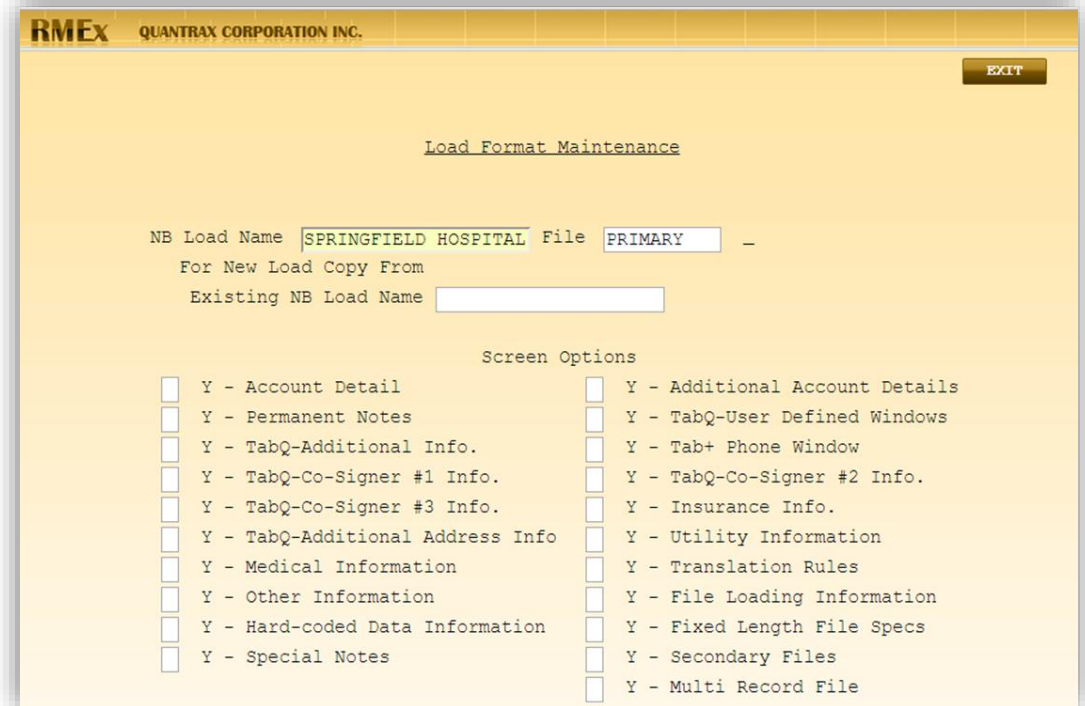


RME_x Training: I-Load

Loading New Accounts Fast and Efficiently



- What is I-Load
- Who Needs I-Load
- How I-Load Works



RME.x QUANTRAX CORPORATION INC. EXIT

Load Format Maintenance

NB Load Name File -

For New Load Copy From
Existing NB Load Name

Screen Options

<input type="checkbox"/> Y - Account Detail	<input type="checkbox"/> Y - Additional Account Details
<input type="checkbox"/> Y - Permanent Notes	<input type="checkbox"/> Y - TabQ-User Defined Windows
<input type="checkbox"/> Y - TabQ-Additional Info.	<input type="checkbox"/> Y - Tab+ Phone Window
<input type="checkbox"/> Y - TabQ-Co-Signer #1 Info.	<input type="checkbox"/> Y - TabQ-Co-Signer #2 Info.
<input type="checkbox"/> Y - TabQ-Co-Signer #3 Info.	<input type="checkbox"/> Y - Insurance Info.
<input type="checkbox"/> Y - TabQ-Additional Address Info	<input type="checkbox"/> Y - Utility Information
<input type="checkbox"/> Y - Medical Information	<input type="checkbox"/> Y - Translation Rules
<input type="checkbox"/> Y - Other Information	<input type="checkbox"/> Y - File Loading Information
<input type="checkbox"/> Y - Hard-coded Data Information	<input type="checkbox"/> Y - Fixed Length File Specs
<input type="checkbox"/> Y - Special Notes	<input type="checkbox"/> Y - Secondary Files
	<input type="checkbox"/> Y - Multi Record File

The I-Load Advantage:

- Acquiring and loading New Business placements are a vital part of the collections operation – Time is of the essence
- Delays cost money: Loading and working new accounts fast and efficiently can make all the difference.
- I-Load will allow you to create a new Business load immediately **WITHOUT** the cost and time associated with a third party programmer!



