Welcome to RMEx Version 5.2. This document is intended to be used by your management to understand the changes that have been added to RMEX. Please read the documentation carefully prior to installing the new version!

<u>IMPORTANT – Release 5.2 installing GUI features is a separate process l and Quantrax must do the installation and you must coordinate update at the same time 5.2 is being installed.</u>

Table of Contents

Printing RMEx Letters with MS Word Templates

This feature will allow you the ability to define MS Word templates associated with RMEx merge codes. In other words, you now have the ability to design and print letters internally using MS word and all of its features!

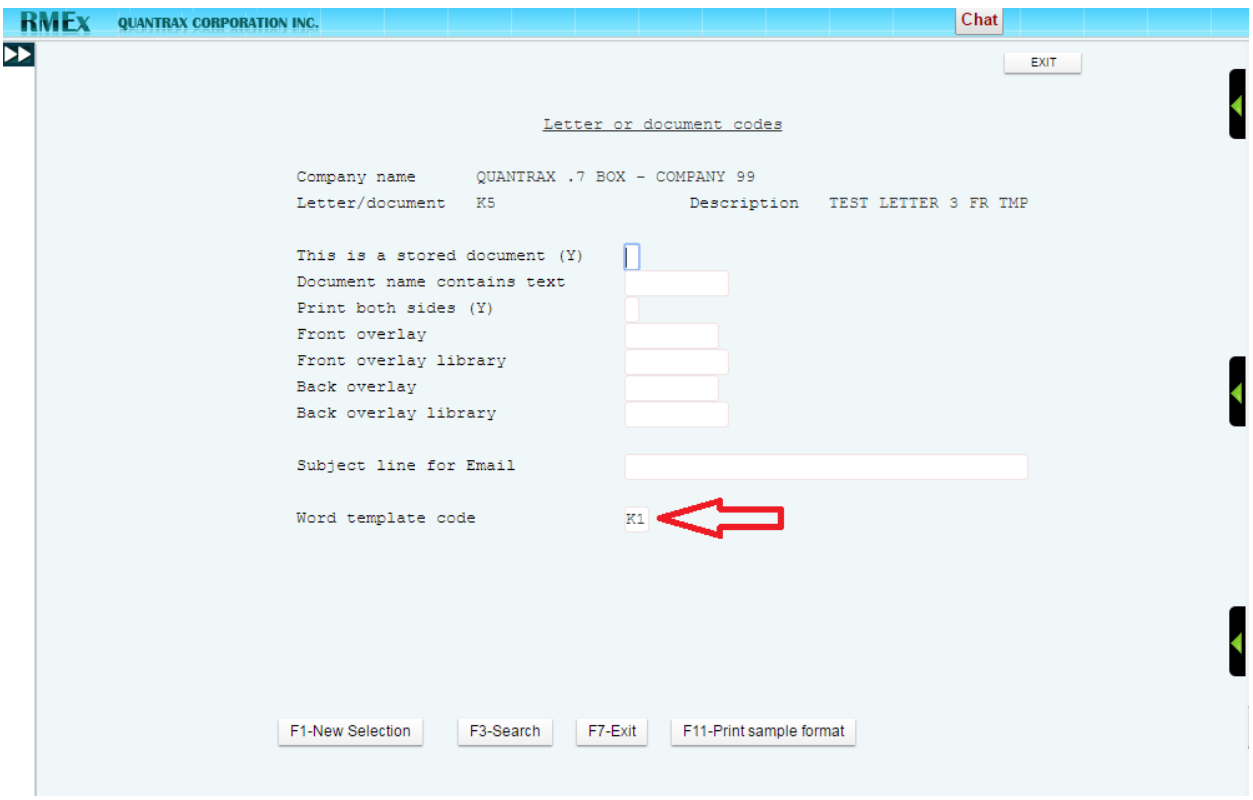
NOTE – There is a $500.00 setup fee for this product. Please contact support@quantrax.com for more information.

The user will be able to define any template of their liking and include RMEx merge codes into the letter template. When a user requests a letter through RMEx (Both batch and on demand) the letter will be printed in house through a designated PC.

Setting up Templates

Step 1 – Assign a template code to your letter in RMEx

This option is setup from System Control menu > Letter Codes, where you will assign a 2 character Template Code. You must setup the template code before you can define the template elements.

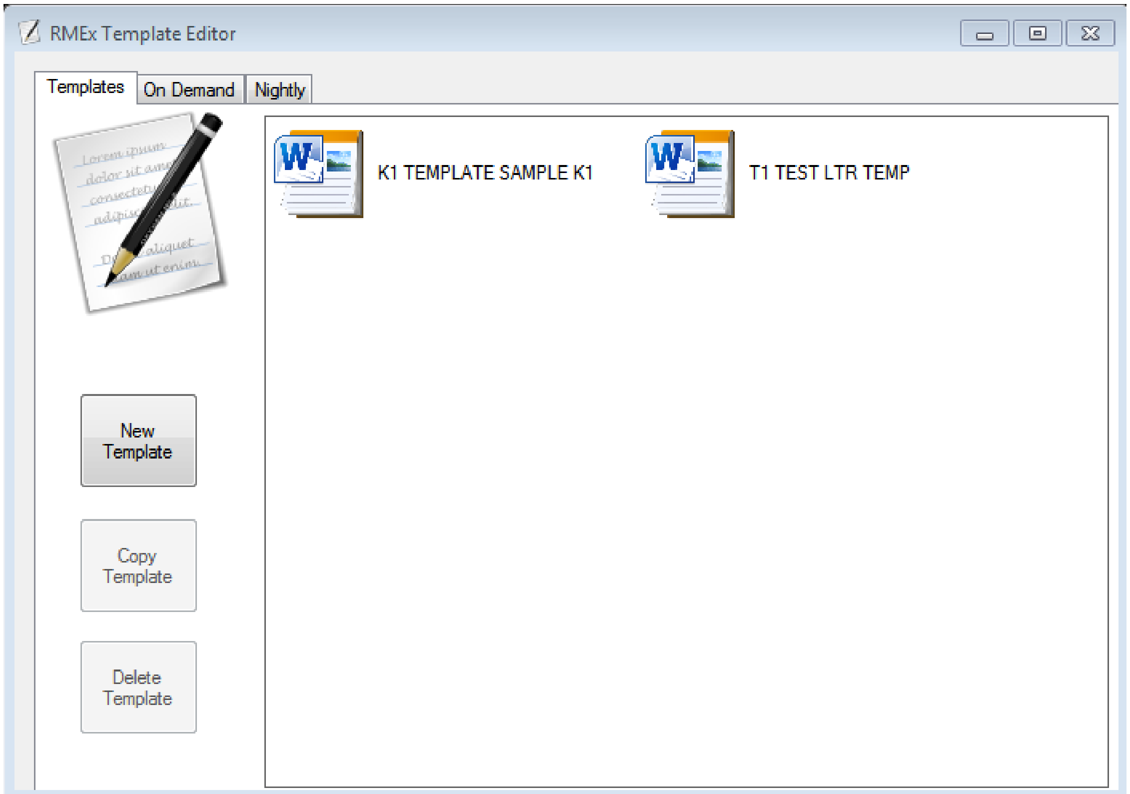


NOTE – Once assigned with the MS Word template, your letter will no longer be printed through an IBM spool nor will it be available to be sent to a letter vendor.

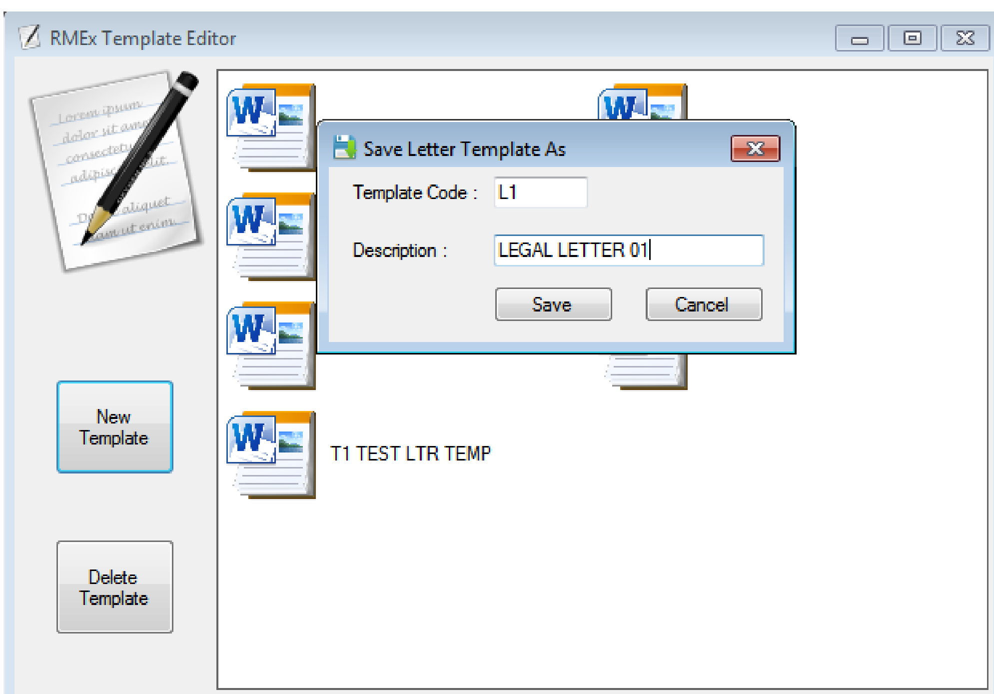
Step 2 – Define your MS Word template

1. Look for the 'RMEx letter editor' shortcut on the desktop of your PC server.

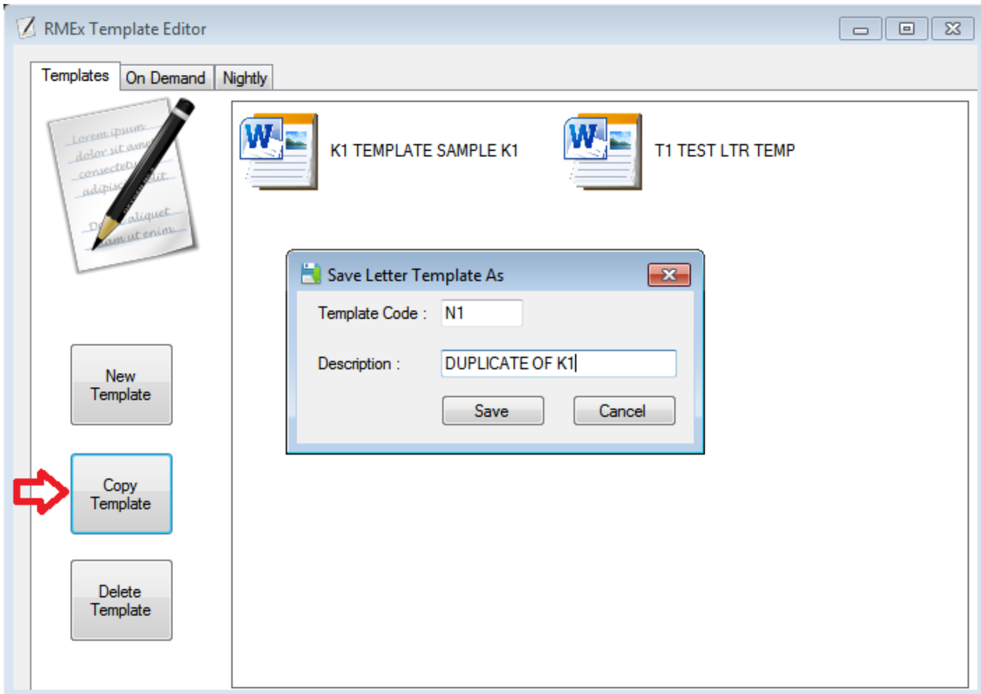
NOTE: Once this product has been installed on your system, the shortcut will be on the desktop.



