

# RMEEx Management Training: Terminology and Setting Up A Company



# Agenda

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- Reviewing RME<sub>x</sub> Terminology
- Understanding the Design and Architecture of RME<sub>x</sub>
- Setting Up a Company
  - Multi-company concept
  - Management role
  - System controls
  - System parameters
  - Types of users (owners and workers)
  - Balance Types
  - Close Codes

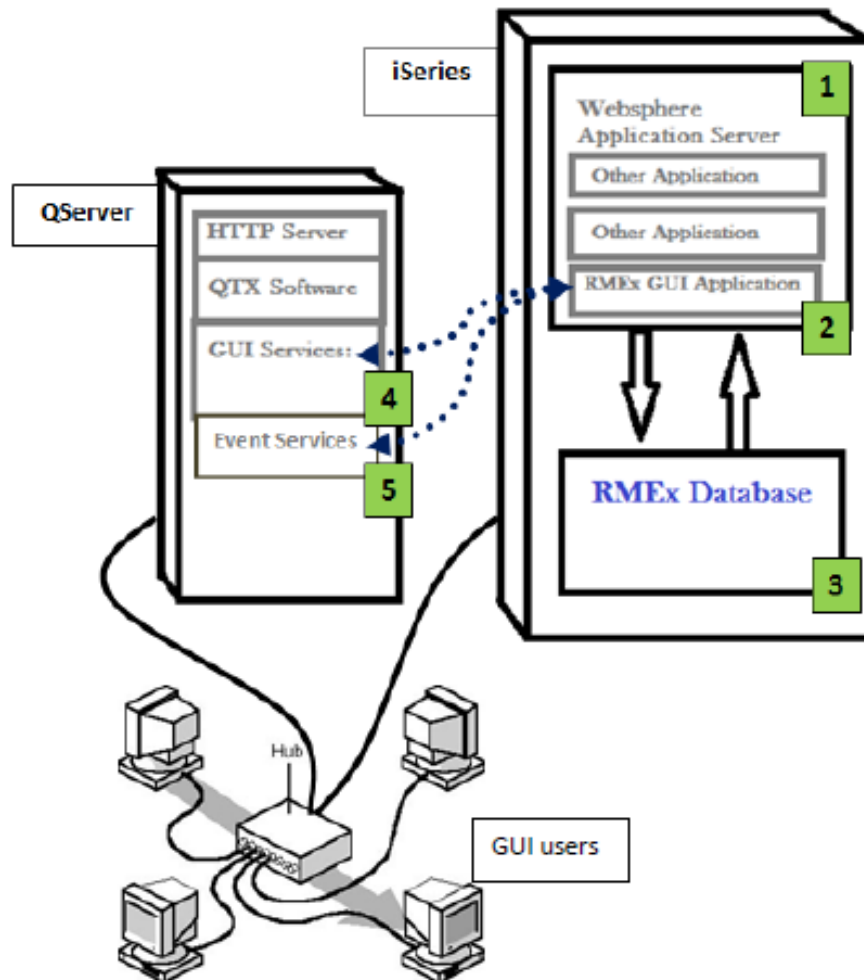
verb | RMEx·plain·ing | \ik-'splān\ -ing = to make clear and understandable relative to RMEx

- Cosigners
- Owner, worker and split collector codes
- Home, work and cell phone on the account detail screen
- Description codes
- ACat codes (Account category codes)
- QCat codes (Queue category codes)
- Last transaction date
- Primary balance
- Secondary balances

- Interest
- Linked balance
- Contact series
- Smart codes
- Smart code series
- Close codes (Inactive and active close codes)
- Reportable balances
- Account status codes
- Processing type
- Time frame
- User ID (for a user)
- Campaign



# The Components of RME<sub>x</sub> Graphical User Interface



- 1** – WebSphere Application Server (WAS): Required to host applications such as the RME<sub>x</sub> GUI
- 2** – RME<sub>x</sub> GUI Application: Runs in the WebSphere Application Server
- 3** – RME<sub>x</sub> Database: This is where all the information is stored about your accounts, clients and other data.
- 4** – The RME<sub>x</sub> GUI Application (2) requires the GUI Services to run on the QServer to be able to present the Notes and Description codes on an account and other information
- 5** – Events Server: Required by the RME<sub>x</sub> GUI App (2) for presenting “Events” from the first detail screen of an account.

