



Store Manual

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Chapter 13: Mobile Applications

KPI App

Download the Cynergi|suite App

To download the KPI (Key Performance Indicator) mobile app, go to the Apple Store (iOS) or Play Store (Android) and search “**cynergi kpi.**”

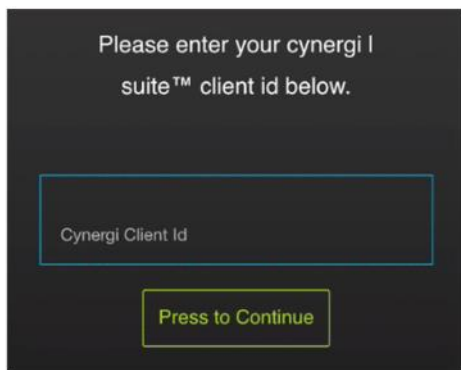
Choose the app labelled “**cynergi |suite KPI™**” with this logo:



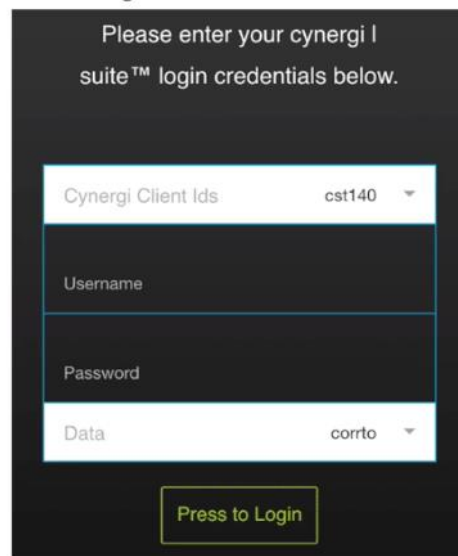
Login to the App

How to Login

You first need to register. You will need your cynergi | suite **Client ID**. If you don't know your **Client ID**, please contact High Touch support at [855-296-3744](tel:855-296-3744) or email cynergisuitesupport@hightouchinc.com. Enter your **Client ID** into the cynergi client id box on the set up page and click the "Continue" button.



Next on the Register page, enter your cynergi | suite username and password. This is the same username and password that you use at your cynergi terminal. Choose your appropriate dataset and click the "Login" button.

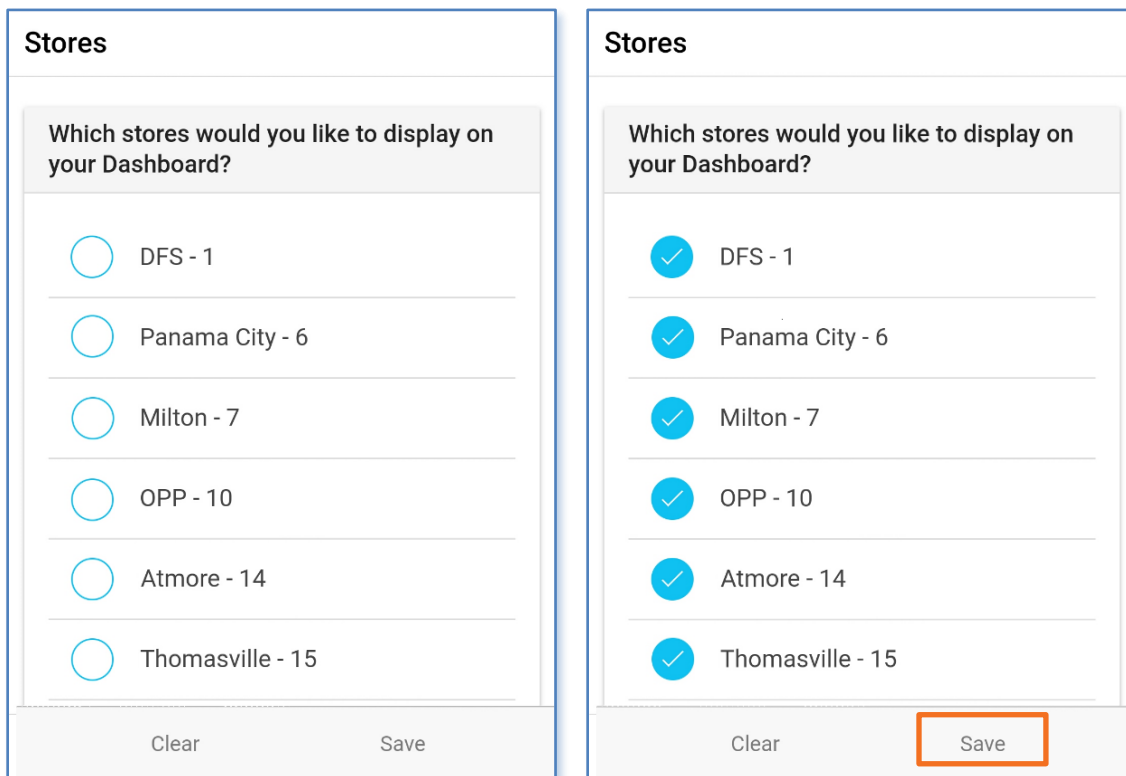


Please Note: If your cynergi |suite server houses multiple companies or datasets, please choose the desired dataset on the bottom field.

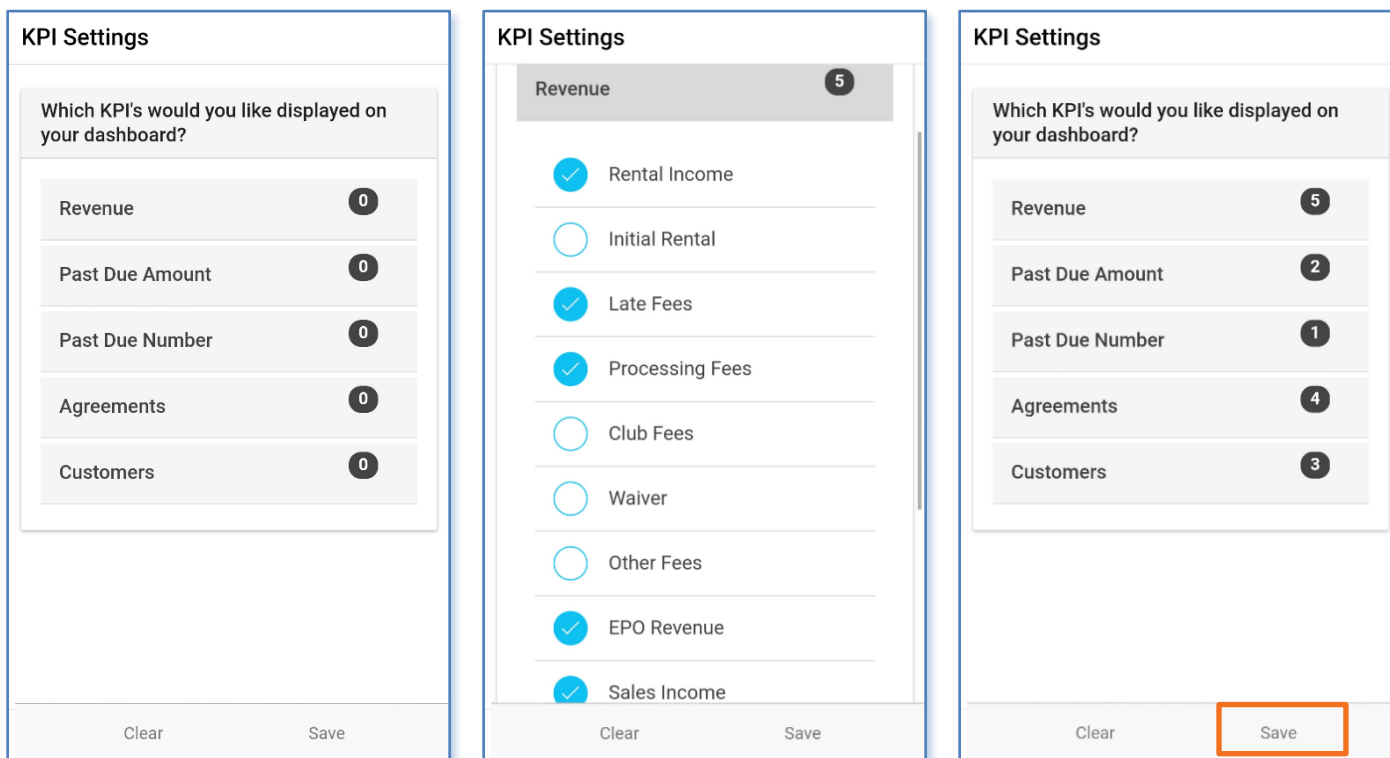
Enter your **Username** and **Password**.

Please Note: The username is your cynergi |suite employee number and the password is your cynergi |suite passcode.

You will be prompted for which **Stores** you would like your dashboard to include. You can select multiple stores to display their KPIs summed together. Tap **Save** at the bottom when done.

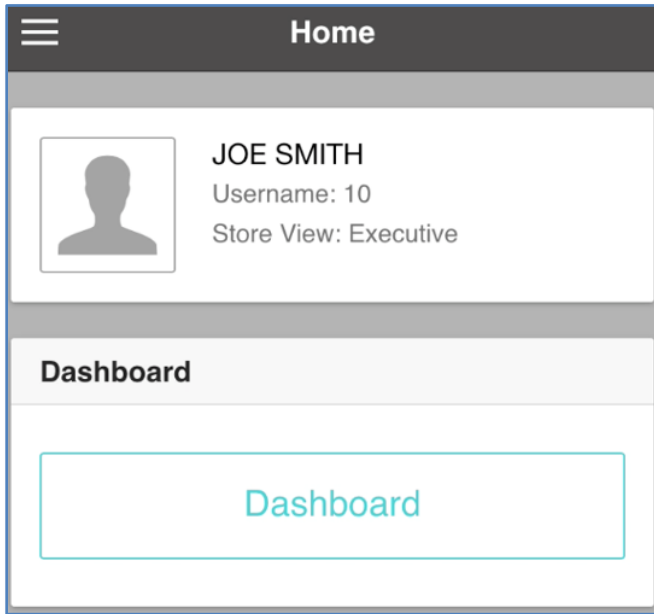


You will then be prompted for the specific **KPIs** you would like to view on your dashboard. Tap on a category to expand a list of specific KPIs. You can select multiple KPIs per category. The number to the right of the category shows how many KPIs are selected within the category. When done, tap **Save** at the bottom.

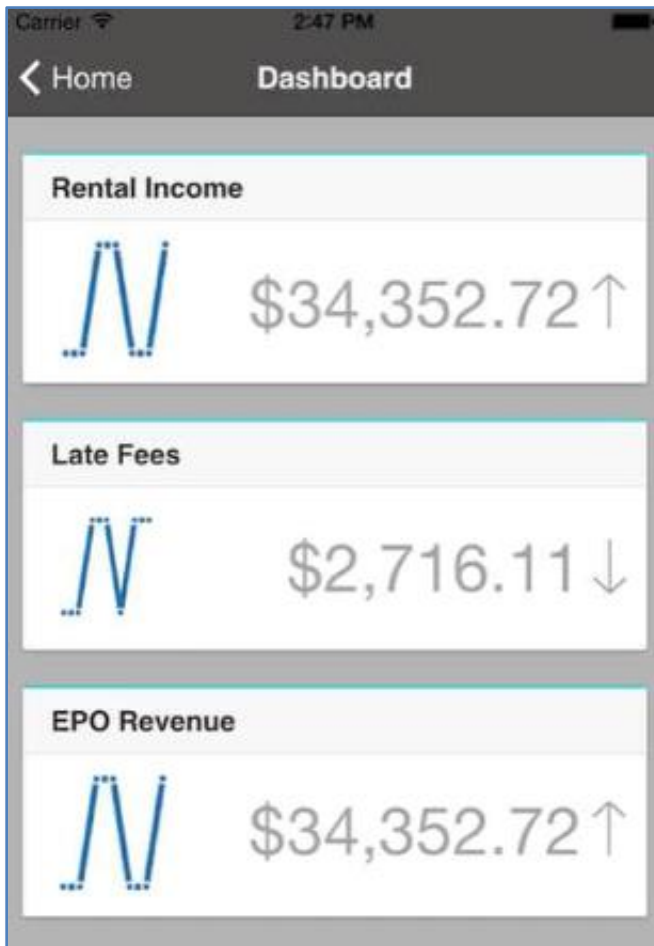


View the KPI Dashboard

From the main App Home screen, tap on the **Dashboard** button to gain access to the dashboard.



The KPIs selected will be displayed showing the latest figures. Tap on a KPI to display further details.



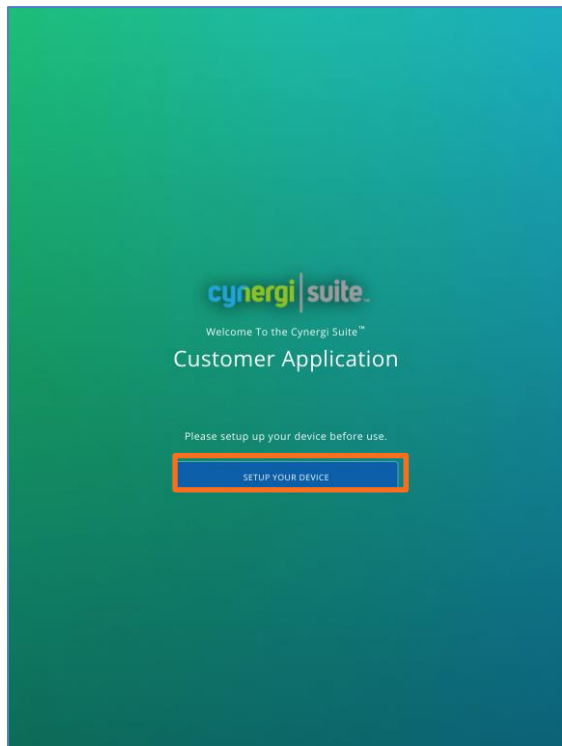
Current Available KPIs (as of 8/25/15)

- Revenue
 - Rental Income
 - Initial Rental
 - Late Fees
 - Processing Fees
 - Club Fees
 - Waiver
 - Other Fees
 - EPO Revenue
 - Sales Income
- Past Due Amount
 - Past Due Amount 1-7
 - Past Due Amount 8-14
 - Past Due Amount 15-45
 - Past Due Amount 46-90
 - Past Due Amount 90+
 - Past Due Amount Total
- Past Due Number
 - Past Due Number 1-7
 - Past Due Number 8-14
 - Past Due Number 15-45
 - Past Due Number 46-90
 - Past Due Number 90+
 - Past Due Number Total
- Agreements
 - Agreements Total Number
 - Agreements Pending
 - Agreements Delivered
 - Agreements Picked Up
 - Agreements Paid Out
 - Agreements Charged Off
 - Agreements Net
- Customers
 - Customers Total
 - Customers New
 - Customers Current
 - Customers Existing
 - Customers Lost
 - Customer Net

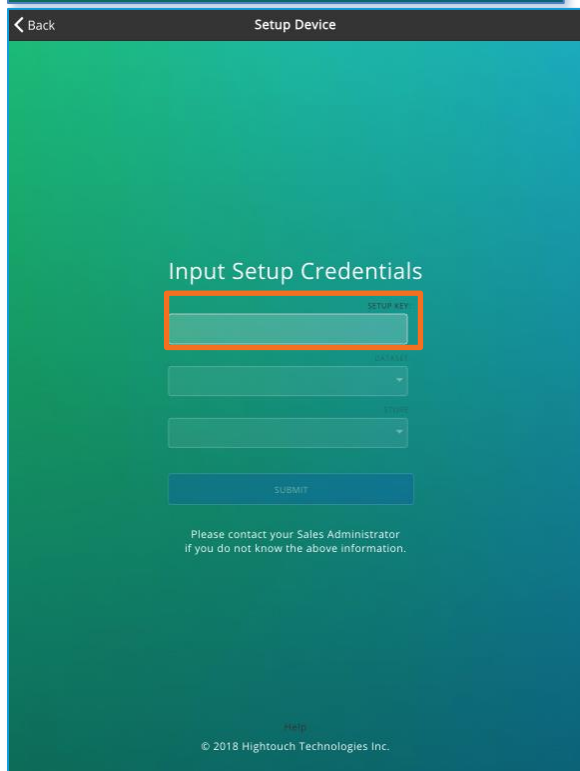
Rental App

Setup

Setting up Your Device

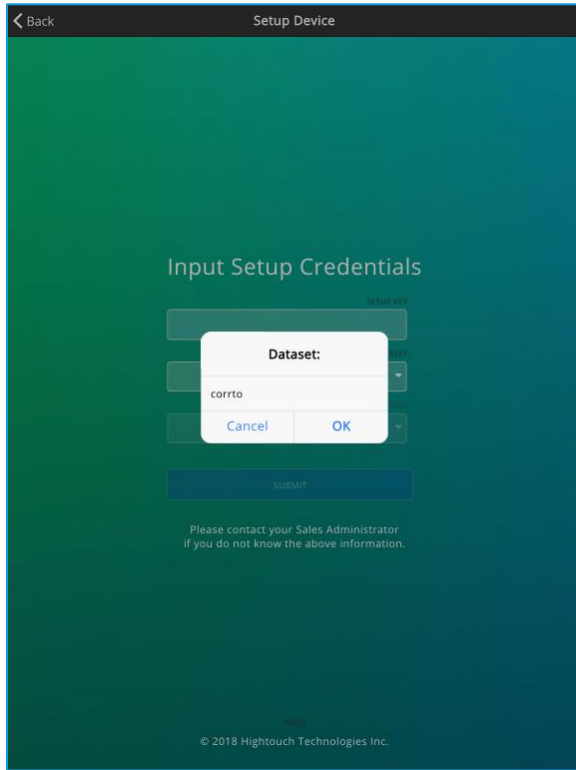


Once the device has loaded, you will be brought to the intro screen. Tap the **SETUP YOUR DEVICE** button in order to continue to setup.