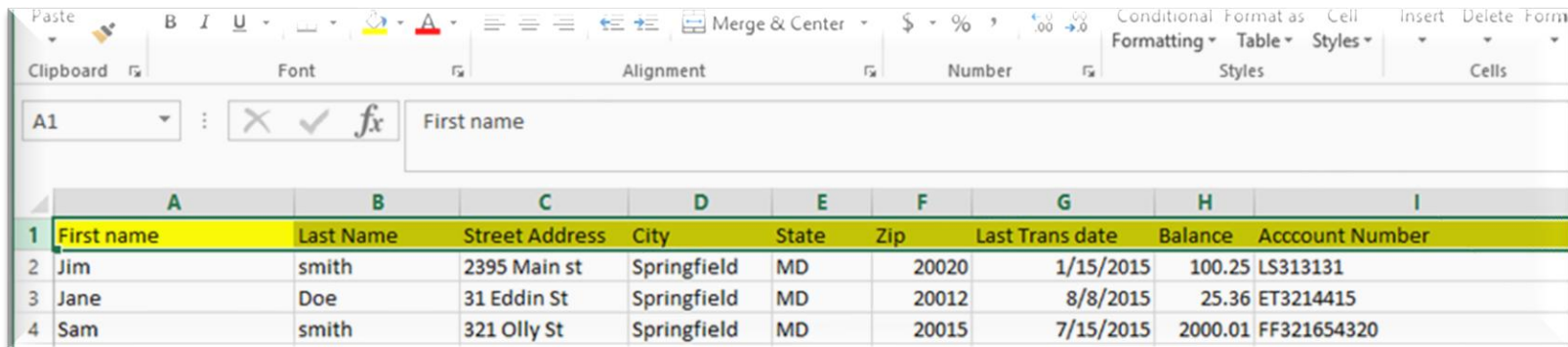
Topic – An Overview

The I-Load Advantage:

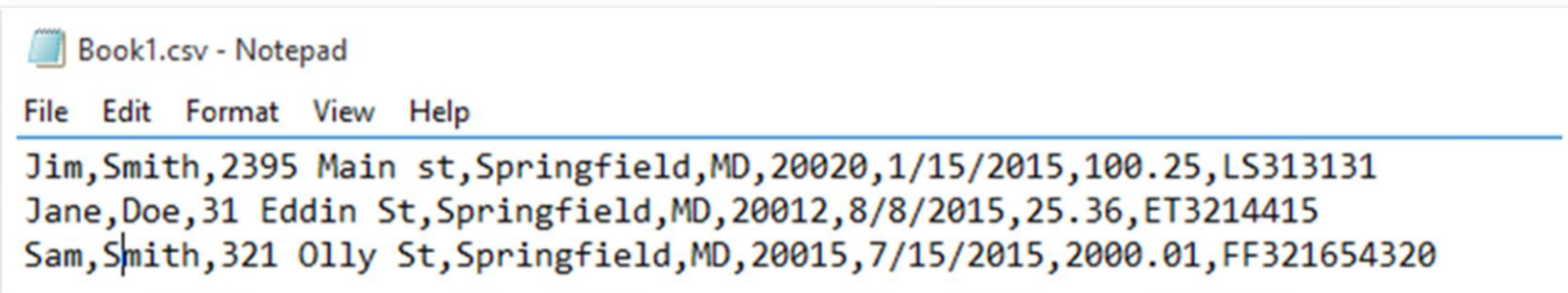
- Process any delimited file or a fixed length file
- Process a multi-file or multi-record load
- Convert various date formats
- Convert various money formats
- Combine multiple fields (including dates) to create unique Client Account Numbers
- Process certain combined fields such as names and city/state/zip
- Add data to the most commonly used New Business fields
- Add multiple balance types
- Add data to the Note file
- Add data to multiple User-Defined Windows
- Add data to Co-Signer screens
- Add data to some of the F16 screen including the F6 Medical screen
- Add data to the Other Phones Window
- Apply certain actions to the load to override the Client master set up

