

# RME<sub>x</sub> Management Training: Handling Disputes and Objections



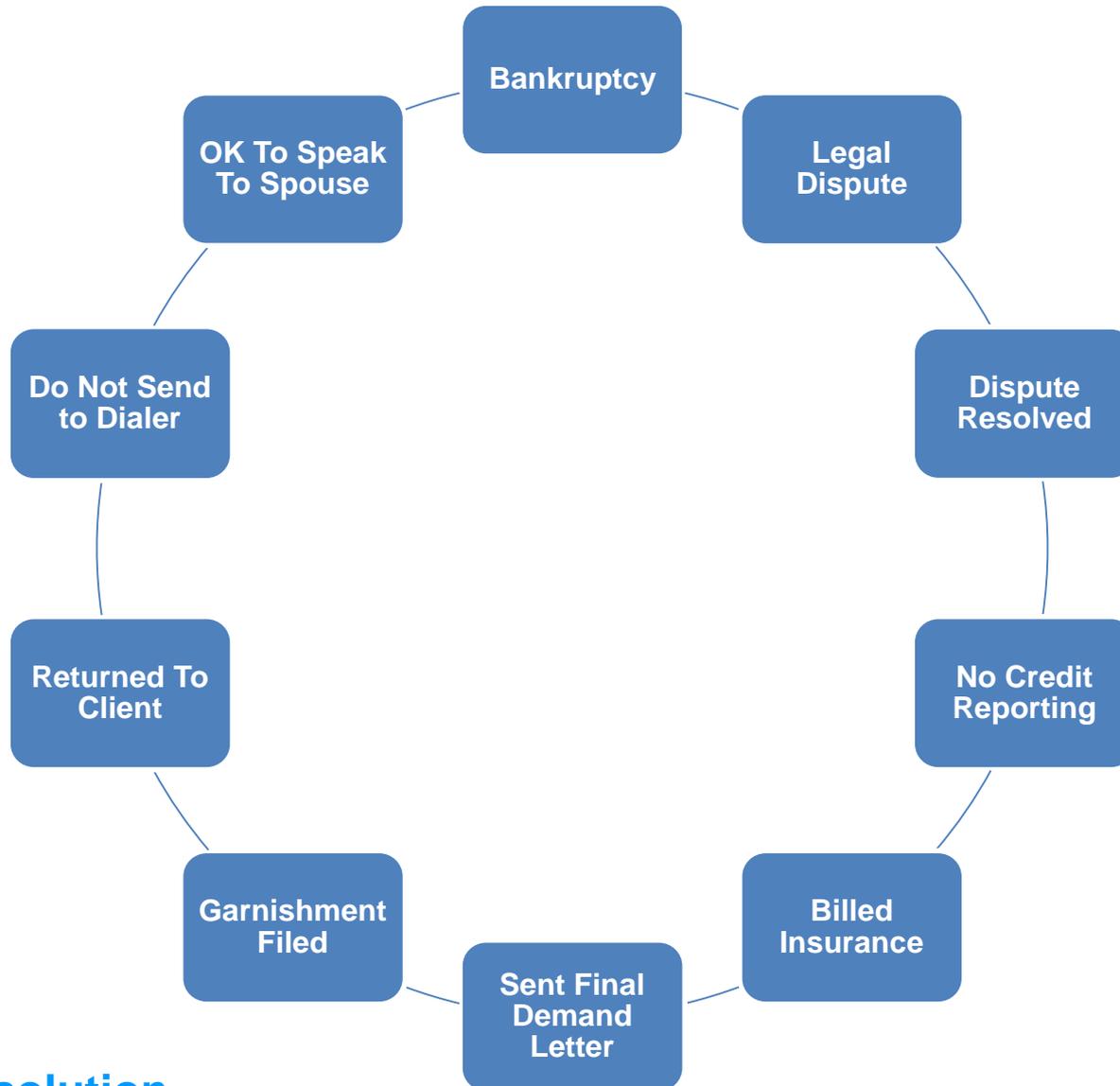
- Understanding how to flag accounts in RME<sub>x</sub> for various types of disputes or objections
- Warning users that an account is being disputed or has an objection when the account is displayed
- Closing accounts automatically based on its status
- Moving an account from an agent to a supervisor
- Notifying and providing account information to your client when an account is being disputed or has objections
- Adding an attorney on the account, how mail is handled when there is an attorney