## Setting Up Your Company – Have A Plan!

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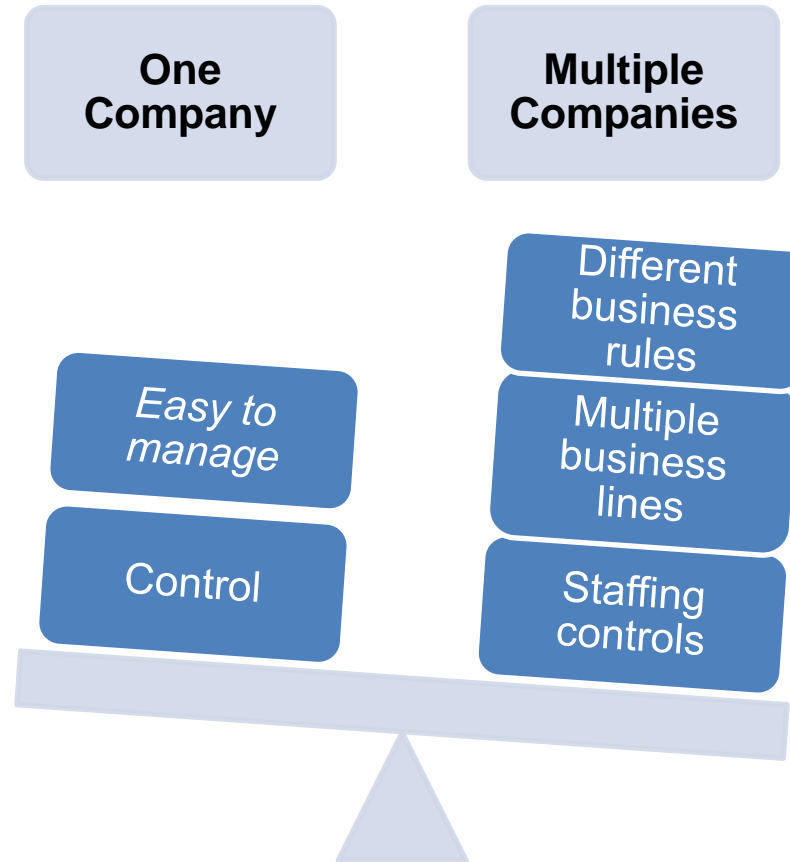
- ❑ “A goal without a plan is just a wish.”  
— *Antoine de Saint-Exupéry*
- ❑ “If you don't know where you are going, you'll end up someplace else.”  
— *Yogi Berra*
- ❑ “If you fail to plan, you are planning to fail!”  
— *Benjamin Franklin*
- ❑ “Efficiency is doing things right; effectiveness is doing the right things.”  
— *Peter Drucker*
- ❑ “Work your phone numbers, not your accounts!”  
— *Ranjan Dharmaraja*

*Ask yourself questions and create a plan.....*

# What Are Your Company's Processes - Overview?



# Working With One vs. Multiple Companies In RME<sub>x</sub>







# How Are You Going To Operate Your Company?

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- Ask yourself many questions:
  - How many companies and businesses do you have?  
(early out, third party, debt purchasing)
  - Should users have access to the system *outside* of business hours?
  - Do you have multiple locations?
  - Should system highlight certain types of accounts?
  - Do you want to add a warning when collectors are presented with accounts that area associated with special circumstances?
  - Do you want to stop consumers giving you a check after there was an NSF?
  - How long do you consider an account as new business?
  - What client policies/regulations do I need to consider?

Your RME<sub>x</sub> solution. . . . .

