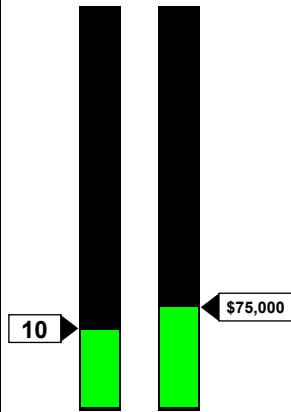
YOUR STANDING

Goal 35 Enrollments ?



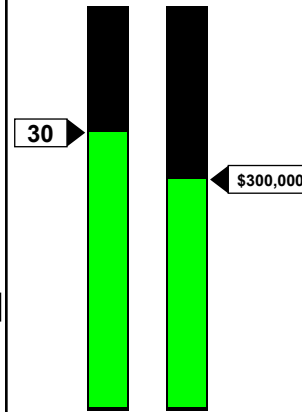
Karen R.

LOWEST PERFORMERS



San D. John D.

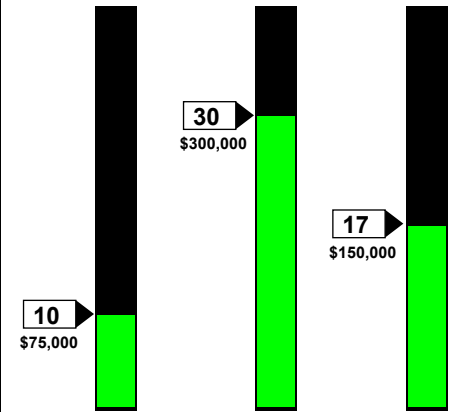
HIGHEST PERFORMERS



Kenny D. Jeff A.

TEAM RANKINGS



Goal 90 Enrollments ?



Team 1 Team 2 Team 3

OK

● **MDIS** 2.0





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(Modaless dialog window)
✕

### Spotlight

1 week ▼
Search: 
🔍

Date	Entry	Location
06/01/09	Dr. appt Friday @2:00	Appointment Book
06/01/09	Documents received Friday - Called client	Log Entry
06/01/09	Call back client - John Doe - 12345678 Friday	Appointment Book
06/01/09	Prelim contract received Friday 	Log Entry

To open client

Documents received Friday - Called client

Close

# 6.1

## MDIS FRAMEWORK

Toolbar - Personal Log

Spotlight contains a list of log entries from both the Log Entries window and Time Manager. Double clicking any underlined client in Spotlight opens client in window. Spotlight window will persist per session.



- New Client
- Close Client
- Change Password
- Log Out

# LOGOUT

(Modal dialog window)

Select:

- 15 minute break
- Lunch break
- Day completed
- Other

Select:

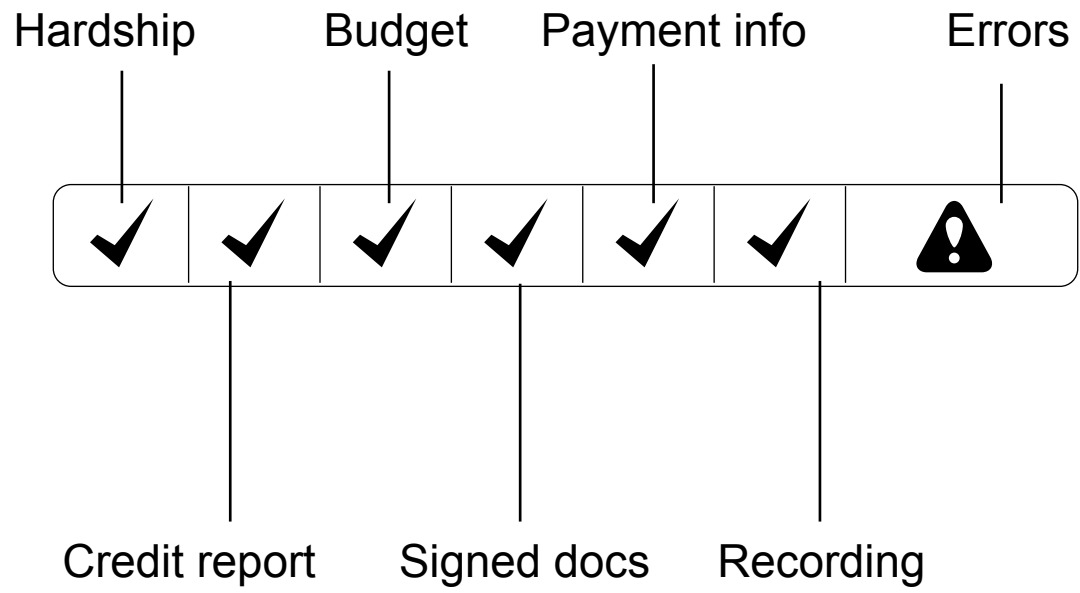
Reason:

Cancel

Logout



# **STATUS/PREREQUISITES**









FILE VIEW

## CLIENT LIST

## JOHN NODOE



SEARCH:

2 weeks | Warm

(Modal dialog window)

John NoDoe	●	
Johnny NoCash		
Tone Broke	●	
MT Pockets	●	
Poverty Pete		



### Errors

- ⚠ Client address missing zip code.
- ⚠ Co-client missing income.
- ⚠ Total debt amount is less than \$2500

OK



Click to open errors

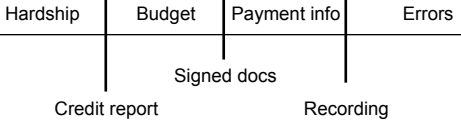
Client List

Appointments **6 min**

Missed Appointment 05/27/09

Hardship | 
  Budget | 
  Payment info | 
  Signed docs | 
  Recording | 
  Errors

SUBMIT







**TABS**

CLIENT LIST

JOHN NODOE

SEARCH: [ ] VIEW BY: 2 weeks Warm

CLIENT INFO

Note location CREDIT REPORT BUDGET

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

John NoDoe	●	📧
Johnny NoCash		✉️
Tone Broke	●	👤
MT Pockets	●	📁
Poverty Pete		

New location

CLIENT INFO

LAW FIRM: Howard Nassiri www.howardnassiri.com

FILE NUMBER 1056194101

Initial contact date: 03/29/09 07:30 am Clients Current Time: 8:40pm

Client Co-Client

Phone number: 949.555.1212

First Name: John NoDoe

Last Name: 2323 Main St.

Mail Address: Wewoka OK 65256

Work number:

Preferred number:

Email:

Fax number:

Edit

Income source:

Number of dependents:

Back taxes:

Other assets with equity: Yes No

Asset amount:

Do you rent or own your home: Rent Rent Own Neither

Property value:

Refinanced in the last 3 years: Yes No

Are you happy with the loan: Yes No

New location

DSP Appt Tech

DSP Hardship text

Staff

Appt Tech: Will Smith DS paralegal: Steve McQueen Resolution officer: Jeff Goldbloom CC paralegal: Britney Spears CP paralegal: William Shatner CP status: Full QC Analyst: Doc Brown

Numbers

MDIS Password: 55659 Available EDAF: \$800.00 Monthly payment: 121 Terms: 24 After all payments are made: \$2904.00 Post payment disposable income: \$200.00 Enrollment date: 05/02/09



Client List

Appointments 6 min

Missed Appointment 05/27/09

Progress indicators: 6 green checkmarks, 1 warning triangle

SUBMIT

Hardship has been entered



**CLIENT LIST**

**JOHN NODOE**



SEARCH:

VIEW BY: 2 weeks Warm

- CLIENT INFO**
- CREDIT REPORT
- BUDGET
- FINANCIAL PROFILE
- DOCUMENTS
- PAYMENT
- RECORDING

<b>John NoDoe</b>	<span style="color: red;">●</span>	
Johnny NoCash		
Tone Broke	<span style="color: orange;">●</span>	
MT Pockets	<span style="color: blue;">●</span>	
Poverty Pete		

**Edit Client Information**

(Modal dialog window)

Phone number:

First Name:

Last Name:

Mail Address:

City:  State:  Zip:

Work number:

Preferred number:

Email:

Fax number:

Initial contact date: 03/29/09 07:30 am

Resolution: Sen Goldbloom  
 CC paralegal: Britney Spears  
 CP paralegal: William Shatner  
 CP status: Full  
 QC Analyst: Doc Brown

Monthly payment: 121  
 Terms: 24  
 After all payments are made: \$2904.00  
 Extra monthly disposable income: \$200.00  
 Enrollment date: 05/02/09

- Client List
- Appointments **6 min**

Missed Appointment 05/27/09





**CLIENT LIST**

**JOHN NODOE**

SEARCH:

VIEW BY:

CLIENT INFO

**CREDIT REPORT**

BUDGET

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

- John NoDoe** ●
- Johnny NoCash
- Tone Broke ●
- MT Pockets ●
- Poverty Pete

**FILE NUMBER 1056194101**

**CREDIT REPORT**

**Client**

Co-Client

SSN:

DOB:



Get Credit Report

View Credit Report

**Included**

Excluded

ADD

DEL

EDIT

EXCLUDE

Description	Account #	Init. Balance	Monthly Pmt.	Account Type	Status	Added
MCYDSNB	123456789	100	20.00	R		
Wamu	123456789	600	34.00	I		●
CitiGroup	123456789	5060	120.00	B		
Disc	123456789	3003	98.00	C		



- Del
- Edit
- Exclude

Average Settlement %

Total Debt \$8009.00



Client List



Appointments

**6 min**

Missed Appointment 05/27/09



**SUBMIT**







**CLIENT LIST**

**JOHN NODOE**

SEARCH:

VIEW BY:

CLIENT INFO

**CREDIT REPORT**

BUDGET

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

- John NoDoe** ●
- Johnny NoCash
- Tone Broke ●
- MT Pockets ●
- Poverty Pete

**FILE NUMBER 1056194101**

**CREDIT REPORT**

**Client**

Co-Client

SSN:

DOB:



Get Credit Report

View Credit Report

Included

**Excluded**

**INCLUDE**

Description	Account #	Init. Balance	Monthly Pmt.	Account Type	Status	Added
BofA	123456789	100	20.00	R		
Wamu	123456789	600	34.00	I		
Wells	123456789	5060	120.00	B		
Disc	123456789	3003	98.00	C		



Include  
Edit reason

Average Settlement %

Total Excluded Debt \$309.00



Client List



Appointments

**6 min**

Missed Appointment 05/27/09



**SUBMIT**







**CLIENT LIST**

**JOHN NODOE**

SEARCH:

VIEW BY: 2 weeks Warm

CLIENT INFO

CREDIT REPORT

**BUDGET**

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

John NoDoe

Johnny NoCash

Tone Broke

MT Pockets

Poverty Pete

**FILE NUMBER 1056194101**

**BUDGET**

Client

Co-Client

Expenses

**Income**

Self employment: \$900.00  
 W2 employment: \$  
 Disability: \$  
 Unemployment: \$  
 Workman's comp: \$  
 Social security: \$  
 Other: \$  
**Total income: \$**

Net monthly income \$900.00

**Expenses**

- Home
- Utilities
- Vehicle
- Food
- Health
- Education
- Entertainment
- Misc

Monthly rent / mortgage: \$900.00  
 Property taxes: \$  
 Home owner's association: \$  
 Maintenance: \$  
 Second mortgage: \$  
 Home insurance: \$

Total Expenses \$900.00

Client List

Appointments **6 min**

Missed Appointment 05/27/09



**SUBMIT**



**CLIENT LIST**

**JOHN NODOE**

SEARCH:

VIEW BY: 2 weeks Warm

CLIENT INFO

CREDIT REPORT

BUDGET

**FINANCIAL PROFILE**

DOCUMENTS

PAYMENT

RECORDING

John NoDoe	<span style="color: red;">●</span>	
Johnny NoCash		
Tone Broke	<span style="color: orange;">●</span>	
MT Pockets	<span style="color: blue;">●</span>	
Poverty Pete		

**? CALCULATE**

**FILE NUMBER 1056194101**

**FINANCIAL PROFILE**

Total Debt \$8009.00

Total Income \$4000.00

Total Monthly Expenses \$2000.00

**Terms**

**24 months**

Estimated monthly payment for standard 24 months: \$300  
Total after 24 months: \$6700

**Calculate**

Total Debt Re-negotiation: \$8009  
Engagement Fee \$900  
Monthly service fee \$20  
Min. Monthly Payment \$200

Total income: \$4000  
Monthly expenses: \$2000  
Disposable Income: \$1500

Monthly savings: \$500  
Yearly savings: \$6000

**36 months**

Estimated monthly payment for standard 36 months: \$200  
Total after 36 months: \$7200



**EDAF Availability**  
You are approved!

30 Day \$250  
60 Day \$500  
90 Day \$1000

**Current Settlements from banks**  
listed on your credit report

Citi 35%  
BofA 30%  
Wells 25%  
MBNA 24%

**Savings Calculator**

Clients current debt amount:

Clients average interest rate:

**Calculate**

Clients average monthly payment:



**Current Debt Plan**

Years to payoff: 24 yrs.  
Total interest paid: \$28,000  
Debt plus interest over 24 years = \$58,000  
Debt free by: May, 1 2033



**Morgan Drexen Plan**

Months to payoff: 24 Mo.  
Total paid: \$15,000 At \$250 a month  
Debt free by: May, 1 2012

**Savings of \$13,000**

**Commission \$125.00**

**New**



**Client List**



**Appointments**

**6 min**

Missed Appointment 05/27/09



**SUBMIT**



CLIENT LIST

JOHN NODOE

SEARCH: [ ] [ ]  
VIEW BY: [ 2 weeks ] [ Warm ] [ ]