# Flagging Accounts In RMEx For Various Types Of Disputes Or Objections

- ❑ What does the collector need to know as an account is presented to them?



# Description Codes - Examples



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

# Creating Description Codes

## System Control menu 1 > Description codes > Description code

- Can be added to an account manually or only with a Smart code
- Can choose to have code duplicate on linked accounts

Description Codes

Company name      QUANTRAX .7 BOX - COMPANY 99  
 Code                AB

Description      DISPUTE RESOLVED

Description for status report     

Description for close report     

Language translation (Y)     

Can not be added by user (Y)     

Can not be removed by user (Y)     

Do not duplicate on links (N)            Payments allowed (N=No)     

Do NOT remove if new code is            Include balance for      N  
 to be added to account and      collectors (N=No)

all codes are used (Y)

Special warning message ----->            Allow access if  
 (User will need special            special authority  
 authority for access)            is at least

Expand Event (ANb)     

Smart codes to advance



# Description Codes Groups – Warning Message

## System Control 1 > System Parameters

Company # 99 Case # 001895159 Get Primary NEXT

Client Number 770700 **DAMNA'S TRAINING COMPANY**-----

Owner 2 4 Worker 2 4 Split

Client Acct #

INQUIRY  
000  
A

Home Phone 301 - 568 - 7455

Work Phone

Cell Phone

Follow Up Date 11/09/15 Time

Promise Amount .01

EVENTS

SCAN DOCS.

EXIT

Guarantor None ▼ **BROWN** **ANNETTA**

Extra Address R/Mail Y

[Street Address](#) 120 DREISER LOOP RM Once Y

City/State/Zip BETHSDA MD 20814

Home

Email

[Employer](#)

Social Security 658-65-8455 Date of Birth 12/24/1964

Contact

X-Reference

Spouse (L/F)

ACat Status

Letters Pending  Cred.Rept Do not Report

Amount Placed 350.00

Balance 350.00

Total Balance 350.00

No. Of Accts 1

No. Paid in Full 0

Date Placed 11/01/15

Last Transaction 10/02/15

Last Worked 12/29/15

Last Letter

Last Payment .00

Last Payment Date

PD Check Amt

PD check Date

P/ARR Smart Code Q

Code	Description
AA	DISPUTED

Payments

Date	Description	Amount

Date	Time	Notes	User
01/29/16	12:35	TX "TEXTING CONV. STARTED"	TXT
01/29/16	12:50	TS SMS CONV COMPLETED	TXT
12/29/15	15:01	SUIT FILED	IVR
02/01/16	18:01	9B Returned mail flag to Y	DAW
02/15/16	17:46	8Z Date of death was 042716	DAW

Close Code

Closed Date

**Temporary Notes**

Date	Note



# Warning Users That An Account Is Being Disputed Or Has An Objection When The Account Is Displayed

## Management Menu > Client Update > Page 7- Information to Be Displayed When Account is Presented

- ❑ Example: Warning messaged displays when account is presented to agents

Company 01 Case # 150820002	INQUIRY 000 M	Home Phone 386 - 330 - 6818
Client Number 000001 TEST CLIENT		Work Phone
Owner 01 WorkerDUNK Split		Cell Phone
Client .Acct # 54321		Follow Up Date 5/01/15
		Promise Amount 150.00
Guarantor 0 ACCOUNT TEST		Amount placed 5000.00
Extra Address		Balance 5000.00
Street Address 3663 WEST TOWER RD		Total balance 5000.00
City/State/Zip USA MD 32060		No. of Accts 1
<div style="border: 2px solid blue; padding: 20px; margin: 20px auto; width: 80%;">DO NOT SPEAK TO CONSUMER SEE YOUR MANAGER-DISPUTE</div>		