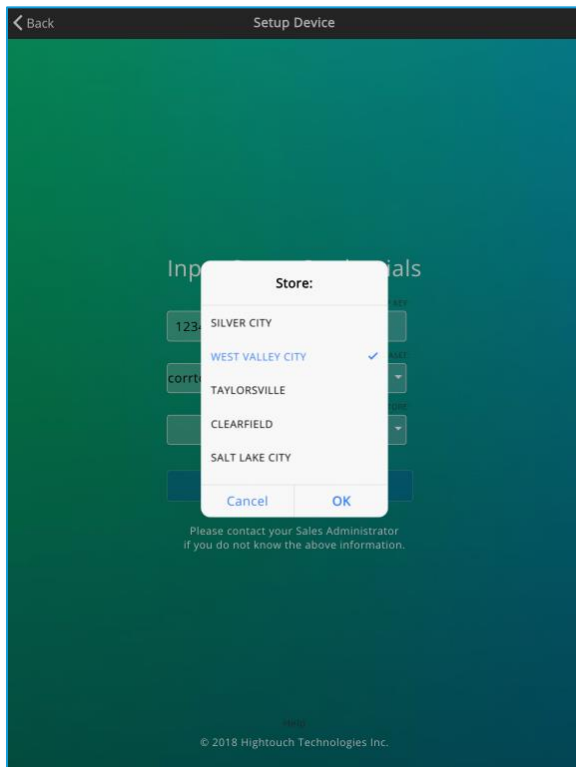


You will arrive at the setup screen. Input the **SETUP KEY** that was provided to you from High Touch. **Do not lose this key, as it is your password to update settings, should you desire to at a future date. High Touch can recover the key in the event of a loss.**

When the setup key has been successfully entered, the datasets will be populated. Tap the **DATASET** field and choose the appropriate dataset for your store, then tap **OK**.



Once you have chosen your dataset, choose the store where the device will be used. Tap the **STORE** field and choose the appropriate store, then tap **OK**. Tap **SUBMIT** to complete credential setup.

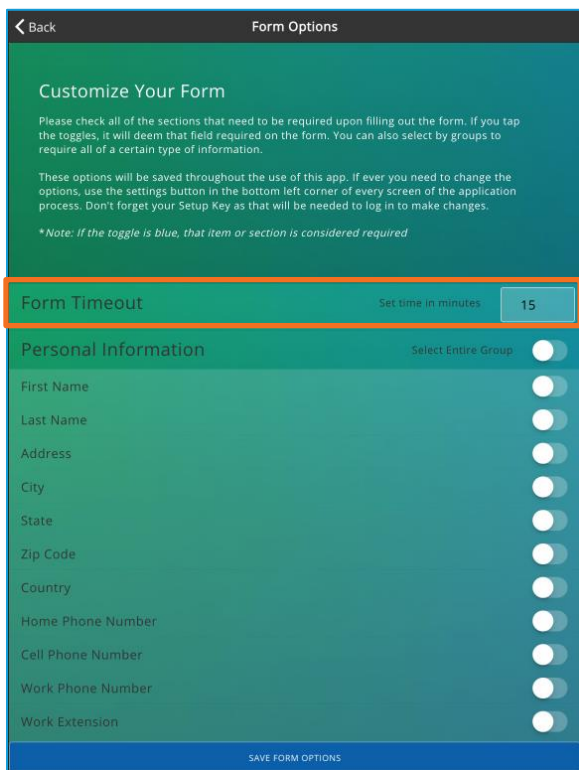


The settings screen will load immediately after the initial credential submission. If you are returning to this screen, tap **UPDATE** to proceed to the language selection.

Choosing Your Settings

Upon successfully submitting credentials, you will be prompted to choose some settings for the Rental Application.

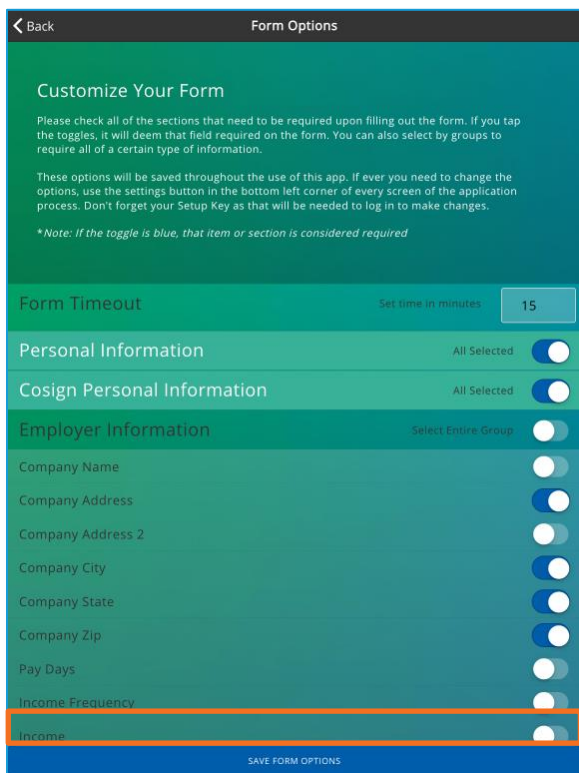
Setting a Timeout



At the top of the selections, you will see a **Form Timeout** field denoted in the red box. This timeout is used to determine how long the device can be idle before clearing information and returning to the language selection screen. This helps to ensure that a person does not leave a device partially filled out and the following person picks it up and uses his or her information.

Time is shown in minutes.

Selecting Requirements



Below the Form Timeout are options for each field on the Rental Application. If you tap on a field and the toggle turns blue, it will deem that field *required* when a customer is filling out the rental application (they *must* input information into that field).

Likewise, if you select a section, such as **Personal Information** or **Cosign Personal Information**, it will deem that entire section *required*. Everything underneath that field will require input when a customer is filling out the Rental Application.

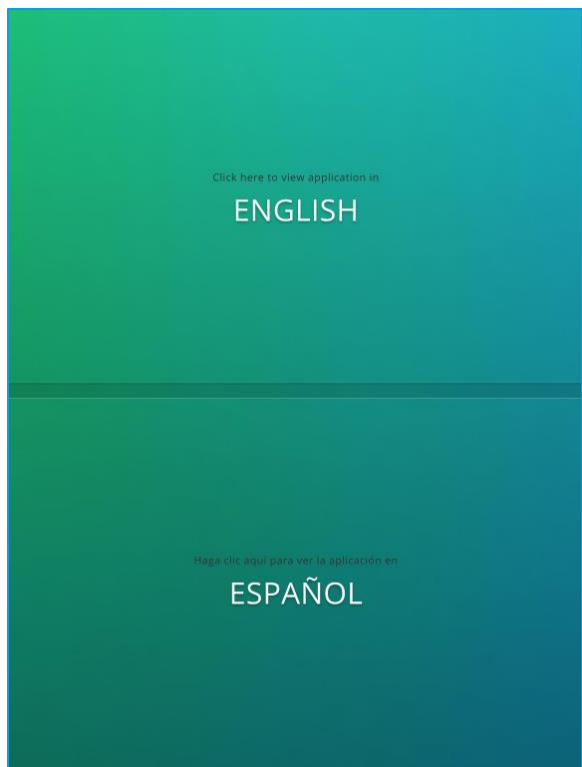
If you do not tap one, the field will still be available during the application, but it will not be required.

When satisfied with your selections, tap the blue **SAVE FORM OPTIONS** button at the bottom. If you would like to change something, you can come back to this page later (please reference [Changing Administrator Information](#) at the end of this section).

Congratulations! You have completed your application setup, now put it to work.

Filling out the Rental Application

Choose Language



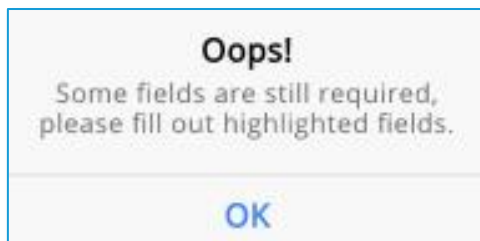
This will be the initial screen that your customers will see upon receiving the application on the tablet. They will tap either language and the rest of the application will be translated to that language. For this demonstration, English will be used to guide you through the submission process.

Personal Information

This is the most important page on the application, as it discerns the flow and information available on the next pages.

The screenshot shows the 'PERSONAL INFORMATION' section of the Rental Application. The form includes fields for: FIRST NAME, LAST NAME, CONTACT NAME, DATE OF BIRTH, SOCIAL SECURITY NUMBER, DRIVERS LICENSE NUMBER, ADDRESS, ADDRESS CONT., CITY, STATE, ZIP, COUNTRY (US), HOME PHONE, CELL PHONE, WORK PHONE, SEX, OTHER PHONE, OTHER PHONE, MAIL, BEST TIME TO CALL, TAX NUMBER, and TAXABLE (YES/NO). A red outline highlights the 'FIRST NAME' and 'LAST NAME' fields. A yellow box with the letter 'A' is in the top right corner.

A: A red outline appears when a field is required but the user tries to submit before filling it out. The following image is an alert which tells the user that some fields are not complete:



Co-signer Information Fields

The screenshot shows the 'PERSONAL INFORMATION' section with the 'Do You Have a Co-Signer' toggle switch turned on. The co-signer section includes fields for: CO-SIGNER FIRST NAME, LAST NAME, ADDRESS, ADDRESS CONT., CITY, STATE, ZIP, HOME PHONE, WORK PHONE, SEX, CO-SIGNER SOCIAL SECURITY NUMBER, CO-SIGNER DRIVERS LICENSE, CO-SIGNER DATE OF BIRTH, and RELATIONSHIP. A blue button labeled 'NEXT SECTION →' is at the bottom. A yellow box with the letter 'B' is in the top right corner.

B: This switch shows an alternate customer information section for a co-signer. It toggles to blue to show the information. The information here, in the co-signer area, has its own required section which is controlled separately from the personal information.

Landlord Information

The **Landlord** page has requirements from the settings but no special attributes. Fields will turn red upon attempting to submit empty required fields. There are two different pages based on whether you own or rent your place of residence.

This screenshot shows the 'Landlord Information' form for a user who owns their property. The 'Own' radio button is selected. The form includes the following fields: Management Company, Address, Address 2, City, State (dropdown), and Zip. There are also sections for References (Phone, Address) and Demographic Information (Monthly Payment). Navigation buttons for 'Previous Section' and 'Next Section' are at the bottom.

This screenshot shows the 'Landlord Information' form for a user who rents their property. The 'Rent' radio button is selected. The form includes the following fields: Apartment Manager, Apartment Name, Apartment Unit Number, Address, Address 2, City, State (dropdown), and Zip. There are also sections for References (Address) and Demographic Information (Monthly Payment). Navigation buttons for 'Previous Section' and 'Next Section' are at the bottom.

Employment Information

This screenshot shows the 'Employment Information' form. The 'CURRENT EMPLOYER' section is active. Fields include: Employer Name, Date Employed, Address, Address 2, City, State (dropdown), and Zip. The 'SUPERVISOR NAME' field is also present. The 'REFERENCES' section includes fields for Title, Hours Pay, Pay Days, and Payment Frequency. The 'DEMOGRAPHIC INFORMATION' section includes fields for Position, Shift, and Full/Part Time. Navigation buttons for 'Previous Section' and 'Next Section' are at the bottom.

The **Employment** page includes the co-applicant employment information upon that selection being chosen. Fields will turn red upon attempting to submit empty required fields.

Auto Information

The **Auto** page will also turn red upon attempting to submit empty required fields. This page will always have two vehicle sections, regardless of co-sign selection. Requirements apply equally to both sections. For example, a required year on *Vehicle #1* is also required on *Vehicle #2*.

References

The **References** page also has fields that will turn red upon attempting to submit empty required fields.

Originally, three references are shown with the option to add up to three more (six total). Tap the blue **ADD ANOTHER REFERENCE** button at the bottom of the list to add another reference.



Doing so will add requirements to that section as well. Tap the blue **X** on each added section to remove it.



There will always be a minimum of three references available. Whether all of them are required or not is determined by settings.

Demographic Information

The **Demographic** page also has fields that will turn red upon attempting to submit empty required fields. Co-signer does not affect this page.

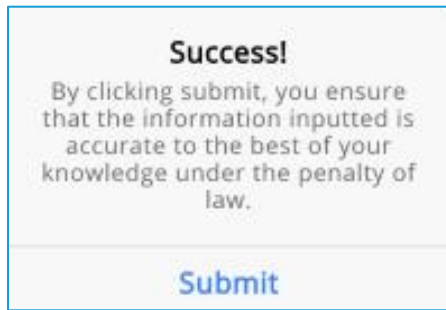
Release Page

This is the final piece of the Rental Application, requiring (by default) a signature as well as acceptance of information.

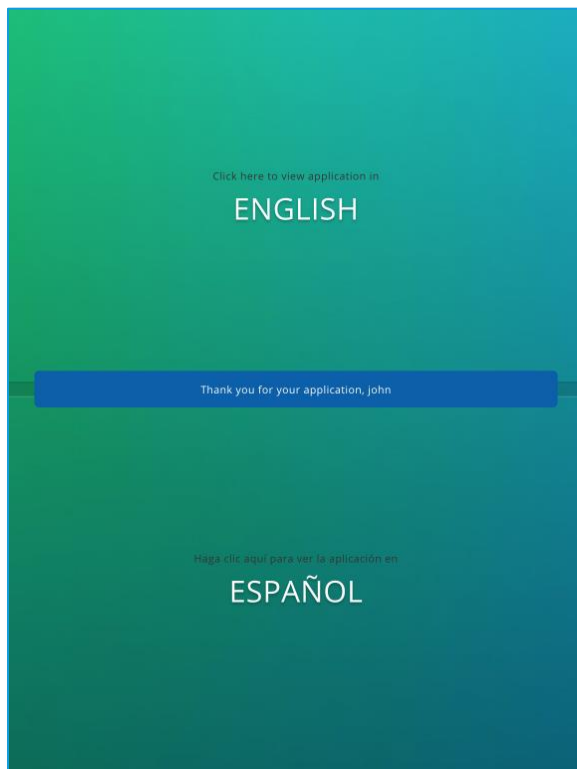
A: Legal information is generated by default but can be adjusted to fit your needs. Send High Touch your legal documentation, and it will be uploaded and the application will automatically pull the new version. Changes to the legal information are billed at our normal hourly development rate.

B: The signature area can be signed with your finger. If the customer messes up, tap the **X** in the top right corner to clear the field and start over. If a co-signer has been selected, two signatures will be required: one for the main customer and another for the co-signer.

Upon successful submission, an alert pops up:



When the customer taps **Submit**, they are directed back to the language selection screen, and the application is ready for the next customer. The information submitted is sent to cynergi|suite for customer creation.



Adding a Customer to Cynergi|suite

After the customer has finished submitting the form via the tablet, the customer information is immediately available in the web order screen.

Navigate to Web Orders

In the top right corner of your screen, click on the **Web Orders** icon . Beside this icon is a number indicating the number of incoming customers you have.

Notice that on new customers, there are no account numbers (see the red boxes below). On this screen, you can bring the customer into the system and save their data in the customer maintenance screen. This will generate an account number for them or tie them to an existing customer if they already have an account.

WEB ORDERS							PENDING	COMPLETED	CANCELLED
Order	Store	Account	Last Name	First Name	Phone	Entry Date			
383	40	130186480	LAST6	FIRST		06/20/2017 13:43 CDT			
384	1	130186486	JONES	FIRSTLY	(575) 657-6768	06/20/2017 13:57 CDT			
385	23			TESTY		06/28/2017 13:28 CDT			
386	1		TEST	BILL		06/28/2017 14:17 CDT			
387	1	130186487	HIGHLANDERS	JOEL		06/28/2017 14:54 CDT			
388	1	130186488	MCTESTOR	JOE	(316) 555-6670	06/28/2017 15:36 CDT			
389	1					06/28/2017 15:47 CDT			
390	1	130186489	BARNES	JACK	(123) 456-7890	06/28/2017 15:58 CDT			

Showing 31 to 38 of 38 entries First Previous 1 2 3 4

Locate the customer that submitted the application. Two of the easiest ways to find your customer are to search at the top or filter by date by clicking on **Entry Date**, both outlined in red below.

WEB ORDERS							PENDING	COMPLETED	CANCELLED
Order	Store	Account	Last Name	First Name	Phone	Entry Date			

Once your customer is found, click his or her row to load the customer data.

390	1	130186489	BARNES	JACK	(123) 456-7890	06/28/2017 15:58 CDT			
-----	---	-----------	--------	------	----------------	----------------------	--	--	--

In the box that appears, a brief overview of the customer is shown. The notes at the bottom also show that this customer was created from a mobile application.

