

Client Portal Guide

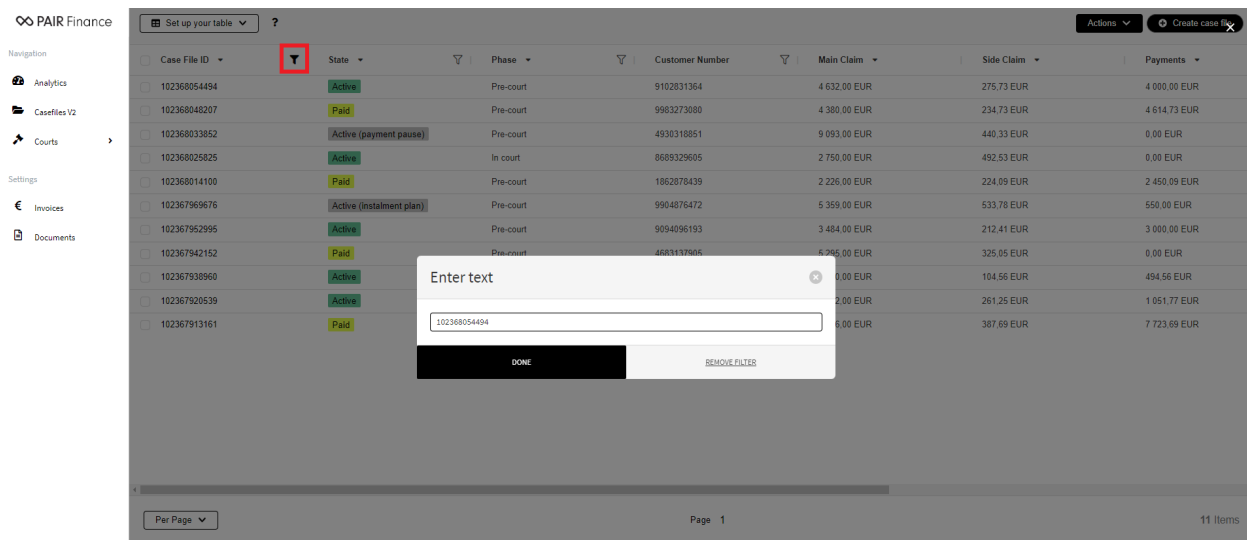
These are the new functions

Updated Search functionality.

Looking for PAIR file numbers, invoice numbers, customer numbers, or contract numbers whose files are currently in "Active" status and in the "Court" phase?

With the new search functionality per column of the casefile overview, this information is only a few clicks away. You now have the option to filter by desired search criteria per column.

Multiple search criteria? No problem! Simply select the desired search criteria via the filter buttons of the respective columns and your result will appear.



Set up personalized table.

The screenshot shows the PAIR Finance interface. At the top, there is a navigation bar with the PAIR Finance logo and a 'Set up your table' dropdown menu highlighted with a red box. Below the navigation bar, there is a sidebar with navigation options: Analytics, Casefiles V2, Courts, Settings, Invoices, and Documents. The main area displays a table of casefiles with columns: Case File ID, State, Phase, Customer Number, Main Claim, Side Claim, and Payments. Above the table, there is a multi-select menu for 'Set up your table' with 10 items: Case File ID, State, Phase, Customer Number, Main Claim, Side Claim, Payments, Total debt outstanding, Invoice number, Invoice Date, Contract Number, and Contract Date. The 'Contract Number' item is highlighted with a red box. There are also checkboxes for PSP merchant ID, E-Mail, Contact, and Created at. A 'Save' button is located at the bottom right of the multi-select menu.