## System Control 1 > Company Information

- Company Name
- Address
- Phone
- System Availability Times for Users To Login
- Special Access to Certain Areas In System

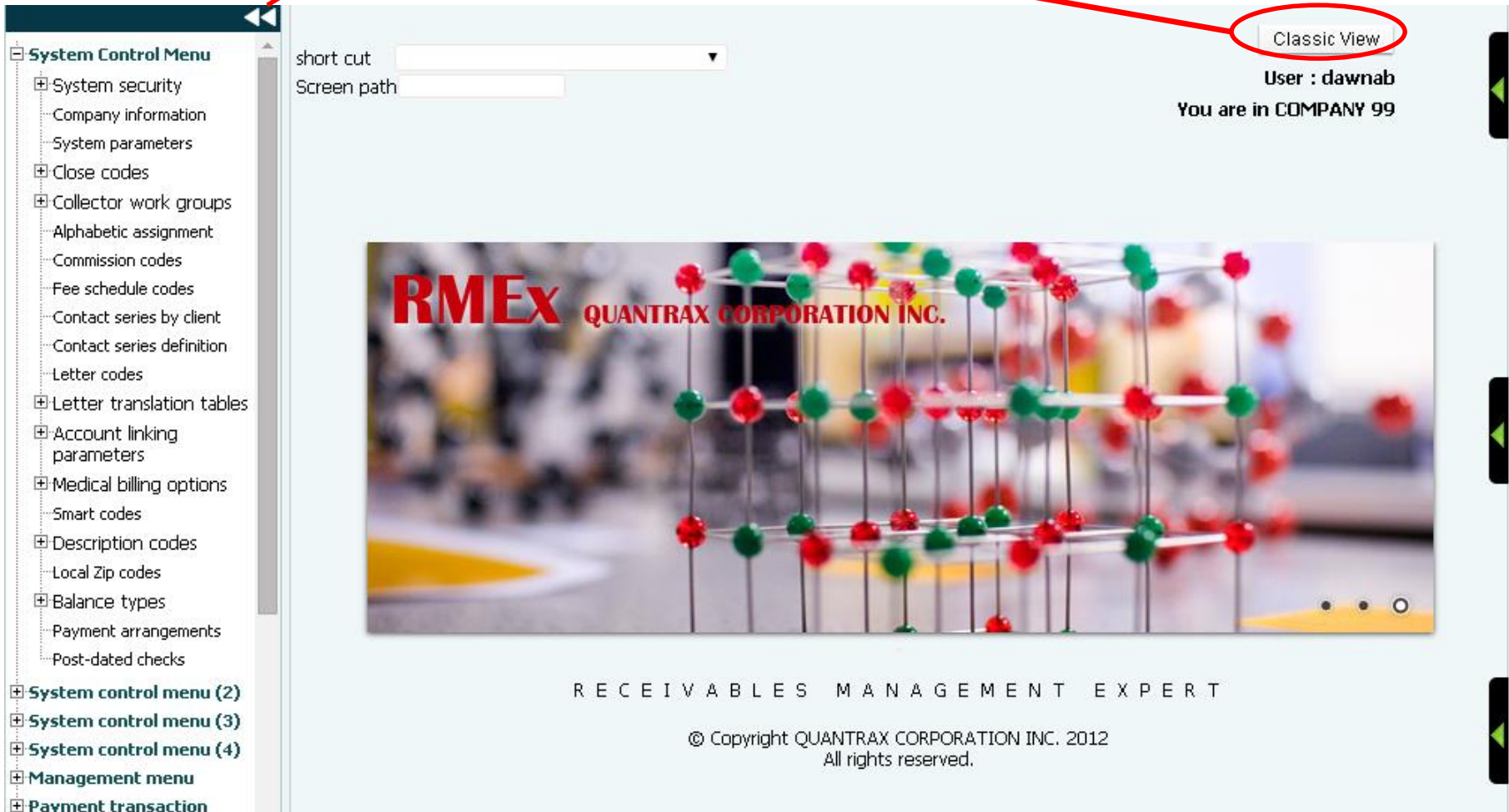
## System Control 1 > System Parameters

- Setting Up Your System Controls
  - Defining system defaults
  - Creating system warnings for accounts
  - Customizing your company based on your process