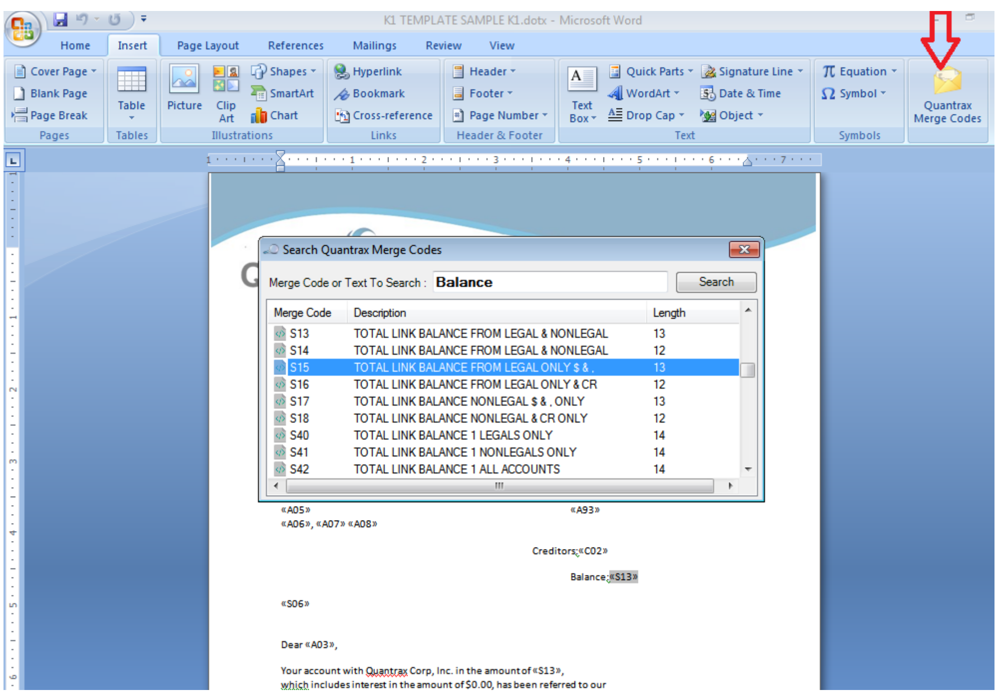
2. Use the 'New template' button to start designing your new template.
3. You will be asked to enter the Template code and the Template description to proceed. The template window will open up with all MS Word features available to you to design your template.
4. You will see the templates that have already been designed as well. A double click on any of the documents will open it up which allows the user to edit as needed.



5. The software comes with the ability to duplicate an existing template to a new one which provides the user to design letters with similar wording/formats easily.



6. Place the cursor at a location you wish to enter a merge code, Press 'Insert' and then RMEx Merge codes button to look up the merge code. Double click the desired merge code and it will appear on your template.



NOTE – You can use any MS word features/edits that you desire on the merge code (Highlight, Color, fonts, etc.) and the letter will contain the related data area according to the feature/edit. Once a MS word template is saved, the merge code details will automatically be saved in the RMEx letter format for the designated letter code.

Requesting a Letter

Any letter requested through RMEx can be associated with an MS Word template. When you request a letter through a smart code, the letter will be processed through the nightly. When you request a letter using the **TabQ - Print a letter** feature the letter will print on demand.

Nightly Letters

Any templates related to letters that are to be printed through the nightly will get printed through a printer that is assigned with the PC where the RMEx software resides. A dated folder will contain all the nightly letters which will be accessible through the RMEx letter editor software.

Letters on Demand

When a letter is requested to be printed on demand through **TabQ - Print a letter** feature; the letter will be created on the PC and will be accessible through the RMEx letter editor software. The user can view the letter and print it as desired.

P. O. BOX 0001
TEST CITY, FL 32402
RETURN SERVICE REQUESTED
TEST

ABC Collections, LLC
P. O. Box 0001
Test City, FL 32402
(P) 888-888-0088 / (F) 000-888-1708

March 31, 2017

Jennifer M Crisman

1225 3rd Ave NW
Great Falls, MT59404

BP0050386

Creditors:ST. MARY'S HOSPITAL

Balance:

March 31, 2017

Dear Jennifer M,

Your account with Quantrax Corp, Inc. in the amount of , which includes interest in the amount of $0.00, has been referred to our office for collections.

Please submit your check or money order payable to ABC Collections, LLC at the above address within thirty (30) days of this letter to prevent this collection being placed on your credit file for seven (7) years, as allowed by Federal Law.

For your convenience, we accept Debit & Credit cards by phone.

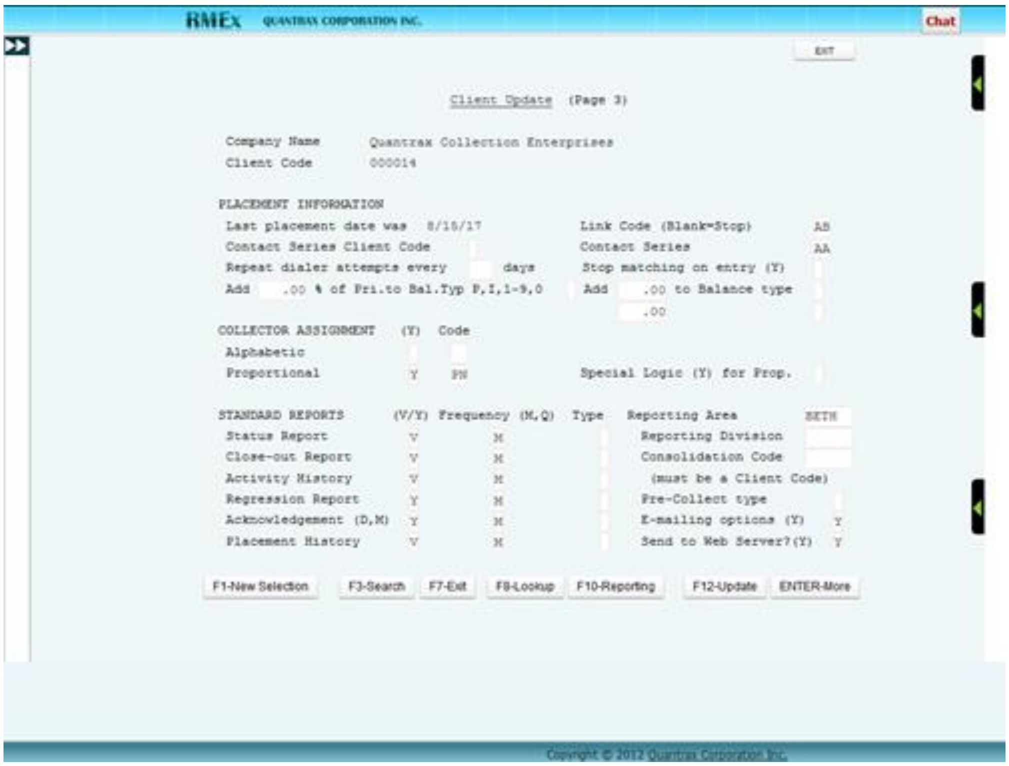
Sincerely,
ABC Collections, LLC
(888) 888-0088

CSV Files for Standard Reports

The section provides guidance for the users to create / email .csv files using Standard reports.

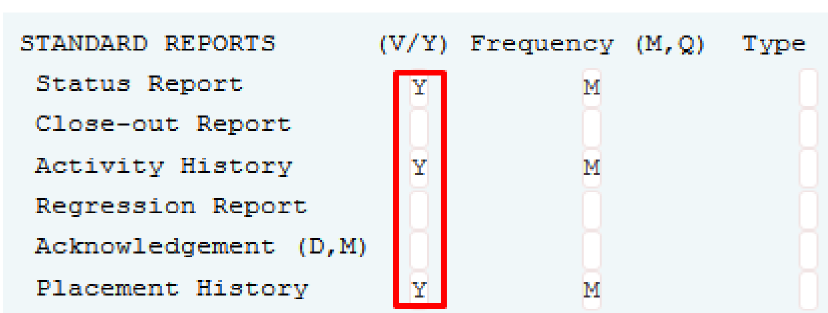
Setting up A Client

From **Management Menu > Client update** (page 3), set up the 'V/Y', 'Frequency (M,Q)' and 'Type' against the relevant Standard Reports.



From **Management Menu > Client update** (page 3), set up the 'V/Y', 'Frequency (M,Q)' and 'Type' against the relevant Standard Reports.

- Y = email the reports/ CSV files
- V= email and view .csv file using command line

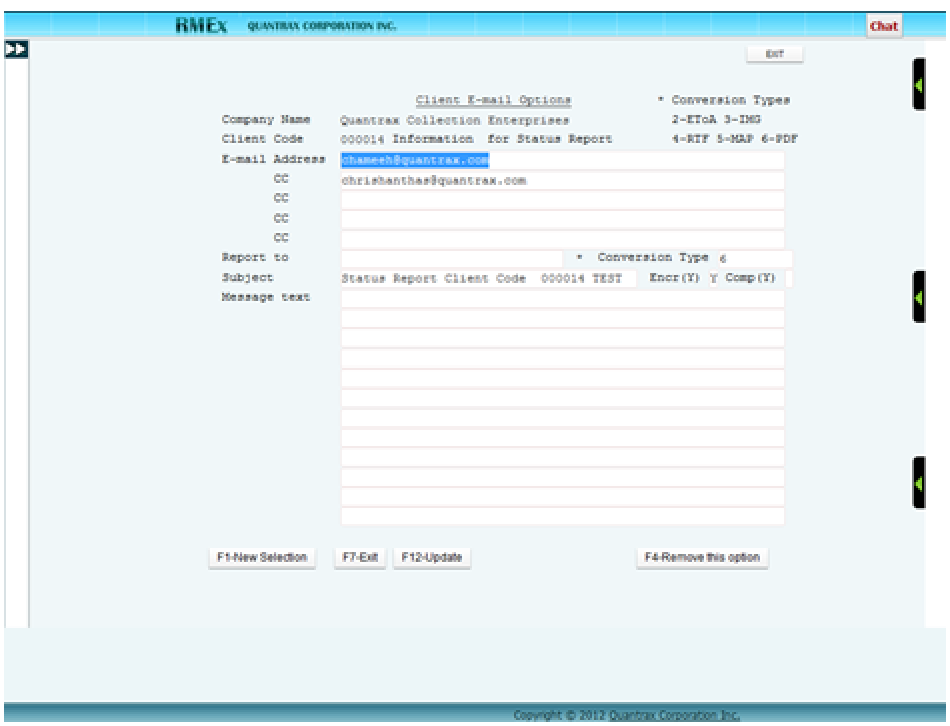


Setting Up Standard Reports to Send Emails

Setup Standard Reports to send emails by doing the following:

1. **Client update** > **Client E-mail Options** (After page 3).

2. Set up the email addresses that you wish to email them to as follows.



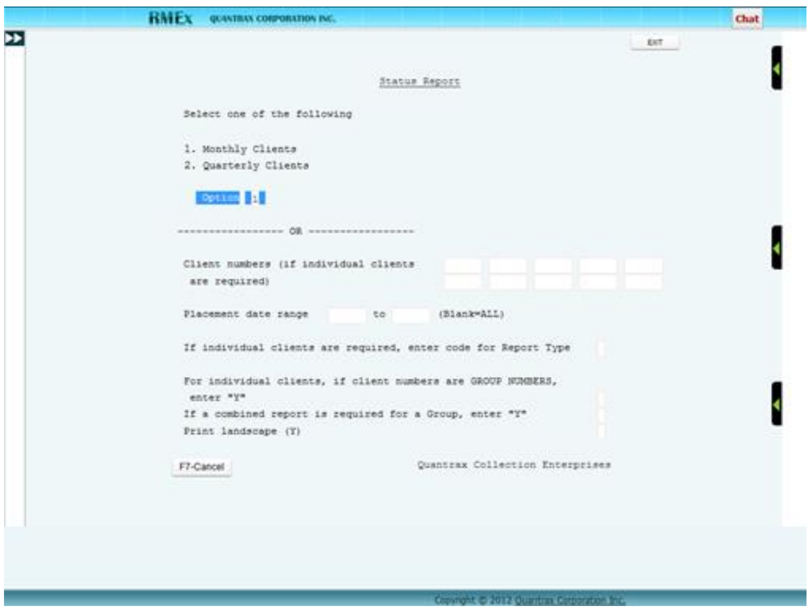
Create / Send PDF or CSV

From **RMEx Main Menu** > **Periodic reports menu,** you can create / send .pdf or .csv files to the email addresses that have been setup in Client Master

There are 2 options available.

