BAILBOND-NET

for Arkansas Professional Bail Bondsmen

Version 1.11 dated 02/07/2003

Documentation and Installation Manual

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Chapter 1 Program Overview and Philosophy

Simplicity! The keyword to both overview and philosophy.

A quality software production serves the end-user by increasing accuracy and reducing clerical chore and paperwork time. If it cannot accomplish these ends with little required learning effort and great ease of operation; the software production is a failure. The user must be master of the software; the software NOT the master of the user.

Every screen, all reports, diagrams and explanations have been created for ease and accuracy of operation and minimal understanding effort.

BAILBOND-NET is a unique software product. It is designed individually for each and every state. Your ARKANSAS software production was created solely for the Arkansas Professional Bail Bondsman.

We appreciate the great effort and learned assistance of your Arkansas Professional Bail Association Administrator MS. DONNA MATCHETT. Her expertise and guidance has enabled us to write a very easy to use and time saving program for the Professional Bondsman and his/her Licensed Agents.

The system is wholly integrated and interactive. As a bond is written into the system, automatic fee calculations are implemented, court calendar tracking and quarterly reporting established, dozens of search keys created and many financial records updated during the process. All changes and activity are sensed by the system and updated appropriately.

When a repeat defendant is entered into the system, the original data on file can be moved to the new bond record and then updated accordingly. A new entry, therefore could take as little as 30 seconds to generate.

Just a few keystrokes will obtain any report available in the system in a variety of formats. All required Arkansas State forms and quarterly filings will be instantly created on demand. Weekly and monthly activity reports are available for individual agents or on a company wide basis.

A QUICK LIABILITY POSITION function puts you in touch with reality in just a few seconds. Its on the screen and its up to the minute short order reporting.

Power issue and management is a breeze and knowing who has what is just a couple of keystrokes away.

The court calendar and an appearance worksheet with the court clerk's name and the court telephone number together with the defendant's phone numbers can be generated at any time.

The system is capable of viewing all bonds written to a single client. Billing statements, both individual and batch processed are readily available. Payment receipts and payment scheduling is also provided.

The system allows the generation of unlimited notes related to a single bond and access to notes can be made at the bond screen, the client bond summary screen, that is, all notes related to a single client, or all notes generated during any calendar day.

Your system includes a telephone book, a calendar, a notebook, a full blown time clock module, a client call in module, available from any screen in the system on an integrated operations window, and best of all, a pocket PC updating module that permits the agent to access the key defendant data on file anywhere from the hand held portable pocket PC.

There are no extras to buy! You get it all the first time. Your monthly service fee includes all updates to the system.

Chapter 2 <u>System Installation</u>

Hardware System Options:

Any computer, connected to the Internet and running any Windows operating system will work.

If you use a dot matrix printer, you will need a wide carriage printer such as the Okidata Model 321 or the Epson LX500, however, you can use a variety of laser jet and ink jet printers that connect to your computer through the 25 pin printer port. The system can also generate file folder labels and/or mailing labels. Labels can be generated on a standard dot matrix printer or on a thermal transfer printer such as the Eltron 2600 and 2700 series printers.

Software Setup and User Options:

***<u>Logging on:</u>* When your BAILBOND-NET system was installed, your technician placed your name together with your first and last initials in the system for log on use.**

*At the **SELECTION MENU** select the **BAILBOND-NET** option then at the **OPERATOR CODE:** prompt type in your initials e.g. **FJ** [Enter]. Next the system asks for your personal code; type **CODE.***

If your next keystroke is [Enter] the log on code remains CODE if, on the other hand, your next keystroke is the [F7] key you will be prompted to change your code. From this point in time your new code will have changed to whatever your currently selected. Spaces are NOT acceptable.

***<u>Company Information:</u>* During the technical installation process your technician installed your basic company data required for proper printing of your Arkansas State reporting and for proper internal report generation. In the event you change address, telephone numbers and/or designated primary licensee name, you can revise that information by first making appropriate changes in the COMPANY DATA FOR FORMS located on the system menu and then changing data in the COMPANY DATA & PROCESS OPTIONS.**

Make sure that ALL of the options appearing on the screen are accurate. An error in any of the data could affect the resultant reports accuracy. If you need assistance making such changes call us for help.

***<u>Quarterly Report Initialization:</u>* If you have been in the bonding business prior to implementing the BAILBOND-NET system you will have to install your last quarterly report data in the system so that accurate quarterly reports can be generated by your newly installed system.**

Before starting this process make sure that you have your last quarterly report handy.

*At the **BAILBOND-NET** menu select **INITIALIZE LIABILITY SUMMARY** function. In the lower left corner of the screen notice that the quarter and the year are both set to **0** (zero) as are all of the required data fields. It is not necessary to change the quarter and year fields if you are installing the last quarterly data. Simply select the [F5] key then you can install the correct values for the requested data fields.*

When you have completed the installation, or if you wish to abort the operation, hit the [Esc] key and the system will return to the menu structure.

It will be necessary for you to install all of your active bonds together with those discharged or exonerated or voided bonds acted upon during the current quarter so that accurate quarterly reports can be created by the system. You are not required, however, to install all of the personal data for those bonds if you so desire. Only the financial, court and charges data is required.

Carefully study the bond installation information provided in Chapter 3 of this documentation. Familiarizing yourself with that information is essential to insuring successful use of the BAILBOND-NET system.

You may also wish to install some of the old BF-PAID bonds together with the SOB records to help insure avoidance of the same defendants by your agents in the future. The system maintains a "Just Say No" module which disallows the bonding of selected defendants.

If you were using another software data base prior to installing BAILBOND-NET, it might be wise to consider keeping the old system actively on line for occasional reference purposes. Make sure you keep ample backups of your old system for audit and reference purposes when required.

<u>Adding Your Agents:</u> adding agents is a three step process. First you must add them to the employee file. This is accomplished selecting the NEW EMPLOYEE option on the BAILBOND-NET menu. Fill in all of the data requested. Use two characters for the log on operator and up to four numbers and/or letters for the log on code. No two operators can share the same operator designation; the same code, however, can be used for more than one employee.

Next, select the SET PERSONNEL ACCESS option. You are prompted to give

your agent either full system access or agent specific access.

Full agent access enables an agent to review bonds written by other agents and print reports having other agents defendants included. Agent specific access precludes the logged agent from accessing any but his/her own bond records and prevents printing of company wide reports.

If the agent specific access is given. a list of access options appear on the screen. Answer each question Y or N as is appropriate (see Set Personnel Access below).

Finally, you must access AGENTS & ACCOUNTS from the menu.

Select [F5] to add a new agent to the system. Now enter the Agent's company agent number e.g. ***002*** *followed by [Enter].*

Now provide ALL of the requested biographical, commission and build up fund information requested taking note of the following criteria:

> *Name:* ***LAST, FIRST MI***
> *Employment date:* ***071457*** *system displays* ***07/14/57***
> *Termination date: leave blank*
> *Commission %:* ***40.00*** *(40%)*
> *Build up fund:* ***8.50*** *(8 1/2%)*

In the event you wish to initialize the quarterly and monthly data in the agent record, you may select [F7] then follow the prompts to initialize the data.

NEVER install data for the current quarter. So doing will cause inaccuracies in the data base. Consult with your technician before entering historical data.

<u>Powers Assignments</u> are optional for system implementation. Using the powers assignment module will insure that all powers are accounted for. Powers that are not activated will remain in the system in the Not Activated state until the bond is written or the power is voided. If the system will be used remotely by agents and the written bonds transferred electronically, powers MUST be pre assigned.