# Getting Started - RMEx Menu: Graphical User Interface (GUI)

Collapse Tree Menu

Classic View - menu options similar to green screen

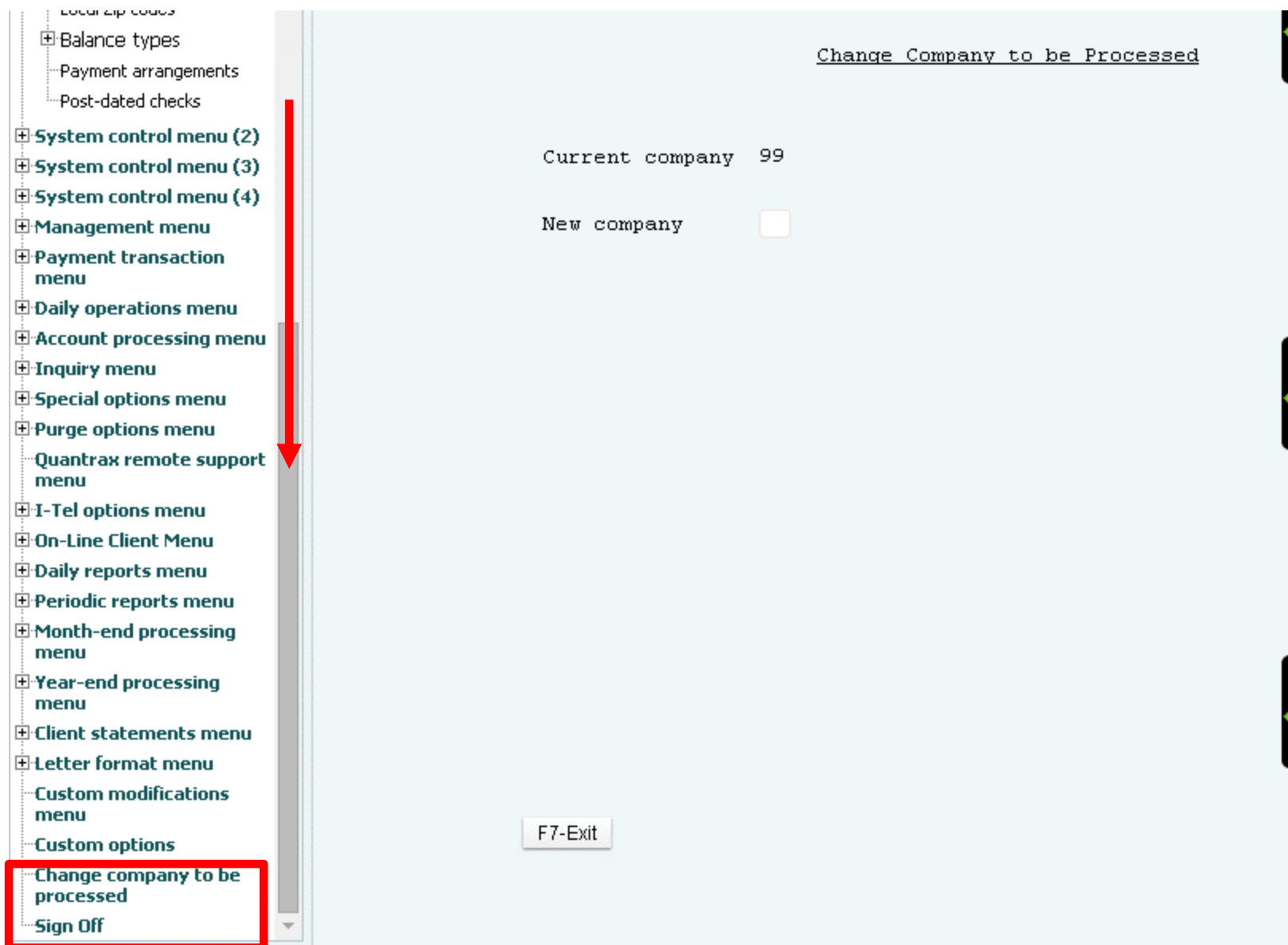


The screenshot displays the RMEx graphical user interface. On the left side, there is a vertical tree menu with a collapse icon (two arrows pointing left) at the top. The menu items include:

- System Control Menu
  - System security
    - Company information
    - System parameters
  - Close codes
  - Collector work groups
    - Alphabetic assignment
    - Commission codes
    - Fee schedule codes
    - Contact series by client
    - Contact series definition
    - Letter codes
  - Letter translation tables
  - Account linking parameters
  - Medical billing options
    - Smart codes
  - Description codes
    - Local Zip codes
  - Balance types
    - Payment arrangements
    - Post-dated checks
- System control menu (2)
- System control menu (3)
- System control menu (4)
- Management menu
- Payment transaction

On the right side, the interface shows a "short cut" dropdown menu and a "Screen path" input field. Below these, there is a "Classic View" button circled in red. The user information "User : dawnab" and "You are in COMPANY 99" is displayed. The main content area features a banner with the RMEx logo and the text "QUANTRAX CORPORATION INC." over a background image of a molecular model. Below the banner, the text "RECEIVABLES MANAGEMENT EXPERT" is displayed, followed by the copyright notice "© Copyright QUANTRAX CORPORATION INC. 2012 All rights reserved."

# Getting Started - RMEEx Menu: GUI- Logging Off and Changing Company



The screenshot displays the RMEEx GUI interface. On the left is a vertical menu with various options, each preceded by a plus sign (+). A red arrow points to the 'Change company to be processed' option, which is highlighted with a red rectangular box. The main area on the right is titled 'Change Company to be Processed' and contains the following text:

Current company 99

New company

At the bottom of the main area is a button labeled 'F7-Exit'.

# Getting Started - RME<sub>x</sub> Menu: GUI – Classic View (similar to green screen)

Expand for Tree Menu

System Control 1 > Change company to be processed



Company: 99



EXIT

MENU: MAIN  
-RME<sub>x</sub> Main Menu-

Date : 1/22/16  
Time : 14:42:15

- |                                 |                               |
|---------------------------------|-------------------------------|
| 1. System control menu          | 13. Daily reports menu        |
| 2. Management menu              | 14. Periodic reports menu     |
| 3. Payment transaction menu     | 15.                           |
| 4. Daily operations menu        | 16. Month-end processing menu |
| 5. Account processing menu      | 17. Year-end processing menu  |
| 6. Inquiry menu                 | 18. Client statements menu    |
| 7. Special options menu         | 19. Letter format menu        |
| 8. Purge options menu           | 20.                           |
| 9. Quantrax remote support menu | 21. Custom modifications menu |
| 10.                             | 22.                           |
| 11. I-Tel options menu          | 23.                           |
| 12. On-Line Client Menu         | 90. SIGN OFF                  |

# Setting Up Your Company In RME<sub>x</sub> – Company Info

## System Control 1 > Company Information

RME<sub>x</sub> QUANTRAX CORPORATION INC. Chat

EXIT

Company Information

Company code	99		
Company name	QUANTRAX		
Extra address	SUITE 106		
Address	106/5 MONGOMERY AVENUE		
City/State/Zip	BETHESDA, MD 20817		
Phone number	( 301 ) 555 - 5555		
Output queue	PRT01		
No sign-on from	<input type="text"/> to <input type="text"/>	Mobile dashboard	QUANTRAX
Special password	CD	S/Codes on links (N=No,C=Client)	<input type="checkbox"/>
Letters sent MTD:	YTD:	No D/Checks if NSF exists (N)	N <input type="checkbox"/>
Delete (D/I)	<input type="checkbox"/>	No queue if any in C/Series (N)	<input type="checkbox"/>
(I=Inactive)		Special data library	SCDATARM50