1. To send email for 'Monthly / Quarterly' clients
2. To send email for 'individual clients' on demand

OPTION 1 - Monthly / Quarterly Clients

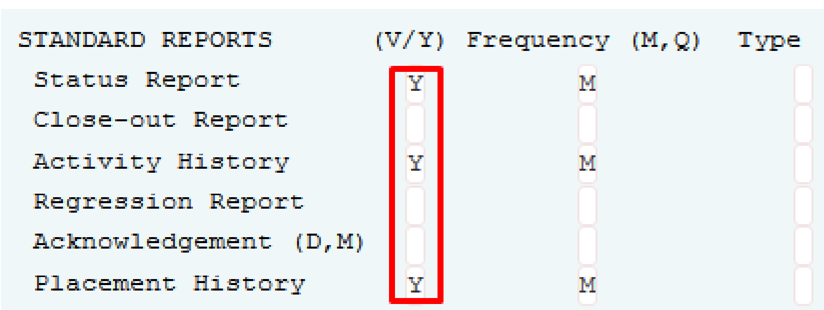


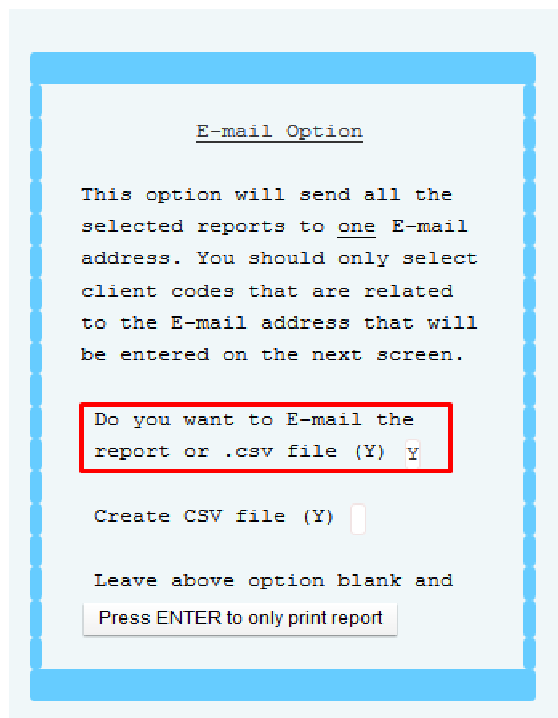
OPTION 2 - Individual Clients on Demand

- Once you take one of the above options it will ask you to select the type of Report you want and email the PDF / CSV accordingly based on the following 3 conditions:

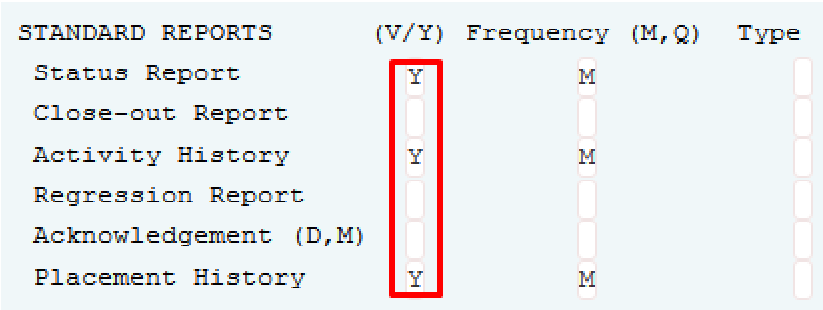
Conditions

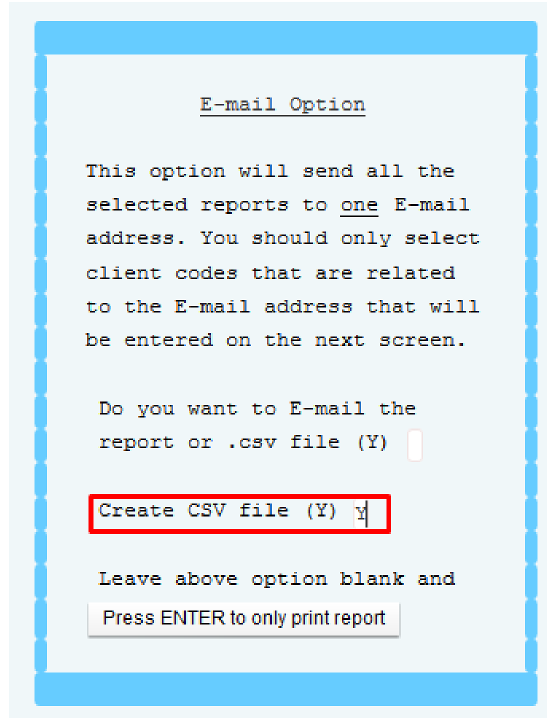
1. If you have a 'Y' in STANDARD REPORTS selection on **Client Update** and 'Y' for **Do you want to E-mail the report or .csv file** (Y), **<u>it will email a .pdf</u>**.



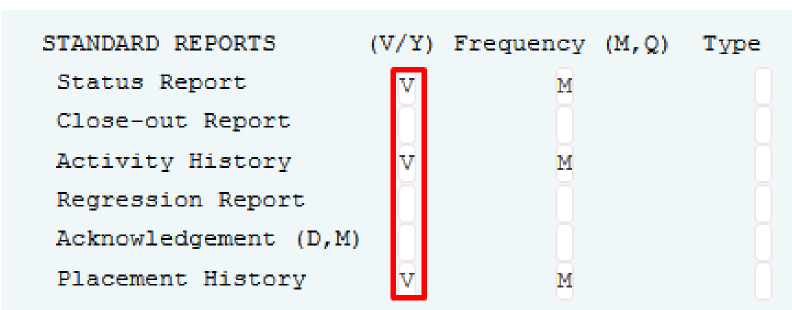


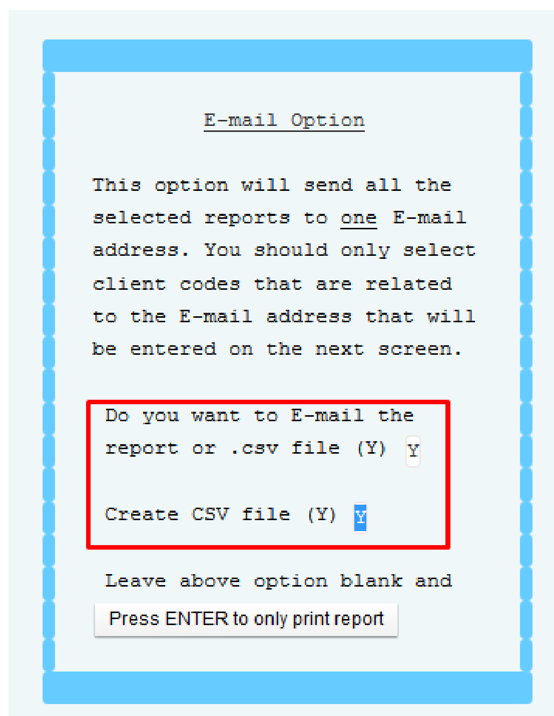
2. If you have a 'Y' in STANDARD REPORTS selection on **Client Update** and 'Y' for **Create CSV file (**Y), **<u>you can view csv file using command line</u>**.





3. If you have a 'V' in STANDARD REPORTS selection on Client Update and 'Y' **for both the options**, **<u>it will email a csv and you can also view csv file using command line</u>**.





RMEx Document Packets

This feature allows the user to request a bundle of letters/documents through RMEx. This is a new feature in addition to the standard letter features in RMEx.

This feature requires document scanning and Quantrax has a basic document scanning / management system that is available now and comes with a small set up fee of $500.00.

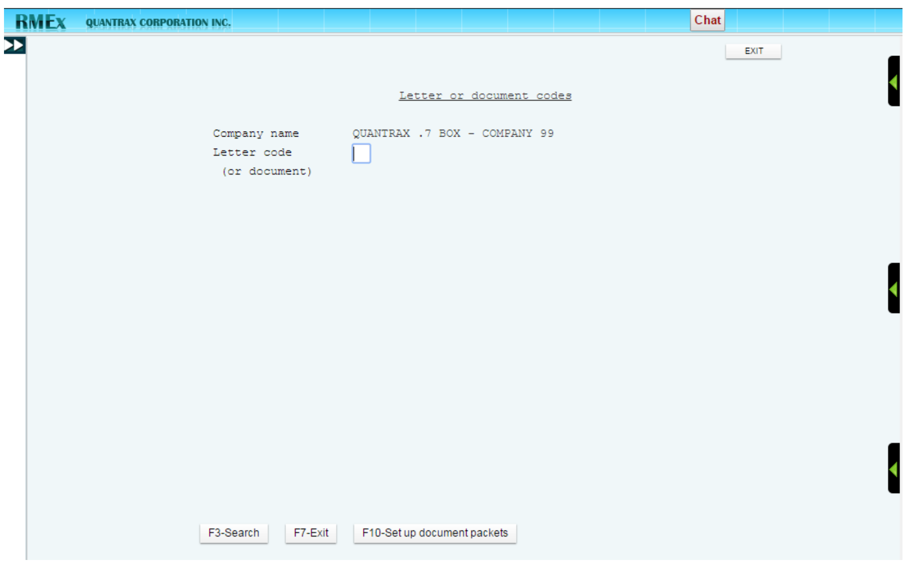
Quantrax also has a new partnership with *Applied Innovation* whose superior document management system "Papyrus" is what we are recommending and planning to interface with.

Please contact support@quantrax.com for more information.

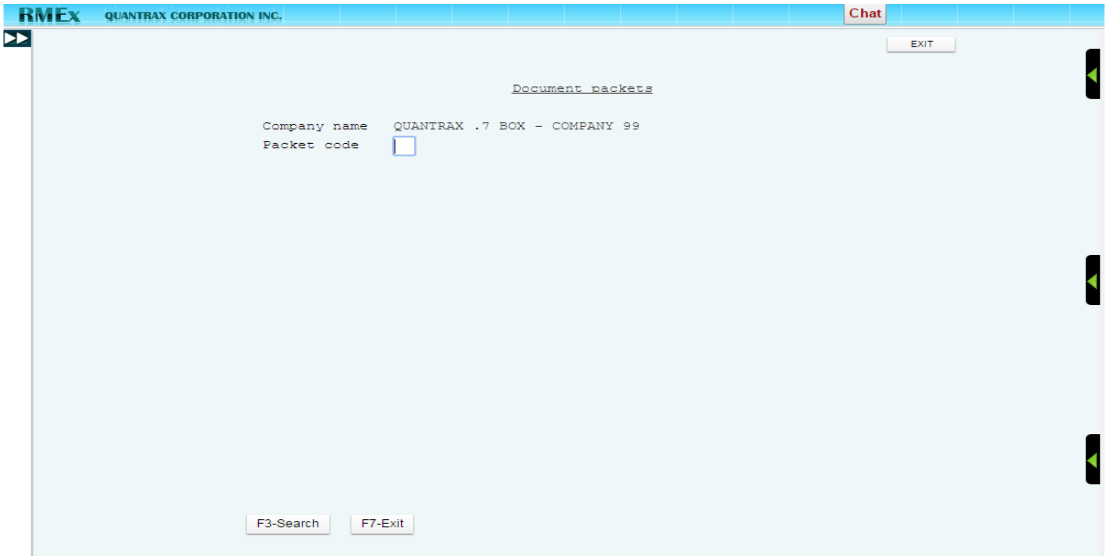
Setting up document packets

The user can set up 'Document packet codes' using F-10 from System Control Menu > Letter codes menu. This option allows user to assign up to 20 previously defined RMEx letters/document codes to be bundled together.

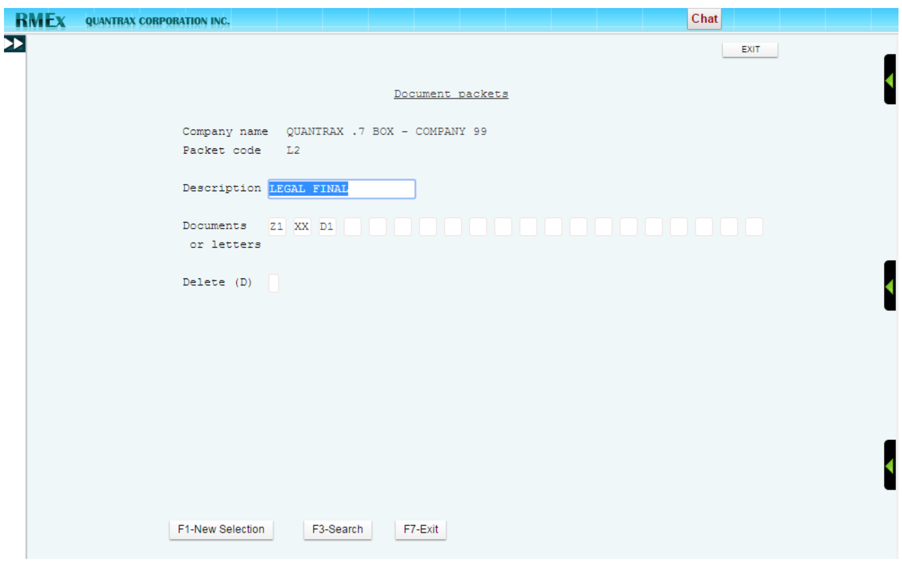
- Letter Code



- Packet Code



- Document Packet

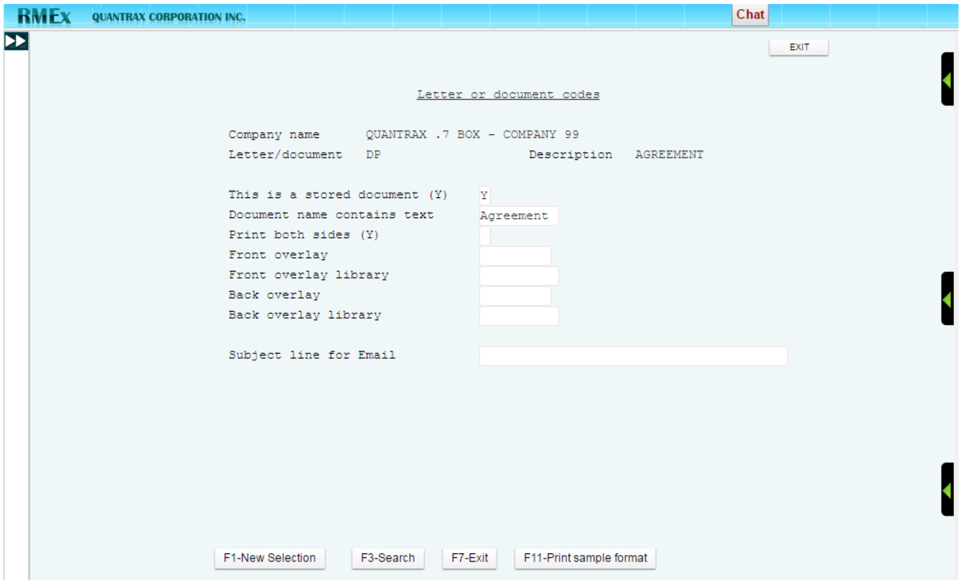


NOTE - Letter codes and letter packets codes shouldn't be the same. The 2-character packet code MUST not be the same as a letter code.