The bond number is composed of both the agent number and the power number. Consequently, if you wish, the same power number can be issued to one or more agents.

To assign powers, select POWERS ASSIGNMENTS from the menu. Notice that several options appear. [F1] selects the assignment of powers to agents. Complete the three requirements and the system will automatically generate the powers within the range specified.

In the event you find it necessary to reassign powers [F5] will prompt you to specify the power reassignment process.

The [F3] key will give you an instant record of all unused powers.

<u>The Court Directory:</u> Although the court record is optional, it is wise to maintain the records accurately in the interest of providing you with clerk names and phone numbers on your COURT CALENDAR report. You can also use this on line tool to assist your clerical effort.

Select COURTHOUSE LOOKUP at the system menu. Then select [F1] to add a new court record.

Using the [pg up/] and [pg dn] keys select the county in which the court is located then, by similar process the court name. Now type in the requested information.

When you are done hit the [Esc] key to file and exit the record.

<u>Table of Criminal Charges</u>: to help facilitate uniform data entry, a Table of Charges is incorporated into the system. Its operational implementation is discussed in Chapter 3. The table can be modified by selecting the Table of Charges option in section 17 of the menu structure.

Available are two (2) means of listing the charges already in the system; alphabetical charge listing or listing by charges code. Using the [F7] and [F9] options charges can be either added to or deleted from the listing.

<u>Table of Court Fees:</u> The system contains general default court, state and administrative fee settings, however, some courts have exceptions to the defaults included. Changes to the fees can be made during financial data input, but, in the interest of accuracy and ease of operation, the Table of Court Fees has been included in the system. Here's how it works. When entering a new bond the system examines the Table of Court Fees to determine if fees have been incorporated for the jurisdiction at hand. If it indeed finds the specific court and county in the list, it will apply these fees to the appropriate data fields; if not, it will apply the default

amounts. If the fee has been hand set or previously written to the bond file, no changes will be made.

Select Table of Court Fees in menu category 17. A listing of all of the counties and courts appear on the screen. Appropriately select the county [F1] and the court [F2] and then the [F7] get record option; the data already on file for that county and court will appear or, if it is not on file, the defaults will appear. Now select [F5] to enable fee changes. Make sure you file the entry [F8] upon completion of the entry.

<u>Table of Workstations:</u> This feature enable the operator to set the printer control codes peculiar to his (her) local workstation. This means that no matter where you are working, it is likely that a printer option will suffice to set up communication between the server and the printer.

To access the Table of Workstations module, select the option in category 17 of the menu structure. The table allows for a printer or location name (user defined) and the optional control file designator for LPT1 and LPT2 and/or LPT3 (if available). The following control designators have been structured into the system:

EPFX *standard Epson FX printer codes available on most dot matrix printers; all Epsons, most Okidatas including models 320 and 321, and many other printer brands and models*

HPIJ *Most ink jet printers including all Hewlett-Packard models, many Lexmark, Okidata and other brands and models*

HPLJ *many Laser Jet printers including, but not limited to Hewlett-Packard machines*

Additionally, special printer codes can be implemented on request and for a modest set up fee.

<u>Billing Invoice, Payment Receipt and Statement Formatting:</u> The billing invoice, the statement and the payment receipt forms are individual text files. These files are designated as BILL001, BILL002 and BILL003. They can be accessed from the FORMS, VARIABLES and STRUCTURES module. To make changes to the format simply select the applicable function key, edit the text and then tap the [Alt] key, arrow down to exit. You will be prompted to either file or abort the changes

effected.

All of the variables and formatting requirements are described on the form data screen. A sample of each format is provided with your software.

Note that the formatting structure allows you to create a custom form or to set up the billing and receipts to be printed on a preprinted continuous form.

The variables listed on the screen show the description followed by the maximum size of the data field, finally followed by the substitution designator to be placed on the format form at the line and position of the desired variable replacement.

e.g. **<I>04 (designates the position of the defendant's name on the form)**
<I>11 (designates the placement of the billing address)

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<u>Set Operations Options:</u> Your BAILBOND-NET allows you to set several operations options as described below.

Option #1 Allow (N) or disallow (Y) changes to financial data. This option prevents the user from making changes to financial data without making an adjusting entry.

Option #2 Implement (Y) billing module

Option #3 Suppress (Y) billing finance charges

Option #4 Compound finance charges (Y)

Option #5 Arkansas State Bonding law compliance (Y)

Option #6 Labels on Eltron Printer (Y) standard dot matrix (N)

Option #7 Labels on LPT1 (Y)

Option #8 Labels on LPT2 (Y)

Option #9 Labels on LPT3 (Y)

Option #10 Payment requires receipt number (Y)

Option #11 Payment requires specified form of payment (Y)

Option #12 Payment requires agent number (Y)

Option #13 Allow powers to be assigned when entering bonds (Y)
for pre assigned powers only (N)

Option #14 Combine all bonds on one statement per client (Y)
separate billing statement for each bond (N)

Option #15 Suppress bond issue date on multiple billing statement (Y)

Option #16 On appearance verification reports suppress FTA's (Y)
(failure to appear)

Option #17 Allow date change of payment while entering (Y)
automatic dating of payments (N)

Option #18 & 19 Use to set default printer in program

	Option 18	Option 19
LPT1	Y	N
LPT2	Y	Y
LPT3	N	N
XLPT1	N	Y

(XLPT1 is a disk file name)

Options #20 thru 30 are not applicable to BAIL BOND-NET server implementation.

Option #31 allows you to set appearance report order by just appearance date or by court (jurisdiction) and then by appearance date.

All changes here apply to ALL terminals but will be implemented ONLY after rebooting the system.

To make changes hit the [Esc] key then type in the option to be changed. If it is set to no toggling it will change it to Y the converse is also applicable.

Menu Creation and Assignments: ***BAILBOND-NET features a unique menu structure module. You can create as many as 20 different menu configurations and assign a given menu to any specified employee(s).***
Several basic menu structures have been provided with the system. You can modify them or create your own menus. Select the [M]odify option. Follow the prompts to locate, modify or view an existing menu or create a new one.

To add or delete items from the menu, select the [M]odify menu option then look up you selection from the [P]rogram lists then, using the [M]odify menu composition option add or delete the specific function line item.

Set Personnel Access: ***BAIL BOND-NET allows you to customize and limit access by individual personnel to the data base and restrict writing to the system as well.***

Simply select Set Personnel Access then type in the two letter employee identifier followed by the agent number (if any) of that employee. Now you can select access level 2 (total access) or level 1 (limited access). If you select level 2 all system resources will be made available to this employee and there is no need for further customization. If, however, you selected level 1 then a screen appears containing 11 options enabling restricted access to the system. An 'N' response means you do NOT want this option as stated; conversely a 'Y' response indicates that the option is accepted.

Remote Agent Access to Server: ***Using the aforementioned personnel access it is possible to allow agents to write their bonds to a temporary file instead of the master data base. In this case, powers can (if you issue powers on a limited basis) be issued to the agent and then the SYSOP (System Operations Manager) can retrieve bonds written by the agent. One of the personnel access options permits this type of bond submission into the system.***

Chapter 3 <u>Bailbond Data and Reporting</u>

Function 1 on the BAILBOND-NET Main Menu

Entering a new bond:

Selection of the method for initiation of a new bond is dependent upon one of four possible conditions under which the bond can be written. Following is a description of each circumstance and an instruction in each case as to how to get started creating a new bond. Once one of the initial methods has been selected and properly executed, continue the process from the instructions on page 12, Bond Data Entry.