ENTER-Update Information      F5-Company search      F7-Exit



# Setting Up Your Company In RME<sub>x</sub>

## System Control 1 > System Parameters

RME<sub>x</sub> QUANTRAX CORPORATION INC. Chat

EXIT

System Parameters

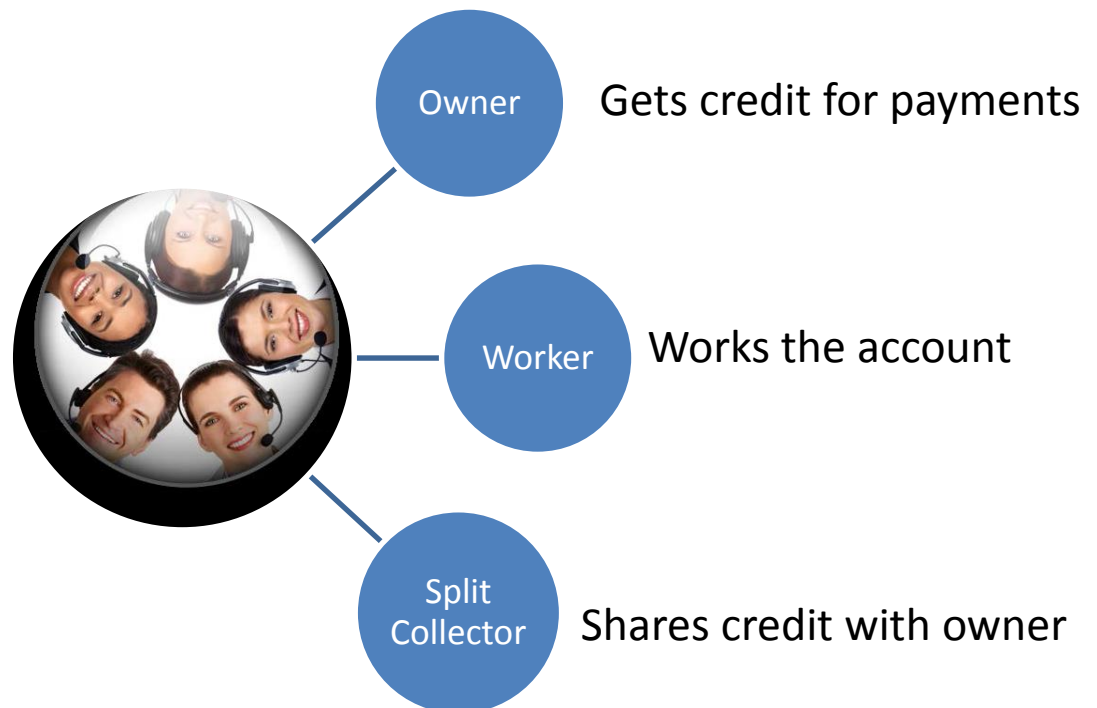
Company name	QUANTRAX .7 BOX - COMPANY 99
Delete CC series and checks after all have been processed (Y)	<input checked="" type="checkbox"/>
Mask 3rd parties when work is masked for home before work (Y)	<input type="checkbox"/>
Description code to stop calls to work phones	BB
User-defined window code for financial information	90
Description code for express consent GIVEN	CE
Description code for express consent REFUSED	CI
Ask for consent when there are newer placements / always (Y,A)	Y
Description code to stop calls to home phones	<input type="checkbox"/>
Description code to stop calls to cell phones	<input type="checkbox"/>
Mobile dashboard - Show money for month in "Money" (Agent)-Y	<input type="checkbox"/>
Smart code if consumer is a minor when account is posted	239

-Exi



# How Are You Going To Operate Your Company?

- Ask yourself the following questions:
  - Who are my users and what is their role in the process?
  - What menus do they need access to?
  - Will you be treating all collectors the same way?
  - Are certain collectors better at working certain types of accounts?



Your RME.x solution. . . . .