Associating a Scan Document with a Document Packet

This feature allows the user to bundle up letters defined in RMEx as well as documents stored under scanned documents (i.e. Documents that can be viewed through the document viewer).

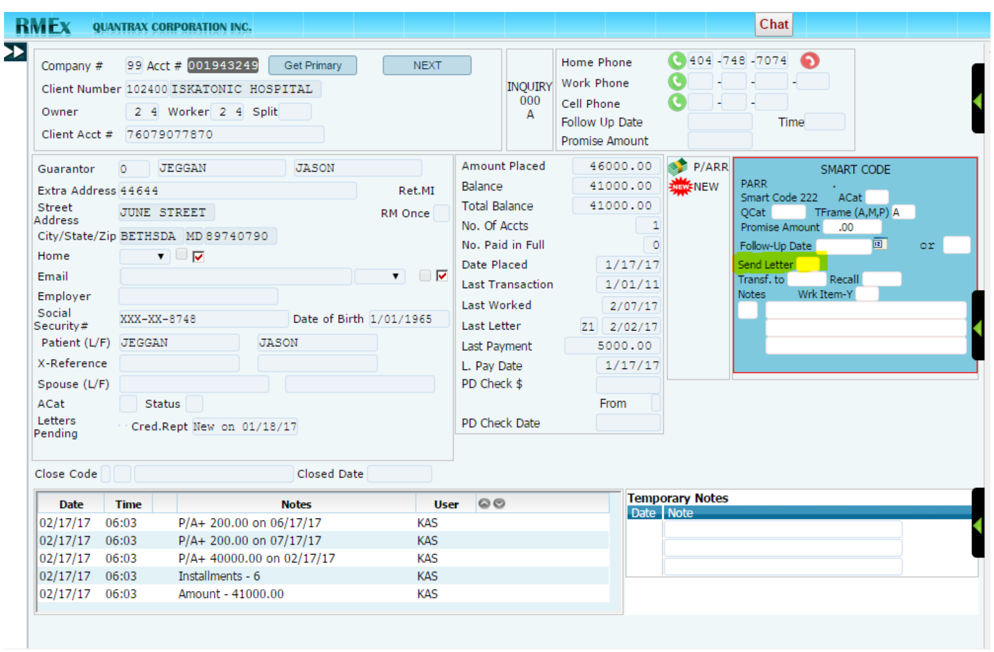
A scanned document related to a document packet requires a 'letter code' in RMEx to be defined and assigned as shown below.



- This is a stored (scanned) document (Y) – This requires a Y when defining a scanned document. Example of a scanned or stored document: copy of a client contract
- Document name contains text – First 10 characters of the document name under the account. (do not enter the file extension)

Requesting a Document Packet

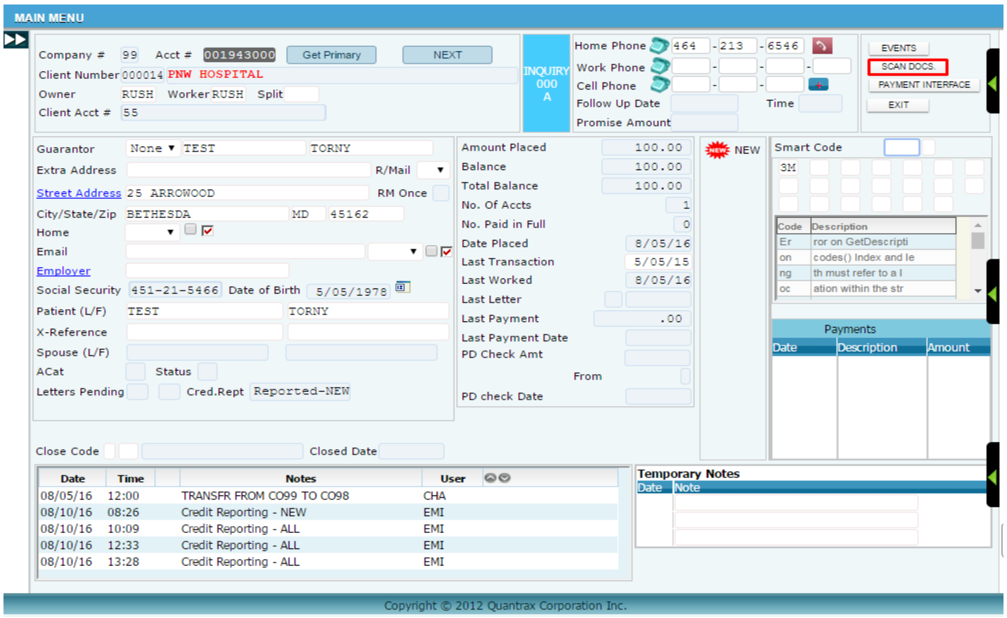
The user can request a letter packet the same way they request a letter via a smart code. When the entered code is a document packet code, the user requires choosing the printing option to continue.



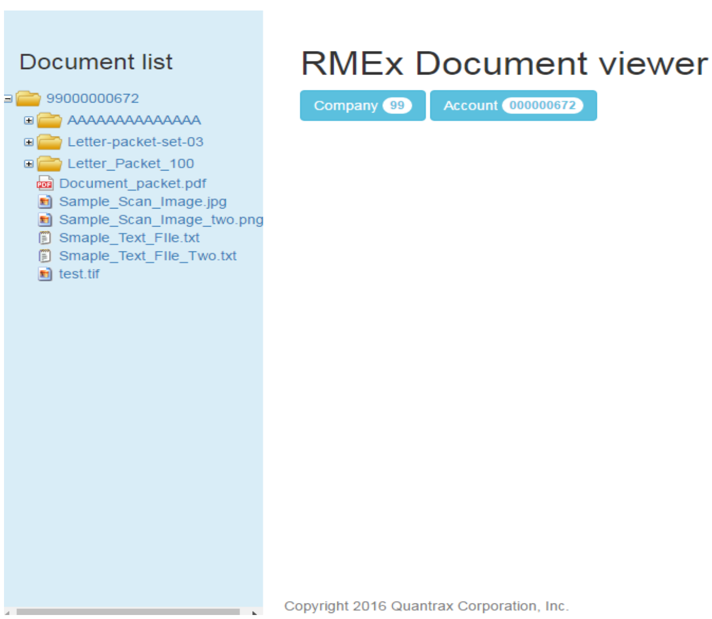
- Printing option (Y/b) – A 'Y' here will print the document packet through the nightly process. If left blank, then the document packet will be generated immediately and will be available to be accessed through the account (under scan documents).

Accessing and Working With a Document Packet

Once requested, the user is allowed to view the document packet through Document Viewer under the related account.

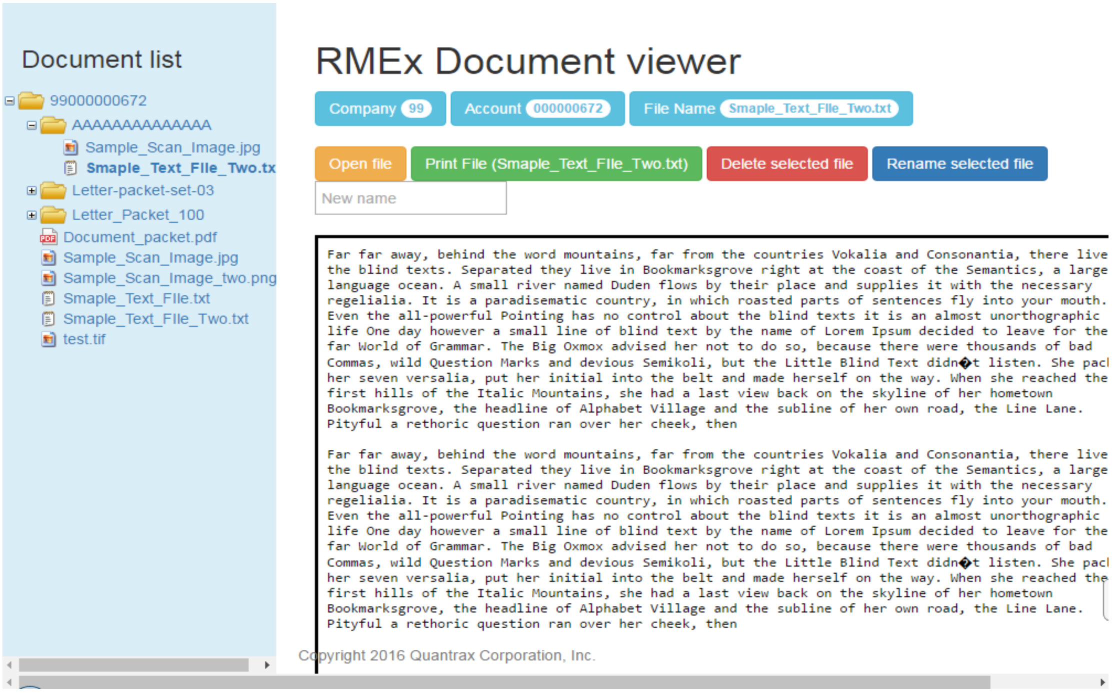


1. Select **Scan Docs** from Account Detail screen.

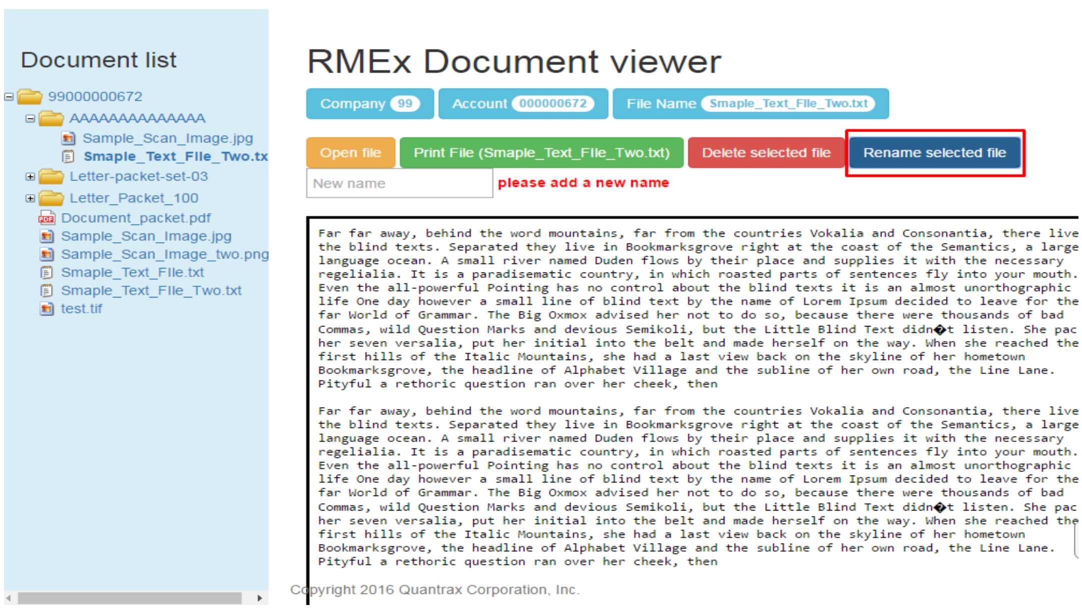


NOTE - It is possible to repeatedly request a document packet, re-editing the related documents (Scanned documents or the RMEx letters) for as many times as desired.

