



RMEx Email Robotic Process Automation

Email Response bot

The email response bot is new feature offered through RMEEx. With the email response bot, the emails responses sent by customers are intelligently and automatically sorted into their accounts. Additionally, the bot can also identify the context of the contents in the email and take action on the accounts based on it.

Product Onboarding

The bot can be set up for a determined email address for your company. This email address needs to be also used for outbound emails for customers as well as inbounds emails from customers.

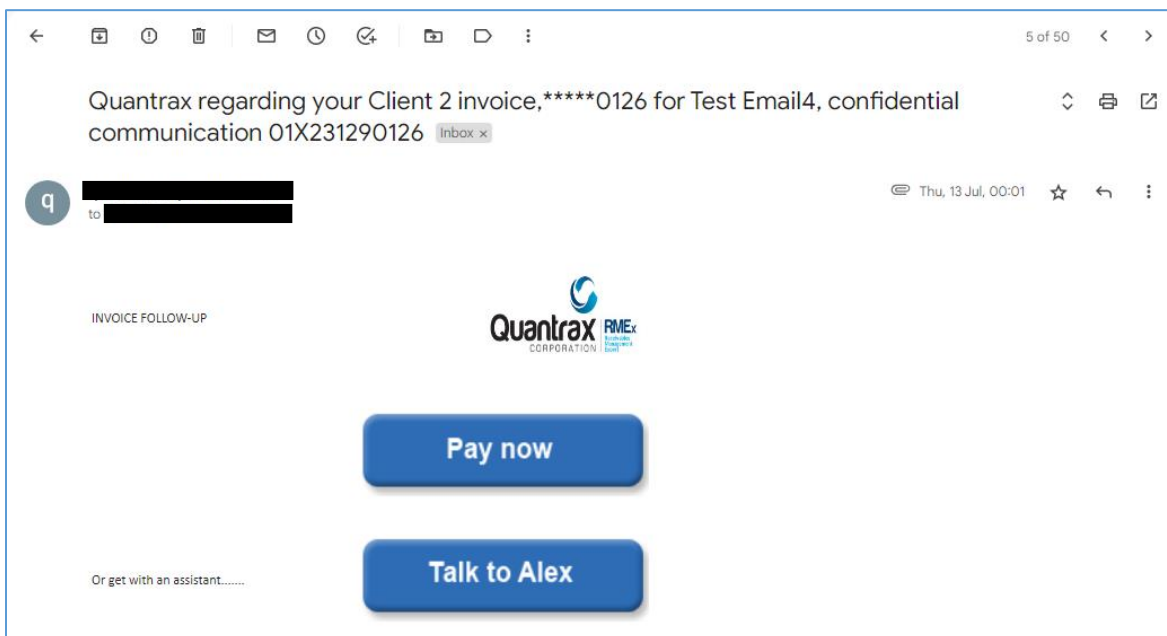
Important: The email address and login credentials must be provided to Quantrax in order for the incoming and outgoing emails to be read by the bot. The bot reads the incoming emails to identify and segment them based on the responses. The credentials must be supplied securely to Quantrax, and any changes in the passwords must also be communicated with Quantax. The credentials will only be used by the bot for mailbox access.

Scandocs: The scandocs product by Quantrax is required for the functionality of the email response bot for storing received emails as documents on accounts.

The email response bot mainly identifies email responses sent by customers as replies to emails that are sent to them.

The bot uses the RMEEx case number in a specific format in the subject line of the email. This case number is included in the emails that are sent to the customers. The replies to that email are then identified based on context. The RMEEx Case number format sent out follows the format of [(COMPANY CODE)X(CASE NUMBER)] which is included in the subject line of the email.

Ex: 01X123456789



The email and any document attachments send through the customer response email are first added to the Scandocs for the customer (Contact Quantrax to learn more about the Scandocs feature), and can be viewed. A note is also added.