Order #390 Notes _ X

Account: 130186489
 Last Name: Barnes
 First Name: Jack
 Phone: (123) 456-7890
 Email: test@test.com
 Address: 123 testing
 Address 2: N/A
 City: Jacksonville
 State: AZ
 Zip: 63729

NOTES:
Submitted from mobile app

On the **PRIMARY CUSTOMER** tab (customer maintenance), the data automatically populates for new customers. When finished, click the **SAVE** button in the bottom left corner of the **PRIMARY CUSTOMER** screen. After clicking the **SAVE** button, the remaining sections of information will transfer over from the mobile application and populate the appropriate tabs in the customer maintenance screen.

Please Note: You must click the **SAVE** button on the **PRIMARY CUSTOMER** tab in order to populate the rest of the customer maintenance tabs.

The screenshot displays the 'PRIMARY CUSTOMER' tab in the Cynergi Suite mobile application. The interface includes a top navigation bar with icons for home, back, and power, and a status bar showing 'CLIENT ID: CST', 'EMPLOYEE: 0000998', 'LOCATION: HOME OFFICE -9000', and the date/time '4/22/2019 10:47:46'. Below the navigation bar, there are tabs for 'PRIMARY CUSTOMER', 'ALTERNATE ADDRESS', 'REFERENCES', 'EMPLOYER', 'LANDLORD', '2ND CUSTOMER', 'CAR INFO', 'MARKETING INFO', and 'PAP SETUP'. The main form area contains several sections of input fields:

- Personal Information:** Last Name (GREY), First Name (AMBER), Account# (3002196), Company Name, Address (1109 GEORGIA), Address Line 2, Contact Name, Zip, City/State, and Map Code.
- Phone Information:** Primary Phone# ((316)222-5555), Work Phone#/Ext. ((312)555-6666), Secondary Phone#/Cell# ((316)888-9999), Alternate Phone#, and Fax#.
- Identification:** Birth Date, SSN, and Drivers Lic#.
- Account Settings:** Taxable (Yes), Tax#, Charge Customer (No), Credit Limit (0), Status Flag, Bill to, Override Tax Group, Retail Disc. Level% (Regular), and Default Payment Form (Select Option).
- Operational Settings:** Default Salesperson (Select Option), Customer Type (Select Option), Acct. Mgr. (1-ROUTE 1), and RTO Receivable Amt.
- Communication:** Email Address (AGREY@SNAILMAIL.COM), Allow Online Pmt (Yes), Allow Recurring Pmt (Yes), Default PO#, Best Time to Call (09:00), Default Store# (1-KANSAS CITY), and Retail Conversion Cust? (No).

A 'Notes' window titled 'Order #70 Notes' is open on the right side of the screen, containing the following text:

```

Account: 003002196
Last Name: Grey
First Name: Amber
Phone: (316) 222-5555
Email: agrey@snailmail.com
Address: 1109 GEORGIA
Address 2: N/A
City: Wichita
State: KS
Zip: 67217

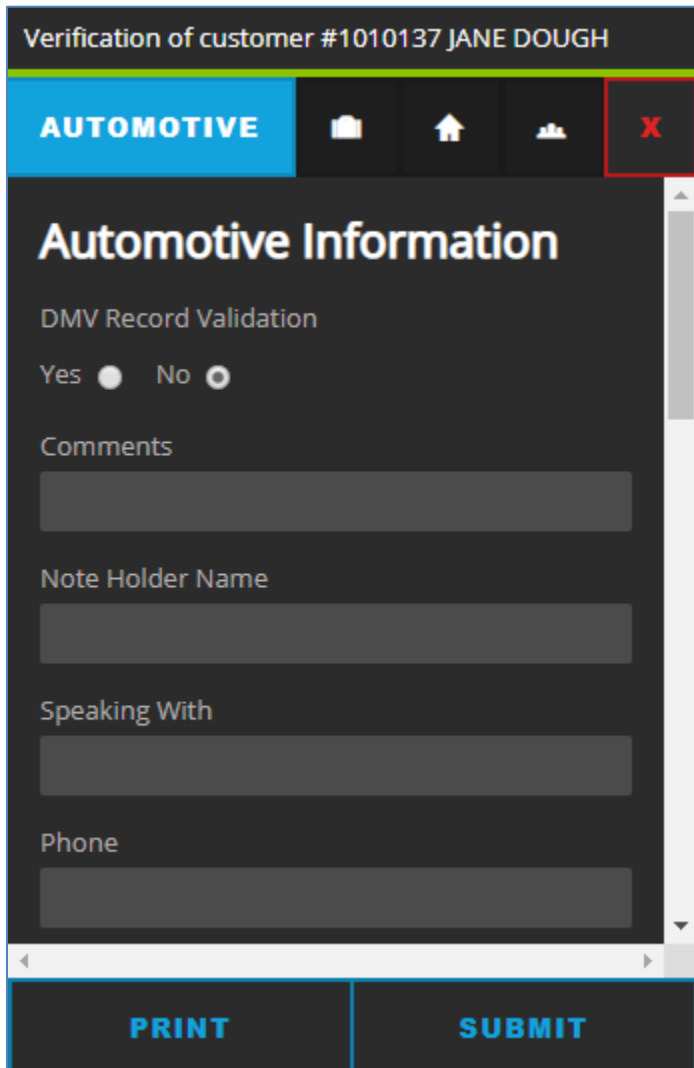
NOTES:
Submitted from mobile app
    
```

At the bottom of the screen, there are buttons for 'SAVE' (highlighted in a red box), 'VERIFY', 'BACK', and 'MAIN MENU'.

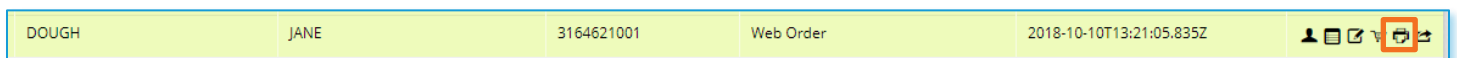
When tied to **Customer Verification**, this mobile application completely automates and eliminates paper rental applications. The picture below depicts the **Customer Verification** app. Please reference the **Customer Verification** section of **Chapter 2: Customers** for more information.

You can print the customer application from Customer Verification or within the web order screen.

From Customer Verification, click the **PRINT** button at the bottom of the page to print the application. The customer's signature can be seen on the printed application.



From web order, click on the **Printer** icon to print the document.



Print

Total: **3 pages**

Destination Save as PDF

Pages

All

e.g. 1-5, 8, 11-13

Layout Portrait ▼

[+ More settings](#)

[Print using system dialog... \(⌘P\)](#)

[Open PDF in Preview](#)

8/10/2018 cynergisuite WEBORDER

PERSONAL INFORMATION

NAME: JOHN DOE		DATE OF BIRTH: 01/01/1965	DRIVER LICENSE: KS123456	SOCIAL SECURITY NUMBER:
ADDRESS: 110 S MAIN		ADDRESS CONT.: WICHITA	STATE: KS	ZIP CODE: 67216
PHONE: 555 555 5555	PHONE: 444 444 4444	WORK EXTENSION:	CELL: 333 333 3333	ALTERNATE: <input type="checkbox"/> FAX: <input type="checkbox"/>
CUSTOMER ACCOUNT #: 000102257	CREATED AT: 07/09/2018	EMAIL: JOHN.D@MAILINATOR.COM	STATUS FLAG:	STORM NUMBER:
TAX NUMBER:				DOB(S): <input checked="" type="checkbox"/> Y

LANDLORD INFORMATION

APARTMENT MANAGER: TOMMY SMITH	APARTMENT NAME: SUNRISE	LANDLORD NAME:	MONTHLY PAYMENT: \$900	MORTGAGE COMPANY:	PHONE: 3169087654
ADDRESS: 333 E LULU ST	ADDRESS CONT.:	CITY: WICHITA	STATE: KS	ZIP:	67216

EMPLOYMENT INFORMATION

COMPANY NAME: SPIRIT	ADDRESS: 1200 S OLIVER	ADDRESS CONT.:	CITY: WICHITA	STATE: KS	ZIP: 67215
EMPLOYMENT DATE: 01/01/2077	FULLTIME: <input checked="" type="radio"/> F	WICHI: \$700	INCOME:	DATE PAID: 26	
FREQUENCY: BI-WEEKLY	POSITION: EXPEDITOR	SHIFT: 1	SUPERVISOR: BOBBY STRANGE		

AUTO INFORMATION

AUTOMOBILE 1

LEASER HOLDER: JOHN DOE	LEASER HOLDER PHONE: 3124556766	PURCHASE DATE: 05/31/2006	PAYMENT AMOUNT: \$400	PAYMENT FREQUENCY: M	SEQUENCE NUMBER:
CAR COLOR: WHITE	MAKE: TOYOTA	MODEL: RAV 4	YEAR: 2005	VIN NUMBER: 1234HT09GJ346700	LICENSE PLATE NUMBER: RTS 123

AUTOMOBILE 2

LEASER HOLDER:	LEASER HOLDER PHONE:	PURCHASE DATE:	PAYMENT AMOUNT:	PAYMENT FREQUENCY:	SEQUENCE NUMBER:
CAR COLOR:	MAKE:	MODEL:	YEAR:	VIN NUMBER:	LICENSE PLATE NUMBER:

MARKETING INFORMATION

CELL PHONE COMPANY: VERIZON	GRADE: F	MONTHLY STATUS: S	MONTHLY BILL: 76	ENROLLMENT: R	OWNMENT DATE: 20140101	BARCODE: N
REFERRAL NAME: BUTCH CASSIDY	REFERRED BEFORE: N	MARKET CALL: OPT OUT	MARKET INFORMATION: OPT IN	PAYMENT REMINDER: OPT IN	DATE VERIFIED: 07/09/2018	

http://cat140.cynergisuite.com/?cyn_session_id=a54b71e-f174-407d-b912-810c1981861b
1/3

8/10/2018

cynergisuite WEBORDER

PERSONAL INFORMATION

NAME: JOHN DOE		DATE OF BIRTH: 01/01/1965		DRIVERS LICENSE: KS123456		SOCIAL SECURITY NUMBER:			
ADDRESS: 110 S MAIN		ADDRESS CONT.:	CITY: WICHITA		STATE: KS	ZIP CODE: 67216	COUNTRY: US		
HOME: 555 555 5555		WORK: 444 444 4444		WORK EXTENSION:	CELL: 333 333 3333		ALTERNATE:	FAX:	
CUSTOMER ACCOUNT #: 000102257		CREATED AT: 07/09/2018		EMAIL: JOHND@MAILINATOR.COM		STATUS FLAG:	STORE NUMBER:	TAX NUMBER:	TAXABLE: Y

LANDLORD INFORMATION

APARTMENT MANAGER: TOMMY SMITH		APARTMENT NAME: SUNRISE		LANDLORD NAME:		MONTHLY PAYMENT: \$900		MORTGAGE COMPANY:	PHONE: 3169087654
ADDRESS: 333 E LULU ST		ADDRESS CONT.:	CITY: WICHITA		STATE: KS	ZIP: 67216			

EMPLOYMENT INFORMATION

COMPANY NAME: SPIRIT		ADDRESS: 1200 S OLIVER		ADDRESS CONT.:	CITY: WICHITA		STATE: KS	ZIP: 67215	
EMPLOYMENT DATE: 01/01/2077			FULLPART: F		INCOME: \$700		DAYS PAID: 26		
FREQUENCY: BI-WEEKLY		POSITION: EXPEDITOR			SHIFT: 1		SUPERVISOR: BOBBY STRANGE		

AUTO INFORMATION

AUTOMOBILE 1

LIEN HOLDER: JOHN DOE		LIEN HOLDER PHONE: 3124556766		PURCHASE DATE: 05/31/2006		PAYMENT AMOUNT: \$400		PAYMENT FREQUENCY: M		SEQUENCE NUMBER:
CAR COLOR: WHITE	MAKE: TOYOTA	MODEL: RAV 4	YEAR: 2005		VIN NUMBER: 1234HT09Gj346700			LICENSE PLATE NUMBER: RTS 123		

AUTOMOBILE 2

LIEN HOLDER:		LIEN HOLDER PHONE:		PURCHASE DATE:		PAYMENT AMOUNT:		PAYMENT FREQUENCY:		SEQUENCE NUMBER:
CAR COLOR:	MAKE:	MODEL:		YEAR:		VIN NUMBER:		LICENSE PLATE NUMBER:		

MARKETING INFORMATION

CELL PHONE COMPANY: VERIZON		GENDER: F	MARITAL STATUS: S	MONTHLY BILLS: 76	OWN/RENT: R	OWN/RENT DATE: 20140101		BANKRUPTCY: N		
REFERRAL NAME: BUTCH CASSIDY		RENTED BEFORE: N	MARKET CALLS: OPT OUT		MARKET INFORMATION: OPT IN	PAYMENT REMINDER: OPT IN		DATE VERIFIED: 07/09/2018		

8/10/2018

cynergisuite WEBORDER

CO-SIGN INFORMATION

NAME:		DATE OF BIRTH:		DRIVERS LICENSE:		SOCIAL SECURITY NUMBER:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:	
MAILING ADDRESS:		MAILING ADDRESS CONT.:		CITY:		STATE:	
PHONE:		WORK PHONE:		EXT.:		RELATIONSHIP:	

CO-SIGN EMPLOYMENT INFORMATION

COMPANY NAME:		ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	
EMPLOYMENT DATE:		FULL/PART TIME:		INCOME:		PAY DAYS:		POSITION:			
SHIFT:		SUPERVISOR:		PAY FREQUENCY:		COMMENTS:		MAP CODE:			

REFERENCES

REFERENCE NAME: DANA SMITH		EMAIL: DANAS@MAILINATOR.COM		PHONE: 5624336788		RELATIONSHIP: FRIEND		MARKET OPT OUT:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	
		5656 WEST GEORGIA		BELAIRE		GA		88877 -	
REFERENCE NAME: MARK HIGBY		EMAIL: MARKH@MAILINATOR.COM		PHONE: 4628889900		RELATIONSHIP: FRIEND		MARKET OPT OUT:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	
		123 E A STREET		OAKFIELD		AL		88990 -	
REFERENCE NAME:		EMAIL:		PHONE:		RELATIONSHIP:		MARKET OPT OUT:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	
REFERENCE NAME:		EMAIL:		PHONE:		RELATIONSHIP:		MARKET OPT OUT:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	
REFERENCE NAME:		EMAIL:		PHONE:		RELATIONSHIP:		MARKET OPT OUT:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	
REFERENCE NAME:		EMAIL:		PHONE:		RELATIONSHIP:		MARKET OPT OUT:	
ADDRESS:		ADDRESS CONT.:		CITY:		STATE:		ZIP:	

SIGNATURES

NAME:



8/10/2018

cynergisuite WEBORDER

OFFICE VERIFICATION FOR JOHN DOE

REFERENCES

	1	2	3	4	5	6
VERIFY RELATIONSHIP:	NO	NO	NO	NO	NO	NO
VERIFY ADDRESS/EMPLOYMENT:	NO	NO	NO	NO	NO	NO
HAS HOME PHONE:	NO	NO	NO	NO	NO	NO
VERIFY TELEPHONE NUMBER:	NO	NO	NO	NO	NO	NO
IS MR./MS. SUZY ALFRED RELIABLE?	NO	NO	NO	NO	NO	NO
MAY WE LEAVE A MESSAGE?	NO	NO	NO	NO	NO	NO
HOW LONG HAVE YOU KNOWN THE CUSTOMER?	52 MONTHS	0 MONTHS	0 MONTHS	0 MONTHS	0 MONTHS	0 MONTHS
HOW OFTEN DO YOU SEE THE CUSTOMER?						
REFERENCE RATING GFP:	G					

LANDLORD

WITH WHOM ARE WE SPEAKING? **SALLY MERKLE**
 VERIFY ADDRESS: **YES**
 HOW LONG AT CURRENT ADDRESS: **3**
 VERIFY PHONE: **YES**
 ALTERNATE PHONE: **N/A**
 TYPE OF LEASE: **MONTHLY**
 HOW IS RENT PAID? **MONTHLY**
 RENT AMOUNT: **\$900**
 RELIABLE: **YES**
 MAY WE LEAVE MESSAGES? **YES**

EMPLOYMENT

WITH WHOM ARE WE SPEAKING? **DONOVAN SMITH**
 POSITION/TITLE: **OWNER**
 DATE OF HIRE: **01/14/2002**
 MAY WE LEAVE A MESSAGE AT WORK? **YES**
 WHAT DEPT/SHIFT: **1ST - SALES**
 RELIABLE: **YES**

AUTO

DMV RECORD VERIFICATION: **YES**
 COMMENTS: **CONFIRMED VEHICLE RECORD**
 NOTE HOLDER NAME: **BANK OF AMERICA**
 SPEAKING WITH: **DONOVAN**
 PHONE: **431-556-7890**
 HOW RELATED: **OWNER OF CAR LOT**
 VERIFIED SAME ADDRESS: **YES**
 IF DIFFERENT ADDRESS: **110 S MAIN**
 VERIFIED SAME PHONE: **YES**

IF DIFFERENT PHONE: **122-333-4545**
 VERIFIED SAME EMPLOYER: **YES**
 IF DIFFERENT EMPLOYER: **NOT ANYMORE**
 PURCHASE DATE: **01/07/2015**
 PAYMENT AMOUNT: **\$550**
 FREQUENCY OF PAYMENT: **MONTHLY**
 LAST PAYMENT: **06/01/2018**
 NEXT PAYMENT DUE: **01/01/2018**
 PREVIOUS LOAN: **YES**
 ANY ACTION PENDING (REPO, ETC): **NONE PENDING**

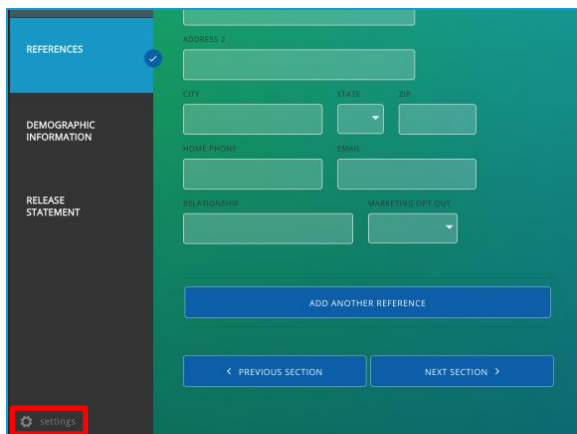
COMMENTS

EXCELLENT CUSTOMER AND PERSON.