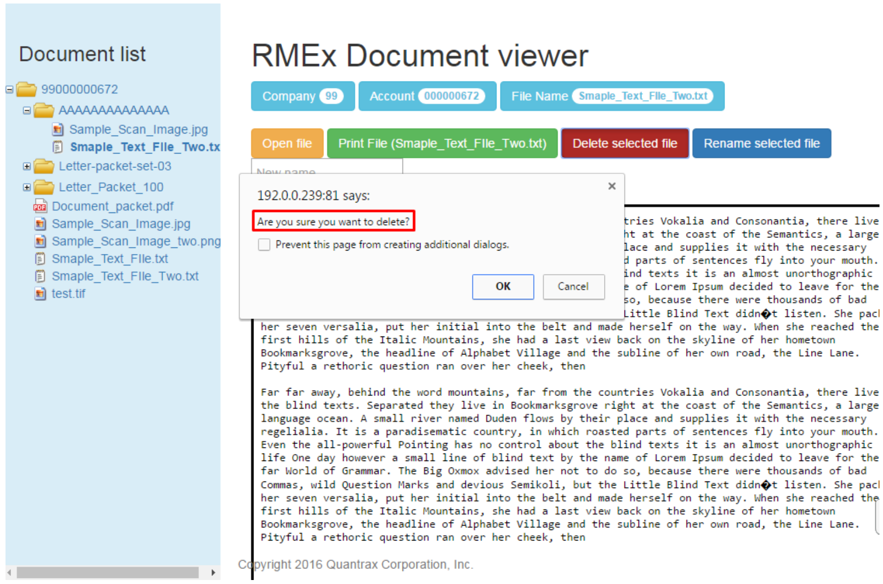
2. Select the document from the Document list.



3. To rename the file, click **Rename selected file.**



4. The Document Viewer allows the ability to delete any scanned document and allows the user to import new documents and process them to get the document packet in the correct condition. To delete a document, click **Delete selected file**.



NOTE - If a document packet is requested again the same day, the previous subfolder will be replaced with the latest document content.

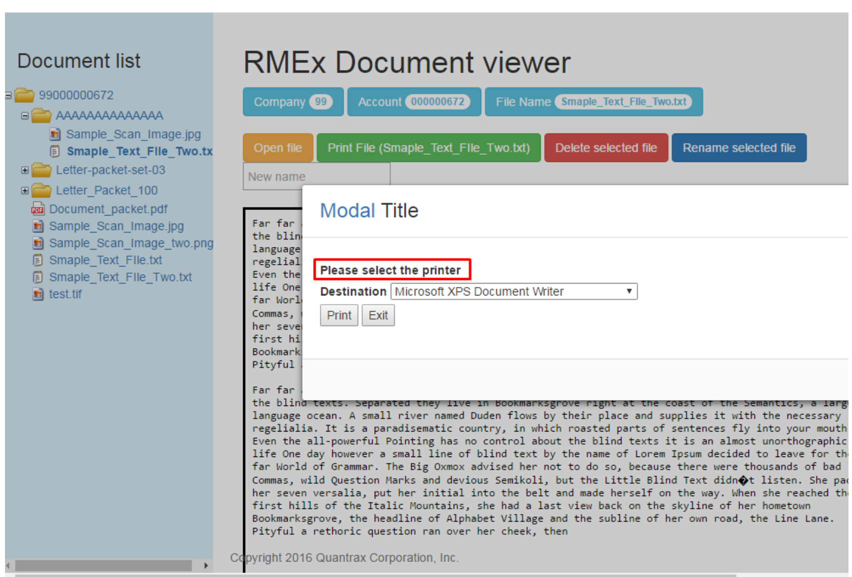
Correcting a Scanned Document

In case a user needs to replace a scanned document before printing, they will delete or rename the original document and then process the new document with the proper name into the account.

NOTE - The user will be allowed to delete or rename subfolders belonging to an account. These changes to documents and subfolders will be notated in the relevant account.

Printing documents

At any point during the process, the user will have the ability to print documents individually or as a complete packet through a desired printer by simply clicking on **Print File**.



File Transfer Web Module

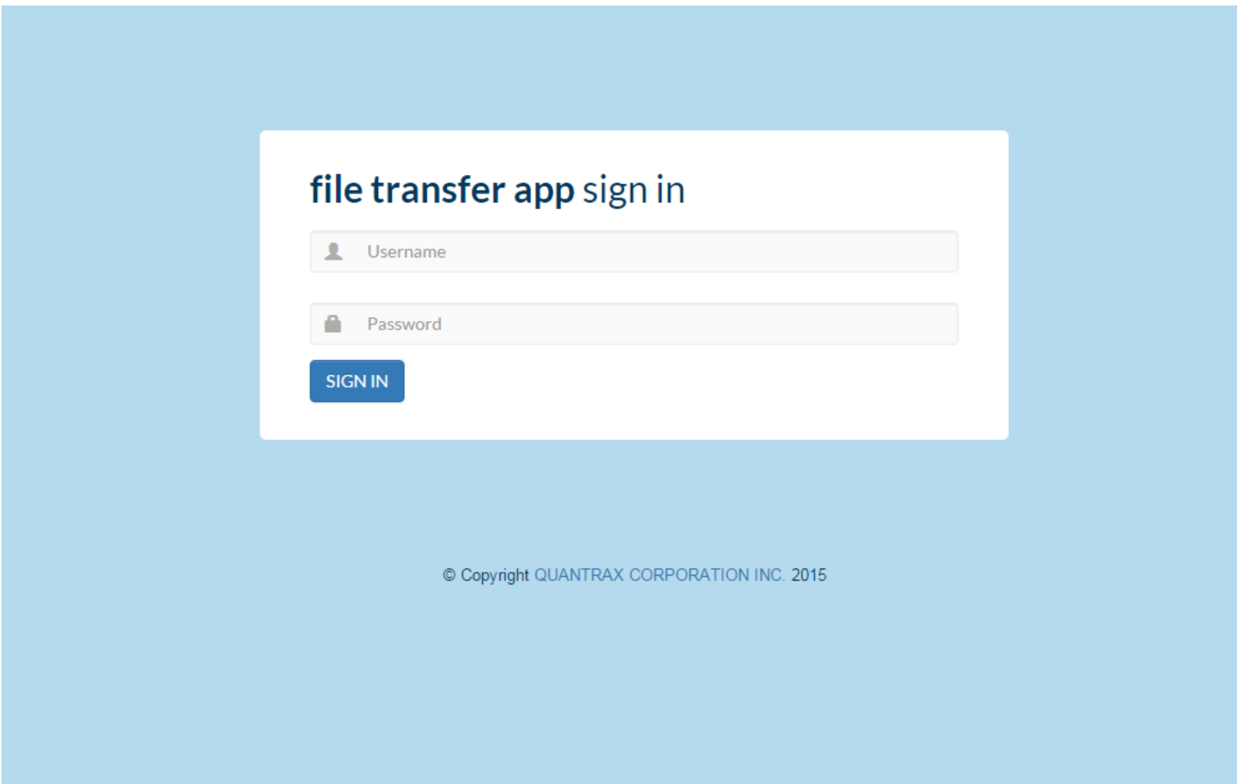
The purpose of this product is to provide an easy method for RMEx users to receive and load client files through a single interface.

The interface provides two different types of functionality.

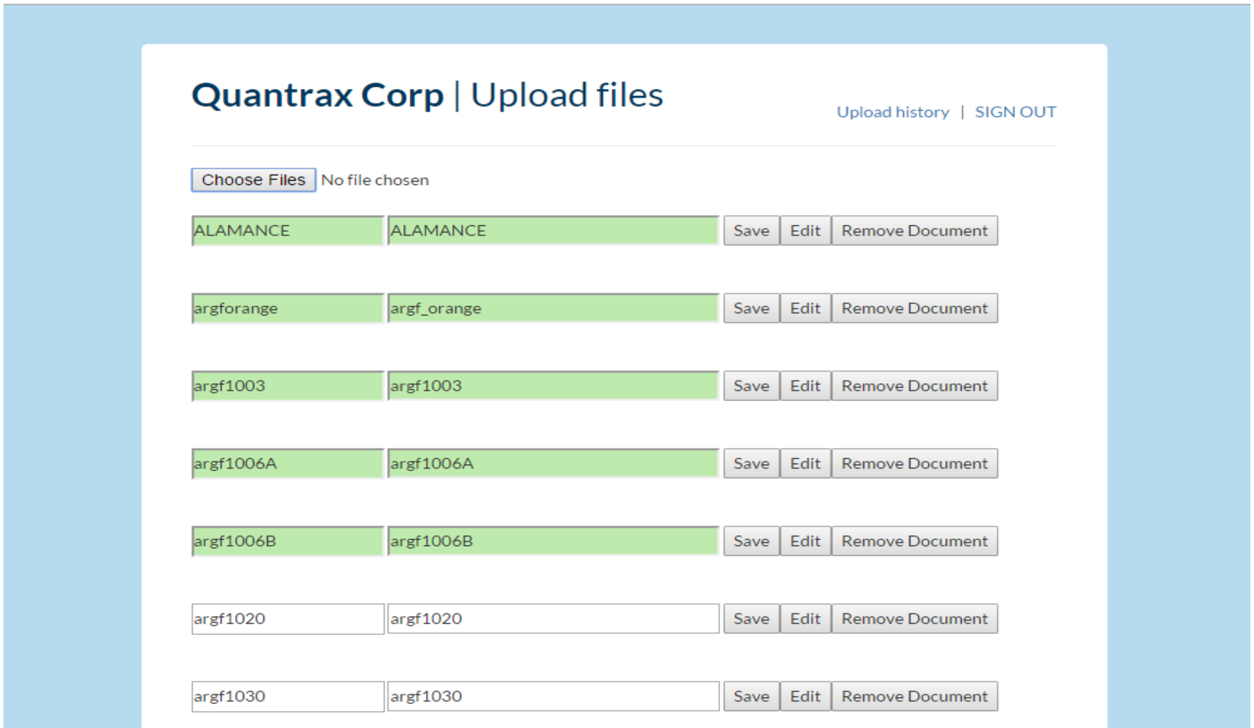
1. The Client Interface – This interface provides the RMEx user's client the ability to send files to the RMEx user through a secured channel.
2. The Agency Interface – This interface allows the RMEx user to view, edit and load the received files in to RMEx.

The Client Interface

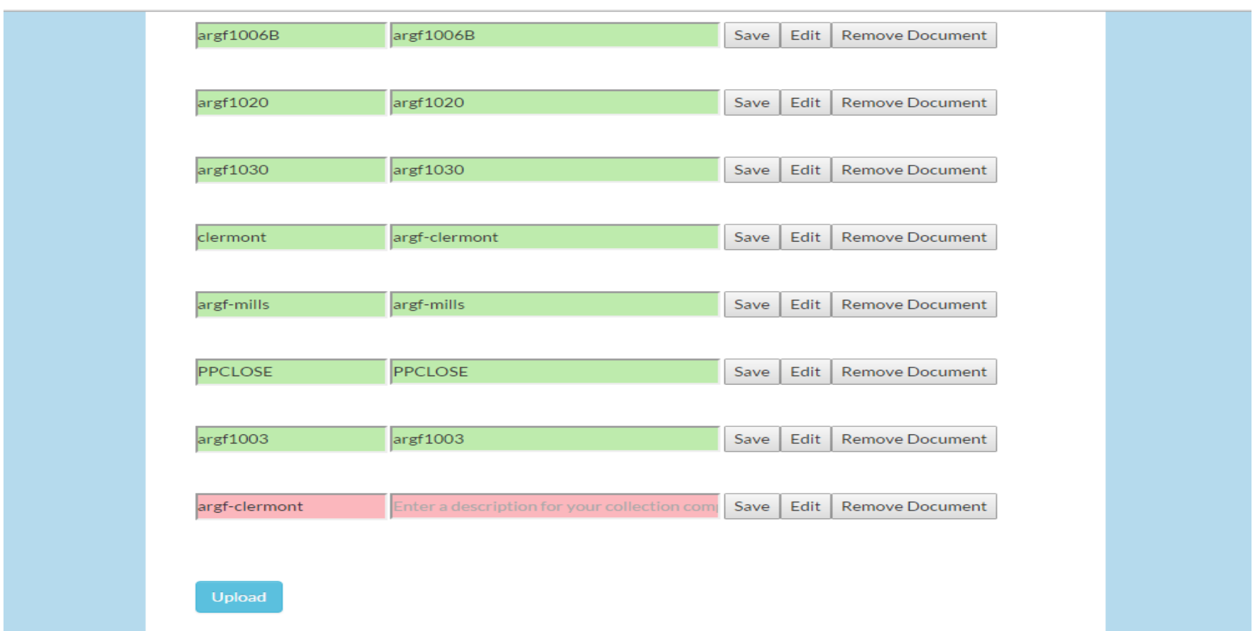
- The client will receive login details and a URL to connect to. The agency will create the profile for them.