If you wish to activate a pre allocated power:

Select [F5] Recall EXISTING Bond then, at the prompt
type in the Agent Number followed by [Enter] then
type in the Power Number followed by [Enter]

If you want to create a new power without pre allocation:

Select [F3] Issue a NEW Bond then, at the prompt
type in the Agent Number followed by [Enter] then
type in the Power Number followed by [Enter] then
type in the Court Case Number (optional) followed by [Enter]

If the defendant is already in the system with an active or discharged bond and you wish to reuse the data from the old bond and the new bond is a pre allocated power:

Select [F7] Copy DATA to Power, then at the prompt
type in the Agent Number of the existing Bond then [Enter]
type in the Power Number of that Bond followed by [Enter]
Now the data from the old bond appears. Notice that the dates and amounts have been zeroed.

Select [Alt][F9] then type in the Agent Number and the Power number of the new Bond.

Now select [F5] Recall EXISTING Bond and type in the Agent Number and Power Number of the new Bond.

If the defendant is already in the system with an active or discharged bond and you wish to reuse the data from the old bond and the new bond is not a pre allocated power:

Select [F3] Issue a NEW Bond then, at the prompt type in the Agent Number followed by [Enter] then type in the Power Number followed by [Enter] then type [Esc] twice to return to the options. You have just created a new power and now the old Bond can be copied to it.

Select [F7] Copy DATA to Power, then at the prompt type in the Agent Number of the existing Bond then [Enter] type in the Power Number of that Bond followed by [Enter] Now the data from the old bond appears. Notice that the dates and amounts have been zeroed.

Select [Alt][F9] then type in the Agent Number and the Power number of the new Bond.

Now select [F5] Recall EXISTING Bond and type in the Agent Number and Power Number of the new Bond.

Retrieval of an existing bond.

Select [F5] Recall EXISTING Bond then, at the prompt type in the Agent Number followed by [Enter] then type in the Power Number followed by [Enter], all of the previously installed data will appear on the screen.

Bond data entry instructions.

So that your BAILBOND-NET data base will serve you full well, it is very important for you to enter accurate, timely and complete data into the system information gathering mechanism.

First we will discuss a few helpful and needed screen conventions. We have created numerous shortcuts that can and should be used to simplify the data entry task.

Before we begin our discussion, it is necessary to understand the definition of a few terms that will be used throughout this section.

convention	*a specific way of entering data or ordering the operation*
cursor	*the blinking or solid character appearing on the screen where the next character input from the keyboard will appear on the screen.*
data base	*the total of all data stored in the system. e.g. the client data base contains all of the information stored in the system related to all the clients*
data element	*one of the many data items if the data base*
data field or field	*is the specific designation in a file structure of a single data element. e.g.* ***Defendant's name*** *or* ***Premium*** *etc.*
echo	*to display a keystroke on the user's monitor*
function key	*one of the keyboard keys labeled* ***F1*** *through* ***F12*** *or the* ***Alt*** *key or* ***Shift*** *key or* ***Ctrl*** *key* ***Page Up*** *or* ***Page Down*** *Using one and occasionally two of the function key together will engage a given option. Usually the option will appear in reverse video on the screen. e.g. etc. When prompted to use the Alt or Shift or Ctrl key together with another function key always press the Alt, Shift or Ctrl first holding it down while you press the numerical function key and then release then together.*
index	*a file section containing an alphabetic or numeric key to the data. A single file may contain many different*

	indices (multiple indexes).
input instruction	*a short message appearing on the screen telling you what options are available for the current data entry. Usually, if there are several methods of entry for a given data element, a line will appear at the bottom of the screen showing your data input options.*
option	*one of several operation choices appearing on the screen e.g.* ***[F7]-financial data input***
optional data	*information that can or cannot be written into the data base*
prompt	*a line or marker appearing on the screen showing current data ready for input or modification*
shortcut	*an optional quick way to enter the data element into a given data field*
single keystroke	*the entry of just one character that immediately causes the system to react.*
window	*a box appearing on the screen, usually having a back-ground with a color other than the general screen back-ground.*

Reviewing the data related to the bond is a simple matter. Simply us the [F8] key the scan through the screens. In the event you wish to enter new data or modify existing data, simply select the appropriate function key as prompted on the right side of the screen.

Selection of the [F7] key will enable access to information related to up to six indemnitors and also a financial table that will appear as a window when the [F8] key is selected.

The bond status can be changed by using the [Alt][F9] keys repeatedly until the appropriate status appears on the screen.

Using the up arrow while entering data into the system will cause the cursor to appear in the preceding data field. Tapping the [Esc] key will cause the cursor to return to the option list.

When you are finished entering data, using the [Esc] key will cause the data to be rewritten to the files, create appropriate indices and cause updating of data throughout the BAILBOND-NET system.

Data entry conventions, required usage, and the optional shortcuts available in the BAILBOND-NET software are described below.

Type of Data	**Entry Conventions and Options**
General Note	*when entering alphabetic characters it makes no difference whether you enter upper or lower case. The system will convert all such data to upper case and echo it back to the screen.*
Name of a person	*type in the LAST NAME first followed by Jr., Sr. etc., followed by a comma and a space then the first name and middle name or initial. e.g.* ***JONES, FRANKLIN THOMAS*** ***JONES JR., FRANKLIN THOMAS*** ***JONES, FRANKLIN T.*** ***JONES, F. THOMAS*** ***JONES-RIVERA, THOMAS FRANKLIN*** *It is essential that the proper convention is observed to insure complete index access during search operations* *If your intended entry is for the court date, termination (exoneration) date or defendant's address notice the options at the bottom of the screen* ***[F6] [F7] and [F8]*** *when used, will jump the cursor to the appropriate field.*
City State Zip Code	*type in the city followed by a comma and a space then followed by the two character state code another space and then the zip code. e.g.* ***FAYETTEVILLE, AR 72701*** ***VAN BUREN, AR 72956*** ***FORT SMITH, AR 72901*** *you are also prompted to use the [F1] key. When enabled, a window will appear on the screen. First make an alphabetic single keystroke entry of the first letter in the city you desire. A list of city, state and zip codes will appear on the screen. [Page Up] or [Page Down] will display more names in the index. at any time you may select*

the entry by entering the line number of the item you wish to use. If you do not see the one you want and wish to enter it into the list select the [F7] key and you will be prompted to input the required item. When you are finished, the window will disappear and your selection will appear on the screen in the appropriate data field.

County (of court) *this field will appear blue when accessed. You must use the [Page Up] or [Page Down] key to change the county name by tapping the appropriate key repeatedly until the right county appears in the field then hit [Enter].*

You are also prompted to enter the first two letters of the county name. If the two counties have the same beginning two letters use the [Page Down] key to then further refine your selection.

Court *this field will appear blue when accessed. You must use the [Page Up] or [Page Down] key to change the court name by tapping the appropriate key repeatedly until the right court appears in the field then hit [Enter].*

City of the Court *type in the city where the court sits. e.g.*

FAYETTEVILLE
VAN BUREN
FORT SMITH

you are also prompted to use the [F1] key. When enabled, a window will appear on the screen. First make an alphabetic single keystroke entry of the first letter in the city you desire. A list of city, state and zip codes will appear on the screen. [Page Up] or [Page Down] will display more names in the index. at any time you may select the entry by entering the line number of the item you wish to use. If you do not see the one you want and wish to enter it into the list select the [F7] key and you will be prompted to input the required item. When you are finished, the window will disappear and the name of the city you selected will appear as the last entry on the county

	+ court data line.
Offense Classification	*Using the [Page Down] key select either **FELONY** or **MISDEMEANOR***
Court date reason	*after entering the court date you may use the **[pg up/dn]** key to select the appearance action. You can type in the type action if it does not appear in the online table.*
Dates	*all system dates must be entered in six digit format. Always type in the first two numbers of the month, followed by the two day numbers then by the year.*

	ENTER	*SCREEN*	*STORED AS*
e.g.	***030500***	***03/05/00***	***03/05/2000***
	123172	***12/31/72***	***12/31/1972***
	110201	***11/02/01***	***11/02/2001***

all dates are verified for input accuracy. If the entered date was incorrect, the cursor will remain in place and a proper entry can then be made. If you do not want to install a date, enter spaces.