The screenshot shows the RME X QUANTRAX CORPO interface. At the top right, the 'SCAN DOCS.' button is highlighted with a red box. Below the header, there are fields for Company # (01), Account # (231290131), and Client Number (000002 CLIENT 2). A blue 'INQUIRY 000 A' button is visible. The interface is divided into several sections:

- Customer Information:** Guarantor (None), Extra Address (TESTING STREET), City/State/Zip (IOWA FALLS IA 50126), Email, Social Security (000-00-0000), Date of Birth, etc.
- Financials:** Amount Placed (60000.00), Balance (60000.00), Total Balance (60000.00), Number of accounts (1), Date Placed (7/12/23), Last Transaction (2/02/22), etc.
- Smart Code:** A table with columns 'Code' and 'Description'. One entry is 'DS DEBTOR SERVED'.
- Payments:** A table with columns 'Date', 'Description', and 'Amount'.
- Temporary Notes:** A table with columns 'Date' and 'Note'. Two entries are shown:

Date	Note	User
07/12/23 13:18	EM 01231290131_em_o2zayn1ku	SCANDocs
07/12/23 13:18	SD jm52sfufiqufc.pdf	SCANDocs

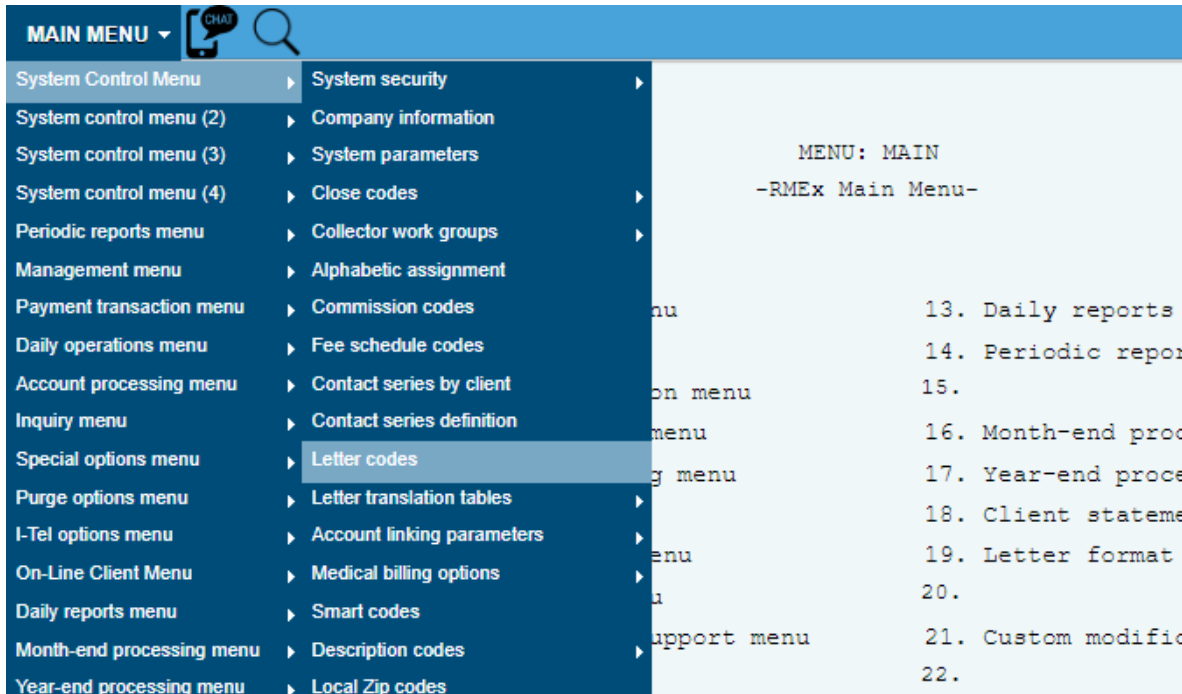
Taking the scandocs option will take you to the document viewer where the emails will be shown as shown.

The screenshot shows the RME X Document viewer interface. On the left, a 'Document list' sidebar is highlighted with a red box, showing two files: '01231290124' and '01231290124/01231290124_e'. The main area displays the 'RME X Document viewer' with the following details:

- Company: 01, Account: 231290124, File Name: 01231290124_em_IN_jgs3axswv5t03dfrdrvpay.pdf
- Buttons: Open file, Print File (01231290124_em_IN_jgs3axswv5t03dfrdrvpay.pdf), Delete selected file, Rename selected file, New name
- Preview: Shows an email header with 'From:', 'Sent on: Wednesday, July 12, 2023 6:14:47 PM', 'To:', and 'Subject: 01X231290124'. The body text starts with 'Consumer may have insurance'.