# Automating Description Codes

## System Control menu 1 > Smart codes

- ☐ Use to make decisions with Smart codes

->Go to page  Smart Codes pg/1 Override exists

Smart Code 101 Last used 01/29/16 Override Type (A,P,C,N,O) C

Description LEFT MESSAGE W/3RD PARTY Special notes

Category  RPC (Y,X)  Called us (Y)

SELECTION CRITERIA

POE	--Days--		Addr		Lett		SS	Ds	Not	No	Phon	#	Cd
	Wrk	pmt	YN	At/Con	ers	YN	Cd	wrk	pmt	YN	At/Con		
R	X	<input type="text"/>											
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>											
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>											
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>											
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>											

ACTION

Send	Note to be added	Send to	Change	Follow-	Close	Des	+
Let.	(or S/Code to apply)	worker	owner	up days	acct	Cd	QCcat
<input type="checkbox"/>	LEFT MESSAGE W/3RD PARTY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	BL	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Using Description Code Groups

## System Control menu 1 > Description codes > Description code group

- Use to remove several description codes at one time

Description Code Group

Company name      QUANTRAX .7 BOX - COMPANY 99

Group code        A

Description       

Description code

# Automating Description Code Groups

## System Control menu 1 > Smart codes > Page 6

### ❑ Use to make decisions with Smart codes

->Go to page  Smart Codes pg/6

Smart Code 006 Override Type (A,P,C,N,O) A

Description PROMISE PIF

Immediate update of Desc.Code N=No	<input type="checkbox"/>	Desc.code group to remove	<input type="checkbox"/>
Desc.codes to be added	<input type="checkbox"/>	Desc.codes to remove	<input type="checkbox"/>
Stop decisions on codes	<input type="checkbox"/>	Desc.codes needed	<input type="checkbox"/>
Remove all description codes (Y)	<input type="checkbox"/>	Check linked accounts (Y)	<input type="checkbox"/>
No decisions with QCat/ACat (N)	<input type="checkbox"/>	(for desc.codes in sel.criteria)	
Start contact series (or *S,*R)	<input type="checkbox"/>	Make decisions on legals (Y)	<input type="checkbox"/>
Force user to verify (Y)	<input type="checkbox"/>	Unlink account (Y,R)	<input type="checkbox"/>
Keep follow-up date (Y)	<input type="checkbox"/>	Do not update date last worked (Y)	<input type="checkbox"/>
Smart Code for duplicated cases	<input type="checkbox"/>	Transfer immediately (Y,O,S)	<input type="checkbox"/>
Start S/Code series	<input type="checkbox"/>	Stop Smart Code series (Y,1-6)	<input type="checkbox"/>
Re-start S/Code series (Y, 1-6)	<input type="checkbox"/>	Left message (Y,A,R)	<input type="checkbox"/>
Transfer to company	<input type="checkbox"/>	Transfer to client	<input type="text"/>
Close code for existing account	<input type="checkbox"/>	Transfer notes (Y) Oth.inf (Y/D)	<input type="checkbox"/>
Keep existing commission rate (Y)	<input type="checkbox"/>	Transfer secondary balances (Y)	<input type="checkbox"/>
Do not transfer duplicates (N)	<input type="checkbox"/>	Use same Case# for transfer (Y)	<input type="checkbox"/>
Reset attempts, contacts (Y,A,C)	<input type="checkbox"/>	Reset decisions (Y,A)	<input type="checkbox"/>
Write off bal-Y Code (41-49)	<input type="checkbox"/>	Adj.code	<input type="text"/>
Add payment code Balance type	<input type="checkbox"/>	Amount (optional)	<input type="text"/>
		Percentage of Pri.	<input type="text"/>