VERIFIED BY: CHRISTOPHER C HALE #1004

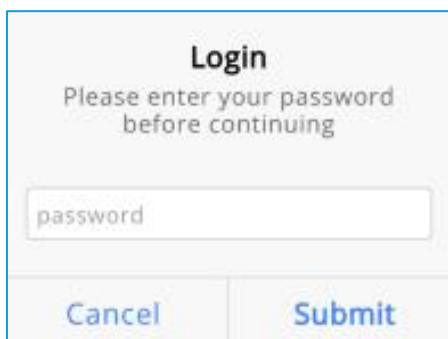
VERIFIED DATE: 2018-07-09

Changing Administrator Information

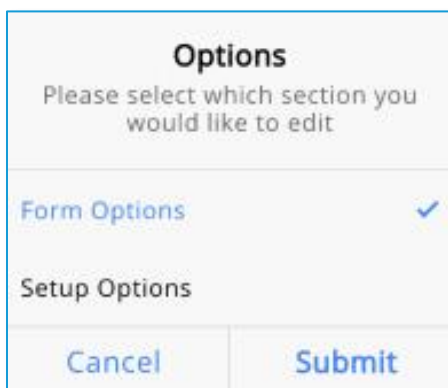


To change any settings that have been committed during setup, tap the **settings** button in the bottom left corner of any screen (see the red box above).

Enter the setup code that was initially provided to you when you set up your device, then tap **Submit**.



If the code is correct, you will have two options:



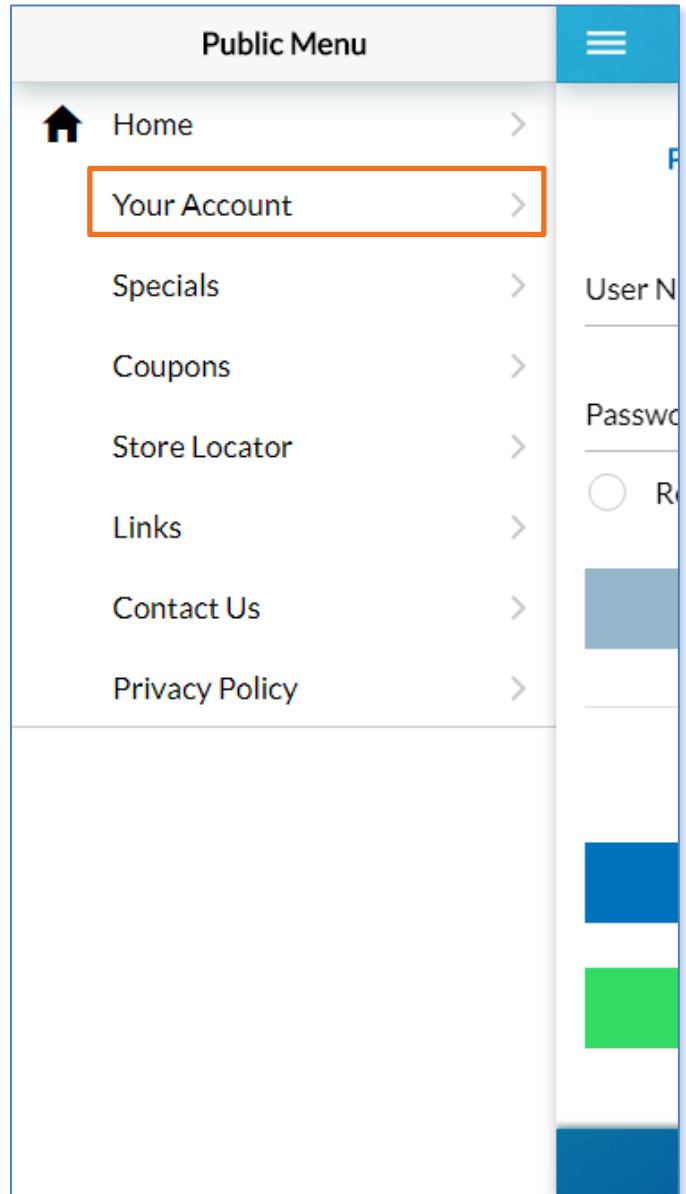
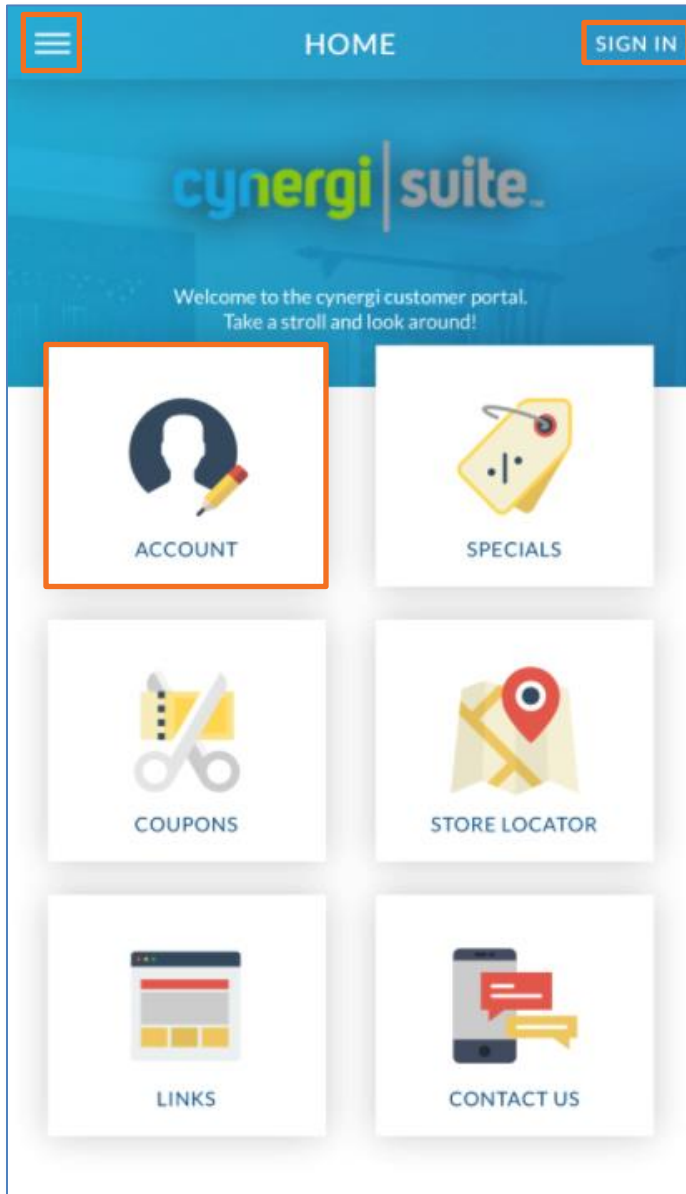
Tap **Form Options** if you wish to change the fields that are required for the customer. This will take you back to the **Form Options** page. Go to **Choosing Your Settings** (toward the beginning of this section) for details on changing these fields.

Tap **Setup Options** to change items such as the store where information is pushed and the dataset associated with the device. Go to **Setting up Your Device** (at the beginning of this section) for details on changing options.

Customer Portal App

Home Page

After opening the app, the customer may register or log in to the account by pressing the **Account** icon or by pressing **SIGN IN**, located in the top right corner. At any time, the customer can select the **Menu** icon in the top left corner for more options. This icon will open up a sidebar which displays the additional options. The customer can also sign in or register an account by pressing **Your Account** on the menu sidebar.



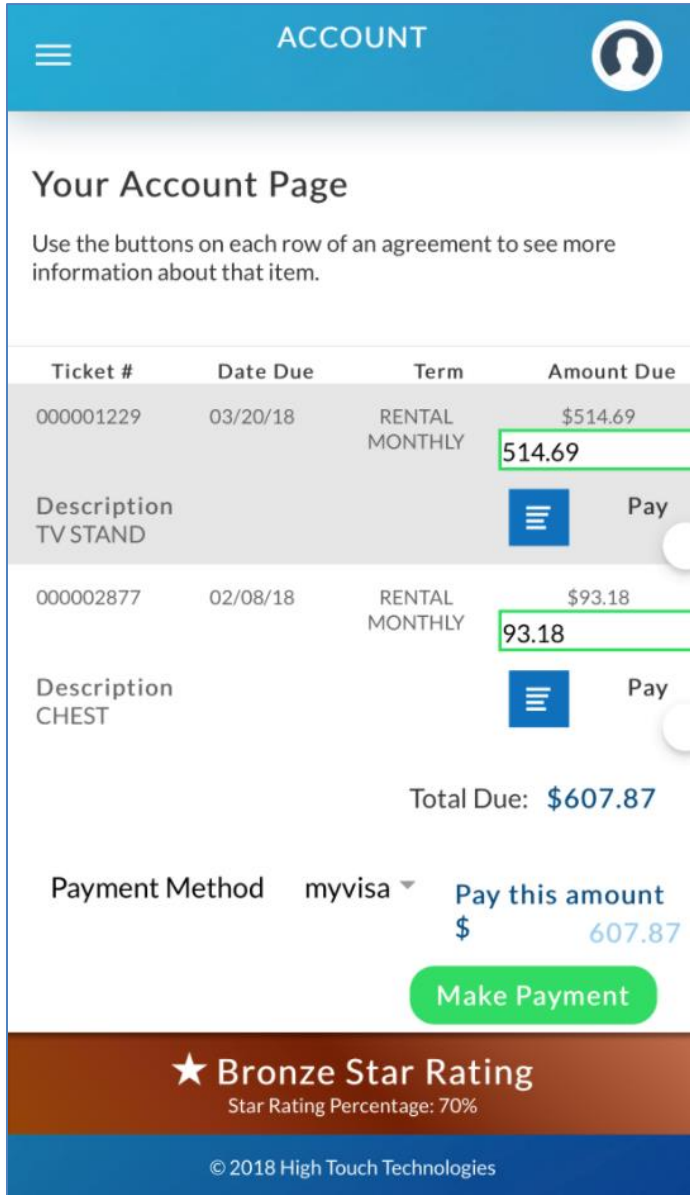
Sign In

The customer must have a valid cynergi|suite account to register and log in. Press the **REGISTER** button to create an account. The cynergi|suite account number is needed to register.

Account

Your Account Page

After logging in, the customer will be taken to *Your Account Page*. This shows the customer’s rental agreement information and what is currently due. If the client (store) has OLP or PAP, then the customer may make a payment through the app. The customer must have a valid tokenized payment method created to make a payment. The Star Rating is based on the percentage of on-time payments.



Account History and Details



Press the **Info** icon (see left) to access the details for an agreement. This screen shows the rental agreement *Payment History and Details*. The customer can scroll horizontally through the *Payment History* table.

ACCOUNT HISTORY
CLOSE

Payment History for RA 000003609
(Store 000001)

DATE	RENT	FEES	OTH
05/03/2018	\$23.88	\$0.00	\$0.0
05/01/2018	\$23.88	\$0.00	\$0.0
05/01/2018	\$23.88	\$0.00	\$0.0
04/27/2018	\$23.88	\$0.00	\$0.0
04/27/2018	\$23.88	\$0.00	\$0.0

Only the last 5 entries are displayed

Agreement 000003609 Details

Progress: 69.89% completed

Store:	(000001)
Type:	RENTAL
Mode:	WEEKLY
Contract Date:	12/08/17

Update Profile

The customer may update his or her profile by pressing the profile picture in the top right corner of any screen. The only details that may be changed are email address, password, and profile picture. When finished, press the **UPDATE PROFILE** button to save. The customer will be returned to *Your Account Page*.

Account Number

000000

Username

johnd

You may only change your email address and password

Email

johnd@mailinator.com

Password

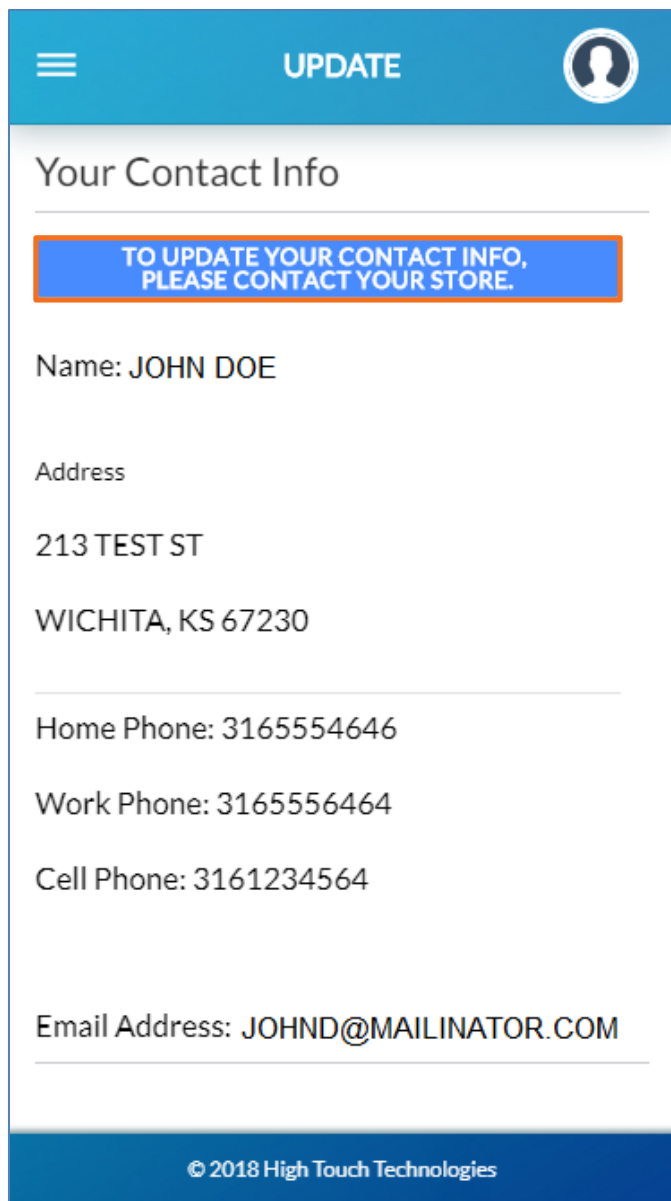
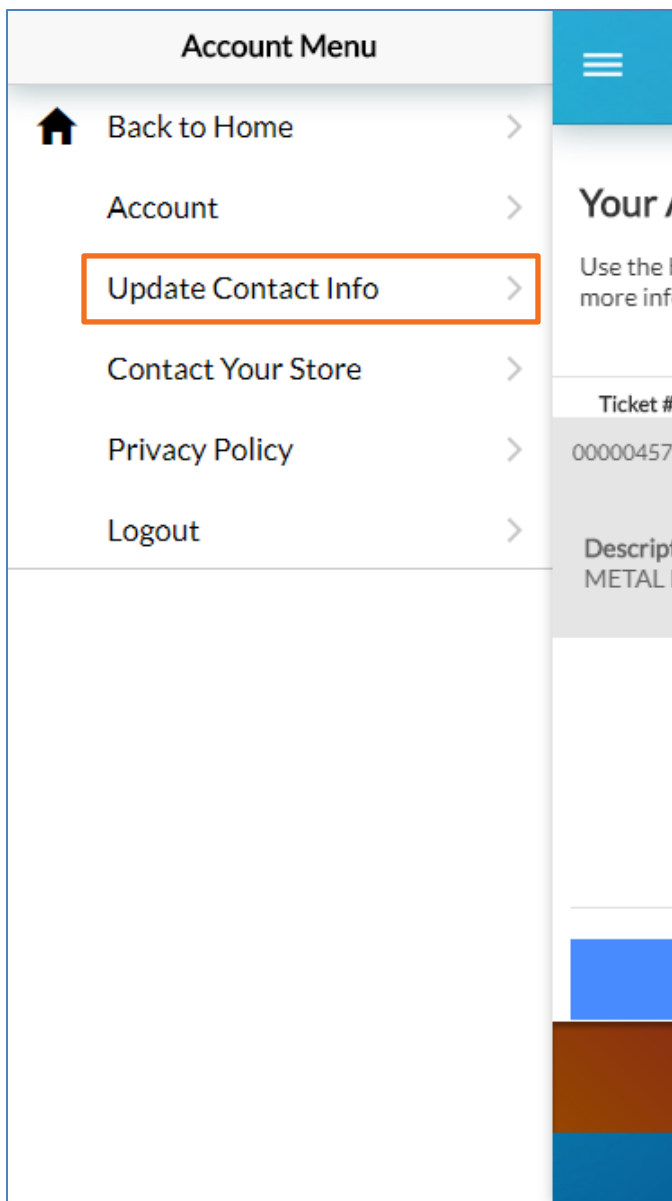
Leave Password field blank if not changing password. Password must be at least 8 characters long. Letters, numbers and special characters - no spaces.