I-Load – A large cache (Cash) of accounts

- ❑ Electronic Files: A received from your client file loaded with dozens, maybe thousands of accounts:
- ❑ For this example we will use a “Delimited File”
 - A delimited file meaning the information in the file is separated by a common character
 - Excel file created using Microsoft Excel



	A	B	C	D	E	F	G	H	I
1	First name	Last Name	Street Address	City	State	Zip	Last Trans date	Balance	Account Number
2	Jim	smith	2395 Main st	Springfield	MD	20020	1/15/2015	100.25	LS313131
3	Jane	Doe	31 Eddin St	Springfield	MD	20012	8/8/2015	25.36	ET3214415
4	Sam	smith	321 Olly St	Springfield	MD	20015	7/15/2015	2000.01	FF321654320

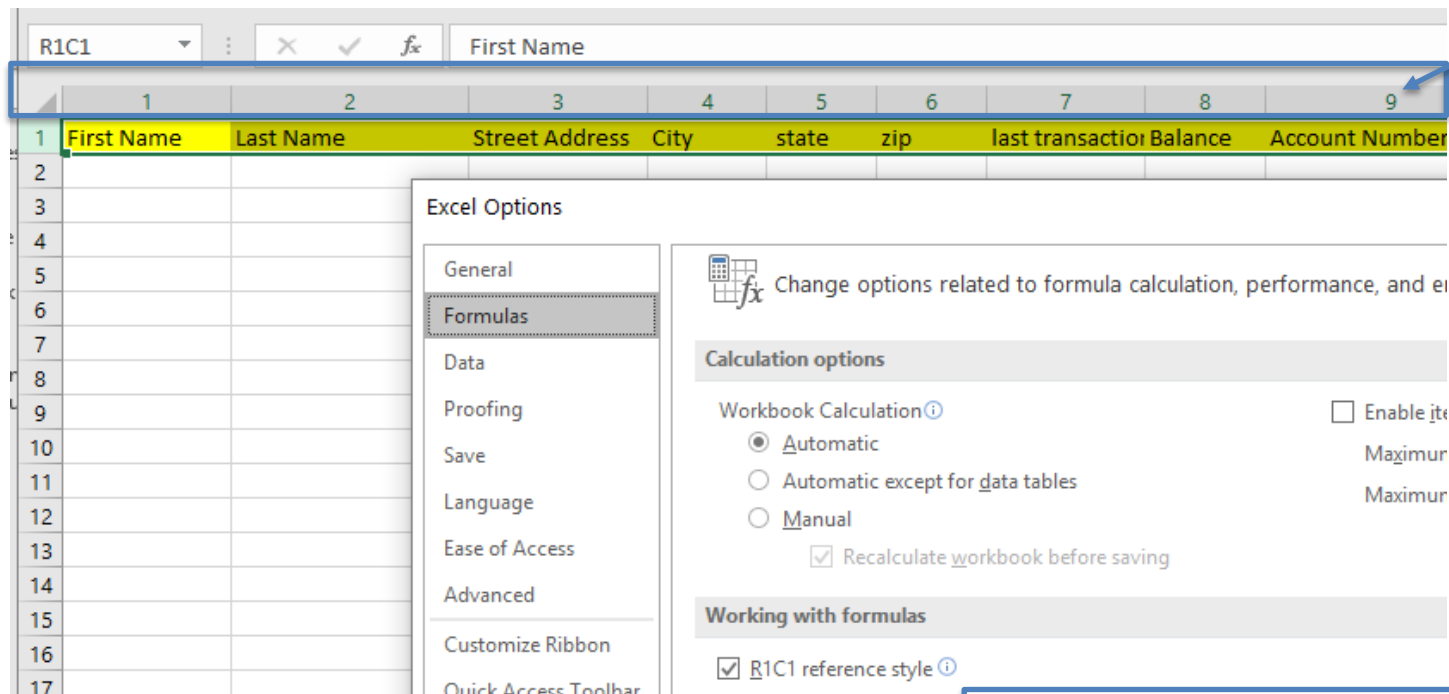


```

Book1.csv - Notepad
File Edit Format View Help
Jim,Smith,2395 Main st,Springfield,MD,20020,1/15/2015,100.25,LS313131
Jane,Doe,31 Eddin St,Springfield,MD,20012,8/8/2015,25.36,ET3214415
Sam,Smith,321 Olly St,Springfield,MD,20015,7/15/2015,2000.01,FF321654320
  