F1-New Selection F3-Search F12-Update Page keys Delete Code (D)

# Creating Close Codes

## System Control 1 > Close Codes

- Two types of Close codes
  - Active
  - Inactive

Close Codes

Company name      Quantrax RME.x      (01)

Close code      0

Description     

Short description     

Remove from placement amount (Y)     

Inactive balance (Y)            Active for statistics (Y)     

Collector credit for payment (Y)            Collector credit if one  
Max.days for credit after close            linked account is open (Y)

Open on payment transaction (Y,P)            Open through Smart Codes      N  
Bankruptcy or deceased (B,D)            (N=No)

Stop letters (Y)            Omit from reports (Y,S,C)     

Days to wait before purging            Smart Codes not allowed (Y)     

Status report description     

Special Code (D,N)     

F1-New Selection      F3-Search      F7-Exit

# Closing Accounts Automatically Based On Its Status With Smart Codes

## System Control 1 > Smart Codes > Page 1

->Go to page  Smart Codes pg/1

Smart Code 160 Override Type (A,P,C,N,O) C

Description DISPUTED ACCOUNT Special notes

Category A RPC (Y,X) Y Called us (Y)

SELECTION CRITERIA POE --Days-- Addr

Sel.X	Age	-Ac/Picmt\$-	-Lk/Pic\$-	Let	SS	Ds	Not	No	Phon	#	Cd	
YWPRS		From	To	From	To	ers	YN	Cd	wrk	pmt	YN	At/Con
R	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>						
	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>						
	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>						
	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>						

ACTION

Send	Note to be added	Send to	Change	Follow-	Close	Des	+
Let.	(or S/Code to apply)	worker	owner	up days	acct	Cd	QCat
<input type="checkbox"/>	DISPUTED ACCOUNT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DA	<input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					

Page Up/Down   Use Bal. for Picmt (Y)  Age code

Look up

# Closing Accounts Automatically Based On Its Status With Smart Codes

## System Control 1 > Smart Codes > Page 1 > ? Logic Page 2

- Look for if multiple description codes exists – apply Smart code

->Go to page  Smart Codes pg/1

Smart Code 160 Override Type (A,P,C,N,O) C  
 Description DISPUTED ACCOUNT Special notes  
 Category A RPC (Y,X) Y Called us (Y)

SELECTION CRITERIA

YVPRS	Age	-Ac/Picmt\$-	-Lk/Plc\$-	Lett	SS	Ds	Smart Code	Override	Type (A,P,C,N,O)
From	To	From	To	ers	YN	Cd	160		C
R	?								

Smart Codes pg/x

Smart Code 160 Override Type (A,P,C,N,O) C  
 Description DISPUTED ACCOUNT

SELECTION CRITERIA LINE 1

POE	--Days--	Addr
Not	No	Phon
wrk	pmt	YN
At/Con		
R	-	-

ACTION

Send Note to be added Send to Change  
 Let. (or S/Code to apply) worker owner  
 DISPUTED ACCOUNT

ADDITIONAL SELECTION CRITERIA

Field Name Condition Value (Numbers, Characters)

Field Name	Condition	Value (Numbers, Characters)
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

AND/OR (A,O)

More...