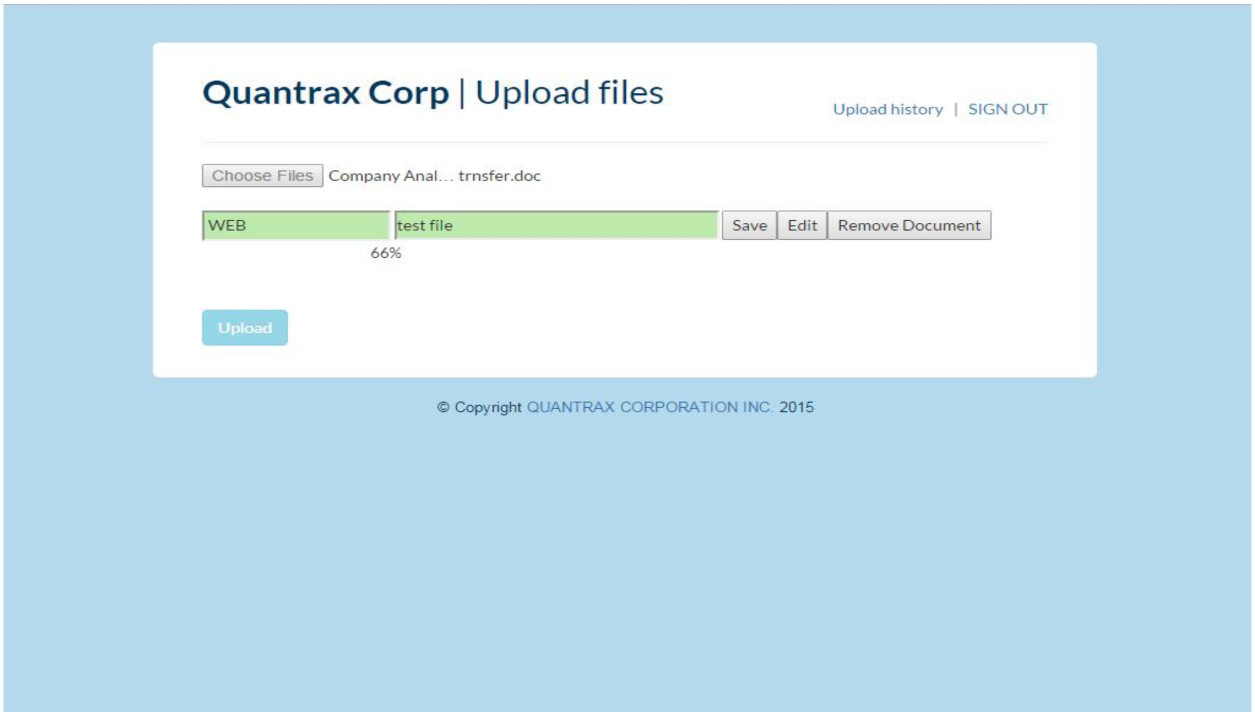
- The interface will allow the client end user to select up to 10 files at a time. They will need to enter a valid description for the file and save it.
- The field name and the description field will be highlighted in green color once you click on the 'Save' button. (This description will be visible to the user on the agency side when they access the files).



- The maximum length allowed for a file name (when manually entering) is ten. If it exceeds 10 (when choosing files to upload) it will present you a message (when you try to save it) while highlighting the particular field in pink color.

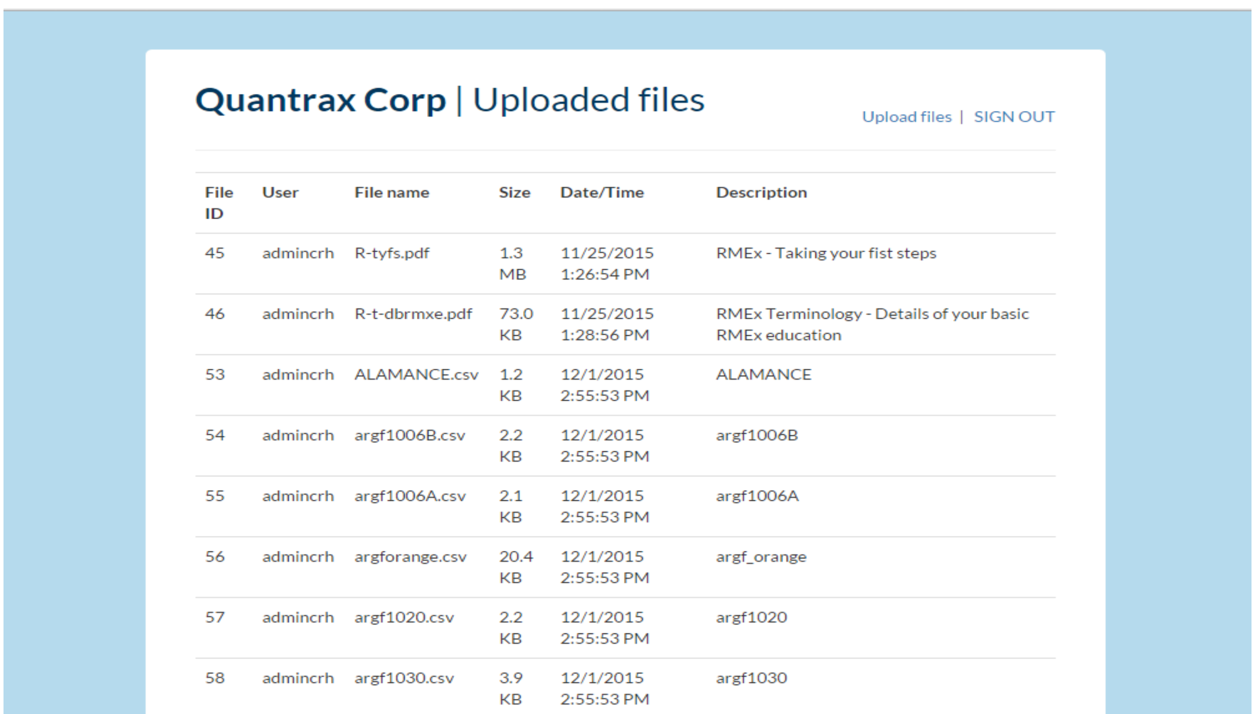


- The client will be allowed to upload the files and a progress bar will indicate the status of the transfer.



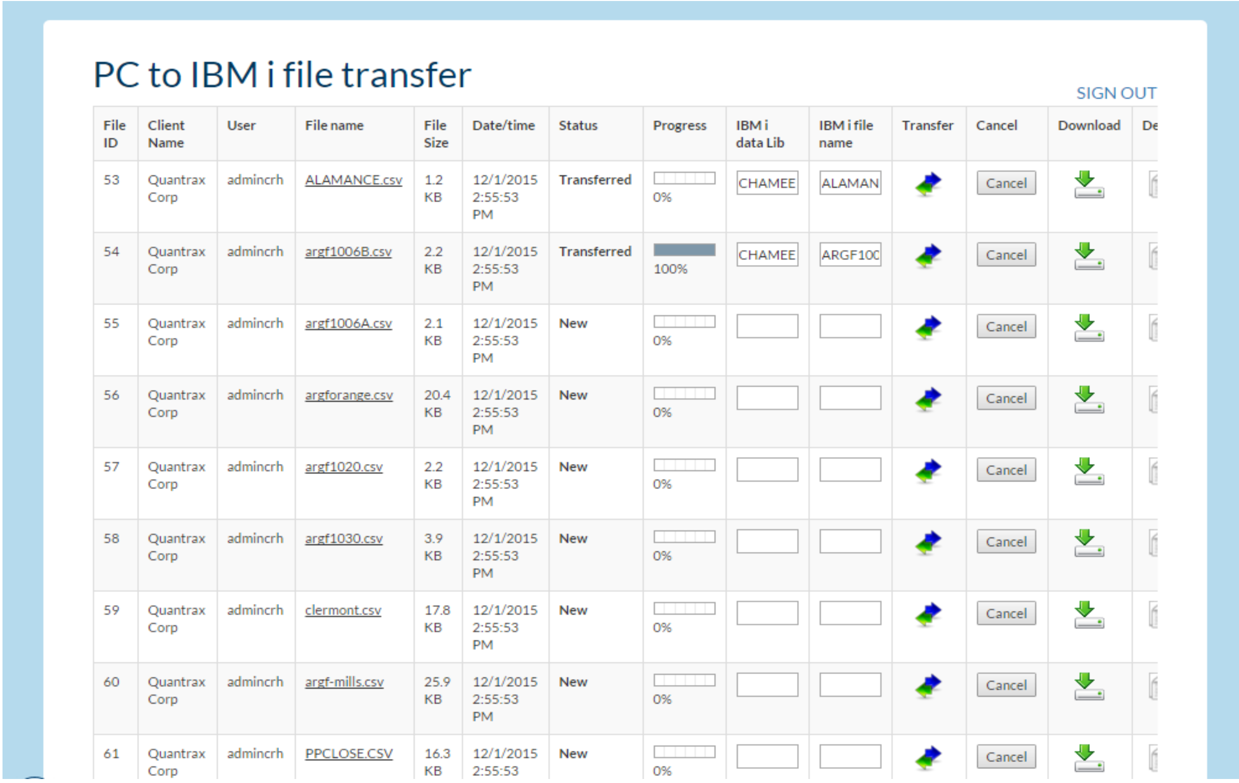
Upload History

- The user has the option to have a look at the 'Upload history' to prevent uploading the same file.



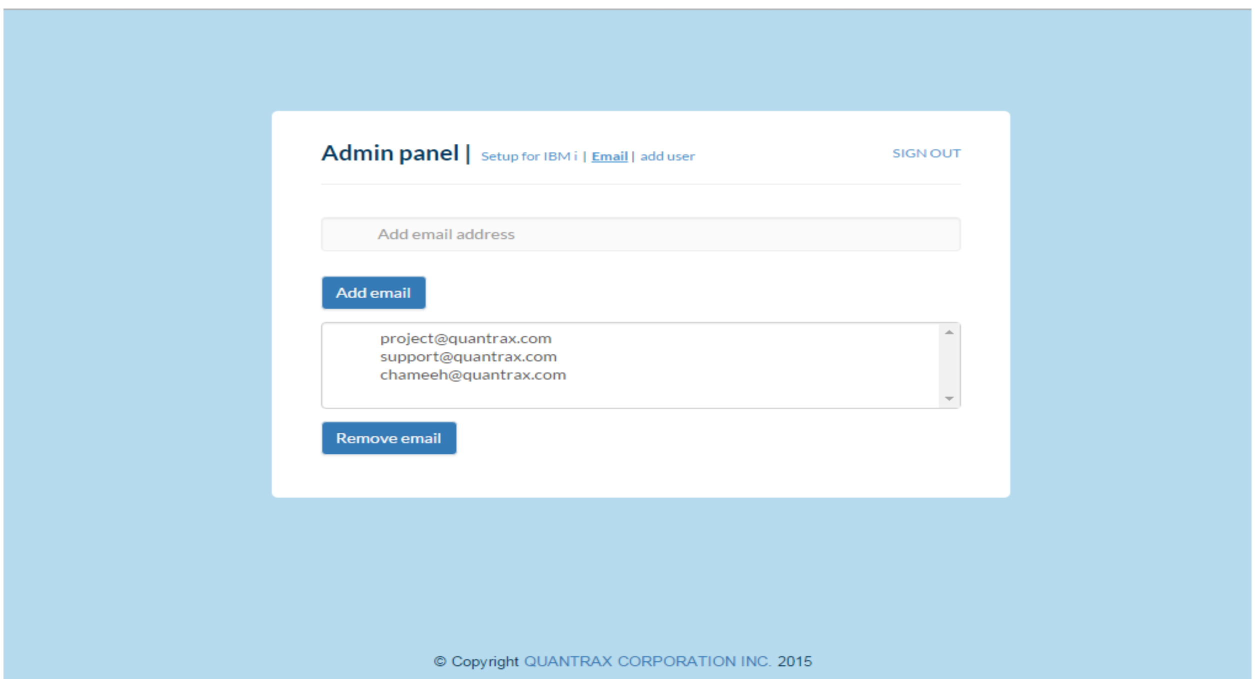
File ID	User	File name	Size	Date/Time	Description
45	admincrh	R-tyfs.pdf	1.3 MB	11/25/2015 1:26:54 PM	RMEx - Taking your fist steps
46	admincrh	R-t-dbrmxe.pdf	73.0 KB	11/25/2015 1:28:56 PM	RMEx Terminology - Details of your basic RMEx education
53	admincrh	ALAMANCE.csv	1.2 KB	12/1/2015 2:55:53 PM	ALAMANCE
54	admincrh	argf1006B.csv	2.2 KB	12/1/2015 2:55:53 PM	argf1006B
55	admincrh	argf1006A.csv	2.1 KB	12/1/2015 2:55:53 PM	argf1006A
56	admincrh	argforange.csv	20.4 KB	12/1/2015 2:55:53 PM	argf_orange
57	admincrh	argf1020.csv	2.2 KB	12/1/2015 2:55:53 PM	argf1020
58	admincrh	argf1030.csv	3.9 KB	12/1/2015 2:55:53 PM	argf1030

- The files will be transferred to a location on the agency's server. An admin on the agency's end will define the location as to where the files will be stored. The configuration allows the admin to select the location based on the client.