```

I-Load – Mapping the New Business File

- ❑ PRO TIP – Mapping data to I-Load is based on the column number



Change from Letters to Numbers

To show the column NUMBERS instead of letters in Excel go to: File> Options> Formulas> And choose R1C1 reference style

I-Load – Mapping the New Business File

Mapping just means knowing the location of each field.

	1	2	3	4	5	6	7	8	9
1	First Name	Last Name	Street Address	City	state	zip	last transaction	Balance	Account Number
2	John	Smith	2395 Main st	Springfield	MD	22020	1/15/2015	100.25	LS313131
3	John	Smith	2395 Main st	Springfield	MD	22020	2/2/2020	50.32	LS1151212
4	Jane	Doe							
5	Sam	Smith							

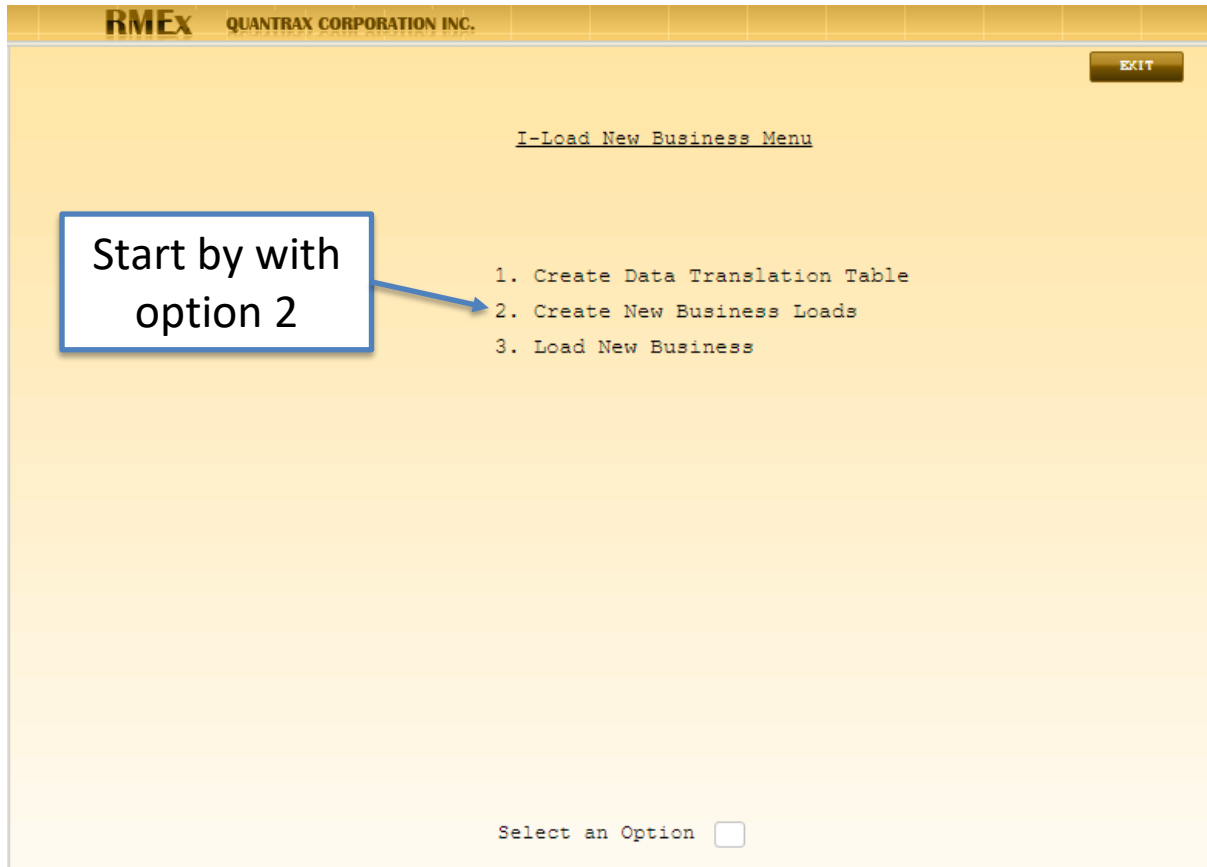
You will need to know what information is in what column

- Column 1: First Name
- Column 2 Last Name
- Column 3 Street Address
- Column 4 City
- Etc.