F1-Search F7-Exit F12-Update F20-Delete Page Down-For More ENTER-Return

# Closing Accounts Automatically Based On Its Status With Smart Codes

## System Control 1 > Smart Codes > Page 6 - Close Code for Existing Account

->Go to page  Smart Codes pg/6

Smart Code	160	Override	Type (A,P,C,N,O)	C
Description	DISPUTED ACCOUNT			
Immediate update of Desc.Code N=No	<input type="checkbox"/>		Desc.code group to remove	<input type="checkbox"/>
Desc.codes to be added	<input type="checkbox"/>	<input type="checkbox"/>	Desc.codes to remove	<input type="checkbox"/>
Stop decisions on codes	<input type="checkbox"/>	<input type="checkbox"/>	Desc.codes needed	<input type="checkbox"/>
Remove all description codes (Y)	<input type="checkbox"/>		Check linked accounts (Y)	<input type="checkbox"/>
No decisions with QCat/ACat (N)	<input type="checkbox"/>		(for desc.codes in sel.criteria)	
Start contact series (or *S,*R)	<input type="checkbox"/>		Make decisions on legals (Y)	<input type="checkbox"/>
Force user to verify (Y)	<input type="checkbox"/>		Unlink account (Y,R)	<input type="checkbox"/>
Keep follow-up date (Y)	<input type="checkbox"/>		Do not update date last worked (Y)	<input type="checkbox"/>
Smart Code for duplicated cases	<input type="checkbox"/>		Transfer immediately (Y,O,S)	<input type="checkbox"/>
Start S/Code series	<input type="checkbox"/>	<input type="checkbox"/>	Stop Smart Code series (Y,1-6)	<input type="checkbox"/>
Re-start S/Code series (Y, 1-6)	<input type="checkbox"/>		Left message (Y,A,R)	<input type="checkbox"/>
Transfer to company	<input type="checkbox"/>		Transfer to client	<input type="checkbox"/>
<b>Close code for existing account</b>	<input type="checkbox"/>		Transfer notes (Y) Oth.inf (Y/D)	<input type="checkbox"/>
Keep existing commission rate (Y)	<input type="checkbox"/>		Transfer secondary balances (Y)	<input type="checkbox"/>
Do not transfer duplicates (N)	<input type="checkbox"/>		Use same Case# for transfer (Y)	<input type="checkbox"/>
Reset attempts, contacts (Y,A,C)	<input type="checkbox"/>		Reset decisions (Y,A)	<input type="checkbox"/>
Write off bal-Y Code (41-49)	<input type="checkbox"/>		Adj.code	<input type="checkbox"/>
Add payment code Balance type	<input type="checkbox"/>		Amount (optional)	<input type="text"/> .00
			Percentage of Pri.	<input type="checkbox"/>

F1-New Selection F3-Search F12-Update Page keys Delete Code (D)

# Moving An Account From An Agent To A Supervisor

System Control 1 > Smart Codes > Page 7- Change Worker  
System Control 1 > Smart Codes > Page 7- Change Owner

->Go to page  Smart Codes pg/7

Smart Code 160 Override Type (A,P,C,N,O) C

Description DISPUTED ACCOUNT

Recalculate commission (Y)

Utilize placed date for age (Y)  Substitute commission

Change fee code to  code for fee code (Y)

Forward to agency number

Forwarding rate  .00 % Recall from forwarding agency (Y)

Change account status code to  Change owner based on first open account (YPT) Worker (\*S,\*D)

Change worker code using Work group code (Y)  Change owner code using Work group code (Y,X)

Delete from account processing (Y)  Smart Codes needed

Applied within

Credit report as new account (Y)  Fax standard letter to client (Y)

Stop mail (Y,N)  Clear letters pending (Y)

Code for additional Smart Codes  Stop/Start interest (Y/P,S/N)

Change internal score to  Interest rate & frequency  .000

F1-New Selection F3-Search F12-Update F22-Codes for additional S/Codes

# Moving An Account From An Agent To A Supervisor

## System Control 1 > Smart Codes > Page 8

- ❑ On page 8 of the smart code, setup the actions for moving a disputed account to a supervisor

->Go to page  Smart Codes pg/8

Smart Code 160 Override Type (A,P,C,N,O) C

Description DISPUTED ACCOUNT

Report description

Clear POE (P,W,B)

Clear phones (H,W,C,B,O,A)  TAB+ (Y)  **Transfer to Own/Wrk/Spl if worked by another user (O,W,S)**