UPDATE PROFILE

EDIT PROFILE IMAGE

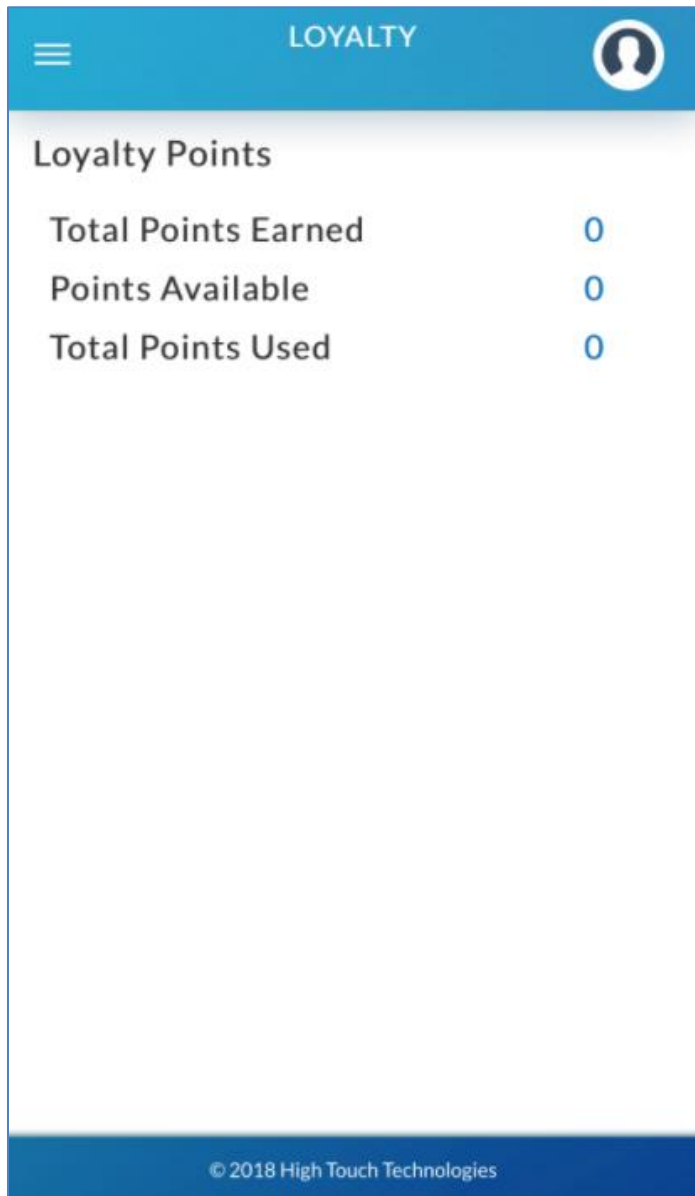
Update Contact Info

The customer can see more options by pressing the **Menu** icon in the top left corner of the screen. From here, he or she may view personal contact information by pressing **Update Contact Info**. This shows the contact information currently stored in the cynergi|suite system. This information can only be updated by contacting the store. To do this, press the blue button under **Your Contact Info**.



Loyalty Points

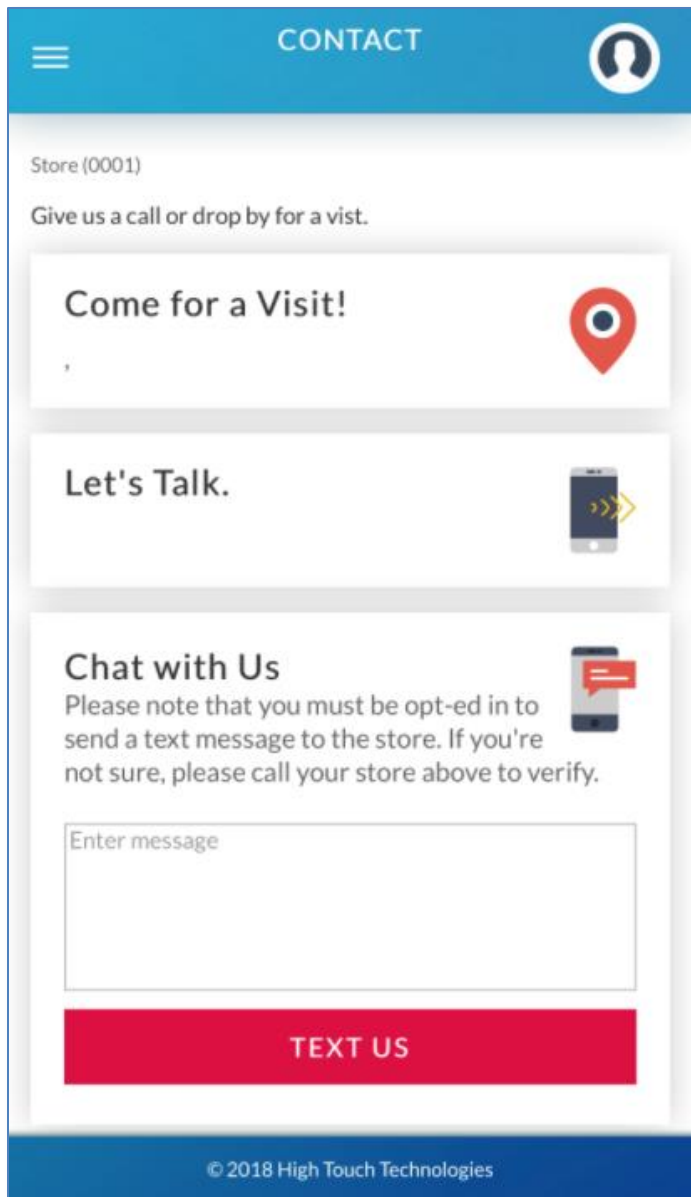
If the customer has earned loyalty points, he or she can access this information from the menu sidebar.



Contact Your Store

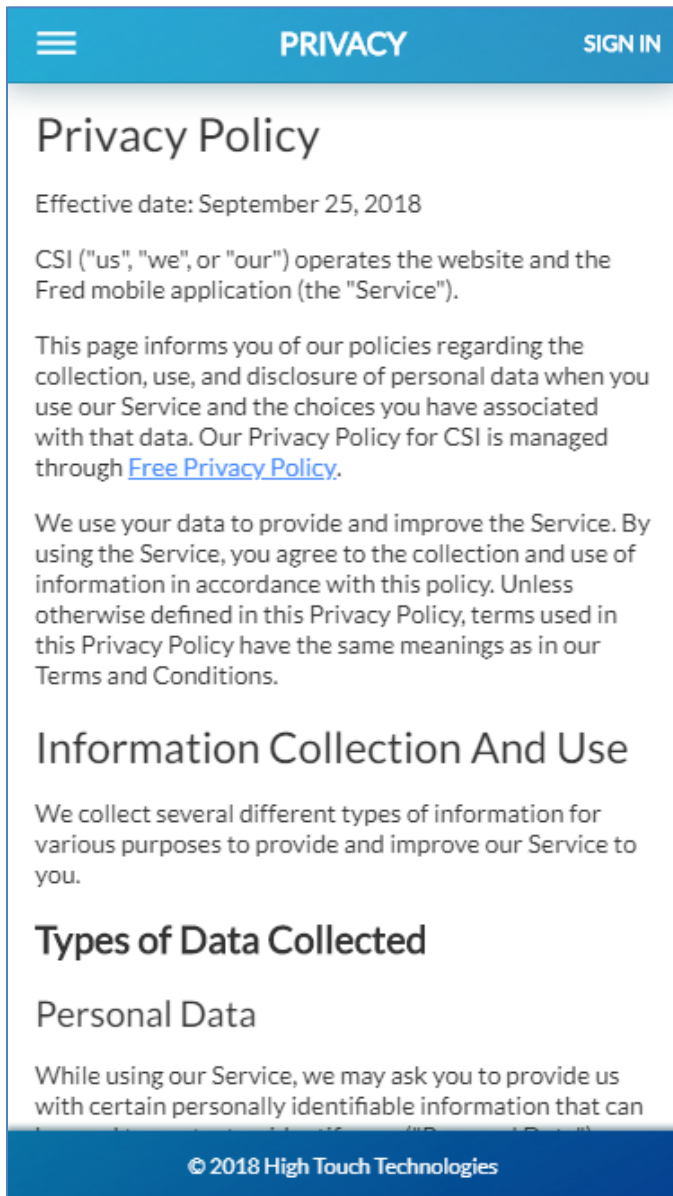
The customer may also contact the store from the menu sidebar.

- “Come for a Visit!” will take the customer to the default mapping app on the mobile device.
- “Let’s Talk” will call the store if on a cell phone.
- “Chat with Us” is only enabled if the client’s cynergi|suite system has SMS (text messaging) enabled.



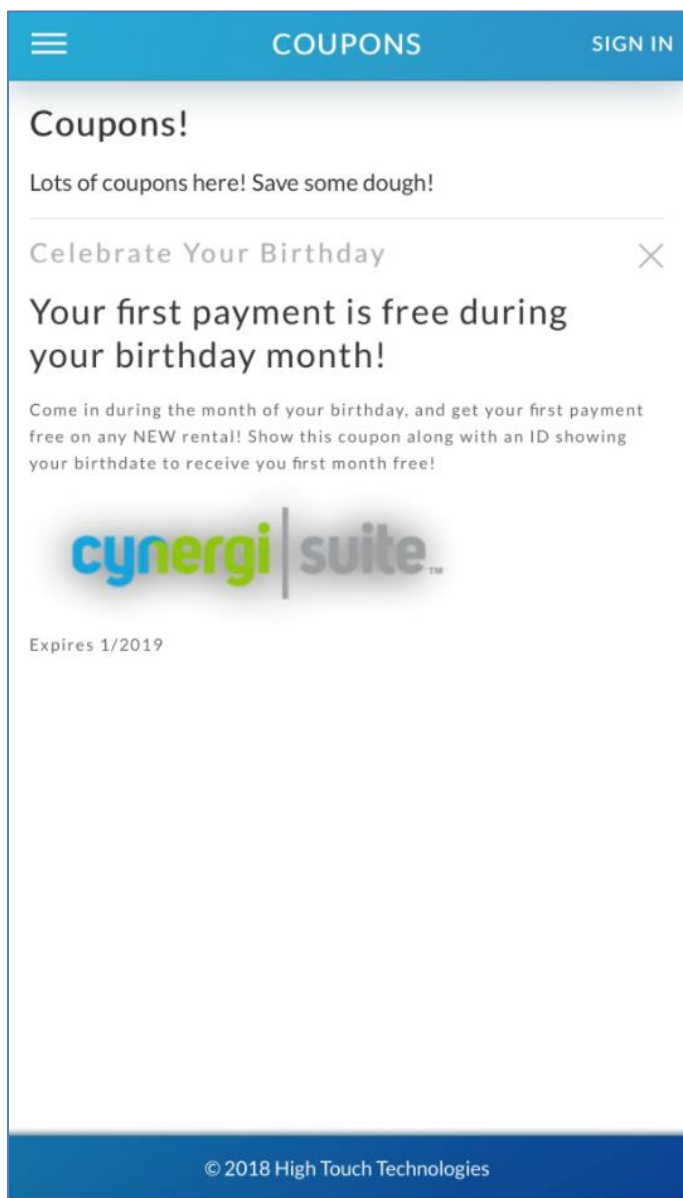
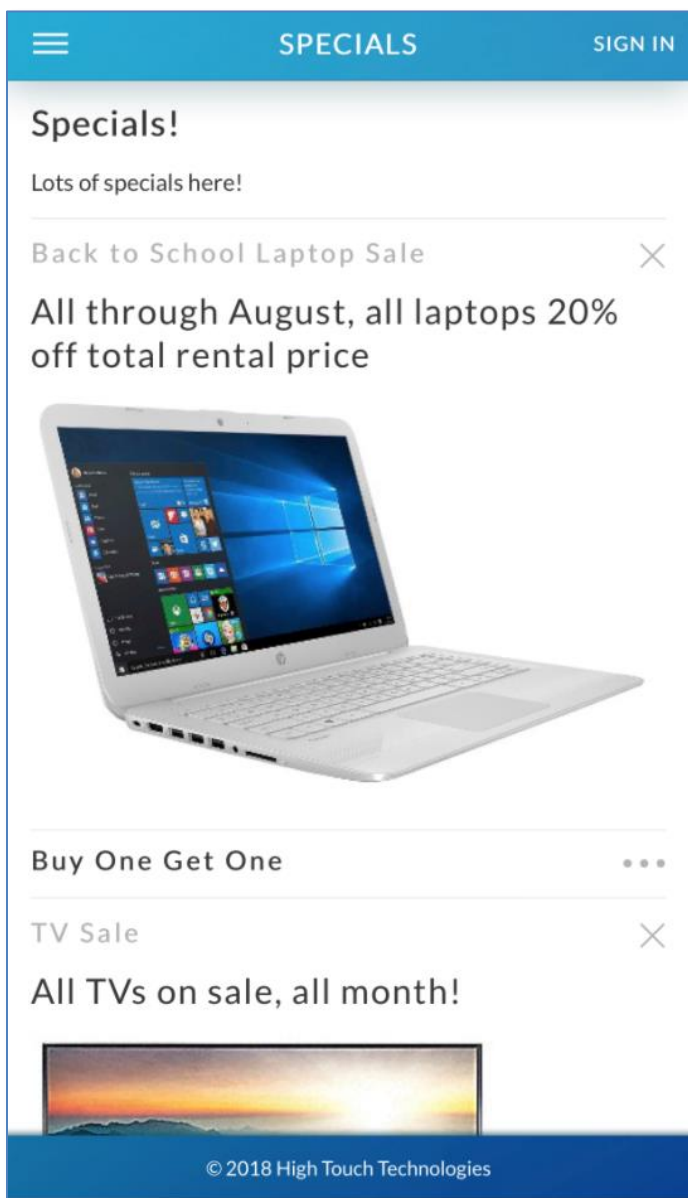
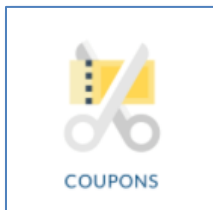
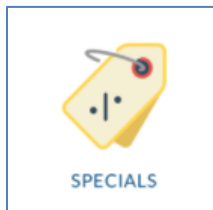
Privacy Policy

The *Privacy Policy* may also be viewed from the menu sidebar. Each client (store) is required to have its own Privacy Policy.



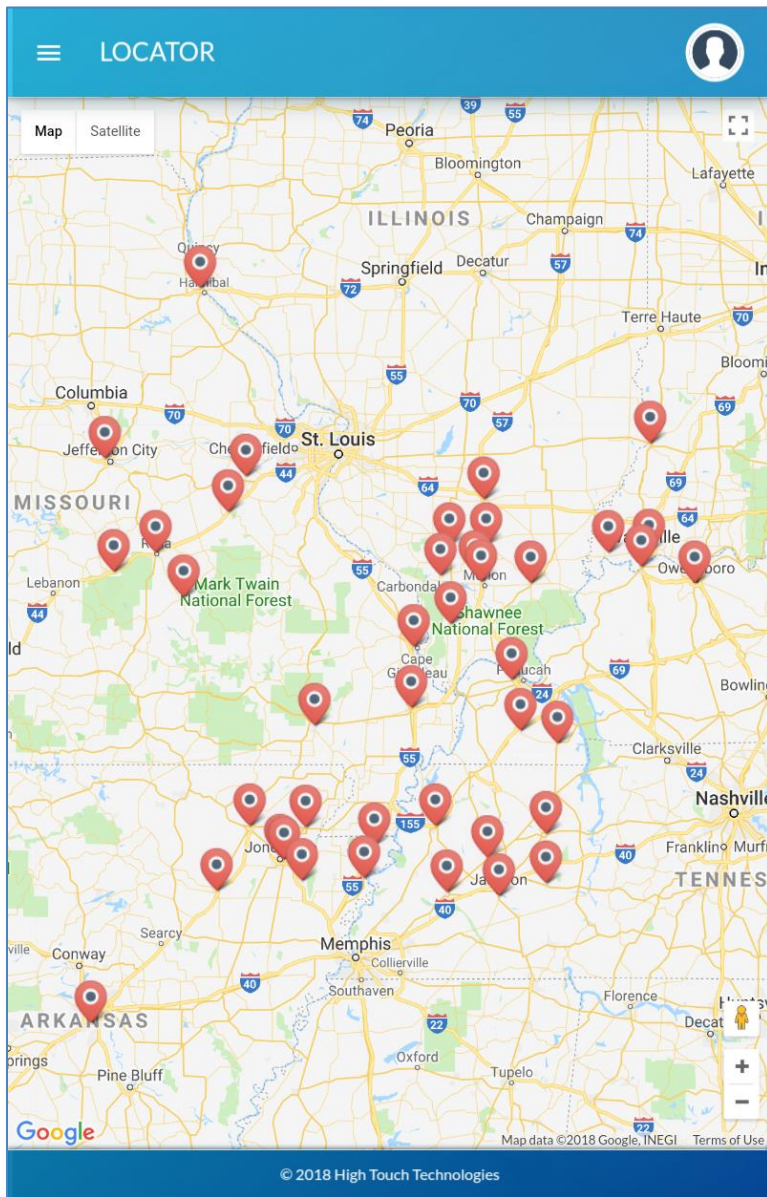
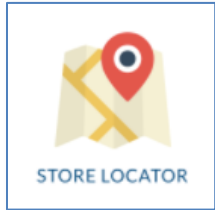
Specials and Coupons

From the *Home* page, press the **Specials** icon or the **Coupons** icon to view these offers. Once the client (store) enables the mobile app, specials and coupons may be created for the customer.