Numbers *amounts or quantities must be entered as follows:*

ENTER	ECHOED DISPLAY
300.	***300.00***
65.01	***65.01***
1.00	***1.00***

note: *the system may display a value containing a decimal point followed by zeros. Make sure that your entry compensates for what may remain on the screen from the prompt data. If the screen shows 3.00 and you want to change it to 15.00 make sure that you put in the decimal point when you make your change otherwise the amount the system records may be 150.00 since you have overwritten the original decimal point.*

telephone numbers *twelve character spaces are provided for phone numbers the field is free format. e.g.*

501-555-1765
555-1765
501-5551765 *are all acceptable numbers.*

intentionally blank — *it is a good idea to indicate that you have left a data field intentionally blank by using the words* ***NONE*** *or* ***N/A*** *(not applicable) in the data field. Using the* ***[F6]*** *key will cause* ***N/A*** *to appear in the data field while using the* ***[F7]*** *key will cause the word* ***NONE*** *to replace the field data.*

same — *occasionally you may wish to indicate the data is identical to the preceding entry. e.g. the mother and father entries for phone and address are the same. Using the word same is acceptable only of the data will not be used in a standalone state on a report. The report writer will NOT recognize your convention and will assume SAME is the actual data.*
Using the ***[F8]*** *key will set the data in the field to the word* ***SAME.***

scars, marks, tattoos disfigurement etc. — *When data is entered into the Scar & Marks data field, it is stored in an very sophisticated index. This will enable you to locate Defendants through physical description. Therefore it is imperative that accurate, timely and thorough descriptions are entered into the system. When making the description entry use no punctuation or simply commas in the description. Make sure that there is a space between each word in the field. Three lines have been provided for this data.*

comments — *the comment lines are free form and can contain any notes you may wish to add to the bond file. Additional provisions have been made so as to enable unlimited notation attachments to the bond file. Use the key to access the comment module. Comments are automatically dated for ease of readability.*

global comments — *note that there are three comment filing options. In addition to the* ***[Esc]*** *option and the* ***[F4]*** *comment filing option there is a global filing option. When the* ***[F7]*** *global filing option is selected, the same* *comment is replicated on each and every bond the defendant has. All bonds are associated by the social security number. Thus, all bonds having a defendant with the same social security number will be so noted.*

address comments	*After changing a defendant's address, a window will appear giving you the option to **[F1]** Create old address comment (puts the old address in a comment field) and **[F3]** change billing address too. So now you can effect one or both options with a single keystroke for each.*
global address change	*if the defendant's address was changed and there are additional bonds in his name, upon exiting the bond data structure a red window appears giving you the opportunity to **[F1]** change the address on all of bonds, **[F3]** create a comment of each old address on file and **[F5]** change the billing address on all bonds on file. You can toggle the option; ON or OFF by tapping the associated key again. What you see to the left is what you get as the resultant action.*
criminal charges	*criminal charges are described in the charge field. Any additional charge can be written to the added charges field. By selecting **[F6]** at the charges field prompt, a list of charges will appear on the right side of the screen. You may select one or more of the charges by number. Charges so selected will be added to the current charges shown on the screen; all excess verbiage will be placed in the added charges field.*

Indemnitors and security data entry.

While scanning the screens, you will notice that the Indemnitor Data contains a place to install up to six (6) indemnitors, however, only the complete data for just one indemnitor appears.

By selecting [F7]-financial data from the option list a new option menu appears. [F1] through [F6] keys are used to access the individual indemnitor data as well as the ability to make changes if needed.

The required biographical data is quite straight forward. Make sure that the Last Name of the Indemnitor is recorded first, as previously instructed, to insure appropriate indexing of the data.

On the right side of the screen adjacent to the biographical data are six lines that are used to describe the collateral.

On the last line on the screen is the security amount. This amount is crucial in determining the secured and unsecured portion of your bond and therefore, proper reporting is also dependent upon the accuracy of this entry.

All of the indemnitor data is essential to insure accurate and lawful bond reporting to the State of Arkansas.

It is best to attach all of the indemnitor data, particularly the indemnified amount, to the bond file early on or at least before ANY reports are generated.

Financial Arrangements and Payments.

Financial arrangements and payments window can be accessed by selecting [F7] - finances on the bond option list the selection [F8] -Finance TERMS. The window is red and requires a bit of study so that you can utilize this option for your best record keeping advantage.

First, understand that when a bond is entered into the system, the face value for the bond is required to be installed. The lawful premium is calculated automatically in installed in the appropriate field. The premium field can be changed only by changing the face value of the bond. And again, in the interest of reporting accuracy, make sure that the aggregate indemnitor security reflects the appropriate security. If no security is shown or partial security is entered the bond will be reported as either unsecured or partially secured.

Note too, that any of the indemnitors can be selected for billing (sending a premium and charges bill) by selecting [F9] toggle billing indicator and then selecting the appropriate indemnitor by function key. Now adjacent to the indemnitor name and to the right of it will appear the letter Y indicating that a bill is to be sent to this indemnitor. Repeating this process will eliminate the Y, effectively turning off the billing option previously invoked.

After all of the preliminaries are completed, access the financial window. The screen affords several options, all of which are described in the ensuing process options.

OPTION	**USAGE and OPERATIONAL INSTRUCTIONS**
[Alt][F7]	*in addition to the premium amount some or all of your bonds will have additional charges including an Administrative fee, a county fee and/or a State fee. Using this option enables you to select or deselect any or all of these values. During the setup process, some or all of the charges may have been set to automatic. In this case you can optionally override the amount.*
[F1]	*if your bond premium and fees were not fully paid at the time the bond was executed, you may wish to set up a payment schedule. This function automatically sets the payment amount together with the due date. You are prompted to enter the number of equal payments then asked the date of the first payment and finally the number of days between payments. When you enter the requested information, a payment table will appear on the screen. No more than 48 entries can be maintained.*

*the schedule can be created by one of two methods. By tapping the **[F1]** key you can select an installment amount and the system will compute the number of payments or **[F3]** select the number of payments and the system will determine the amount of each equal payment.*

[F3] *If your bond premium and fees were not fully paid at the time the bond was written, you may wish to indicate a payment schedule in the system. This option allows you to set up a payment table manually.*

[F5] *In the event you entered a payment incorrectly, you may change an incorrect payment. All changes are properly administered in the financial management modules by automatic adjustments.*

[F7] *Recording a payment here is a simple process. Today's date is installed automatically you simply type in the amount of the payment, the receipt number, the form of payment, the agent and the amount. Optionally you can modify the date if allowed in the system setup.*

[F9] *this option will delete the current payment table*

[Alt][F8] *this option exposes a table designed for inserting payments and charges not associated with premium and fees. Items such as search fees, credit reports cost of surrender or locating a defendant are installed here. Fees installed here will appear on the billing statements and will show as owed in the on line tables and entries.*

[Alt][F2] *If you elected to use the statement and billing functions, they become available by selecting this option. The following optional operations allow you to customize each account billing criteria.*

The plus sign (+) sign adjacent to the following function keys indicate it is associated with this payment screen option.

