RELEASE 7.0 LATEST UPDATES – *Revised March 21st, 2024*

The following are recent changes to RMEx 7.0 Montana:

January 31st, 2024 – Creating Texting Templates in RMEx

We have added "F5-Texting templates" under the letter setup on Pg. 3 and in the "SBT Company Setting" screen. This now gives clients access to create their texting templates in the system.

January 8th, 2024 – Clearing Failed Reg-F Letters

When a Reg-F letter fails, the system stores the requested letter in "letters pending" so you can resolve the issue and the letter can then go out. Now, we have added a new system note that will be added to an account after two letters fail. If there are two failed notes on the account, the system will now add a note "Pending removed-11" and delete the letters pending.

February 2nd, 2024 – Stopping Inbound and Outbound Text Messages

We have added two new fields to the "Texting – Company Settings for SBT" screen called "Stop texting DC/DC Group" and "Stop Texting Recording". The "Stop texting DC/DC Group" field will block inbound and outbound text messages on accounts that have the description code that is populated in the "Stop texting DC/DC Group" field on pg. 1 of the Texting-Company Settings for SBT.

"Stop Texting Recording" field

February 16th, 2024 – Sending texts through an Account List for Audit

We have made changes to the Account List for Audit screen that will now allow you to request texts messages be sent on accounts with consent. The new field "Send text using letter" has been added to accommodate this new change.

February 19th, 2024 – Adding notes when the group statement is changed

We have made a change to add a note to the client notes in the Client Master when a change is made to a group statement.

February 20th, 2024 – Removing bankruptcies from your credit reporting file

We have made a change within the Credit Reporting System Control settings for the "remove as bankruptcy status" field. The description code in this field is used to remove a previously reported bankruptcy (if you report bankruptcies).

Formerly accounts with this description code would report as such:

1. Base segment, Field 38, Consumer Information Indicator > "Q" (see metro 2 guidelines for more information)
2. Account note: "Credit Reporting - R/BANK"
3. The account would continue to report with a Q and would no longer add credit reporting notes to the account.

After changes made:

4. Base segment, Field 38, Consumer Information Indicator > "Q" is reported ONE TIME
5. Description code is removed.
6. Account continues to report.
7. Account note: "Credit Reporting - ALL

February 28th, 2024 – Changes made for case sensitivity in FTP setup

Remote Library and Directory in FTP setup screen can now accept lower and upper cases to work seamlessly with case sensitive based servers.

February 29th, 2024 - Online Client is not setup in System Security warning

We have made a change to the online client setup. If the flag to enable the online client is BLANK on the System Security profile, and we try to set that userID up as an online client, the following message will be displayed to the user:

“User is not set up as on-line client in System Security”

February 29th, 2024 – Only accept payments from online clients

We have made a change to the “Payment entry” field on System Security Pg. 1 to accept a “P” value. This value is used when an online client userID is ONLY given access to enter payments and no adjustments or reversals.

March 1st, 2024 – New features for texting

We have added several new features to texting:

Delete multiple texts

We have added a new field called “Delete multiple texts (N)” to pg. 1 of the Texting-Company Settings for SBT. This field will allow you to delete multiple text messages to a linked group of accounts, or to accounts with the same cell phone number.

Letter code field

Due to the limitations on the message's length, text messages were designed to generate texts to the consumer, not individual accounts. That means the linked balances are referred and not account balances, and not showing individual client names on a text message either. However, we do have options and merge codes to text an individual account by using special merge codes for individual account information.

Place a 'Y' in this field to indicate that text messages sent through this letter code use individual account information. There are options to delete multiple texts to the same consumer (linked group) or the same phone number (across linked groups). If you are sending texts to individual accounts, the option to not delete individual texts must be turned on (Company setting for texting).

This “by case#” logic only works if the message is requested through the SM setup in page 5 > “Text message (Letter)”

Add notes for inbound messages

If you enter an N in this field, the inbound text. History and notation will ONLY happen on the most. Recently linked group with the cell number. In a case, where the number exists only. Under one linked group then it will be used.

Template code for late payment notification

Allows for a template code to be set up for late payment notification from the company settings.

Text message allowed client master

We have also added a new field to pg. 11 of the Client Master called “Text messages allowed”. This will allow you to allow or block text messages for a specific client. Entering an A in this field, will STOP both the notation of inbound, and outbound texting for that linked group that has an account for the particular client. Entering an N in this field, will STOP the notation of inbound texting for that linked group of accounts. In a case, where the number exists only under one linked group then it will be used for notation.

Text messages request at the account level

Now, text messages can also be requested at the account number level from the smart code audit "Send text using letter" field. It will be added to the letter history file as well. If that text is sent at a link number level it will only add the link number to the letter history.

If it is sent at the account number level It will add the record to the letter history with case number and not the link number.

The text will NOT be written to the SCTEXTCL file if there is already a record with the same letter code, link number and case#. (This is taken from the SCTEXTCL file, from the last 9 characters of the message field)

SBT BOT/CSP Receipt new change

We have made a change for when the silent opt-in program and payment receipt program are run at the same time. With the new change, when the silent opt-in program is called, there will be a 3-second delay until the payment receipt program is called.

This change was made to correct an issue with timing of the receipt and opt-in text message.

Send text option – send text messages option

Now we have the ability to bypass the time zone logic for welcome messages only.

If you put "I" instead of putting "Y" It will bypass the time zone logic for welcome messages.

Cell number displayed in RED

We have made a change on the account detail screen to accommodate this:

Now the accounts' "Cell phone" label is displayed in RED if any cell number has consent. This is for all cell numbers in any of the linked accounts or cell numbers in the TAB + window.

The TAB + window will show which cell number has the consent to text.

Contact preferences

If the account's contact preferences have "N" for texting, not texts are allowed on that account. This includes the immediate (TXX, ALX, etc.) texting function as well.

March 4th, 2024 – Do not delete I-Load

We found a few instances where the users mistakenly deleted the I-loads since the field selector automatically jumps to the "Delete" field at the bottom of the screen. We have added a pop-up to prevent users from deleting an I-load mistakenly (Special options menu > I-Load Options > Create New Business Loads), when they select all screens by keying in a "Y" on the "Load format maintenance" screen.

March 11th, 2024 – Correction made to smart code for active closes

Our team identified a bug within the system that has been corrected. If you did NOT set up a smart code for the OPTIONAL Smart Code for Active Closes, the active closes were by passed. This has been addressed to account for Active Closes.

This field is found on the "Statute for closing accounts" screen - Smart code for active closes (optional)

March 14th, 2024 - A change to 'Client Sues' field on Client Update (Page 5)

We have renamed the above field as 'Sues(Y/Min)' and added an additional field next to that field, to define the minimum balance to sue an account for a client.

March 15th, 2024 - New fields added to ? mark logic

We have added 2 new fields related to 'Sues (Y/Min)' fields on Client Update (Page 5). They will check for the minimum balance defined on Client Update (Page 5) to sue an account and apply the smart code accordingly to the relevant accounts.

CLTSUESPRI MEETS PRI.BAL TO SUE(Y)

CLTSUESBAL MEETS TOTAL BAL TO SUE(Y)

March 21st, 2024 – Corrections made to emailing options

Please note that we have now corrected the following issues we identified with emailing options.

On-demand emailing option has an issue where it was triggering all pending emails to go out when the command was used from an account. This is now corrected and only the expected email from the relevant account gets sent.

Email sending option was sending all pending emails from multiple companies when it was supposed to send the emails belonging for the RMEx company from which the sending option was taken. This is now corrected.