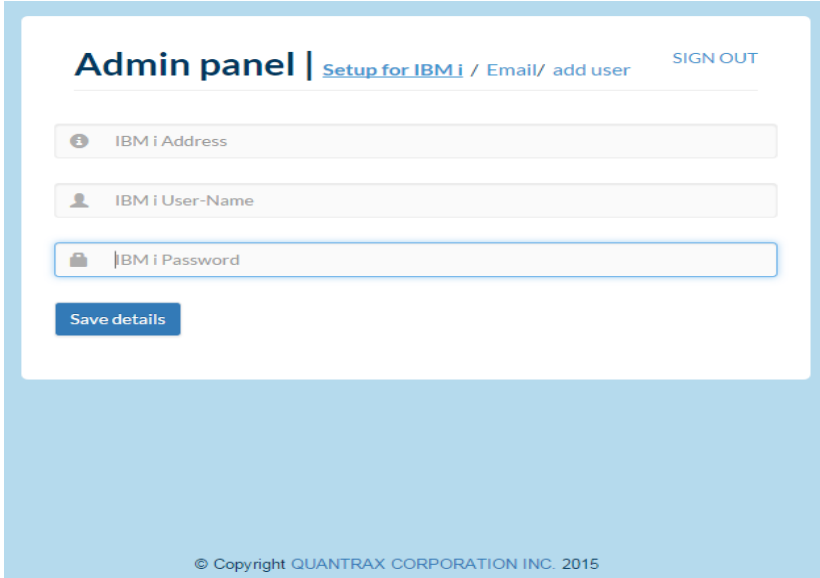
File ID	Client Name	User	File name	File Size	Date/time	Status	Progress	IBM i data Lib	IBM i file name	Transfer	Cancel	Download	De
53	Quantrax Corp	admincrh	ALAMANCE.csv	1.2 KB	12/1/2015 2:55:53 PM	Transferred	0%	CHAMEE	ALAMAN		Cancel		
54	Quantrax Corp	admincrh	argf1006B.csv	2.2 KB	12/1/2015 2:55:53 PM	Transferred	100%	CHAMEE	ARGF10C		Cancel		
55	Quantrax Corp	admincrh	argf1006A.csv	2.1 KB	12/1/2015 2:55:53 PM	New	0%				Cancel		
56	Quantrax Corp	admincrh	argforange.csv	20.4 KB	12/1/2015 2:55:53 PM	New	0%				Cancel		
57	Quantrax Corp	admincrh	argf1020.csv	2.2 KB	12/1/2015 2:55:53 PM	New	0%				Cancel		
58	Quantrax Corp	admincrh	argf1030.csv	3.9 KB	12/1/2015 2:55:53 PM	New	0%				Cancel		
59	Quantrax Corp	admincrh	clermont.csv	17.8 KB	12/1/2015 2:55:53 PM	New	0%				Cancel		
60	Quantrax Corp	admincrh	argf-mills.csv	25.9 KB	12/1/2015 2:55:53 PM	New	0%				Cancel		
61	Quantrax Corp	admincrh	PPCLOSE.CSV	16.3 KB	12/1/2015 2:55:53	New	0%				Cancel		

- An email notification will be sent to (up to) 3 predefined personnel.



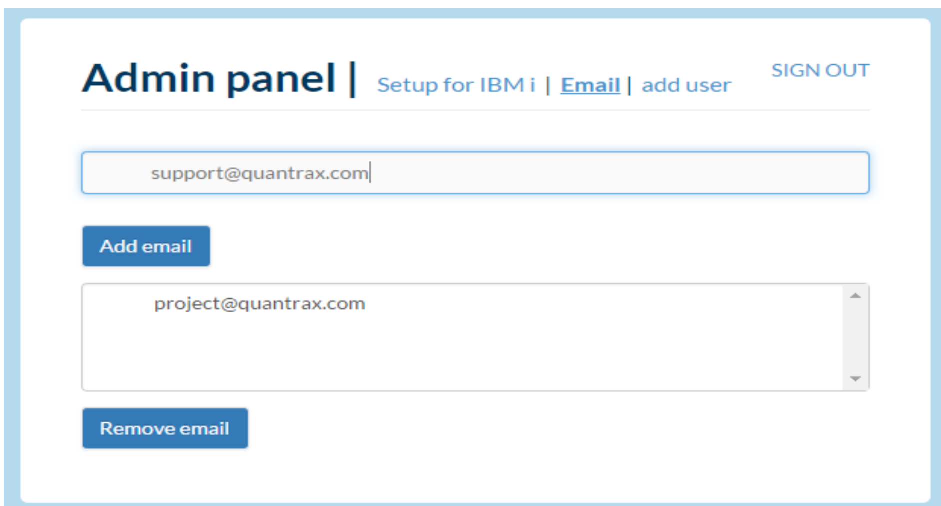
The Agency Interface

- The agency can login to the same URL with their own profile to review folders.
- The user can download, upload and send the file to any location in their iSeries. They will have to do this one file at a time. They will be prompted to key in the destination on iSeries.
- The connection details to the iSeries will be stored at the configuration level by the Admin.



Email Notification Recipients

From the Admin panel, click **Email** to send a notification to recipients.

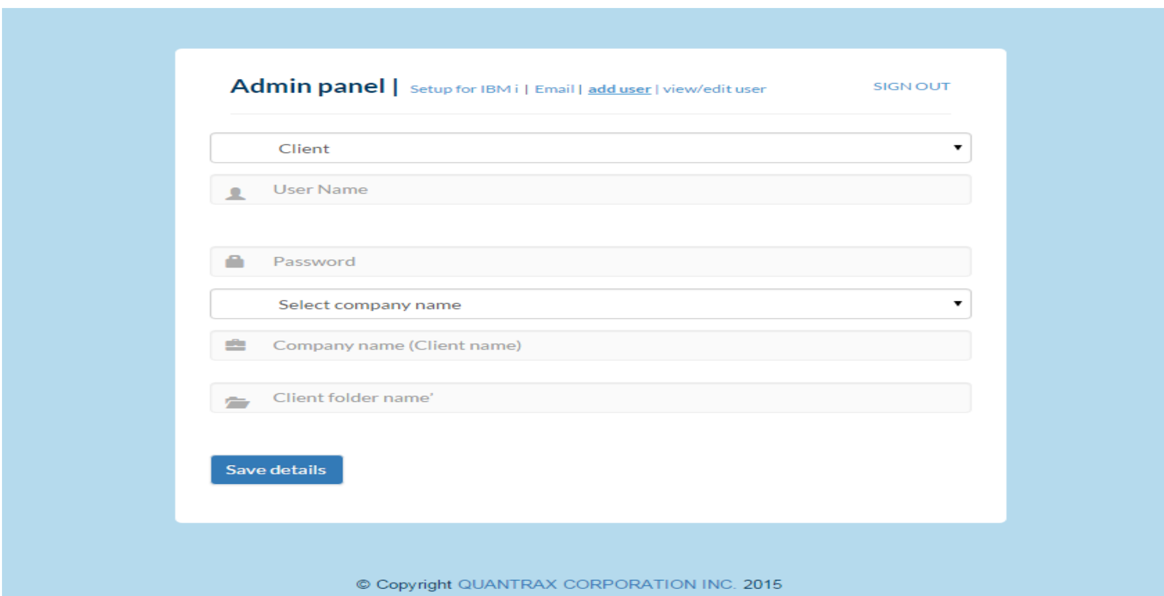


Setting Up an Agency Side User

To add a user, from the Admin panel click **add user**, then choose ***RMEx user*** from drop-down window and type in username and password.

Setting Up A Client Side User

To add a user that is a client, from the Admin panel click **add user**, then choose ***Client*** from drop-down window and type in username and password.



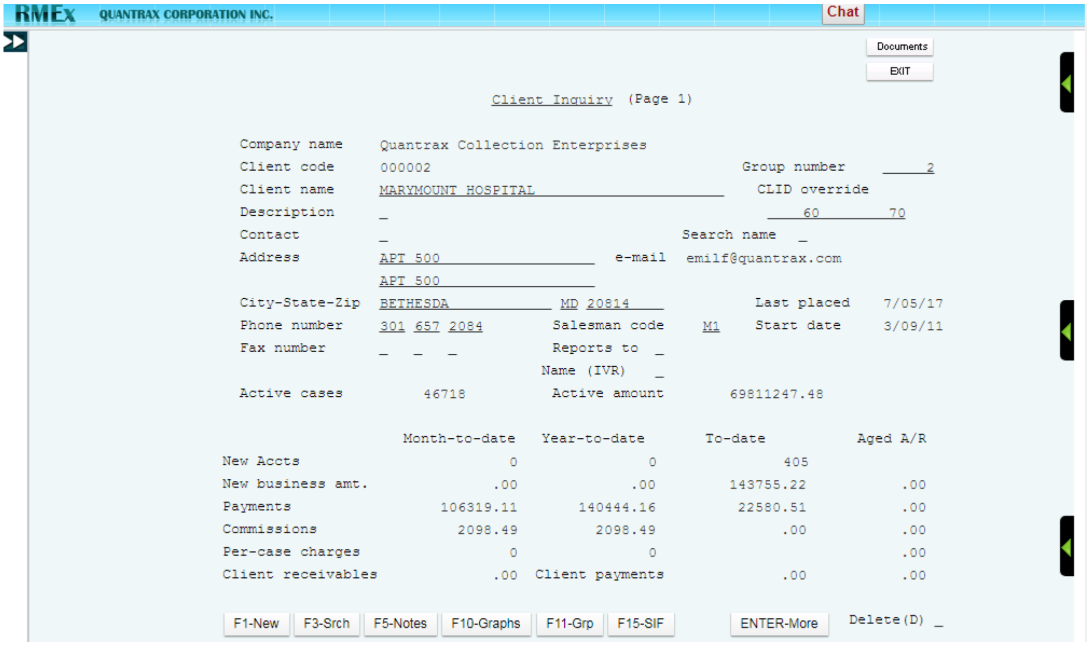
NOTE - The moment the first user is created for any client, the system automatically saves that client name and the related folder name to minimize the risk of multiple folder creation for a single client, etc. All saved clients will be available on the 'Select company name' drop down list which will auto fill the client and the folder details.

Document Viewer – Client Documents

In previous releases RMEx provided users with the ability to store and view documents that belongs with debtor accounts.

NOTE – There is a setup fee for Document Viewer. Please contact support@quantrax.com for more information.

Release 5.2 allows the RMEx user to store and view documents that are associated with RMEx client numbers.



Other Features

I-Bot System Controls

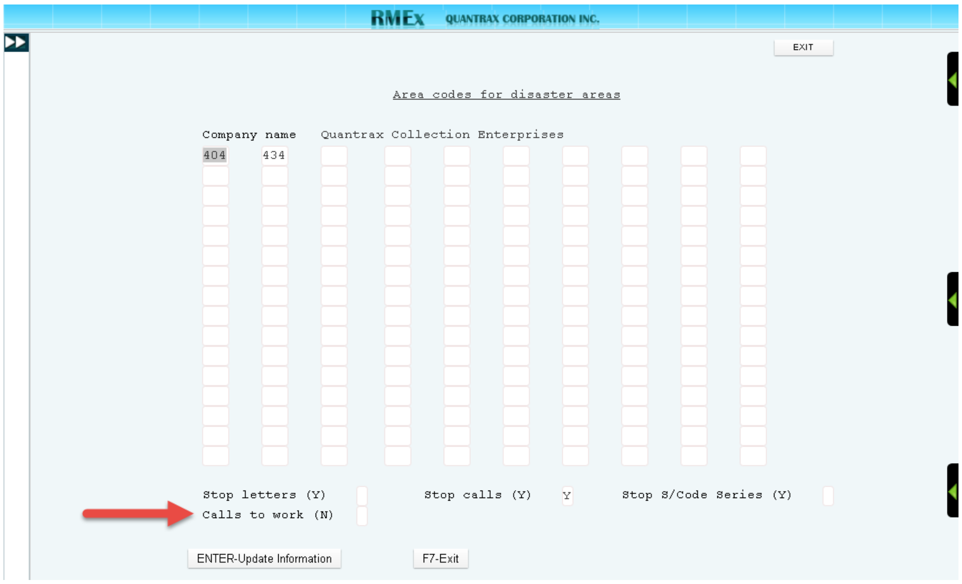
This is a new option on System Control Menu 4 for I-Bot. This is a special option and there is separate documentation for this product.