+ *The system automatically installs the defendant as the party to be billed. This can be changed. Up to four lines are available for a billing name and address.*

+ *You can install the name of a second billing party if you wish. Bills can be sent to both billed parties. Selecting this function toggles the screen display to show both billing names. The one shown on the screen is the one that will be modified when select the preceding function. If two parties are billed, the screen will indicate:* ***Two parties billed****.*

+ *Select either* ***bill pursuant to schedule*** *or* ***bill total balance*** *by tapping this function key.*

+ *Select the billing frequency tapping this key. The options available are:* ***weekly, monthly, semi monthly, biweekly.***

+ *Financing charges can be implemented. We suggest that you consult with your attorney, association and the state regulating authorities before implementing this feature to insure that financing fees are permitted by law in your jurisdiction.*

+ *Use this function to suppress billing statement for this bond. Once invoked, it remains in effect until reversed.*

+ *Print statement causes a statement (or two statements if two parties are billed) will be generated instantly. Statements, however, can be batch printed.*

+ *Print a payment receipt for all payments on the last payment date.*

+ *Write off the balance owed. Check with your accountant* *for advice as to if and when write-off is appropriate.*

Notice that the amount paid to date and the balance owing is clearly displayed on the financial window in yellow, a few lines from the top of the window.

When you have completed your financial data entry, press the [Esc] key to record all of your data entries and exit the module.

Prior to filing your data, BAIL BOND-NET will examine your entries for obvious errors or unusual circumstances and provide you with warnings and error messages when appropriate. The following errors and/or omissions will generate warnings:

+ The bond is either marked Not activated or Voided. This is just a warning but gives you the opportunity to make a correction to the status or simply file it as is.

+ The total indemnified amount exceeds the face value of the bond. You must correct this deficiency before the system will accept the bond.

+ There is no issue date shown on the bond. All bonds including voided bonds must have an issue date.

+ There is no termination date on the bond. All bonds, except active bonds and not activated bonds MUST have a termination date.

Account grouping; review a client's bond history on a single screen.

Both the Defendant History Index [Alt][F1] and the Defendant History by SSN [Alt][F2] appear on the Bail Bond Data Screen. Both functions select a listing of names or SSN's alphanumerically beginning with the closest match to the data entry provided at the name or SSN prompt.

Note that several program features become apparent.

[Alt][F9] *assign to JUST SAY NO. Selection of this option prevents the issue of another bond for this individual.*

[Alt][F10] *releases the just say no option above.*

[Alt][F7] *Displays more directory names and SSN's*

[Alt][F3] *causes the label printer to generate a file folder label showing the last and first name and the DOB and SSN*

[Alt][F4] *Creates a mailing label for the defendant or billed parties.*

Select the desired account by tapping the function key shown adjacent to the line entry. Now all of the bonds written to the person having the SSN of the selected item will appear on the screen and, if need be, on subsequent screens.

After accessing a given bond from the history table, the table will reappear and the same access process can be invoked for the same or another listed bond.

All of the bond functions previously described can be implemented from the bond screen. For intensive account activity, it may be more desirable to use this method of access as opposed to the direct bond access means.

At this point, [Alt][F1] enables you to view all of the comments associated with these bonds. Shown also is the last payment date and the total amount owing.

Search engine, a powerful business tool.

Without an easy to use search engine your system would be nothing more than a fancy data storage system. Retrieval of data by rapid examination of the indices, is an essential element in a quality computing system. BAILBOND-NET exceeds all expectation when it comes to retrieving data during a user definable search.

The bond on line search engine appears on the Bail Bond Data Screen as option [F1] - SEARCH for a bond. When selected, the following fifteen (15) search keys are enumerated.

[F1]	**list by POWER number**	**[Alt F1]**	**list by ALIAS**
[F2]	**list by AGENT number**	**[Alt F2]**	**list by DATE of BIRTH**
[F3]	**list by CASE number**	**[Alt F3]**	**list by DRIVER LIC.**
[F4]	**list by COUNTY**	**[Alt F4]**	**list by SSN**
[F5]	**list by COURT**	**[Alt F5]**	**list by SPOUSE**
[F6]	**list by ISSUE DATE**	**[Alt F8]**	**list by INDEMNITORS**
[F7]	**list DEFENDANTS**	**[Alt F7]**	**search by MARKS SCARS**
[F8]	**list by COURT DATE**		

First we must select the index from which we want to examine the data. The preceding list contains the fifteen (15) possible search keys available. Once the key has been selected, a prompt will appear asking for the specific place in the index you wish to start the search.

e.g. you selected [F7] - by defendants you are prompted to type in the defendants name, type in the last name first followed by a comma and then a space and now the first name or simply type in a few of the letters of the last name. The search will begin at the first item in the index satisfying your request.

e.g. you selected [Alt F2] - by date of birth. type in the date as MMDDYY The system will pick the appropriate 4 digit year by inductive and deductive methods.

Once the selection has been made and the criteria entered as requested, a screen asking for the lower limit and upper limit of several items appears. If you do not want to limit the search by any of the criteria presented, simply tap the escape key until several move function options appear.

First let's examine the Report Limits available for use while making your data query.

Power number	*confining the report to power numbers between the lower and upper limits*
Issue date	*limiting the report to a range between the lower and upper limits*
Agent number	*restricting the report to the agent or agents in the number range specified. If an agent is logged on but is assigned limited access, only his own bonds will be displayed in the report regardless of the agent numbers designated here.*
County number	*from a practical viewpoint selecting a range of county numbers limits the report to several counties in alphabetic order. A county restriction should contain the same number for the upper and the lower limit.*
Termination date	*the date the bond was exonerated, discharged voided or otherwise disposed of. A range of these dates can be entered into the limit fields.*
Report date	*this is the date the bond was reported to the State of Arkansas on the quarterly report.*

Once the report limits have been set you are prompted to further limit the screen report within the following limits:

[F1] ACTIVE bonds only
those without an disposition after the bond was written

[F2] FORFEITS and Surrender On Bond (SOB) only
these two categories

[F3] INACTIVE bonds only
all exonerated and discharged bonds

[F4] NOT ACTIVATED powers only
all powers for which no bonds are written and are not void

[F5]   VOIDED powers only

those powers voided and recorded as such

[F6]   ALL powers and bonds

Once the final delimiter has been invoked, the search begins.

The resultant screen report shows the first four (4) items found. Using the [F7] key the next four will display, indefinitely or until the report is finished.

If you wish, you may select one of the bonds or powers found in the search using the [F1] through [F4] keys. The key designation appears on the right side of the data screen.

Note that the headings at the top of the report correspond to the data that follows in the exact order it appears in the heading.

Chapter 4: On Line Data Review

Agents biographic data and finances.

The BAILBOND-NET system, being wholly interactive, records all activity and bond status changes automatically.

For example, if an agent writes a new bond and collects the bond premium, the system records the new activity automatically when the bond is written into the system.

When the agent collects part premium on another bond this too is recorded in the agents personal financial records. All activity, including discharged and exonerated bonds, payment collections, and other bond activity is recorded at the time of the action and then posted to all required records to insure reliable on line reporting.

In the AGENTS and ACCOUNTS function listed on the Main Menu financial summaries both quarterly and annual are easily available.