Can only be applied by O, W, S, A

**Immediate transfer to worker code**

Add account to queues... User ID  OR

**Worker code (Y)**

Processing type  ----->

QCat code

Time frame (AMP)

**Change queues if worker is changed (Y)**

Start a payment arrangement (Y)  with first payment in  days (Blank=30 days)

Run linking for new account (Y)  Stop audit notes (Y)

Apply S/Code   (override) after  days

Remove future S/Code   (override) Remove all future S/Codes (Y)

A=Broken promises  
D=Dated follow-up  
G=New business  
J=Work phones  
M=Home phones only  
P=Hot accounts  
C=Cell X=Other phones

F1-New Selection F3-Search F12-Update Page keys

# When An Account Is Being Disputed /Has Objections – Control By QCat



# When An Account Is Being Disputed /Has Objections – Control By QCat

## System Control 2 > QCat> By Company

- Setup the QCat for disputed accounts to omit from dialer.
- For legal disputes, use an R as the secondary sort

QCat Codes

Company name	QUANTRAX .7 BOX - COMPANY 99
Code	004
Description	DISPUTE MANAGER REVW
Sort category	<input type="checkbox"/>
Secondary sort	<input type="checkbox"/>
Breakpoint (days)	10
Best time to work	<input type="checkbox"/>
Omit from dialer (Y)	Y
Delete 'D'	<input type="checkbox"/>

SORT/SECONDARY SORT CODES

- C - Client code (ascending)
- B - Descending balance
- P - Primary insurance
- S - Secondary insurance
- Z - Skip tracing (zip,street)
- F - Forwarded agent code
- A - Age from placement (oldest accounts first)
- D - Date last worked (longest not worked presented first)
- R - Court code
- N - Guarantor name
- O - Owner code (Collector)
- I - Internal score (lowest first)
- T - Last transaction date
- E - External score (descending)
- W - Age from placement (new first)

# When An Account Is Being Disputed /Has Objections – Control By QCat via Smart Code

## System Control 1 > Smart Codes > Page 5 - Change QCat

- ❑ Specify the QCat to send the account to

->Go to page 5      Smart Codes    pg/5

Smart Code    132      Override      Type (A,P,C,N,O)    0

Description    NEW COMPLAINT

(+)

Standard letter	<input type="checkbox"/>	Std. note/code	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/>	X-code (Y,b)	<input type="checkbox"/>
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/>	Follow-up (Y,N,P,A,b)	<input type="checkbox"/>
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/>	Duplicate notes (Y,P,A)	<input type="checkbox"/>
Add a follow-up date	<input type="checkbox"/>	days before last P/D	<input type="checkbox"/>	Show account worked (Y)	<input type="checkbox"/>
Allow with phone and no prior ATTEMPT (N=No)	<input type="checkbox"/>		<input type="checkbox"/>	No prior CONTACT (N=No)	<input type="checkbox"/>
Special authority needed (A-Z)	<input type="checkbox"/>		<input type="checkbox"/>	Not allowed (Y,C)    D/C	<input type="checkbox"/>
Do not allow if no decisions are met (Y)	<input checked="" type="checkbox"/>	Y	<input type="checkbox"/>	Show UDW (or Q,*)	<input type="checkbox"/>
Mark as work item (Y) for user	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Screen code/Condition	<input type="checkbox"/>
Recall time (Y,N,b)	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Advance to next Y,D	<input type="checkbox"/>	Max.link bal	<input type="text" value=".00"/>	Stop contact series (Y,P)	<input type="checkbox"/>
For prior payment look up S/Code	<input type="checkbox"/>		<input type="checkbox"/>	Return to owner (Y)	<input type="checkbox"/>
If linked accounts exist look up	<input type="checkbox"/>		<input type="checkbox"/>	Open linked cases (Y,L,A)	<input type="checkbox"/>
Cost associated with code	<input type="checkbox"/>		<input type="text" value=".00"/>		<input type="checkbox"/>
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>		<input type="checkbox"/>	Duplicate on ALL (Y)	<input type="checkbox"/>
<b>Change QCat to</b>	<input type="checkbox"/>	<b>Change ACat to</b>	<input type="checkbox"/>	Eligible to split Comm.(Y)	<input type="checkbox"/>
Move owner to split (Y)	<input type="checkbox"/>		<input type="checkbox"/>	Clear split collector (Y)	<input type="checkbox"/>
Move UserID to Split/Own/Wkr (YOW)	<input type="checkbox"/>		<input type="checkbox"/>	Change split to	<input type="text"/>
				Move split to owner (Y)	<input type="checkbox"/>