Once the mapping is done, in the future the file must be loaded as an ASCII (Text) file. Not as Excel.

I-Load – Access the I-Load Options

Menu path: Main> Special options menu> I-Load options> Create New Business Loads



I-Load – Select Account Screens for Data

Menu path: Main> Special options menu> I-Load options> Create New Business Loads

Load Format Maintenance

NB Load Name File SPRINGFIELD HOSPITAL NB

For New Load Copy From Existing NB Load Name

Screen Options

<input checked="" type="checkbox"/> Y - Account Detail	<input checked="" type="checkbox"/> Y - Additional Account Details
<input type="checkbox"/> Y - Permanent Notes	<input type="checkbox"/> Y - TabQ-User Defined Windows
<input type="checkbox"/> Y - TabQ-Additional Info.	<input type="checkbox"/> Y - Tab+ Phone Window
<input type="checkbox"/> Y - TabQ-Co-Signer #1 Info.	<input type="checkbox"/> Y - TabQ-Co-Signer #2 Info.
<input type="checkbox"/> Y - TabQ-Co-Signer #3 Info.	<input type="checkbox"/> Y - Insurance Info.
<input type="checkbox"/> Y - TabQ-Additional Address Info	<input type="checkbox"/> Y - Utility Information
<input type="checkbox"/> Y - Medical Information	<input type="checkbox"/> Y - Translation Rules
<input type="checkbox"/> Y - Other Information	<input checked="" type="checkbox"/> Y - File Loading Information
<input type="checkbox"/> Y - Hard-coded Data Information	<input type="checkbox"/> Y - Fixed Length File Specs
<input type="checkbox"/> Y - Special Notes	<input type="checkbox"/> Y - Secondary Files
	<input type="checkbox"/> Y - Multi Record File

Name your load

Leave as "PRIMARY"