The agent's biographical data together with the commission and build up fund percentages are also specified. If the agent no longer works for the company, make sure that a termination date is specified is shown in the agent's data. If the agent returns to work remove the termination date to insure system access.

The [F1] key enable modification of the agent biographical data. Install the agent's name, last name first and then proceed to fill in all of the required data, so that adequate report data will be available on demand.

The [F7] key provides access to the quarterly and monthly financial data maintained in the system. When making either selection, the system then asks for the year of query. BAILBOND-NET retains both a monthly and quarterly history for up to 30 years.

Court calendar.

The Remind-O-Matic calendar (see Chapter 6) for detailed instructions) is interactive with the court appearance entry in the bond module. This means that anytime a court appearance date is recorded or changed, the modified entry is written as a reminder in the Remind-O-Matic module and becomes available for screen review in that module.

Quick liability position.

On the Main Program Menu QUICK LIABILITY POSITION will enable you to view your liability position change since the last quarterly report. The closing report figures appear on the screen together with the changes since that report and then give the new position as of this moment.

Do remember, however, that unless ALL of the new bonds and any disposition changes are entered into the system, the resultant reporting may not be accurate. Keeping on top of the data entry is essential for credible financial position reporting.

Chapter 5 <u>Administrative Report Printing</u>

***A**nnual Insurance Department Report.*

The State of Arkansas requires that an annual summary of the quarterly reports filed with the Arkansas Department of Insurance.

This report will be generated upon selection providing all of the corresponding quarterly reports have been finalized and recorded (see the following section). The data used for this report is recorded when the quarterly report is printed.

The report must be notarized and if any bonds exist that were not reported during the year, a check for such bond(s) must accompany this report in addition to a notarized statement detailing the circumstances and reasons why the report was not timely.

The report must be received by the State Insurance Department not later than January 15 of the year following the annual report period.

***Q**uarterly Insurance Department Report*

The Quarterly reports must be received by the State of Arkansas Insurance Department not later than the 15th of the month directly following the report Quarter.

There are four (4) reports that must be filed and a check must accompany each filing.

The first report lists all new bonds written during the quarter. The second report will show all discharged and/or exonerated bonds. The third report is a quarterly

liability summary and the fourth is an affidavit summarizing the number of bonds written during the quarter and the required fee amount. Make sure this form is notarized and that a check in the full amount owing accompanies the report.

Always check your reports for accuracy before filing them!

The system permits you to print a test set of reports before finalizing the data set. Careful examination of the test report set will help insure that no errors and/or omissions exist.

When the quarterly report function is accessed the quarter shown of the screen is the last completed quarter. This is the quarter you would normally print. The select another quarter tap the [F7] key and then enter the quarter followed by [Enter] then type in the year followed by [Enter]. Note that the quarter and year you select appears on the left side of the screen.

If you want to make a test run (not finalized) report, select the [F7] key and then hit [Enter] twice. All reports not in the current quarter will be test status.

Finally, you can print the report in either the power order or in the power order by agent. Tapping the [F9] key will toggle this option.

You must use a wide carriage printer for the New Bonds and the Exonerated & Discharged Bond report. Set the type pitch to 17.1 CPI for all of the reports.

Print the report by selecting the [F1] key, then the [F2] key, the [F3] key and finally the [F4] key.

Monthly Internal Activity Report

A comprehensive monthly report can be printed for the entire company or agent by agent for any period current or past.

The report date range appears in yellow under the MONTHLY REPORT heading. Using the [Page Up] and [Page Down] key you may select the month and year of the report to be generated.

Using the [F7] key you can select the agent for whom the report will be generated. Tap the key until the agent you wish to print appears on the screen. If you decide to print all agents on a single report, hit the [F5] key.

Once you have selected the appropriate options push the [F1] key to start the printing process.

Weekly and Date Range Internal Activity Report

A comprehensive weekly report can be printed for the entire company or agent by agent for any week, current or past.

The report date range appears in yellow under the WEEKLY REPORT heading. Using the [Page Up] and [Page Down] key you may select the week and year of the report to be generated.

Using the [F7] key you can select the agent for whom the report will be generated. Tap the key until the agent you wish to print appears on the screen. If you decide to print all agents on a single report, hit the [F5] key.

Once you have selected the appropriate options push the [F1] key to start the printing process.

Weekly and Date Range Court Appearance Report and Worksheet

A weekly court appearance date report can be printed for the entire company or agent by agent for any week, current or past.

The report date range appears in yellow under the WEEKLY REPORT heading. Using the [Page Up] and [Page Down] key you may select the week and year of the report to be generated.

Using the [F7] key you can select the agent for whom the report will be generated. Tap the key until the agent you wish to print appears on the screen. If you decide to print all agents on a single report, hit the [F5] key.

Once you have selected the appropriate options push the [F1] key to start the printing process.

Just say NO! report.

You guessed it; its a printed defendant listing of all surrender on bond and bond forfeiture paid.

With a single keystroke you now have the ability to print that sorely needed list of potentially risky bonds. The list supplies given names as well as known alias together with Social Security Numbers, driver license numbers and state ID numbers.

Case status verification report.

This listing is a report enumerating all of the pending bonds listed court by court. The report provides writing space for comments with respect to each line entry making periodic inspection and verification of the outstanding liability a relatively simple chore.

Pending bonds report.

This report enumerates ALL of the outstanding bonds maintained in the system. It is a must for audit purposes.

***R**emind - O - matic is an interactive on line general use calendar*

In the preceding chapter it was noted that the Remind-O-Matic module is wholly interactive with the court appearance date. But, Remind-O-Matic is not just limited to court appearance, it is accessible for calendar entries of all types.

To make an entry in Remind-O-Matic simply tap the [Home] key at any single keystroke prompt in the program and the Remind-O-Matic calendar entry input screen will appear ready to use.

Type in the date that the event or reminder will appear. The time may be installed if the reminder is for an appointment or other timed commitment, however, it is not required.

Now type in a reminder note up to 6 lines in length.

If you want to make a reminder repeat on the same day every month for up to one year, select the [M] onthly reminder and then provide the number of months you want the message repeated.

The Remind-O-Matic review function is available in the general program menu structure. Notice that the lines are numbered on the right hand side of the screen so that selective deletion of entries can be made.

Entries display from today forward. You can select a specific date by tapping the [F7] key and then entering the date desired or you can use the [F2] or [F3] keys to list the entries before and after those displayed on the screen.

The [F9] key accesses the deletion options. You can delete a single entry that appears on the screen or you may delete a date range of entries.

***M**y Notebook - a good place to scribble and make other personal notes*

Selection the MY NOTEBOOK option reveals a screen containing slots for up to 20 notebooks. That means that each operator could have his own personal notepad.

Selecting [O]pen a new book causes the system to ask for the access code you want to use for the notebook. It can be up to 4 characters long and must consist of letters and/or numbers.

After entering the code you are prompted to type in your name followed by [Enter]. After this has been done, you are ready to access your notebook. Hit the [A]ccess my notebook option, type in your notebook number followed by your personal code and you are then ready to use the notebook.

The prompts clearly describe your input and review options.

The first page is considered the table of contents page. When you need more space to write to, just add a page. Pages can also be deleted and modified. You can print the notebook as well.

When you are finished with the Notebook, tap the [F5] key to exit the module. All changes you made to the notebook will then be saved.

Time clock for tracking who's coming and who's going.

The TIME CLOCK function is a full blown computer replacement for the old standby wall mounted dinosaur. Although the entire Time Clock is connected into the BAILBOND-NET system, documentation is separately available for it. The documentation fee is $45.00 U.S. currency. Contact your distributor for details and ordering instructions.