Disaster Areas by 5-Character Zip Code

This new feature can be found under **System Control Menu 2** > **State Options** > **F7** > **9. Disaster Areas By 5-Character Zip Code**. This was designed to set up a 3 character zip (large area) when there was a disaster. What happens? Smaller areas (5-character zips) start going back to normal. We need to say that instead of Zip 208 (first 3) being a disaster area, only 7 zip codes are new affected. This is done by entering the 7 5-character zips! 5 character zip are entered as ranges. Use 000000 for client group, which is default for the whole company.

Disaster Areas by Area Code

The Disaster Area by Area Code, only looked at home and cell numbers because the idea was to avoid calling consumers on their personal numbers; the rationale was if they could get to work, they were likely to be fine. We recently discovered was that some consumers worked at the police or fire department. Calls were not stopped to these numbers, and calling the police of fire department under the circumstances, was not a good idea. We had added an option 'Calls to work (N)' to the disaster areas by area code.

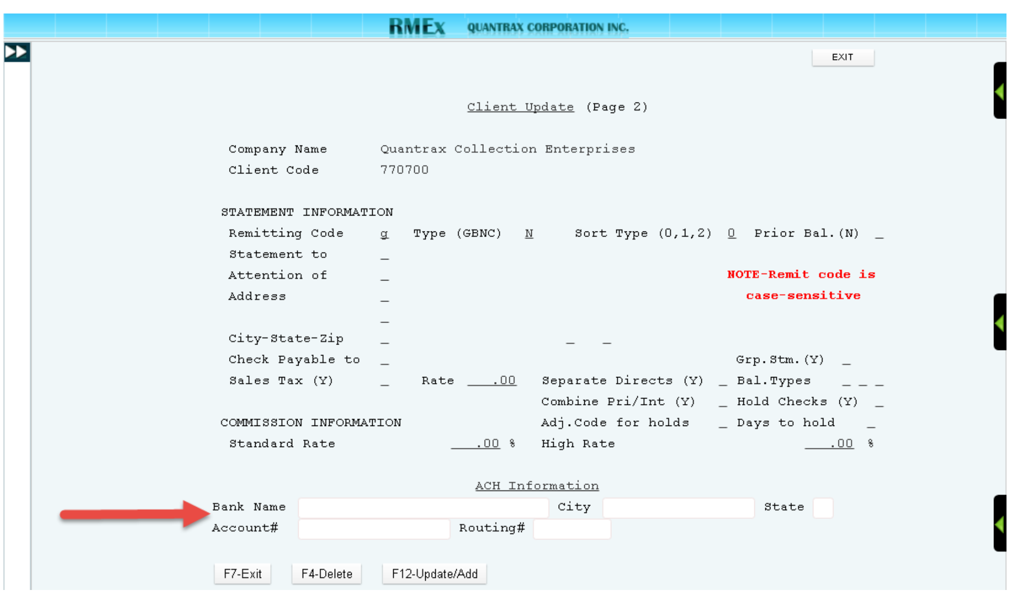


Ability to Setup an Event to Apply a Smart Code Override

Release 5.2 allows the RMEx user to assign smart code overrides with events.

ACH Information for the Client

On page 2 of the **Client Update**, there is a new option; it displays when you **F12-Update** or move to the next screen. It allows you to enter ACH information for the client. This can be used in custom application we may create, for you to ACH money to your clients (e.g. with remittance statements).



Credit Reporting Updates

- If both the SS# and DOB do NOT exist on the account, the account will NOT be selected for credit reporting. The account credit reporting flag will not be changed at the account level so that if either field is updated at a later date, the account will become eligible the next time you run the credit reporting.

- For medical clients, if the CCT code has been updated properly (02 or A2) the date on the second account detail screen will reflect the proper number of days. This is NOT retroactive. It will go into effect for any account loaded after this code is received.

- A new description code field has been added to the Metro2 system controls "**Report as disaster area __".**

- We will now log test file creations in the "**Credit reporting for (New Metro2) history run**" feature. A new field has been added called "**option**".

  When the following options run, the fields will populate the history field as follows:

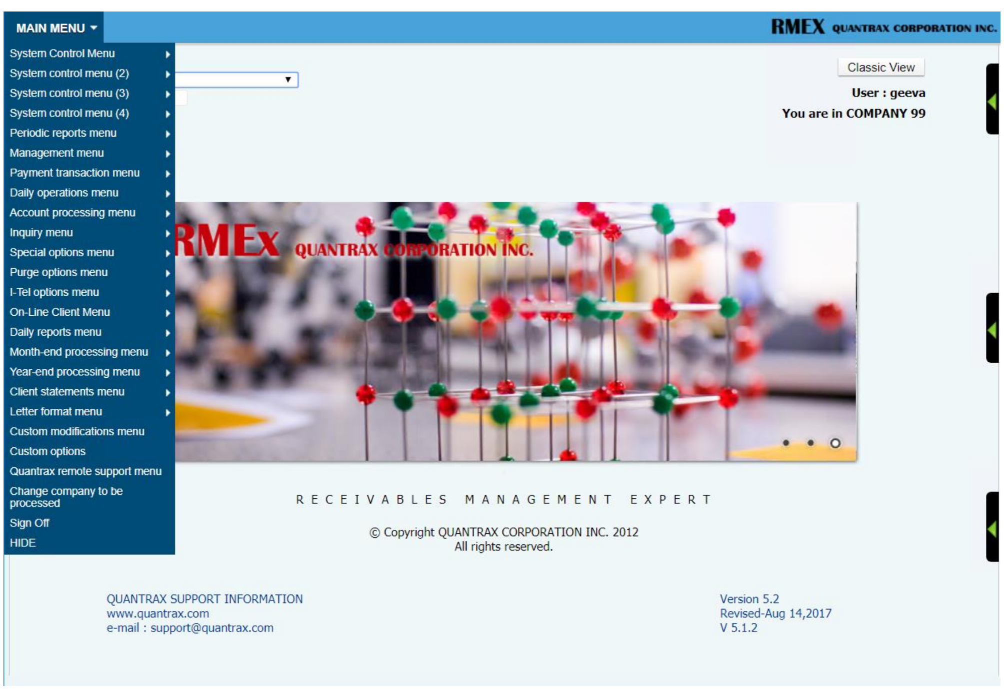
  -*Option run:* **Metro2 TEST file creation (unpacked character format)** = the field will contain the word "**Test**"
  -*Option run*: **Credit Reporting file creation for Metro2 format** = the field will contain the word "**Live**"

NOTE - WE <u>DO NOT</u> RECOMMEND YOU MODIFY YOUR CREDIT REPORTING! BUT IF IT IS MODIFIED, YOU <u>MUST</u> SEND IN A PROJECT REQUEST TO HAVE CHANGES 1, 2 AND 3 ADDED TO YOUR CUSTOM PROGRAM.

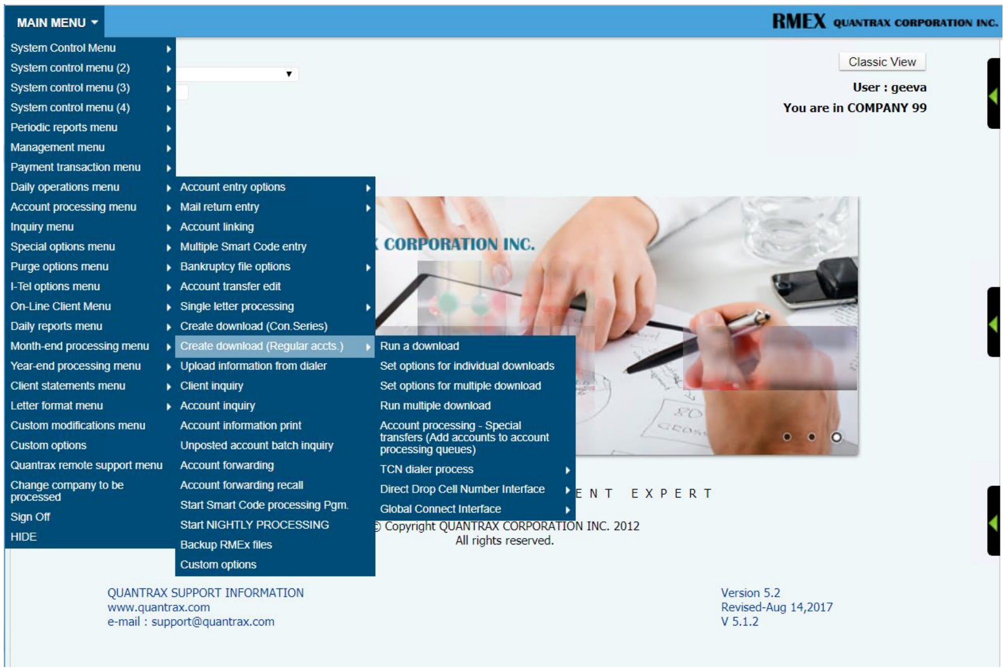
New GUI Standard Menu

<u>**IMPORTANT: Before** upgrading to v5.2, you **MUST** coordinate with Quantrax so that the GUI can be upgraded simultaneously with the new screens.</u>

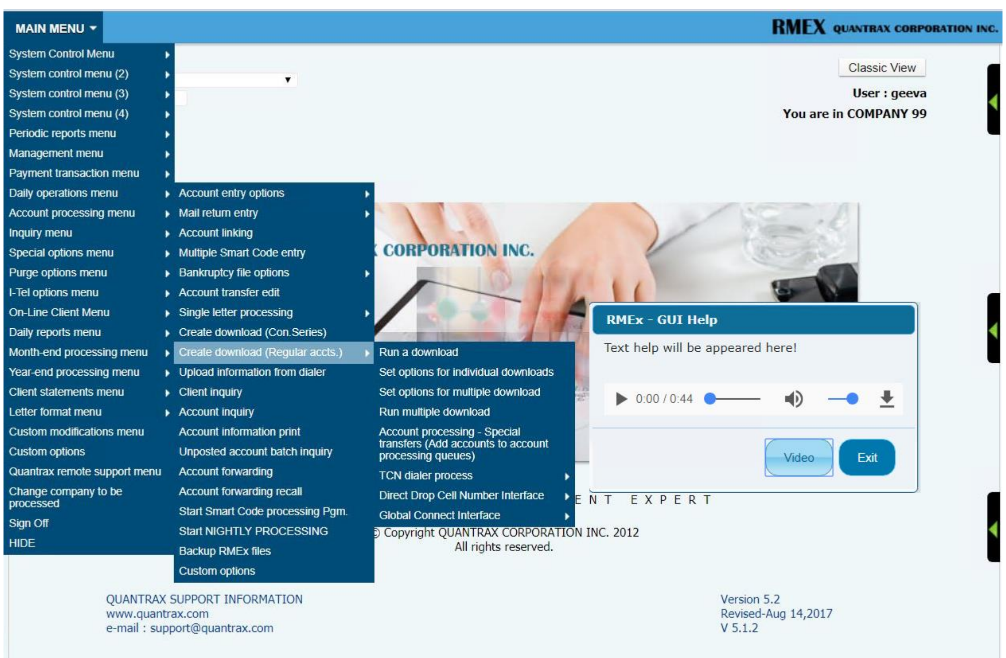
The Tree View is being replaced by the standard MENU system as we see them in all other web applications.



- Users will see only the menu options that they are authorized to access. Currently in the Tree View, each and every user will see all the menus even though they do not have authorized to access. For an example, if the user has access to all of the Menus then they can see all of the menus.



- There is easy access to menu level Help which includes text, audio and video where applicable.



- The short cut for the menu option that was accessed displays on the top of the screen! Many of our clients requested this change. Let's say you took "**Direct Drop Download Process**" option and now you need to take the second option which is "**Direct Drop Upload process**". You do not need to go to the Main menu and select all the way down to the above option, instead you could directly go and select the second option from the top as shown below.