Case File ID	State	Phase	Customer Number	Main Claim	Side Claim	Payments
102368054494	Active	Pre-court	9102831364	4 632.00 EUR	275.73 EUR	4 000.00 EUR
102368048207	Paid	Pre-court	9983273080	4 380.00 EUR	234.73 EUR	4 614.73 EUR
102368033852	Active (payment pause)	Pre-court	4930318851	9 093.00 EUR	440.33 EUR	0.00 EUR
102368025825	Active	In court	8689329605	2 750.00 EUR	492.53 EUR	0.00 EUR
102368014100	Paid	Pre-court	1862878439	2 226.00 EUR	224.09 EUR	2 450.09 EUR
102367969676	Active (instalment plan)	Pre-court	9904876472	5 359.00 EUR	533.78 EUR	550.00 EUR
102367952995	Active	Pre-court	9094096193	3 484.00 EUR	212.41 EUR	3 000.00 EUR
102367942152	Paid	Pre-court	4683137905	5 295.00 EUR	325.05 EUR	0.00 EUR
102367938960	Active	Pre-court	2008279945	1 190.00 EUR	104.56 EUR	494.56 EUR
102367920539	Active	In court	8720410541	1 922.00 EUR	261.25 EUR	1 051.77 EUR
102367913161	Paid	Pre-court	8283246548	7 336.00 EUR	387.69 EUR	7 723.69 EUR

The known casefile overview in the tab "Casefiles V2" can now be individualized for each user.

Click on the button "Set up your table" - this opens a multi-select menu. By selecting the boxes, you can add any information to the file overview.

If a particular information is visible that you don't need at the moment, you can simply uncheck the corresponding box, save it and the information will no longer appear for you.

Further individualization is given by the new casefile overview with the possibility to adjust the order of the columns by drag-and-drop.

You would rather see your internal invoice, customer or contract number at the top instead of the PAIR file number? Simply move the desired information to the first position in the multi-select menu, save and the order will adapt to your wishes.

Export function of casefile view.

You want to export your individually ordered and filtered casefile overview as .xlsx or .csv document? The new export function offers you this possibility!

Simply click on the "Actions" button, select the desired file format in the drop-down menu that opens and the download will start.

The screenshot shows the PAIR Finance interface with the 'Actions' button highlighted with a red box. The 'Actions' dropdown menu is open, showing two options: 'Export selection as csv' and 'Export selection as xlsx'. The table of casefiles is visible below the menu. At the bottom of the interface, there is a 'Per Page' dropdown menu, a 'Page 1' indicator, and a '11 Items' count.

Detailed casefile view - tab "details".

The new detailed casefile view provides an instant overview of the consumer's submitted contact details, claim summary and file status at a glance.

The usual comment function for the communication with our collection team has also been moved more into focus to avoid long scrolling in larger casefiles.

As before, you can book payments in the casefile summary, below which you will find the list of invoices per file and the detailed list of the consumer's contact details.

Detailed casefile view - tab "details".

This tab gives a complete overview of all financial transactions that take place in a casefile. In this way, even before you receive our statement, you can see how payments received have been accounted for. Whether they were received by PAIR or by the client can also be seen here. Any costs incurred or payments bounced are also listed here.

PAIR Finance

Navigation

- Analytics
- Casefiles V2
- Courts

Settings

- Invoices
- Documents

Dr. Luigi Spencer

Customer number: 9983273080
 Birthdate: 1976-06-20
 Address: Langworth Parkways 566, 79727-5802
 West Adulation
 PAIR Score: 0

More Case Files:

CE 192358048207
 creditor: Allegro GmbH

Reference ID:
 RA Micro slug:
 Court slug:
 External case file ID:
 Expected acquisition date:

Merged Case Files:

Contract nature: Purchase Contract

Total debt	0,0€
Open amount	0,00€
Open main claim	0,00€
Open side claim	0,00€
Open DCA fees	0,00€

Activation date: 19.4.2022
 Phase: Pre-court
 State: **Paid**
 In court state:

Comments

No pinned comments

Details History Documents **Booking** Invoices

Booking

ro	position	MC from 2018-06-06 (#8495677039) 4380,00 #8495677039	Creditor installment fee 36,00 #8495677039	0,5 Geschäftsgebühr analog § 13 RVG i.V.m. Nr. 2300 VV RVG 187,00 #8495677039	Creditor charges fees, 00 #8495677039	Collection Expenses 234,73 #8495677039	Σ
1	(306118) MC from 2018-06-06 (#8495677039)	4380,00			-4380,00		0,00
2	(306119) Creditor installment fee		36,00			-36,00	0,00
3	(306208) 0,5 Geschäftsgebühr analog § 13 RVG i.V.m. Nr. 2300 VV RVG			198,73		-198,73	0,00
-	Σ	4380,00	36,00	198,73	-4380,00	-234,73	0,00
-	Σ	4380,00	4416,00	4614,73	234,73	0,00	-