Telephone and address book for general business operations.

BAILBOND-NET has a general use TELEPHONE and ADDRESS BOOK structured into the menu mechanism.

Notice that the telephone book has its own on line documentation available by tapping the [D] key. Read the use instructions carefully before using your new telephone directory.

The telephone directory has search capability unsurpassed by telephone books costing many hundreds of dollars.

[F1]	***Last Name***	***[F5]***	***Zip Code***
[F2]	***First Name***	***[F6]***	***Telephone Number***
[F3]	***City***	***[F7]***	***Category***
[F4]	***State***		

Following are some examples of uses for the telephone book.

+You received a call from someone and have their phone number but want to know their name and associated business.

+ You know that there are several plumbers in your system but can't remember the name of any.

The telephone book will help you solve these and many other mysteries.

Call-in-O-matic for tracking your clients during the active bond period.

Keeping tabs on your clients becomes an easier task when you use the CALL-IN-O-MATIC feature structured into the BAILBOND-NET system in such way as to enable access to the module while in any other function or at any program menu.

When a client calls in, simply hit the [Alt][R] ; a window appears enabling you to access the clients call in record by name or by case and agent numbers.

Use the [F1] key to record the call and the number the client called from and then the [F3] key to set the next call in date.

The [F5] key will display in a flash all those calls expected but not received.

To set up a client for call in status, simply access his bond record and then select

the [F2] defendant's biographic data now tap the [Alt][R] and then select the [F7] option. Now record the date you expect client's first call.

Chapter 7: System Access and Security

System security is a vital component of BAILBOND-NET.

BAILBOND-NET has several security features structured into the system.

The first level of security is the operator log on. Each authorized operator can select his or her own code. The code can be changed easily by the operator.

Each employee, agent and administrator is assigned a menu structure for his or her personal use. That menu displays and accesses only those functions that the operator needs access to. Up to 64 different menu types can be created and each one can be assigned to one or more employees.

The only person that can change the employee menu assignment is an administrator having the menu assignments on his menu.

Additionally, each agent can be assigned a report and reading access level. At the lower level, he/she is able to access only his/her bonds and activity reports.

For security reasons, security documentation detailing the security settings, is available under separate cover to your company chief operating officer or company owner(s).

We are very aware of the security measures peculiar to the bonding business and afford you the latest in agent activity tracking. You are invited to discuss with us any particular concerns or questions you may have.

Not only do we write the very best in business software; we invent the very best in business security solutions.

Chapter 8 Internet Access and Security

Internet Log On. So as to insure high quality access security, you will be given a User name and security code to log on when prompted on the Internet. If you want to change your user code, you must call our office. This security code and user name will tell the server just what data base you are accessing. After logging on to the server you are required to log on to the BAIL BOND-NET system. Your company server administrator will be allowed to change access codes so as to prevent unauthorized access to the system.

If the accessing user is not authorized to access the system, the program will shutdown and deny access to the program or to any other server functions. Our personnel WILL NOT give out access codes or make changes while on the phone. Your designated administrator MUST BE positively identified before any changes or information is provided. ALL such requests, even if denied, will be reported to your designated administrator.

Good security is the key to your data integrity. Carefully observing the following security measures, will insure that your system is tamperproof:

> **Never give your Internet server access code to any unauthorized persons**
>
> **Always change your access code when terminating an employee**
>
> **BEFORE issuing termination notification.**
>
> **Make sure that ALL employees having access are told never to disclose their Internet passwords or their own personal passwords to ANY other person.**
>
> **Make sure that menu and access levels are properly installed for all authorized users.**

If you have ANY question regarding system security call BEN CONNER, our security advisor immediately.

Printer Compatibility Testing and New Log on Procedures

For your convenience, we have installed a printer compatibility test on the Internet server. To access the print test access the server log in. When asked for the User's name, type in the word PRINTER. At the access code prompt type TEST.

ANALYZING RESULTS:

If your printer prints a checkerboard together with readable text above and below it, your printer is designated HPIJ if it is an ink jet printer (any manufacturer) or HPLJ if it is a laser printer.

If your printer does print, but no checkerboard and/or readable text, then your printer is probably designated as EPFX (any manufacturer).

If your printer does not print anything it is probably not compatible. USB printers will generally not be compatible as are many other low end printers.

SETTING UP A PRINTER FOR YOUR SYSTEM:

Log on to your system. There may be an extra step; either a prompt or blank requiring an additional [Enter] key stroke. Log on with your administrative code and the tap the [F4] key. A red menu now appears on the screen; select 17 (do not hit the enter key) now look for the TABLE OF WORKSTATIONS and tap the two characters displayed adjacent to the verbiage and to the left of it.

A table of entries will appear. You may designate as many workstations as you like together with the printer output designation that insures proper printing. For example, if you have three workstations that you access the Internet BAIL BOND-NET program from, you simply test each printer, obtain the appropriate designation as described above and then make appropriate entries in the workstation table. Assume that at MY HOUSE the printer is EPFX, that at the NEW YORK OFFICE the printer is HPIJ and at the LITTLE ROCK OFFICE the printer is HPLJ. The following sample table would then be installed:

WORKSTATION NAME	LPT1-CODE-SET	LPT2-CODE-SET	LPT3-CODE-SET
MY HOUSE	EPFX		
NEW YORK OFFICE	HPIJ		
LITTLE ROCK OFFICE	HPLJ		

Now log off and then log on again. Notice that the first item in you table appears on the screen. If you are at that location, simply press [Enter]; however, if you are at one of the other designated workstations, use the up and down arrows to select the correct workstation and then hit [Enter].

This will insure that the printer output contains the right control codes for your workstation printer.

If you are using a dot matrix printer it MUST be tractor feed and MUST be capable of printing on 11” X 14” wide paper . If your printer is a laser or ink jet type, you printer MUST be capable of printing on legal size paper as well as letter size paper. Most of the system reports will print on wide carriage tractor paper or landscape on the cut sheet printers.

Before any selected report prints, a red block will appear on the 24th line on your monitor telling you to use narrow or wide paper for the ensuing report. If you are using cut sheet paper the term narrow means letter size paper (8 ½ X 11); the term wide means legal size paper (8 ½ X 14).

Now, with all of the materials in hand and a compatible printer in place select a report (preferable the DATE RANGE REPORT) for your test. If the print runs off the paper or if the page number is not the last line on each page call us for assistance.

Now, with all of the materials in hand and a compatible printer in place select a report (preferable the DATE RANGE REPORT) for your test. If the print runs off the paper or if the page number is not the last line on each page call us for assistance.

<u>T</u> ***<u>rouble shooting addendum to your BAILBOND-NET software</u>***

Your QUARTERLY Arkansas State reports should be reviewed carefully to insure that an accurate representation of your quarterly activity is about to be submitted to the state licensing board. Here are a few suggestions together with solutions in the event your report suffers the described deficiency.

1. Make sure that ALL of the bonds written during the quarter as well as the voided bonds during the period appear on the report. If the bond does not appear on the report enter the bond data if it was not installed in the system or if it is in the system insure that the issue date is correct and that, if the bond was exonerated, that the termination date is also correct. If the bond was exonerated it will be necessary to mark the bond active again after making any corrections, exit from the bond data on the screen and then recall it to the screen and again mark it appropriately as exonerated making sure the termination date is correctly stated.

2. If a bond appears on the report that was not activated, simply reset the bond to non activated status and then file it. If a bond appears due to application of an incorrect date, correct the date following the instructions in paragraph 1 above.