F1-New Selection    F3-Search    F12-Update    Page Keys

# When An Account Is Being Disputed /Has Objections – Control By QCat via Smart Code

## System Control 1 >Smart Codes > Page 8 - QCat Code

- ❑ Specify the QCat to transfer the disputed account to

->Go to page  Smart Codes pg/8

Smart Code 132 Override Type (A,P,C,N,O) O

Description NEW COMPLAINT

Report description

Clear POE (P,W,B)

Clear phones (H,W,C,B,O,A)  TAB+ (Y)  Transfer to Own/Wrk/Spl if

Can only be applied by O, W, S, A  worked by another user (O,W,S)

Immediate transfer to worker code  A=Broken promises

Add account to queues... User ID  OR  D=Dated follow-up

Worker code (Y)  G=New business

Processing type  -----> J=Work phones

**QCat code**  M=Home phones only

Time frame (AMP)  P=Hot accounts

Change queues if worker is changed (Y)  C=Cell X=Other phones

Start a payment arrangement (Y)  with first payment in  days (Blank=30 days)

Run linking for new account (Y)  Stop audit notes (Y)

Apply S/Code   (override) after  days

Remove future S/Code   (override) Remove all future S/Codes (Y)

F1-New Selection F3-Search F12-Update Page keys

# When An Account Is Being Disputed /Has Objections – Report to Client by QCat

## Management menu > Account Processing Reports > Report to Client by QCAT Code

- Generate QCat reports by client
- Specify a smart code to be applied to the account when this report is run

Report to Client by QCat Code

Worker Codes (Blank=ALL)	W001	W002	W003	W003						
QCats to include (Blank=ALL)	710	711	712	713	714	715	716	717	718	719
Type for QCat	A	B	C	D	E	F	G	H	I	K
Client Codes (Blank=ALL)	000001	000002	000003	000004						
Smart Code to apply (Required)	200									

Please enter leading zeros for QCat Codes

\* CLOSED ACCOUNTS AND ACCOUNTS  
WITH FUTURE DATES ARE OMITTED

F7-Cancel      Press ENTER to Continue

# When An Account Is Being Disputed /Has Objections – Report to Client by QCat – Modify Text In Report

## Management menu > Account Processing Reports > Update Text For Report To Client By QCat Code

Report to Client by QCat Code

Company name      QUANTRAX .7 BOX - COMPANY 99

Type code         L

Description       RECOMMENDING LEGAL ACTION

Text to print (lower case allowed)

We have exhausted all reasonable efforts to collect the following accounts and are now recommending legal action. Please review and advise us as to how we should proceed.

Data to print     1   -----> 1 - Name, Last charge, Account#, Request amount paid, Date paid and Balance due.

Print line for            2 - Name, Account#, Amount placed, Date placed and Last charge.