CLIENT INFO

CREDIT REPORT

BUDGET

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

- John NoDoe
- Johnny NoCash
- Tone Broke
- MT Pockets
- Poverty Pete

FILE NUMBER 1056194101

DOCUMENTS

Mail

Live Connect

FedEx



Print



Email



Fax

FedEx

- Recap
- Authorization
- Contract
- Debt report
- Financial profile
- Law firm intro
- Instructions
- BK contract

Email Docs

Fax Docs

FedEx Docs

FedEx FAQ

FedEx DVD

FedEx Recap

Physical Address:

\* John NoDoe  
[ ]  
City [ ] State [ ] Zip [ ]

Start Message Date

MAY 2009						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

May 22, 2009

New



Client List



Appointments

6 min

Missed Appointment 05/27/09





CLIENT LIST

JOHN NODOE

SEARCH: [input] [magnifying glass]
VIEW BY: [2 weeks] [Warm] [refresh]

CLIENT INFO

CREDIT REPORT

BUDGET

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

Table with 3 columns: Client Name, Status (colored dot), and Action (icons). Rows include John NoDoe, Johnny NoCash, Tone Broke, MT Pockets, and Poverty Pete.

DOCUMENTS New

FILE NUMBER 1056194101

Mail

Live Connect

FedEx

Client online status: [ON] [OFF]

File Number: 1056194101
Last Four SSN: 7757
Password: 55659

- Financial Profile [checkmark]
Contract [checkmark]
Debt Schedule [checkmark]
ACH [checkmark]

Client docs received, proceed to payment screen.

Client List

Appointments 6 min

Missed Appointment 05/27/09



SUBMIT



**CLIENT LIST**

**JOHN NODOE**

SEARCH:

VIEW BY: 2 weeks Warm

CLIENT INFO | CREDIT REPORT | BUDGET | FINANCIAL PROFILE | **DOCUMENTS** | PAYMENT | RECORDING

John NoDoe	<span style="color: red;">●</span>	
Johnny NoCash		
Tone Broke	<span style="color: orange;">●</span>	
MT Pockets	<span style="color: blue;">●</span>	
Poverty Pete		

**DOCUMENTS**

New

**FILE NUMBER 1056194101**

Mail | Live Connect | **FedEx**



**Clients Physical Address:**

John NoDoe  
2323 Main St.  
Wewoka OK 65256

✓ Docs sent: 5/26/09 ✓ Docs received: 5/28/09

**Shipped**  
To Client



Tracking no: 401454460759

Ship date: May 26, 2009  
Delivery date: May 28, 2009  
Destination Wewoka, OK

**Schedule Pickup**  
From Client

Pickup scheduled for: May 27, 2009

[Schedule Pickup](#)

**Delivered**  
To Morgan Drexen



Tracking no: 401454464555

Ship date: May 27, 2009  
Delivery date: May 30, 2009  
Destination Anaheim, CA

**Client List**

**Appointments** 6 min

Missed Appointment 05/27/09



**SUBMIT**











CLIENT LIST

JOHN NODOE

SEARCH: [input] 🔍

VIEW BY: [2 weeks] [Warm] 🕒

CLIENT INFO

CREDIT REPORT

BUDGET

FINANCIAL PROFILE

DOCUMENTS

PAYMENT

RECORDING

John NoDoe	●	📧
Johnny NoCash		📧
Tone Broke	●	📧
MT Pockets	●	📧
Poverty Pete		

FILE NUMBER 1056194101

Recording

QC Recorded Questionnaire - (Effective October 2008)

1

Do I have your permission to record this conversation?

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17

View Complete Document

Load Recording

- Client List
- Appointments **6 min**

Missed Appointment 05/27/09

SUBMIT



CLIENT LIST

CLIENT

Active Inactive Enrolled

Patricia Smith

949.555.1212

FN: 1056194101

Save & Close

Search and filter options: Central, Warm, 1 Month, Contract received (on hold)

Client Info Credit Report Budget Terms Documents Payment Recording

Client	Number			
Patricia Smith	1056194101	●	●	●
John Azalee	3219561458	●	●	●
Pat Bernestine	5478485123	●	●	●
Connie Phillips	5569988265	●	●	●
Patricia Smith	1056194101	●	●	●
John Azalee	3219561458	●	●	●
Pat Bernestine	5478485123	●	●	●
Connie Phillips	5569988265	●	●	●

20/305

Client List

Appointments

6 min

Client Missed Appointment



SUBMIT

Jennifer Smith calling...

Client's current time: 8:40pm

Network

Phones

Credit