## System Control 1 > System Security

- Creating users and giving them access to RME

## Management Menu > Collector Update

- Defining Collector Profile

## System Control 1 > Collector Workgroups

- Establishing how accounts will be worked
  - Setting up a non-pooled environment vs. pooled environment
  - Setting up credits for payment for one worker
  - Setting up credits for payments for multiple workers

# Setting Up Your Company In RME<sub>x</sub> – System Security

## System Control 1 > System Security

RME<sub>x</sub> QUANTRAX CORPORATION INC. Chat

EXIT

System Security

User ID RANJAN Name RANJAN D

Companies 99 98         All (Y)  Y  
Some (I)

Areas Security Y Control files Y Client updates Y  
(Select with "Y") Client inquiry Y Coll.updates-YTW T Collector inq. Y  
Payment entry Y Account updates Y Client stmts. Y  
Special opt. Y Client reports Y Coll. reports Y  
Other reports Y Month/Year-end Y Letter formats Y  
Acct.processing Y Nightly process Y On-line client

Menus System control Y Management Y Payments Y  
(Select with "Y", Daily ops. Y Acct.processing Y Inquiry Y  
or "S" for the Special options Y Daily reports Y Periodic rep. Y  
starting menu) Month/Year-end Y Client stmts. Y Letter formats Y  
Main menu Y Custom mods. Y On-line client   
Custom menu

Close accounts (YCN) Y Special authority (A-Z)  On-line client (Y)   
Access legals (Y,P) Y User is a collector (Y,S)  Cost factor (%) 100  
Acct.viewed note-N

F1-New selection F3-Search F4-Remove record F6-Duplicate Menu Delete 'D'

# Setting Up Your Company In RME

## Management Menu > Collector Update

RMEx QUANTRAX CORPORATION INC. Chat

EXIT

Collector Update

Company name      QUANTRAX .7 BOX - COMPANY 99  
Collector code     COLB  
Collector name     BILL COLLECTOR  
Search name        BILL  
Working name       PETER  
Phone numbers 1) 301 469 - 7694    2)    -    Dialer CLI (b,1,2,3)      
Bar code (Attny)                       Owner/Worker for Smart Code override (Y)      
Case limit 2500 \$    .00    Balance range    .00 to    .00  
Split percentage    .00 %    Linking options (N,b,S,L,X,0-9,C)    L  
User ID            CURWIN    Legal (Y)    -    Pre-legal only (Y)    -

Active cases            12            Active amount            23,786.00

M-T-D activity by

	Month-to-date	Year-to-date	all users		
New cases	0	0	Attempts		0
Amount placed	.00	.00	Pos.Contacts		0
Payments	.00	.00	Other contacts		0
Commission	.00	.00	Other activity		0
			Promises		0
Status report description			Promise \$		.00

F1-New selection    F3-Search    F7-Exit    Delete 'D'

# Setting Up Your Company In RME<sub>x</sub> – Collector Workgroups

## System Control 1 > Collector Workgroups

RME<sub>x</sub> QUANTRAX CORPORATION INC. Chat

EXIT

Collector Work Groups for REGULAR Accounts

Company name      QUANTRAX .7 BOX - COMPANY 99

Work group      BY      Description      ABC BICYCLE

----- ACCOUNTS WITH PHONES -----

Large balance collectors	EMIL	COLB	CHAM	DEBB										

Small balance collectors

	DELI	JAMI												

----- ACCOUNTS WITH NO PHONES -----

Large balance collectors	DAWN	CHRI												

Small balance collectors

	WASA	BUDD	SHEH											

Small balance (less than)      100.00      Balances over      90000.00      to collector      RANJ

Code (D,E)     

F1-New Selection      F3-Search      F7-Exit      F12-Duplicate for Accounts with no Phones