With the email response bot identifying the context and the contents of the emails sent by the customers, actions though smartcodes can be set up to be automatically applied based on the content identified by the bot.

Smartcode actions can be set up in the smart code menus. The set up the created smartcodes to email actions, go to the back menus of the letter code menu. [1. System control menu > 11. Letter codes (EXIT four times to fourth back menu page)]



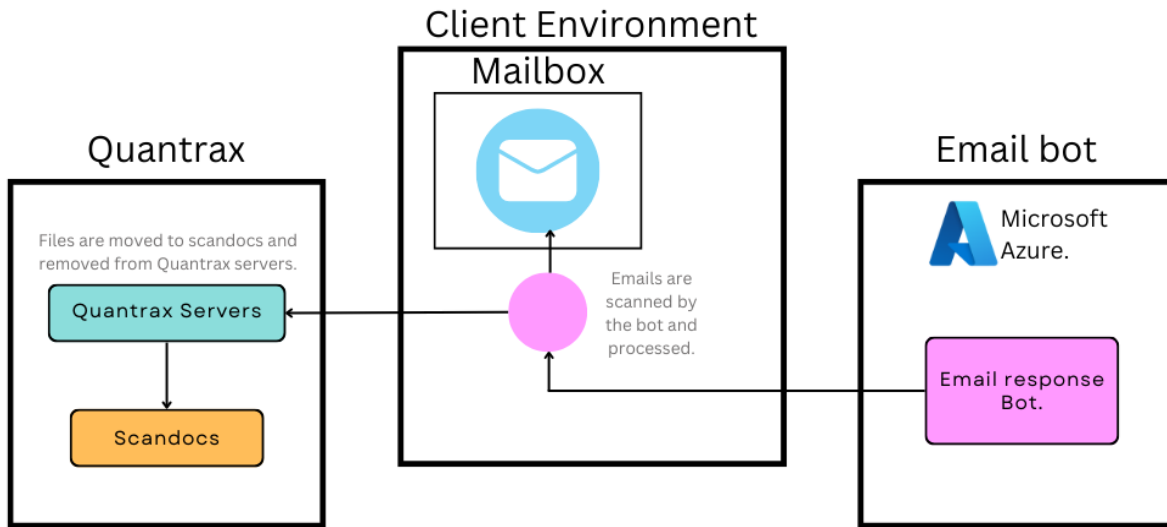
The description on the right of the screen are the contents that can be recognized by the email response bot. Set the relevant smartcodes and overrides for those options and press ENTER to update.

Smart Codes for uploaded E-mails

Company name	Quantrax RME	(01)	Code	Smart Code	Override
Consumer says they paid			PD	230	<input type="checkbox"/>
You contacted the wrong party			WR	231	<input type="checkbox"/>
Consumer may have insurance			IN	232	<input type="checkbox"/>
Possible bankruptcy			BK	233	<input type="checkbox"/>
Consumer may be deceased			DE	234	<input type="checkbox"/>
There may be an attorney involved			AT	235	<input type="checkbox"/>
Consumer is not able to pay			CP	236	<input type="checkbox"/>
Consumer says charges are not theirs			WC	237	<input type="checkbox"/>
Consumer says balance is wrong			WB	238	<input type="checkbox"/>
Consumer needs documentation of charges			DO	239	<input type="checkbox"/>
Other dispute			DI	240	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Once suitable smartcodes and actions are set up on the system, the RPA is ready to be used.

Email RPA Data flow.



FAQ:

- **Who has access to the information sent over from the mailboxes?**
The only external entity that will be reading the mailboxes is the bot. Quantrax will not be accessing the mail box in any other way.
- **Where are the data centers located for processing? What points would the information in the emails be sent to?**
The email bot is an AI that is set up in Microsoft Azure, and is based on the cloud. The data centers are located in Oregon, USA. However, none of the information in the emails from the mailboxes are sent to any location. The bot will directly access the mailbox and process the emails from within your own system and will not move information to itself.
- **Will the email bot or Quantrax be storing any information from the emails?**
The bot will not store any information on the emails at any point. The emails will be moved to Quantax servers as pdf documents and will be removed from the servers after immediate integration with accounts. The documents can only be accessed through scandocs on the account and the inbox of the email.
- **Will the data sent from customers be used for any purpose such as training or research?**
Since none of the data is stored by the email bot or Quantrax, the data will not be used for any purpose.