This document provides the general requirements for the stated mockup.

# General

* The navigation of the mockup is done by the pink highlighted fields [you can also see what “page” you are on by looking at the “bookmarks” tab on the left of your screen
* The initial navigation clicking on the “User Name” field that provides a drop down is only for display purposes to show that there could be different types of users. The actual application will assess the user’s login credentials and will provide them to the appropriate screens within the application based upon their role [e.g. Debt Owner (Cascade user), Collection Agency, or Debt Buyer)

# Recourse Module

* Upon login, the “Main Dashboard” for the Cascade Application will be presented to the user
* Clicking the “Recourse” Module button will present the “Recourse Module Dashboard” to the user
* This module provides the capability for the “Debt Owner” user to perform the 3 main functions of Recourse:
  1. Direct Pay
  2. Media Processing
  3. Recalls
* Clicking the “Recourse” button while viewing the “Recourse Module Dashboard” will simulate the “mouse-over” capability of the “Recourse” module button
* The main functions described in this document are pertinent to the “Media” function under Recourse, as identified below, and are described in the following sections:
  1. Media Upload
  2. Media Fulfillment
  3. Media Request

# Media Upload

* This function is available by the “mouse-over” of the Recourse button
* The initial screen will provide the ability to search for a specific account so the user can upload media to the account
* The 3 types of search capability on this screen are: by PIMS Account Number; by First or Last Name; or by Original Account Number
* Clicking on either of the 3 highlighted selections will simulate the data entry for that selection as described in the following sub-sections

## Search by PIMS Account Number – Selection Field

* Clicking this option simulates what it would look like if the user entered the PIMS account number
* After entry of the PIMS account number, the user will click the “Search” arrows to conduct the search of the information within the PIMS database which will populate the screens with the appropriate account information
* The specific account information retrieved will be presented in a “Verify the Account Information…” box BELOW the “Retrieve Account Information…” box

## Search by First or Last Name – Selection Field

* Clicking this option simulates what it would look like if the user entered the client named
* This entry could be the first or last name of the client, or even a partial entry [e.g. entering “John” would search for any first or last names that “start with” John]
* After entry of the “first or last name”, the user will click the “Search” arrows to conduct the search of the information within the PIMS database and to populate the screens with the appropriate account information
* Since this search could retrieve multiple accounts, the information retrieved will be presented in a “table grid” on a new screen

### Accounts Available from “By Name” Search Screen

* Depending upon the name [or portion of a name] entered in the “First or Last Name” selection field, this table grid will be provided that has a listing of all accounts that match the data entry to EITHER the First Name or the Last Name [or some portion thereof – see the mockup example of searching for “John” retrieves First name of “John” as well as Last name of “Johnson”]
* The data will be retrieved from the PIMS database and will be populated in the table grid
* The user will be able to “view details” on any of the accounts in the list [they will be taken to the “Media – Search for Account” screen for the selected account]
* The mockup provides the simulation of what would happen if the highlighted “View Details . . .” is clicked

## Search by Original Account Number – Selection Field

* Clicking this option simulates what it would look like if the user entered the original account number
* This “Original Account Number” field is actually the PIMS original account number
* After entry of the original account number, the user will click the “Search” arrows to conduct the search of the information within the PIMS database and to populate the screens with the appropriate account information
* The specific account information retrieved will be presented in a “Verify the Account Information…” box BELOW the “Retrieve Account Information…” box

## “Verify the Account Information…” Screen

* When the user is taken to this screen from any of the three search options mentioned above, the user will verify the account information and click either the “Search for Another Account” button or the “Initiate Media Upload” button as described in the sections below

### “Search for Another Account” Button

* By selecting this option, the information retrieved will be deleted from the screen and the user will be taken back to the “Media – Search for Account” screen to begin another account search

### “Initiate Media Upload” Button

* By selecting this option, a popup window [annotated by the “blue-colored” window] will appear that provides the user with the ability to select the media type and the file to upload as described below

#### Step 1 – Select Media Type

* By clicking on the highlighted “Media Type” drop down box, the mockup simulates the drop down functionality for that field
* Clicking on the highlighted “Application” media type simulates what would happen if the user selected that media type from the list by entering that meeting type in the drop down box

#### Step 2 – Browse for File

* By clicking the highlighted “Browse for File” button, the mockup simulates the functionality of opening another window that allows the user to select a file and have it associated with this media upload function
* NOTE: the example in this mockup was that the user clicked on the “Browse for File” button, found the file named “Client application.pdf” and then added that file to this form

#### Step 3 – “Attach…” Function

* By clicking the highlighted “Attach & Prepare for Upload” button, the user is indicating that there are no more files to upload for this account
  1. NOTE: the example in this mockup would take the user to the “Review selected media…” screen discussed later in this section
* By clicking the highlighted “Attach & Add Another File” button, the user is indicating that there are MORE files that need to be added to this account
  1. NOTE: This functionality of selecting more and more documents to attach will be available to the user [e.g. to continue to add more documents] until they are done attaching documents
* The use case described in this mockup indicates that there are “statements” that need to be attached for upload. The functionality of that operation is described in the sub-sections titled “Step 1a through Step 4a” below

#### Step 1a – Select Media Type

* By clicking on the “Media Type” drop down box, the mockup simulates the drop down functionality for that field
* Clicking on the highlighted “Statement” media type simulates what would happen if the user selected that media type from the list by entering that meeting type in the drop down box and then providing the statement “date selection” boxes appear

#### Step 2a – Statement “From/To” Date Selection

* When a user selects the “Statement” media type, an additional selection will appear that the user must select the “From” and the “To” dates for the statements
* By clicking the highlighted “From select date” field, the mockup simulates that the user has selected the date of 01/01/2012
* By clicking the highlighted “To select date” field, the mockup simulates that the user has selected the date of 12/31/2012

#### Step 3a – Browse for File

* By clicking the highlighted “Browse for File” button, the mockup simulates the functionality of opening another window that allows the user to select a file and have it associated with this media upload function
* NOTE: the example in this mockup was that the user clicked on the “Browse for File” button, found the file named “Statements for 2012.pdf” and then added that file to this form

#### Step 4a – “Attach…” Function

* By clicking the highlighted “Attach & Prepare for Upload” button, the user is indicating that there are no more files to upload for this account
  1. NOTE: the example in this mockup would take the user to the “Review selected media…” screen discussed later in this section
* By clicking the “Attach & Add Another File” button, the user is indicating that there are MORE files that need to be added to this account
  1. NOTE: This functionality of selecting more and more documents to attach will be available to the user [e.g. to continue to add more documents] until they are done attaching documents
  2. NOTE: For this mockup, the “Attach & Add Another File” button is not highlighted to create an end to the “infinite loop” that could be seen in the mockup for selecting files to add

## “Review Selected Media for Accuracy…” Screen

* When the user is taken to this screen from any of the options mentioned above, the user will have the ability to review the documents [you will see that there is a hyperlink next to the selected media type] so that the user can click the hyperlink and actually view the file BEFORE it is uploaded to the account
* Once the user is satisfied that the documents are accurate for the upload, they will be able to select either one of the “Upload . . .” buttons at the bottom of the screen

### Upload & Exit

* Clicking this option will upload the document(s) to the selected account and will take the user back to the “Recourse” dashboard

### Upload & Search More Accounts

* Clicking this option will upload the document(s) to the selected account and will take the user back to the “Media – Search for Account” screen so they could search for another account to upload media on

## Media Fulfillment

* This will be finalized in the next version of this document

## Media Request

* This will be finalized in the next version of this document