## How Will Monies Be Posted And Divided?

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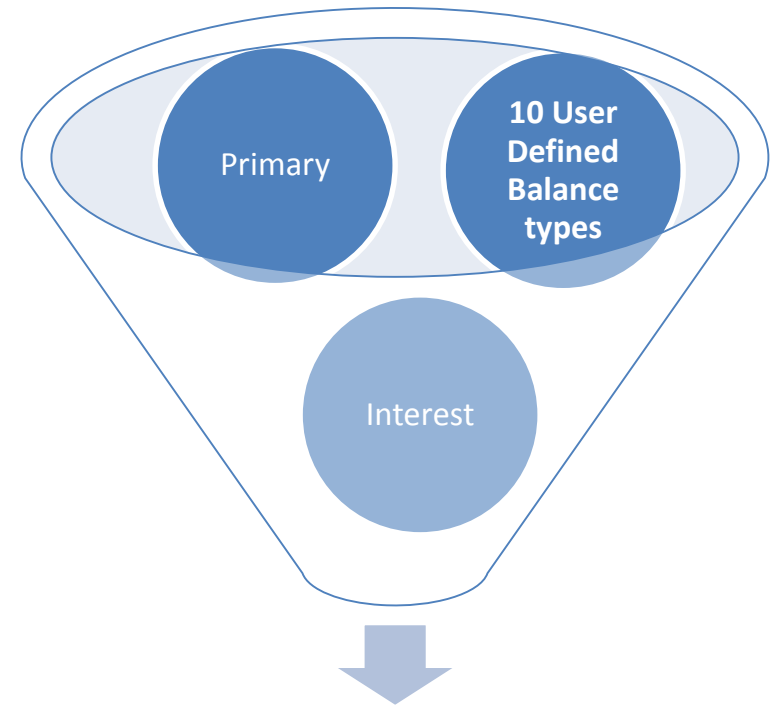
- Ask yourself the following questions:
  - What if a consumer has multiple debts?
  - Does a collector get commission for all payments?
  - Are there any payments that I keep a 100% of the monies?

Your RMEx solution. . . . .

# Defining Balance Types

## System Control Menu 1 > Balance Types

- **Distribution Order**
- **Collector credit**
- **Client Statements**
- **Commissions**
- **Interest**
- **Forwarded agency commission?**



Payment Distribution





## When Will You Stop Working An Account?

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- How will you stop the collection process on an account?
- When will you stop the collection process on an account?
- Does stopping the collection process on an account mean it will not be worked again?
- How does stopping the collection process affect your statistics?

Your RME<sub>x</sub> solution. . . . .

**System Control 1 > Close Codes > Close Code**  
**System Control 1 > Close Codes > Secondary Close Code**

- Setting up close codes
- Active vs. Inactive closed accounts
- Using secondary close codes



# Exercises – Setting Up a Company

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## In your system, use **COMPANY 99**

1. Setup a company with your basic company information (name, address, phone number, etc.). – You should sign on with QMASTER to set up a company.
2. Make sure users cannot sign on between 9pm and 8am.
3. Create a special password that ONLY a few people will have when they want to run certain options.
4. Setup a warning message for accounts that either a garnishment has been filed or there is a lien or malpractice suit.
5. Setup a warning on the payment entry screen that there are prior NSF's on file.
6. Mask all consumers and 3<sup>rd</sup> part numbers when there is an attorney.

## Exercises – Setting Up a Company (continued)

7. Create a user with the following characteristics (perhaps a sales manager):
  - The user can only access company 99
  - The user should be able look at account and clients, but not update clients
  - The user should be able to access the Payment Options but should not be allowed to enter payments
8. Create a Legal Collector that can see the full Social Security number.
9. A consumer is represented by an attorney, how can I make the collector aware of that?
10. For how long do you want an account considered new business for your queues?
11. Set up 3 balance types: Court Cost and keep 100% of the monies and the collector does not get any commission. Bad Check fee that the collector does get commission. Interest that you split with your clients and keep 25% of the payment.
12. Close an account that was “Placed in error”.
13. The client gives you 6 months to collect an account and after those six months, you must return the account to the client. How would you set up that close code?

# RMEx Management Training: Terminology and Setting Up A Company

Thank you!