



The JSTribune

Volume 5, Issue 4

Autumn Edition

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Upcoming Events

Oct 20	VCBA Conference Williamsburg, VA
Oct 26	NARCA Conference
Oct 29	Las Vegas, NV
Oct 27	JST Get Together Las Vegas, NV
Nov 10	CLLA Conference
Nov 12	New York, NY
Feb 7	DBA Conference
Feb 9	Las Vegas, NV



8 is ~~Enough~~ Just the Beginning!

The day has finally come!
JST is proud to announce
CollectMax Version 8!

On Monday, October 17th, we will begin taking orders for the much anticipated release.

Version 8 is loaded with quite possibly our most robust collection of new features and enhancements to date.

Here are some of the items we've added:

Compliance and Security:

Account Review - Allows you to set up individual review items and then build customized checklists/reviews.

Scripting - You can now create scripts for your staff using fields in **CollectMax** much like you would a document.

Maximum Settlement Months - Set the highest number of months users can accept for settlement arrangements.

Paid in Full Tolerance - Allows you to set an allowable dollar amount from the total balance, and still be considered a payoff.

Closed Account Access Restriction - Control which users can access closed accounts.

Workflow Features:

Action Note Display - Action notes can now be seen in the grid on the Summary tab.

Color-Coded Closed Accounts - Closed accounts can be configured to display in the color of your choosing in the Debtor Find screen.

Home Screen Views - The home screen is now

configurable to display in four different modes: Worklist, Interface Log, Document Statistics, and Action.

Financial Features:

Line Item Fee Invoices - View the fee/commission items that make up a combined Fee Invoice.

Court Cost Override by Balance - Set a transaction amount for each cost using the account balance range.

Limits on Manually Entered Transactions - Establish a maximum amount for consumer transaction codes in **CollectMax**.

Financial Notes - Allows you to add a note that must be viewed before posting any financial transactions.

Document Features:

Document Statistics - The date and time stamp of the last generation, the user who generated it, as well as the generation count will be displayed in the Document Properties tab.

Document Variable Grouping - Merge fields are grouped into categories based on their respective locations in **CollectMax**.

Recent Document Feature - Display a list of up to 10 recently used documents.

Multiple Activity Codes for Automation - Add up to three activity codes per document.

Batch Processing Features:

Purge Payment Plans - Allows you to purge/delete payment plans using a batch process.

Mass Client Email - This

feature allows you to send Mass Emails to All Clients, a Client Group, or Client Set.

Update User Code Settings for Teams - Supervisors can now update user codes settings for all Teams or by individual team.

Skiptracing Feature:

There is now a Skiptracing screen accessible by a detail button to track skiptracing events.

More Features:

Batch Image Import Templates - Save frequently used image import settings as templates which can be used again for future imports. (Requires Document Management Module)

Returned Mail Designation for Imaging - Allows you to set the Mail Status or Designation on Images. (Requires Document Management Module)

Document Modification Tracking - Track modifications to documents by requiring users to enter reason for the change. (Requires MaxSecurity)

Call Activity Warning - Alerts users when the number of daily Call Activities on an account reaches a predetermined number. (Requires MaxSecurity)

Plus many more not listed here!

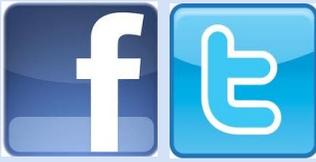
For a complete list of features and more information on Version 8 or any of our other products, please contact our Sales team at sales@collectmax.com, or call (804) 288-7850.



From left: Karen Hammer, Jerry Burch, Nicholas Upshaw, Isaac Hammer, and Stephen Day

If you would like to see your firm spotlighted in a future edition of the newsletter, please drop us a line to Comments/Suggestions below.

Follow **JST**



Comments/Suggestions:

Please send to bwilliams@collectmax.com

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Simply the right choice.

Focus On

Founded by Bill Suttell in 1985, Suttell, Hammer & White, PS has grown from, as Chief Administrative Officer Nicholas Upshaw described, "A mom and pop shop" to a national presence in the collections industry; serving creditors in Washington, Oregon, Idaho, California, Colorado, Alaska and Utah.

I recently had the opportunity to visit their Bellevue, WA location. Upon entering the office, I noticed three things: the various awards adorning the walls, Seahawks signs (They are very close to Seattle,) and **CollectMax** running on every computer.

The firm came to use **CollectMax**, as they needed a program to work in conjunction with their NAN and YGC clients. As Upshaw explained, "The

interfaces allowed us to grow with those clients." He went on to add, "**CollectMax** also helped to expand our client base with the addition of the Citibank, Discover, Ford Motor Credit, Macy's and other interfaces. This in turn, expanded our business"

Expansion is really a point of pride for this firm. When I asked about their accomplishments, sure they acknowledged the aforementioned awards. However, the folks I spoke with really seemed to derive gratification from how the firm has grown every year. As of this writing, Suttell, Hammer & White, PS has over 100 full time employees and 15 attorneys, with offices in Washington and California.

There's a saying that

"Competition breeds excellence," and this couldn't be more true with this firm. Most of the folks there are very avid and competitive golfers, as well as participants in a firm wide FitBit challenge.

They also sponsor a firm softball team cleverly named "The Hammerheads." IT Director Stephen Day explains, "It gives us a chance to get to know some of the people at work that you may not normally interact with on a day to day basis."

Social responsibility is not lost on the firm as they are also very active in the community with local charities. Folks will volunteer time and coordinate food drives around Thanksgiving and Christmas for Eastside Baby Corner and Hopelink.

What's New?

At **JST**, we are constantly striving to develop a better product for our customers. Here is a breakdown of the latest additions and enhancements to **CollectMax**.

Documents:

New fields added for effective commission, employment, and litigation.

Disallow naming a document if same name already exists.

New document variable functions.

Transactions:

Fee transaction note length has been increased.

Demographics:

County Codes can now be up to 6 characters.

Debtor Tab Cell phone option for Expressed Consent.

Litigation:

Ability to sort legal activity List.

Account Number on Litigation form title bar.

Stipulation Date field to the Filing screen.

Preparation Date field to Garn screens.

Members:

Added Employment fields.

Added fields to Member Management Print to Excel.

Reports:

Changes to Invoices, Transaction Report, Debtor History Report, Action Item Report, and Account Detail Report.

Advanced Report Print Items added.

System:

Added a new system options for Litigation, Costs, Payments, and Call Times.

MaxExtract:

Added Debtor, Employer, Bank, Claim, Payment Plan, and History Fields.

Activity Code:

Added Call Timer to Call Activity Entry.

Call Activity reset timer will now ask for confirmation.

Disabled navigation to linked accounts with non-modal forms active such as Activity form.

Accounting:

Added sort by check number in the bank account reconciliation.

Added a print to Excel option to Pending Deposits.

Client Settings:

New setting to select the number of characters to mask reference number.

Added ability at client level to set allowable activity codes.

Actions/Payment Plans:

Changes to Plan Due date, new fields added, and added ability to add a reason when a payment plan is deleted.

Summary Tab:

Changed Memo limit to 3000 characters.

Batch Processes:

Added option to include inactive accounts for Batch Attorney Reassignment.

Password:

Removed 12 character limit on password entry box.

For the complete list of changes, please refer to our Release Notes page (Help>Release Notes).

If you would like assistance with these or any other feature in **CollectMax**, please contact our Support team at (804) 288-7850 or email us at help@collectmax.com.