/24/16  
LBIN

Page : 1

REQUEST FOR INFORMATION  
QUANTRAX .7 BOX - COMPANY 99  
106/5 MONGOMERY AVENUE  
BETHESDA, MD 20817

COLBIN'S CLIENT  
NOW HIT F12  
1111 MAIN STREET  
BETHESDA

MD 20814

**Default text**

Phone : (000) 000-0000 Fax # : (000) 000-0000

Please advise this office of the status of the following accounts :

Name	Last Charge	Account#	Amt.Paid	Date Pd.	Bal.Due
FINANCIAL	UDWPAT 01/12/15	001892098-COL4-COL4	-----	-----	-----
TEST	AMOUNT 02/12/13	001881749-COL4-COL4	-----	-----	-----
SUREN	SUREN 01/01/14	001881772-COL4-COL4	-----	-----	-----
EMIL	EMIL 02/02/14	001881773-COL4-COL4	-----	-----	-----

# Adding An Attorney On The Account - How Mail Is Handled When There Is An Attorney

## Account Details > F2 - Attorney Screen

- ❑ If a consumer is represented by an Attorney here is where you enter the Attorney's information.
- ❑ When there is Attorney info all letters generated for this account will go to the Attorney

Company	01 Case # 152380001	INQUIRY OOO M	Home Phone	386 - 688 - 1081	EVENTS
Client Number	000001 TEST CLIENT		Work Phone	386 - 330 - 6818 -	
Owner	01 Worker01 Split		Cell Phone	- -	
Client .Acct #	12345		Follow Up Date		
			Promise Amount	.00	
Guarantor	0 BAKER JOAN		Amount placed	500.00	
Extra Address			Balance	500.00	
Street Address	3663 WEST TOWER RD		Total balance	500.00	
City/State/Zip	LIVE OAK FL 326060		No. Of Accts	1	
ATTORNEY INFORMATION					
Attorney Name (L,F)					0
Extra Address					
Street Address					
City/State/Zip					
Phone Number			Fax Number		
Note					
Last Changed by		On			
F2-Account details F7-Exit F12-Update F20-Delete F22-Multiple attorneys					

# Exercises – Handling Disputes And Objections

**In your system, use COMPANY 99**

1. Your contract with your client says that any account with a balance under \$200 and is being disputed or has objections should be automatically closed as soon as your agency has been told about the dispute/objection.
  - a. Create an account with a balance of \$150 and flag it as a disputed an account.
  - b. Setup your company so you are complying with your contract with your client.
  - c. Test that everything is working with the account you created.
  - d. What do you need to do if this same consumer has multiple accounts with this client?
  
2. Your contract with your client requires that any account that is disputed or has objections with a balance over \$1000 must be automatically witched from the agent to their supervisor as soon as your agency has been told about the dispute/objection.
  - a. Create an account with a balance of \$2000 and flag it as a disputed account.
  - b. Setup your company so you are complying with your contract with your client.
  - c. Test that everything is working with the account you created.
  - d. What do you need to do if this same consumer has multiple accounts with this client?

# Exercises – Handling Disputes And Objections (continued)

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

3. One of your agents had just told you that an account is being disputed by a consumer. You want to automatically communicate this disputed account information to your client via RME<sub>x</sub>. This is part of your contract with your client when you are alerted about a dispute, objection or any legal matter.
  - a. Setup your company so you are complying with your contract with your client.
  - b. How can you view this information before you send it to your client?
  - c. What do you need to do if this same consumer has multiple accounts with this client?
  
4. Herman Munster was just added as the attorney to one of your accounts you added into the system.
  - a. We want mail to go directly to the attorney and not the consumer.
  - b. Mr. Munster's address is 1313 Mockingbird Lane, Salem MA 01971.
  - c. What will happen if the consumer has multiple accounts with this client?

# Exercises – Handling Disputes And Objections (continued)

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

5. Accounts that are marked as disputed or have objections, must display a message before the account details are displayed to agents.
  - a. The following special message should be displayed when the account is presented, “Please do not speak to this consumer; this account is being disputed by the consumer”.
  - b. The account name should also be displayed in red.
  - c. You want to mask all consumer phone numbers to agents, when an attorney is involved. How do you do that?

# RMEx Management Training: Handling Disputes and Objections

Thank you!