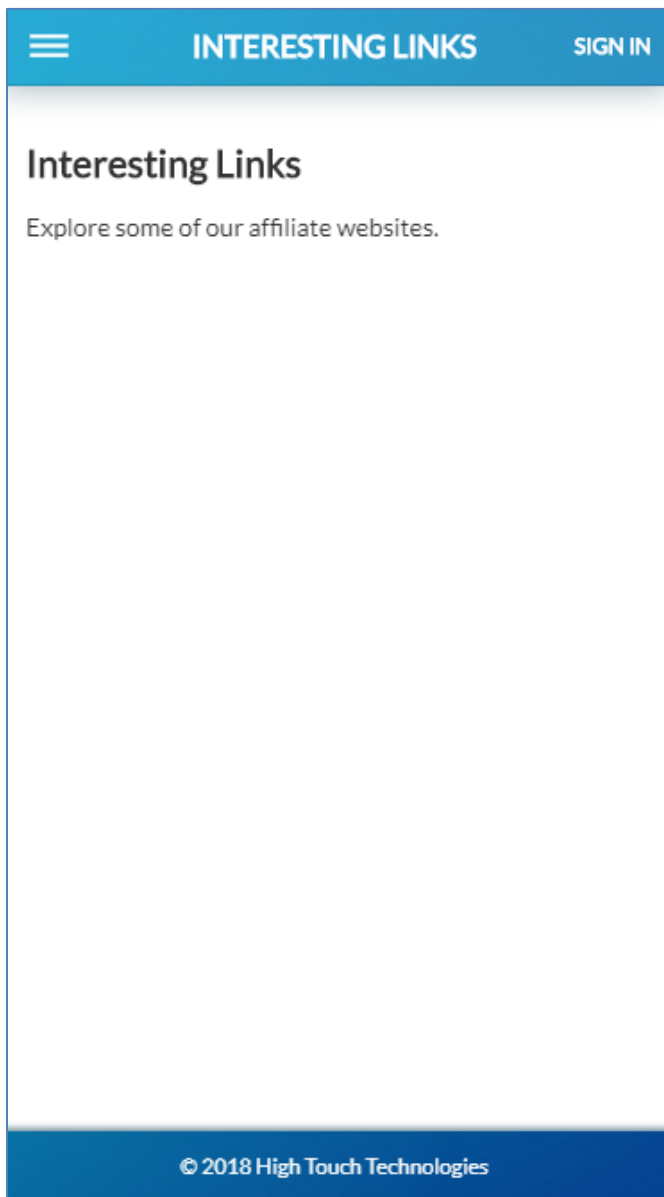
Store Locator

From the *Home* page, press the **Store Locator** icon to go to a map of all stores, generated with information from Google's business pages. This allows customers and potential customers to find and contact a store.



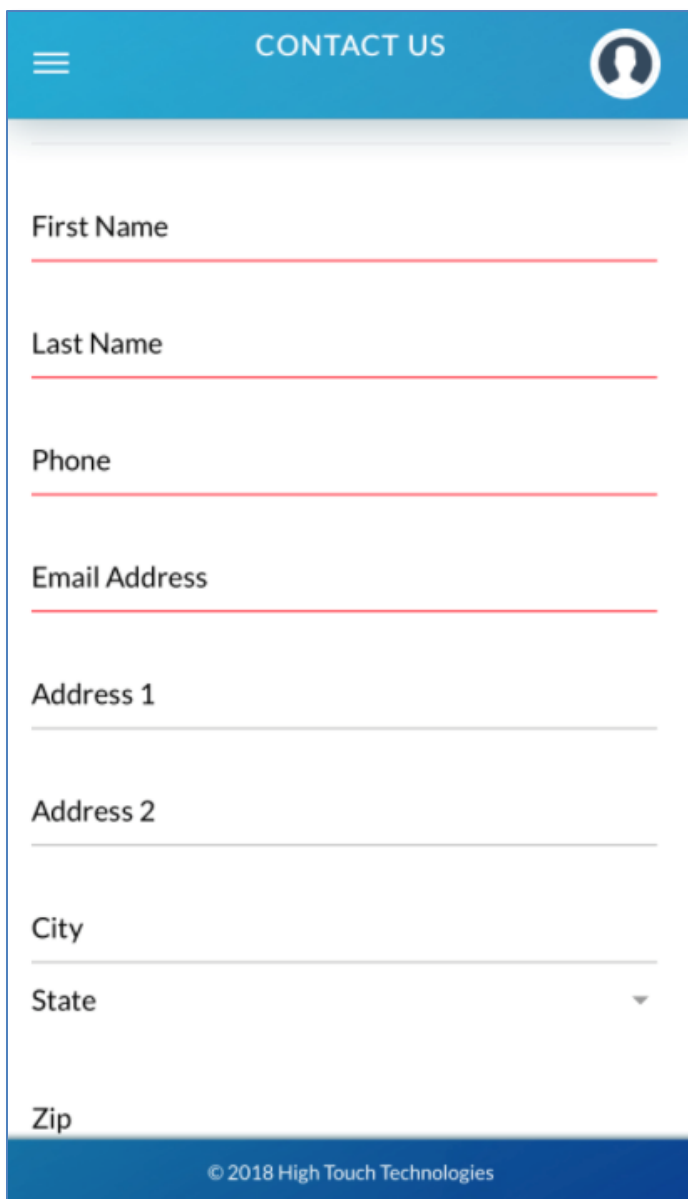
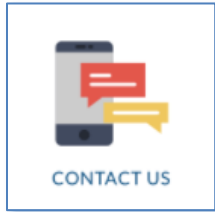
Links

From the *Home* page, press the **Links** icon to see a list of interesting links.



Contact Us

From the *Home* page, press the **Contact Us** icon to send a message. The fields underlined in red are required. If the client (store) has web order enabled, this contact information will go into the Pending web orders table. Otherwise, an email is created and emailed to the client's designated address.



The screenshot shows a mobile application interface for the "CONTACT US" screen. The header is blue with a white hamburger menu icon on the left, the text "CONTACT US" in the center, and a white profile icon on the right. The form contains several input fields, each with a red underline indicating it is required: "First Name", "Last Name", "Phone", "Email Address", "Address 1", "Address 2", "City", "State" (with a dropdown arrow), and "Zip". The footer is blue with the text "© 2018 High Touch Technologies" in white.

Collections App

With cynergi | suite, there is the ability to perform Collections in the field while using your smartphone or tablet. Here is a list of benefits to using the Mobile Collections App feature:

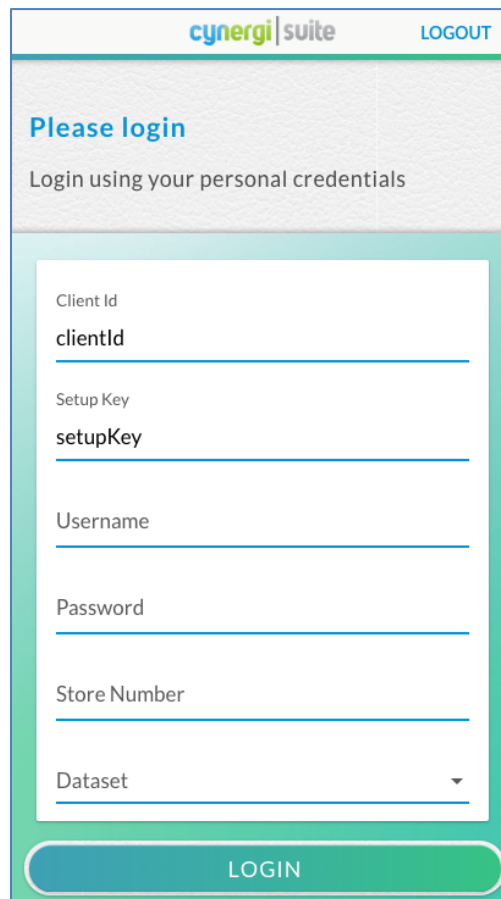
- Ability to access a collections list generated at the store or even create a Past Due Pick-up List on the fly in real-time
- Increase the opportunity of collecting **In Home Collection** fees with the feature to add them within the app
- Ability to search for a customer, create a commitment, and make customer edits while in the field
- Ability to view the Customer Scorecard, which displays the Customer Profile, Agreement Snapshot, and Payment History
- Ability to view real-time Past Due Summary

The High Touch cynergi | suite Mobile Collections App can be downloaded to any Apple or Android smartphone/tablet.

Please Note: You must contact your High Touch Account Manager to begin using this feature!

Logging into the App

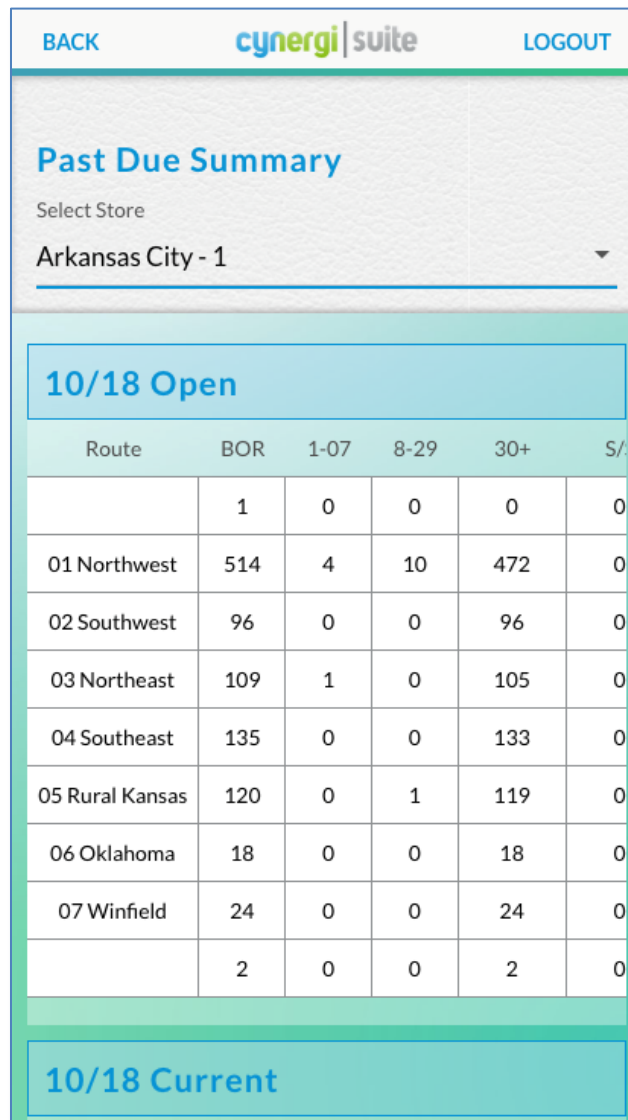
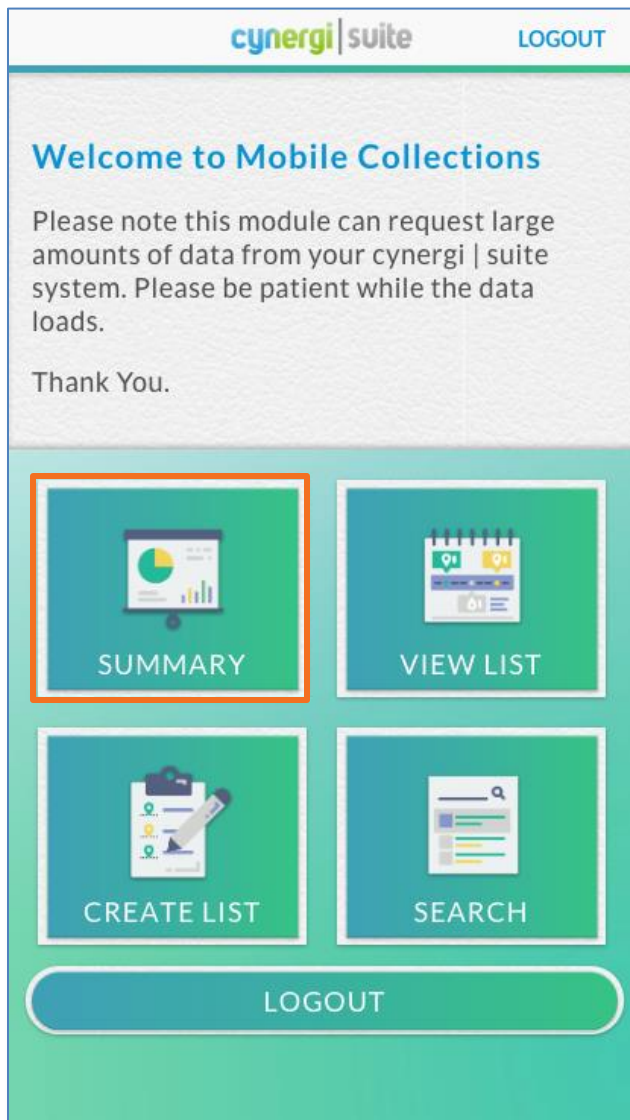
To log into the app, press the **LOGIN** button. First time users will be required to press the **REGISTER** button. Enter your **Client Id**, followed by your cynergi | suite **Username** and **Password**. If your company has a multi-dataset configuration, select the appropriate **Dataset**.



Please Note: An employee who has a termination date in their employee record will not be allowed to log in. It is imperative that if an employee is terminated, you terminate them within the cynergi | suite system immediately.

Past Due Summary

After logging into the app, there are four options available from the menu listing. To view the Past Due Summary, simply press the **SUMMARY** button and select a store. You will be taken to a real-time view of the *Past Due Summary* screen, similar to the summary screen from cynergi|suite (**VIEWPDRS**).



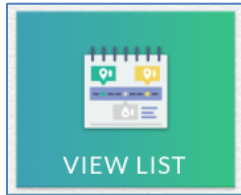
Much like the view in cynergi|suite, this will display each Account Manager Route that is setup. The BOR, Past-Due numbers, and percentages are all available, and the Open view and Current view are available for the day.

View Available Pick-up Lists Generated from Cynergi|suite

If a list has already been created from within the cynergi|suite system, you can press the **VIEW LIST** button.

Please Note: Reference **How to Generate a Pick-Up List Within Cynergi|suite** later in this section.

Each list that you have created can be viewed, along with the time it was created. It is recommended to name the lists according to how you currently perform your customer runs.



BACK
cynergi|suite
LOGOUT

View Available Pickup Lists

Billtest2018 created: 01/09/2018
updated: 01/09/2018

2 customers

Newtest created: 01/15/2018
updated: 01/15/2018

6 customers

caleb test created: 08/13/2018
updated: 08/13/2018

4 customers

dawny created: 08/23/2018
updated: 08/23/2018

3 customers

LOGOUT

dawny
3 customers

created: 08/23/2018
updated: 08/23/2018 ✕

JANE SMITH Acct #
100435

123 TEST AVE
110 S. MAIN WICHITA, KS 67202

RA #	Past Due	Due Data	Amt Due
4531	57 days	06/27/18	\$243.19
27611	206 days	01/29/18	\$1118.02

VIEW CUSTOMER DETAILS

JOHN DOE Acct #
571

110 S MAIN
WICHITA, KS 67202

RA #	Past Due	Due Data	Amt Due
2981	131 days	04/14/18	\$523.74
4530	57 days	06/27/18	\$365.86

VIEW CUSTOMER DETAILS

JOHN SMITH Acct #
100777

110 S MAIN
WICHITA, KS 67202

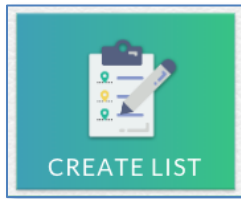
After selecting a Pick-up List, you will be taken into the list where you can see the customers and their Past Due Rental Agreements. From here you can view the customer details by pressing the **VIEW CUSTOMER DETAILS** button. Scrolling down will allow you to see all the customers on the list. Pressing the **BACK** button will take you back to the previous screen.

Revised 10/26/18

40 | Page

Create a Past Due Pick-up List

You may also generate a Past Due Pick-up List by clicking the **CREATE LIST** button.



You can select a date range, a specific store number, and the number of customers to display. There are also options to Show Only Broken Commitments, Exclude Customers with Commitments, and Exclude Today's Contacts. Pressing the button to toggle it green will select the corresponding option.

Press the **GET PAST DUE CUSTOMERS** button to generate the list.

BACK
cynergi | suite
LOGOUT

Create Past Due List

Past Due Filters

Choose Date Range
1-7 days ▼

Choose Store
Arkansas City - 1 ▼

Customers to return
5 customers ▼

Show Only Broken Commitments

Exclude Customers w/ Commitm...