3. Check each bond for the accuracy of the stated secured amount and unsecured amount. If the secured amount is either understated or overstated, access the bond, make the appropriate changes to the indemnitors financial position. If the bond appears exonerated, it will be necessary to follow the steps in paragraph 1 above with respect to temporary activation.

4. Add the secured and unsecured amount at the bottom of the newly written bonds report. They should always add up to the total of the bond value shown on the report.

5. If after carefully examining your report and exercising the aforementioned remedy, you still find an error, call me immediately for assistance.

6. It is a good idea to prepare your reporting data for an initial printing at least seven (7) days prior to the submission deadline. So doing, will help insure that you have adequate time to exercise your remedial options and to obtain assistance if needed. You can receive assistance by calling 479-646-7795 or 479-646-3263.

Transferring powers to agents: The Remote Control SYSOP function permits the transfer of issued powers to agents on line. The system scans all powers issued to the agent and transfers the unassigned powers to the agent. This function must be performed following the transfer of bonds from the agent to the SYSOP.

Receiving bonds written by agents on-line: Again, the Remote Control SYSOP function enables the SYSOP to read and transfer bonds written by the agents on line. If powers are pre assigned to agents, then the transfer of powers to agents must be performed following the transfer.

Chapter 9: Pocket PC Operations

Pocket PC data collection: Upon selection of Pocket PC Data Collection option, several options described below will appear on the screen.

[F1] - Collect Data and Immediately Send to Office Terminal causes the system to scan the bonds and create a file to send to the accessing terminal. Make sure that you access the Windows file drop down menu. Select the Options then click on printer tab and write a file name where LPT1 appears. Make sure that you restore the LPT1 value to the printer options after you receive your data on the desktop.

[F3] -Collect Data and Store for Direct Agent Downloads. Selecting this function causes the system to create a file on the server that can be accessed by any agent or office operator using the [F7] option below. When this process is complete, the system will return to the desktop. Ideally, you should start this operation at office closing time.

[F5] -You can limit the data collection by setting the date range option. This date will cause the system to ignore bonds issued before the date set.

[F7] -Send to Agent for Pocket PC Updating. The most recently collected data will be transferred to the terminal operator's desktop. Select the Options then click on printer tab and write a file name where LPT1 appears. Make sure that you restore the LPT1 value to the printer options after you receive your data on the desktop.

Appendix A - Formatting Program Forms

In the interest of operational flexibility, BAILBOND-NET allows the user to customize billing, statement, and receipt forms and allows the custom creation of unlimited other forms and access to them for the purpose of printing.

There are two (2) formatting functions. The first is Forms Variables & Functions illustrated in figure 1 below and the second is Contract Forms Composition as is shown in figure 2 on the next page.

Billing Form Variables	Receipt Form Variables	
Bond number (9).........<I>01	Bond number (9).......<I>01	F1 -INVOICE
Agent number (8)........<I>02	Agent number (8)......<I>02	
Issue date (8)...............<I>03	Issue date (8).............<I>03	F2 -STATEMENT
Defendant(32).............<I>04	Defendant (32)......... <I>04	
Bond amount (11).......<I>05	Bond amount (11).....<I>05	F3 -RECEIPT
Premium amount (11).<I>06	Premium amount (11)<I>06	
Paid to date (11)..........<I>07	Paid to date (11)........<I>07	F4 -Statement
Balance owed (11)......<I>08	Balance owed (11)....<I>08	MESSAGE
Payment due (11)........<I>09	Payment amount (11)<I>09	
Bill to name (28)....... .<I>10	Billed to name (28)...<I>10	F5 -Quarterly
Billing address (28).....<I>11	Billing address (28)..<I>11	FEE Report
Billing address (28).....<I>12	Billing address (28)..<I>12	
Billing address (28).....<I>13	Billing address (28)..<I>13	F6 -Annual
Billing date (8)............<I>14	Payment date (8).......<I>14	FEE Report
Billing message............<M>	New bal owed (11)...<I>15	
[Text file BILL001]	[Text file BILL002]	F9 -next screen

NEVER columnar position 1 on the billing or payment form.
<N>-normal size type <D>-double size type <C>-center text   Esc -exit

Figure 1 Forms and Variables Function Screen

Invoices, statements and receipts can be modified using the DOS editor that is called when you select the applicable function key. Follow the instructions on the screen to make printing changes.

When you are finished editing the text, tap the [Alt] key. The editor FILE option is now backlighted. Tap [Enter], arrow down to exit and hit enter. If you made changes, the program will prompt you to either save changes or to discard changes.

WARNING: The quarterly and annual fee reports have been created to conform to the Arkansas required submission format. Do not change the foundation format. If and when the state requirements change, your forms will be automatically updated.

```
   Contract Form Variables
Bond number (9)..........<I>01                                  F1 -NEW format
Agent number (8).........<I>02 At the time of contract
Issue date (8)...............<I>03 printing, the operator will
Defendant(32).............<I>04 be asked if the contract is     F2 -MODIFY format
Bond amount (11)........<I>05 to be printed blank or fil-
Premium amount (11)..<I>06 led in using data installed
Paid to date (11)...........<I>07 in a specific bond information F3 -display MENU
Balance owed (11).......<I>08 optional.
Payment due (11).........<I>09
Name of Maker (28)....<I>10 If the data called for            F9 -DELETE format
      address (28).........<I>11  is partially or wholly  in-
      address (28).........<I>12  complete, the forms printer
      address (28).........<I>13  will print an underline.
Contract date (8)..........<I>14                                F5 -Next screen

Name & address can be DEFENDANT or any INDEMNITOR on file.
NEVER use the first line on the contract form.
<N>-normal size type <D>-double size type <C>-center text    Esc -exit
```

<u>Figure 2 - Contract Forms Composition Screen</u>

The contract forms composition function enables you to create custom forms and print them with blanks for manual completion or using the data associated with a specific bond. At the time of printing the defendant's name and address or any of the indemnitors names and addresses can be selected for insertion into the forms you create.

Using the [F1] key create a contract format. Use up to six letters and/or numbers to designate the form. Then type in the form description. Both will appear on the menu.

Use the [F2] key to create or modify a contract form. Use the DOS editor to create your form. If the form is less than 60 lines long, it will print on letter size paper. If it is over sixty(60) and not more than eighty (80) lines long it will print on legal size paper.

When you are finished editing the text, tap the [Alt] key. The editor FILE option is now backlighted. Tap [Enter], arrow down to exit and hit enter. If you made changes, the program will prompt you to either save changes or to discard changes.

PRONOT - PROMISSORY NOTE
LOCINQ - LOCATOR INQUIRY

F1 -print FORM now

F2 -print BLANK form

F3 -select BOND number

F4 -select FORM format

F5 -display FORMS list

F6 -select NAME for form

Esc -exit module

Form code: PRONOT Agent: 001 Bond no: 30

Figure 3 - Contract Printing Operations Screen

Printing any form that is installed in the system is easy. There are two possibilities. You can print a blank form, that is one with underlines instead of bond data, or one using a name and address on a specific bond.

To print a blank form, first select [F4] the form format listed on the left of the screen. Next select [F2] to print the blank form.

To print a data intent form or contract, first select [F4], the form format listed on the left of the screen. Next select [F3], the agent and bond number from which you want the data extracted. Now select [F6] and indicate the defendant or indemnitor to be used on the form and finally select [F1] to print the filled in form.

Note: Until all of the options have been selected, [F1] and [F2] option will not appear on the screen.