Exclude Today's Contacts

GET PAST DUE CUSTOMERS

BACK
cynergi | suite
LOGOUT

Create Past Due List

SHOW FILTERS

JOHN SMITH Acct #
571

110 S MAIN ST
WICHITA, KS 67202

RA #	Past Due	Due Data	Amt Due
571	0 days	10/31/18	\$4.37
2981	9 days	10/14/18	\$109.12
4530	6 days	10/17/18	\$149.63

VIEW CUSTOMER DETAILS

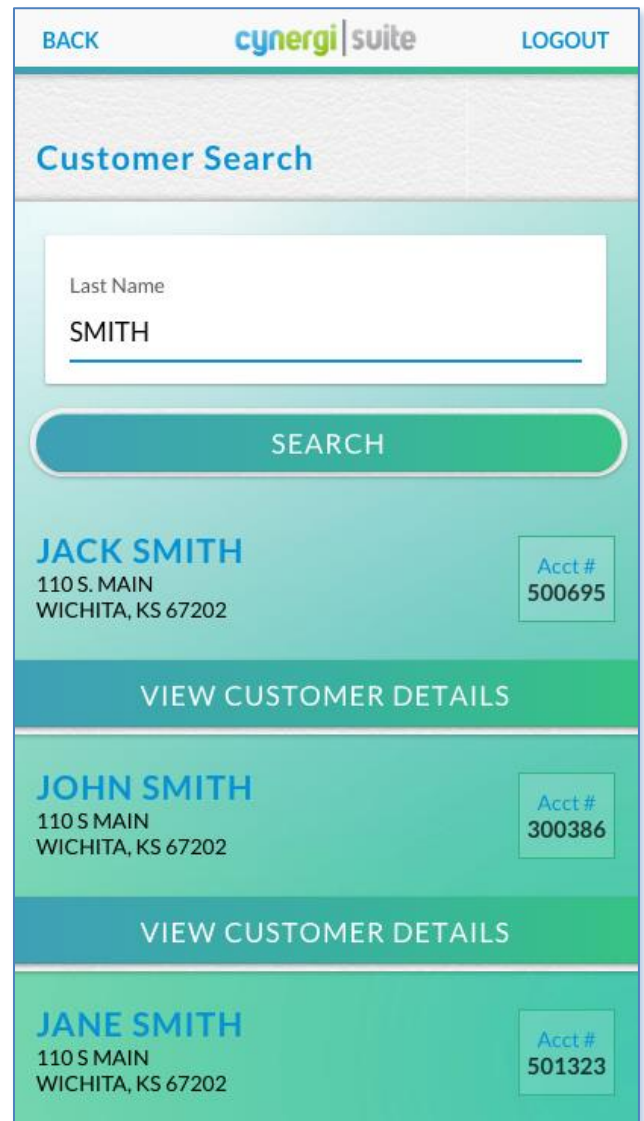
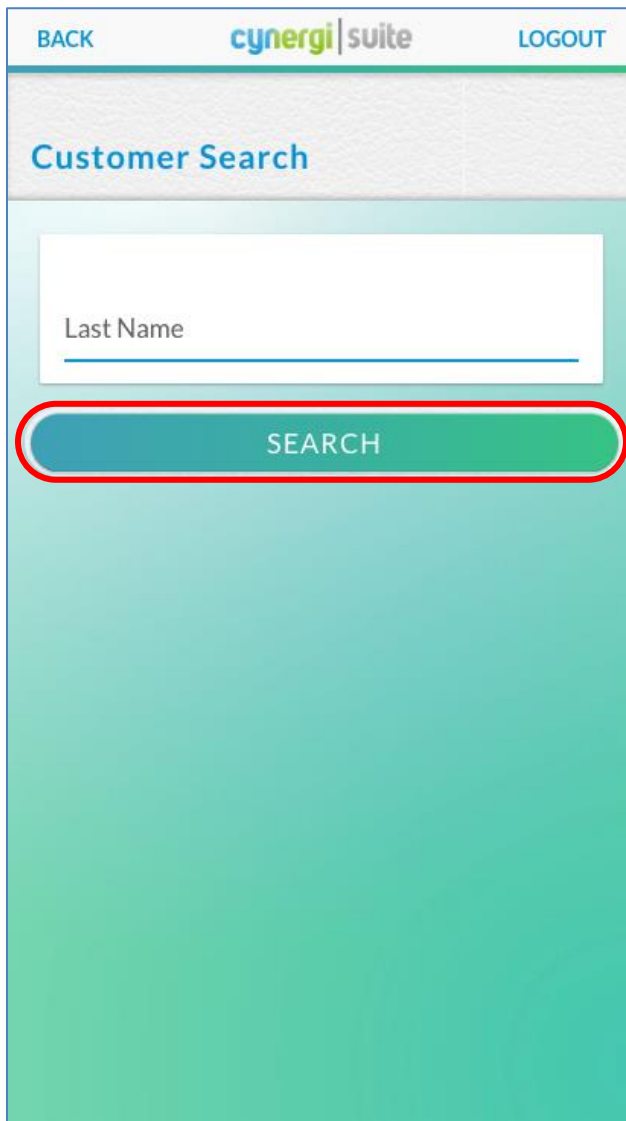
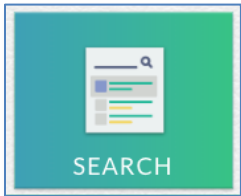
JANE SMITH Acct #
834

110 S MAIN
WICHITA, KS 67202

RA #	Past Due	Due Data	Amt Due
834	6 days	10/17/18	\$4.37
4573	6 days	10/17/18	\$75.12
RA #	Past Due	Due Data	Amt Due

Search for a Single Customer

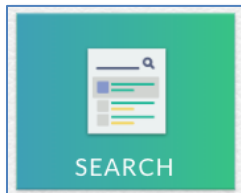
You may also search for a customer by pressing the **SEARCH** button from the Collections Mobile App Home screen. Simply enter the customer's name and press **SEARCH** to search for a customer. A search box will appear while the customers are being generated to the app. Upon the search completing, a list of names will appear. Press the **Get Next Group** button to continue the search.



Customer Information with the Collections App

You may access customer details either by pressing the **SEARCH** button from the Collections Mobile App Home screen or by pressing the **VIEW CUSTOMER DETAILS** button from within the other Mobile App list options that are displayed.

Please Note: The options available while viewing the customer information are the same throughout the app.



After selecting a customer, the following details are available to view:

- Customer Name and Account Number
- Address
- Latest commitment
- Rental Agreements
- Customer Scorecard

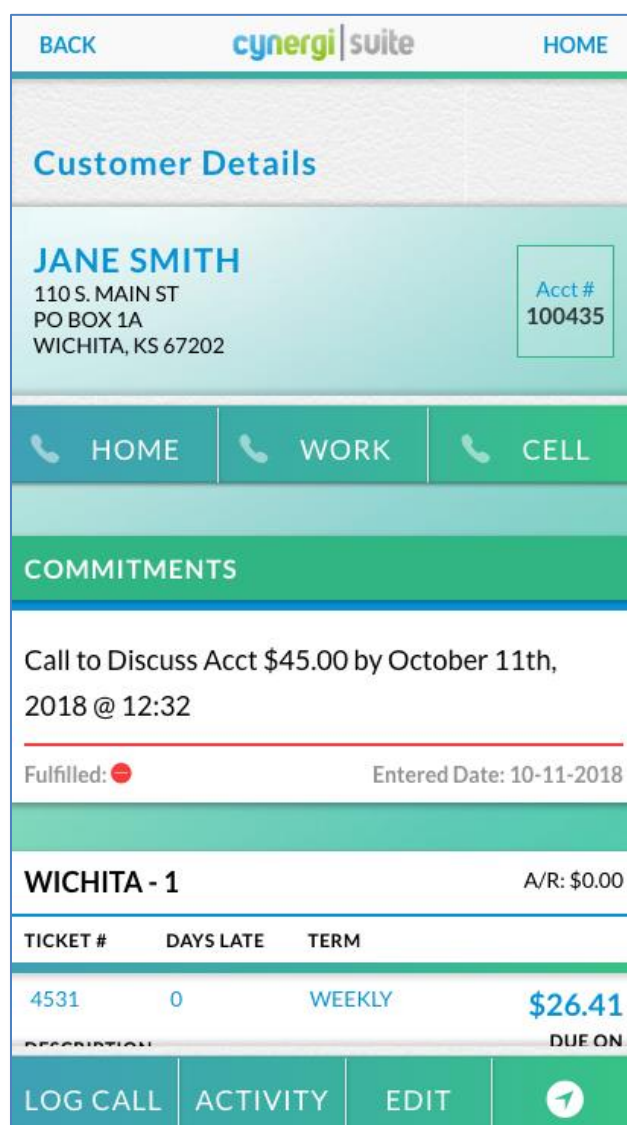
Available at the bottom of the screen are additional options:

- **LOG CALL** to log a call
- **ACTIVITY** to see customer activity
- **EDIT** to edit the customer record

From the Agreements list, you have the ability to charge an **In Home Collection (IHC)** fee directly from the app. Press the button to toggle it green and then press the **ADD IHC FEE** button. An IHC fee will immediately be entered into cynergi|suite as a deferred fee.

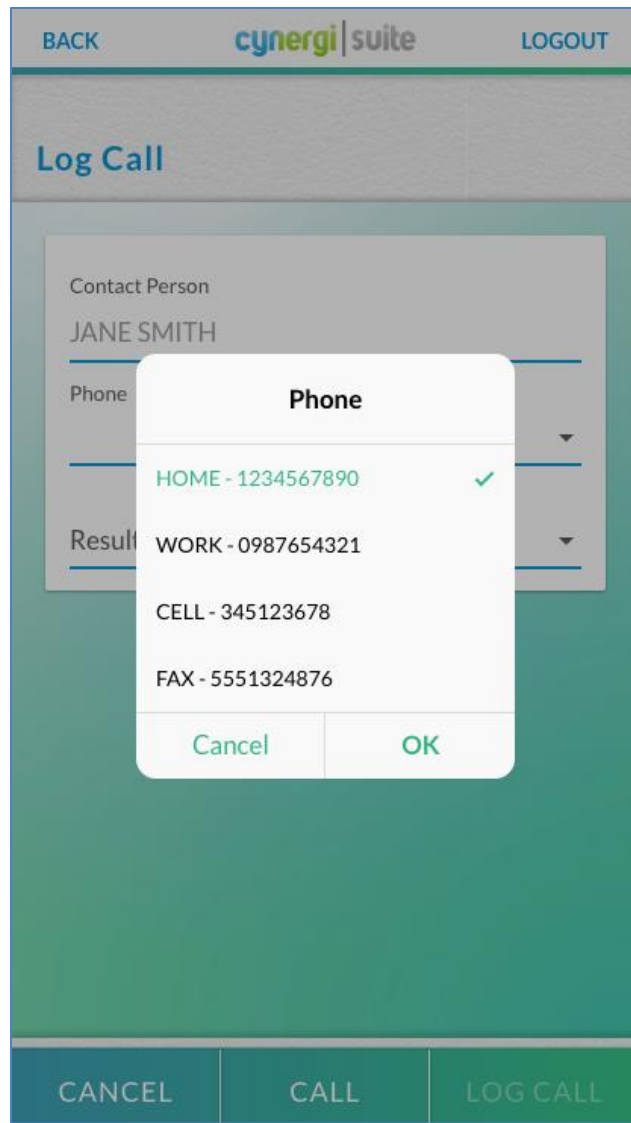
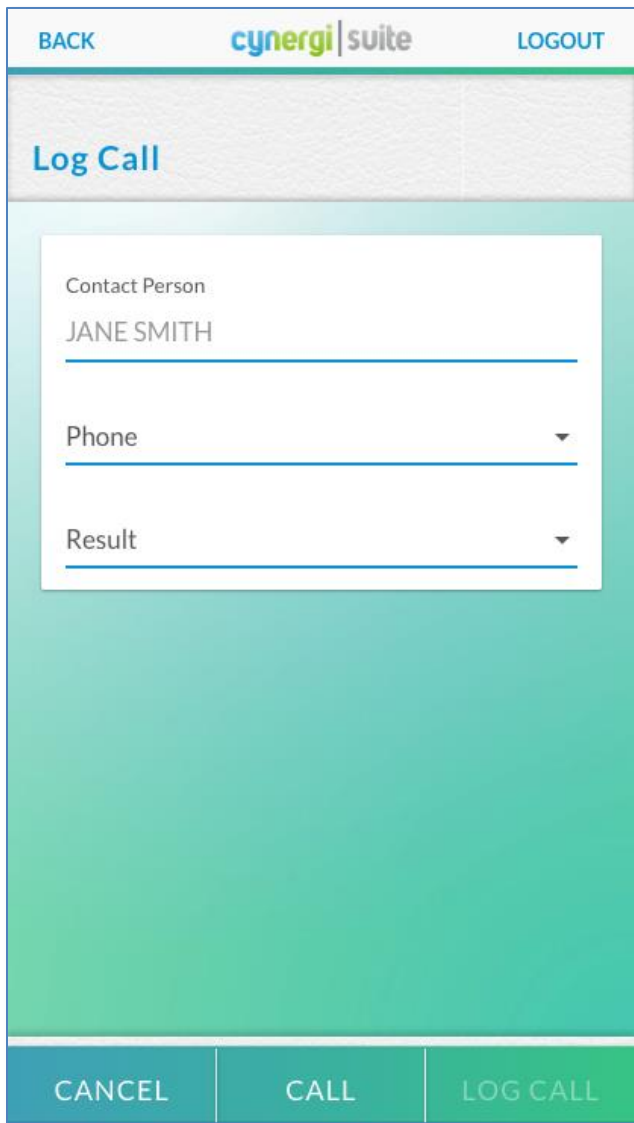
Please Note: This is an excellent opportunity to begin collecting In Home Collections fees constantly. This can now be easily done with this app while in the field as opposed to having to go back to the store to enter this fee.

TICKET #	DAYS LATE	TERM	
4531	0	WEEKLY	\$26.41
DESCRIPTION		DUE ON	
ELECTRIC RANGE		10/24/18	
IHC Fee of \$5.00		<input checked="" type="checkbox"/>	
Amount			\$ 26.41
Total Amount:		\$26.41	
SUBMIT PAYMENT		ADD IHC FEE	



Log Call

To log a call, select the **LOG CALL** button on the *Customer Details* screen. A screen similar to the *Call Log* window in cynergi | suite will be displayed. This screen will allow you to select the customer's Phone Number and Call Code Result from the list.



If a commitment is logged, the date and time can be added as well. The amount, date, and time will display.

The bottom of the screen has three options: **CANCEL**, **CALL**, or **LOG CALL**.

- To call the customer, select the **Phone Number** and press the **CALL** button.
- Logging a collections call within the app is just like logging it in cynergi | suite. You can select the Call Code Result and then press the **LOG CALL** button.

Activity and Edit Customer

When the **ACTIVITY** button is selected from the *Customer Details* screen, you will see the *Customer Scorecard* just like you would see in the *Rental Payment (RP)* screen. It will display the *Customer Profile*, *Agreement Snapshot*, and *Payment History*. Selecting **BACK** will take you back to the previous *Customer Details* screen.

When the **EDIT** button is selected, you have the ability to edit selected customer information fields. Pressing the **UPDATE CUSTOMER** button will immediately update the customer information within cynergi|suite. Selecting **BACK** will take you back to the previous *Customer Details* screen.



CustomerNbr	Date	Count	AmtPaid	
100435	01-28-17	6	\$3723.66	\$0
100435	01-28-17	4	\$3661.62	\$0
100435	01-28-17	1	\$30	\$0
100435	01-28-17	1	\$32.04	\$0

CustomerNbr	TicketNbr	AgmntDate	PmtTerms	PmtTe
100435	4531	06-27-18	W	5
100435	690	07-22-17	M	
100435	27458	01-28-17	M	2
100435	27611	03-01-17	M	3
100435	100435	06-27-18	0	
100435	879	08-01-17	0	

Edit Customer

First Name
JANE

Last Name
SMITH

First Name
110 S. MAIN

Address Cont.
PO BOX 1A

City
WICHITA

State
KS

Zip
67202

UPDATE CUSTOMER

How to Generate a Pick-Up List Within Cynergi|suite

Within the cynergi|suite Collections screen, there is the ability to generate a list of customers that you would like to visit in the field. You can do this by selecting the checkbox under the Mobile (**M**) column for customers that you want to add to a list. This list can be sent to the Mobile Collections App by simply clicking the **SEND TO MOBILE** button.

* FIRST RESULTS GROUP *					
Days Late	Due Date	Type		M	Name
192	10/31/15	RTO		<input type="checkbox"/>	ABBOTT, ABCD
192	10/31/15	RTO		<input type="checkbox"/>	ABBOTT, ABCD
192	10/31/15	RTO		<input type="checkbox"/>	ABBOTT, ABCD
192	10/31/15	FEE		<input type="checkbox"/>	ABBOTT, ABCD
25	4/15/16	RTO		<input type="checkbox"/>	ABBOTT, EFGH ABBOTT, CINDY
60	3/11/16	RTO		<input type="checkbox"/>	ABBOTT, IJKL CORDOVA, APRILLYNN
60	3/11/16	FEE		<input type="checkbox"/>	ABBOTT, IJKL CORDOVA, APRILLYNN
206	10/17/15	RTO	B	<input type="checkbox"/>	ADAMSON, ABCD
213	10/10/15	RTO	B	<input type="checkbox"/>	ADAMSON, ABCD
206	10/17/15	RTO	B	<input type="checkbox"/>	ADAMSON, ABCD

Showing 1 to 10 of 226 entries



Create a New List

After clicking the **SEND TO MOBILE** button, the *Mobile List* screen will display. From here, you can see previously created lists, delete a list, or view a list's details. To create a new list, click the **NEW** button.

MOBILE LIST

MOBILE LISTS 🔍

List Name	Created	Updated	Actions
ROUTE2	03/23/2016	03/23/2016	✕ 📄

Showing 1 to 1 of 1 entries 1

✕ CANCEL
+ NEW

Enter a **New List Name** for the new list you are creating, and press the **SAVE** button to save your list. This list will now be available to be accessed from the High Touch cynergi | suite mobile app.

MOBILE LIST

New List Name

Find Customer

CURRENTLY SELECTED LIST 🔍

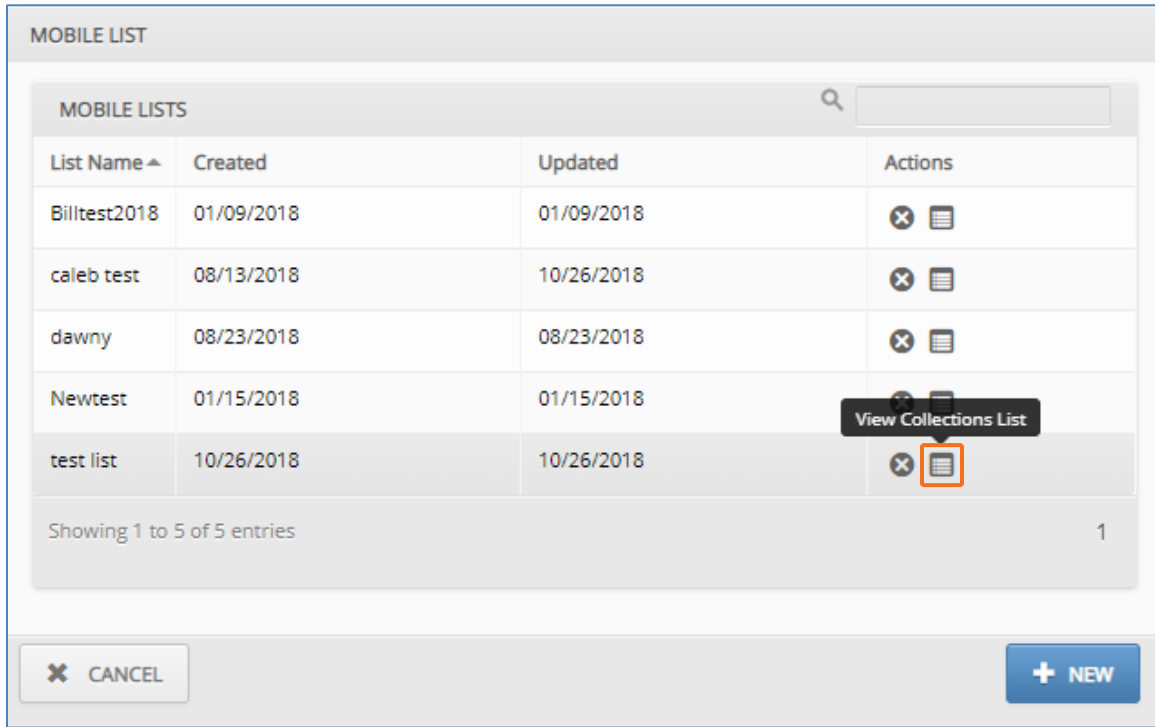
Acct ▲	Name	Phone	Actions
102481	ABBOTT, EFGH	██████████	✕
1003568	ABBOTT, IJKL	██████████	✕
2000040	ABBOTT, ABCD	██████████	✕
2001621	ADAMSON, ABCD	██████████	✕

Showing 1 to 4 of 4 entries 1

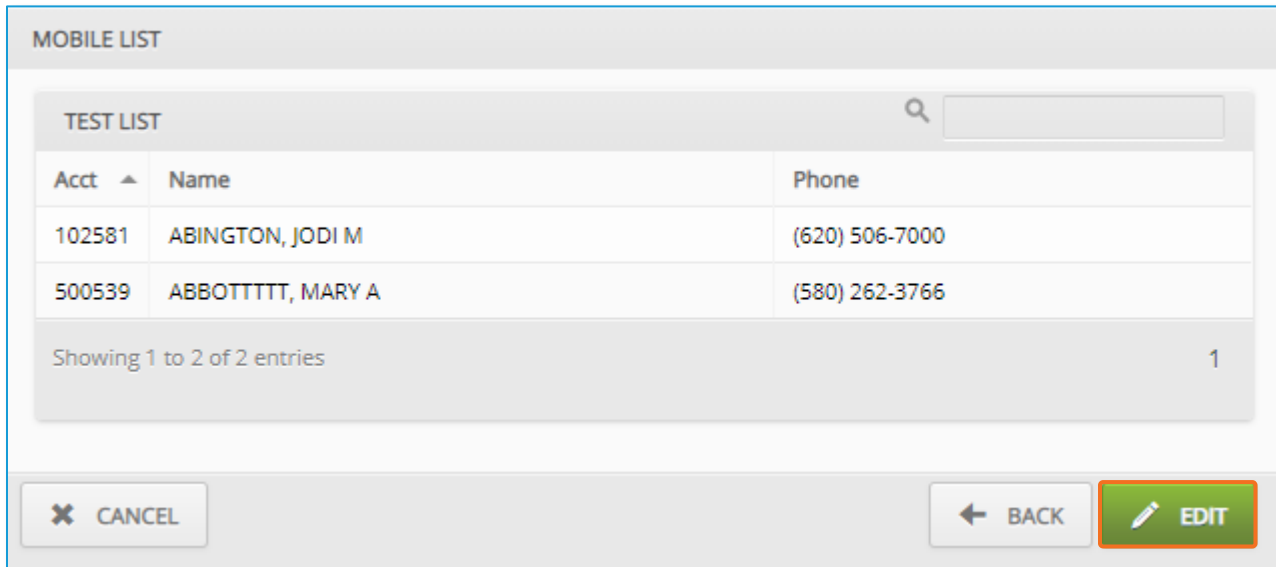
✕ CANCEL
← BACK
✔ SAVE

Edit an Existing List

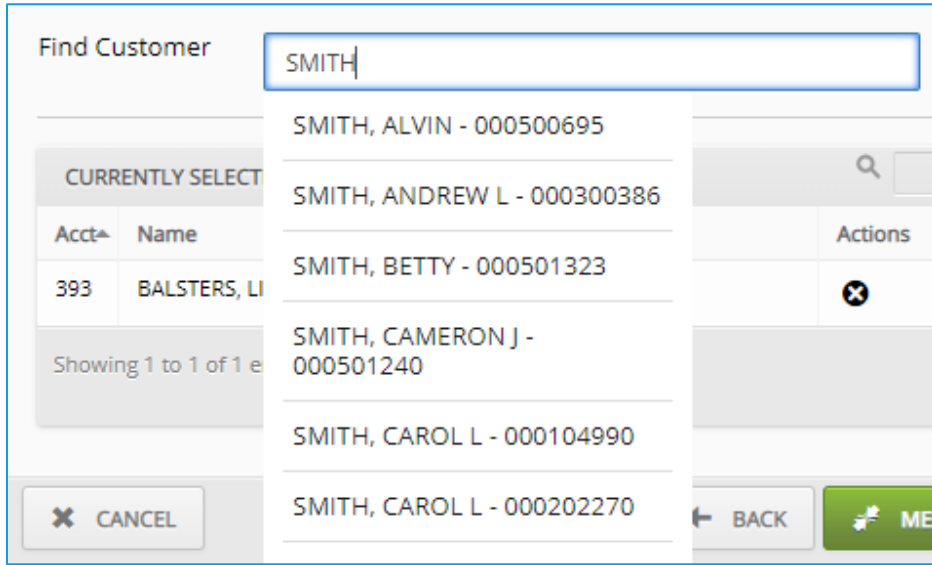
After clicking the **SEND TO MOBILE** button, the *Mobile List* screen will display. From here, you can see previously created lists, delete a list, or view a list's detail. To add to an existing list, click the **View Collections List** icon at the end of the row.



The existing members of the list will appear. Click the **EDIT** button to add the customer(s) you selected in the Mobile column.



The customer(s) you have selected will show in the *Currently Selected List*. To add more customers, type a name into the **Find Customer** search box.



To delete customers, click the **X** icon next to any customer. You may delete customers from the existing list and from the **Currently Selected List**.

CURRENTLY SELECTED LIST			
Acct ▲	Name	Phone	Actions
393	BALSTERS, LINDA	(620)442-0687	
500695	SMITH, ALVIN	(405) 326-5696	

Showing 1 to 2 of 2 entries 1

When you are finished, click the **MERGE LISTS** button.

MOBILE LIST

TEST LIST 🔍

Acct ▲	Name	Phone	Actions
102581	ABINGTON, JODI M	(620) 506-7000	✕

Showing 1 to 1 of 1 entries 1

Find Customer

CURRENTLY SELECTED LIST 🔍

Acct▲	Name	Phone	Actions
393	BALSTERS, LINDA	(620)442-0687	✕

Showing 1 to 1 of 1 entries 1

✕ CANCEL
← BACK
🔄 MERGE LISTS
✓ SAVE

Click **SAVE** if you are finished, or click **BACK** to return to the original list without saving.

MOBILE LIST

MERGED LIST 🔍

Acct ▲	Name	Phone
393	BALSTERS, LINDA	(620)442-0687
102581	ABINGTON, JODI M	(620) 506-7000

Showing 1 to 2 of 2 entries 1

✕ CANCEL
← BACK
🔄 MERGE LISTS
✓ SAVE

After clicking **SAVE**, you will be returned to the *Mobile List* screen.

Payments in Collections App

If the customer has registered for OLP and has a saved payment method, the **SUBMIT PAYMENT** button is enabled, and the employee can take a payment for the amount due.

Customer Details

MABLE FUDGE
3178 ROWLAND AVE,
KANSAS CITY, KS 66104

Acct #
1002410

HOME
WORK

COMMITMENTS

WBI \$0.00 by 11/07/2019 03:41pm

Fulfilled: ● Entered Date: 11-04-2019

KANSAS CITY - 1 A/R: \$0.00

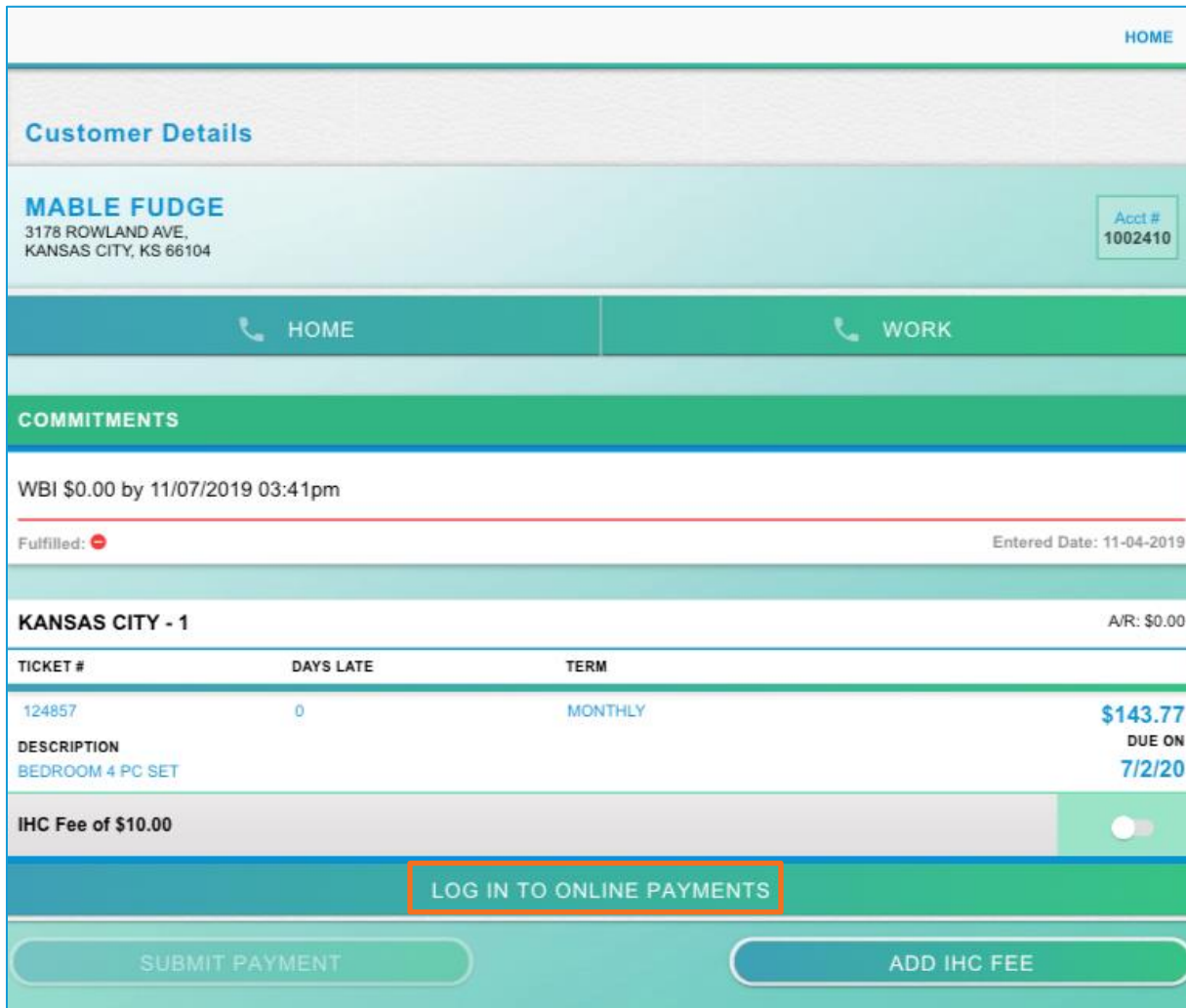
TICKET #	DAYS LATE	TERM	Amount
124857	0	MONTHLY	\$143.77
DESCRIPTION BEDROOM 4 PC SET			DUE ON 7/2/20
IHC Fee of \$10.00			<input type="checkbox"/>
Amount			\$ 143.77

Total Amount: **\$143.77**

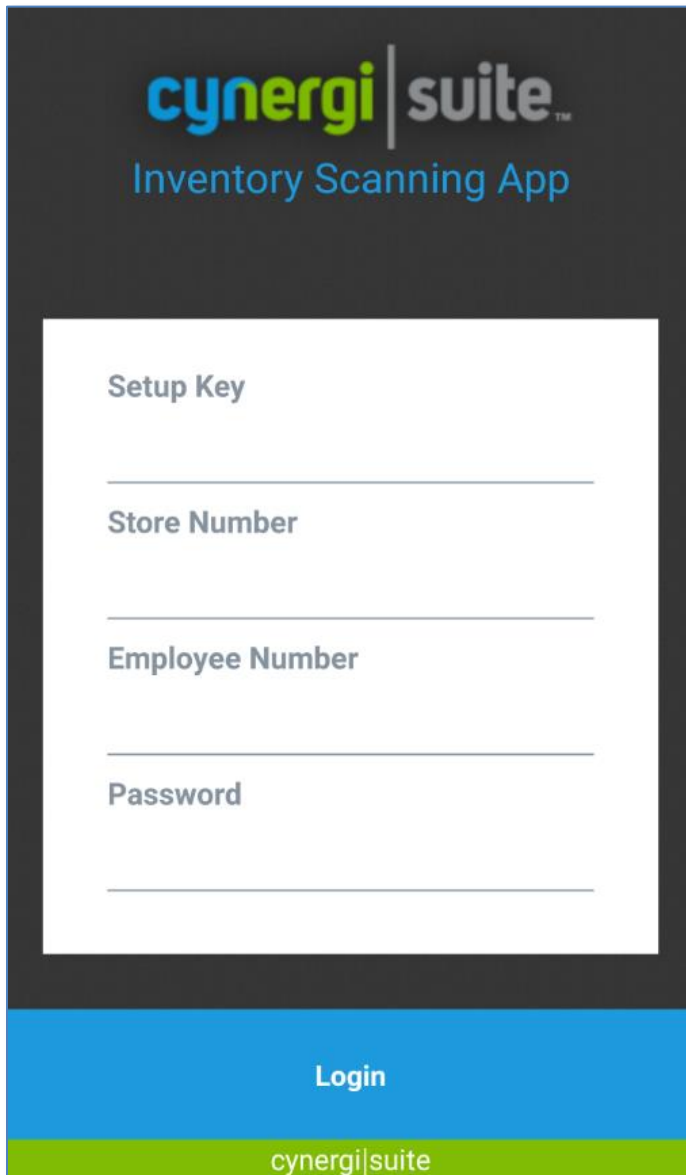
SUBMIT PAYMENT

ADD IHC FEE

If there isn't a saved payment method, the payment button is disabled, and there is a **LOG IN TO ONLINE PAYMENTS** button which will take the employee to OLP. From OLP, the employee can help the customer log in and create a payment method, assuming the customer wants to log in on the employee's device.



Inventory Scanning App



This is the cynergi | suite **Inventory Scanning Application**.

The Inventory Scanning App can be installed on most Android and Apple devices. This includes phones and tablets, so no proprietary barcode scanning hardware is required. The app can be found in the Google Play and Apple stores, similar to other c|s mobile apps.

Communication is established by wireless or cellular connection, and multiple devices can be used to perform the audit process, saving time.

If connectivity is lost during the audit process, the auditor can continue to scan items and the device will automatically sync as soon as connectivity is restored.

Inventory exceptions are created in real-time and the auditor has the ability to explain these on the device at the time of the exception.

Furthermore, the **Inventory Audit Dashboard** is designed to go along with the Inventory Scanning App. It allows you to have a management view of the inventory audits as they are in progress. The current design is for each store to include all of their idle inventory in an audit.

To see more documentation on these features, please reference [Inventory Scanning App and Audit Dashboard](#) in **Chapter 8: Inventory**.