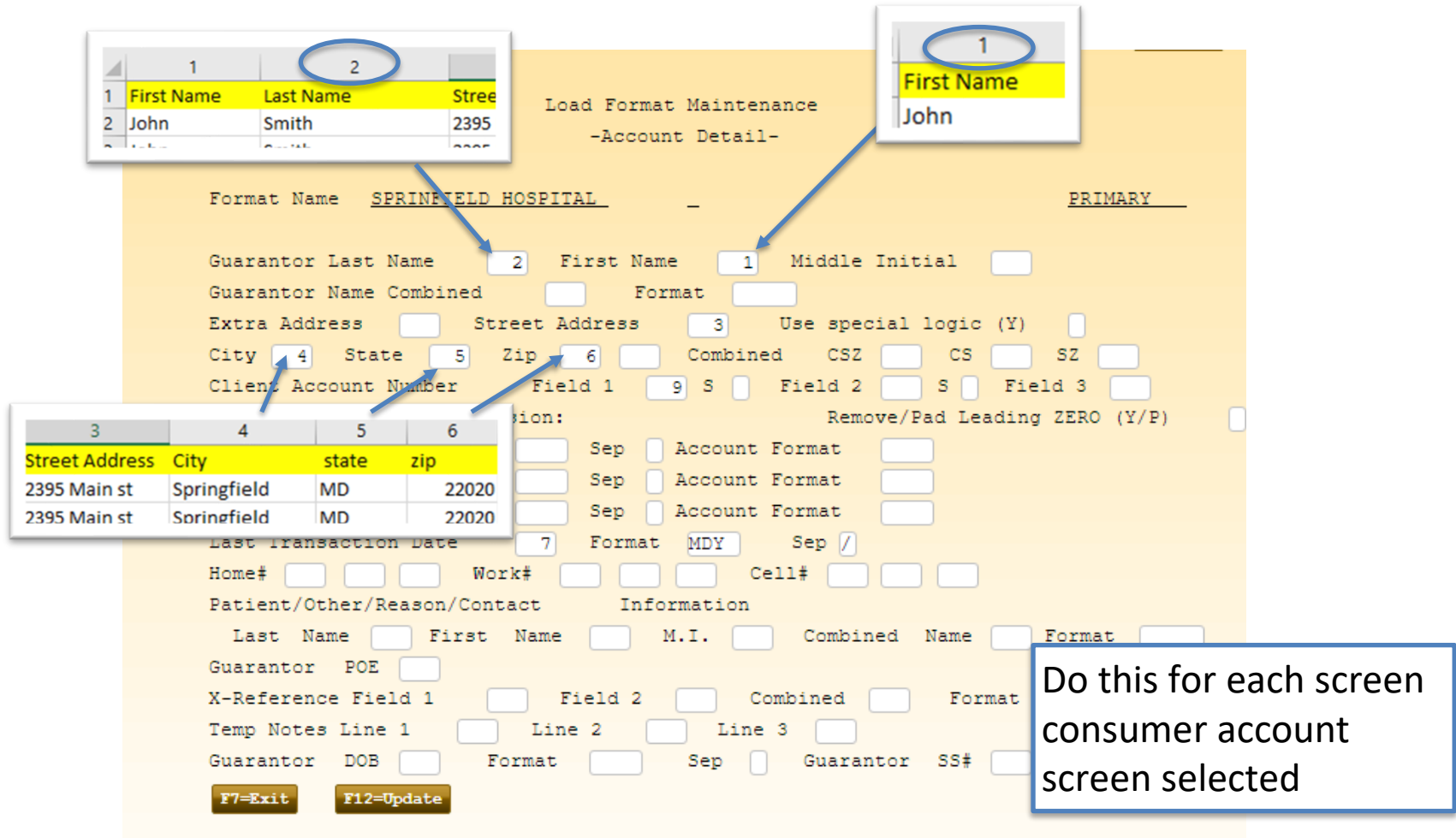
Account Detail Screen to be populated with Information

Name of your new business file

Hit **ENTER** after selection your screens

I-Load – Mapping Data to Account Detail Screens

The Account Detail Screen



Load Format Maintenance
-Account Detail-

Format Name SPRINGFIELD HOSPITAL - PRIMARY

Guarantor Last Name First Name Middle Initial

Guarantor Name Combined Format

Extra Address Street Address Use special logic (Y)

City State Zip Combined CS2 CS S2

Client Account Number Field 1 S Field 2 S Field 3

Client Information: Remove/Pad Leading ZERO (Y/P)

Sep Account Format

Sep Account Format

Sep Account Format

Last Transaction Date Format MDY Sep /

Home# Work# Cell#

Patient/Other/Reason/Contact Information

Last Name First Name M.I. Combined Name Format

Guarantor POE

X-Reference Field 1 Field 2 Combined Format

Temp Notes Line 1 Line 2 Line 3

Guarantor DOB Format Sep Guarantor SS#

F7=Exit **F12=Update**

Do this for each screen
consumer account
screen selected

I-Load – Mapping Data to Account Detail Screens

The Additional Account Detail Screen

Load format maintenance
-Additional Account Details-

Format Name SPRINGFIELD HOSPITAL SPRINGFIELD HOSPITAL NB PRIMARY

BALANCE Information
(Y=Implied decimal, I=IBM numeric, Blank=decimal in file)

Primary	<input type="checkbox"/>	Interest	<input type="checkbox"/>	Balance 1	<input type="checkbox"/>	Balance 2	<input type="checkbox"/>
Balance 3	<input type="checkbox"/>	Balance 4	<input type="checkbox"/>	Balance 5	<input type="checkbox"/>	Balance 6	<input type="checkbox"/>
Balance 7	<input type="checkbox"/>	Balance 8	<input type="checkbox"/>	Balance 9	<input type="checkbox"/>	Balance 10	<input type="checkbox"/>

Last Interest Date Format Sep

Guarantor Bank Name

Spouse Last Name First Name Combined Name Format

Spouse SS#

Last Client Payment Date Format Sep

Commission Rate Interest Rate Frequency

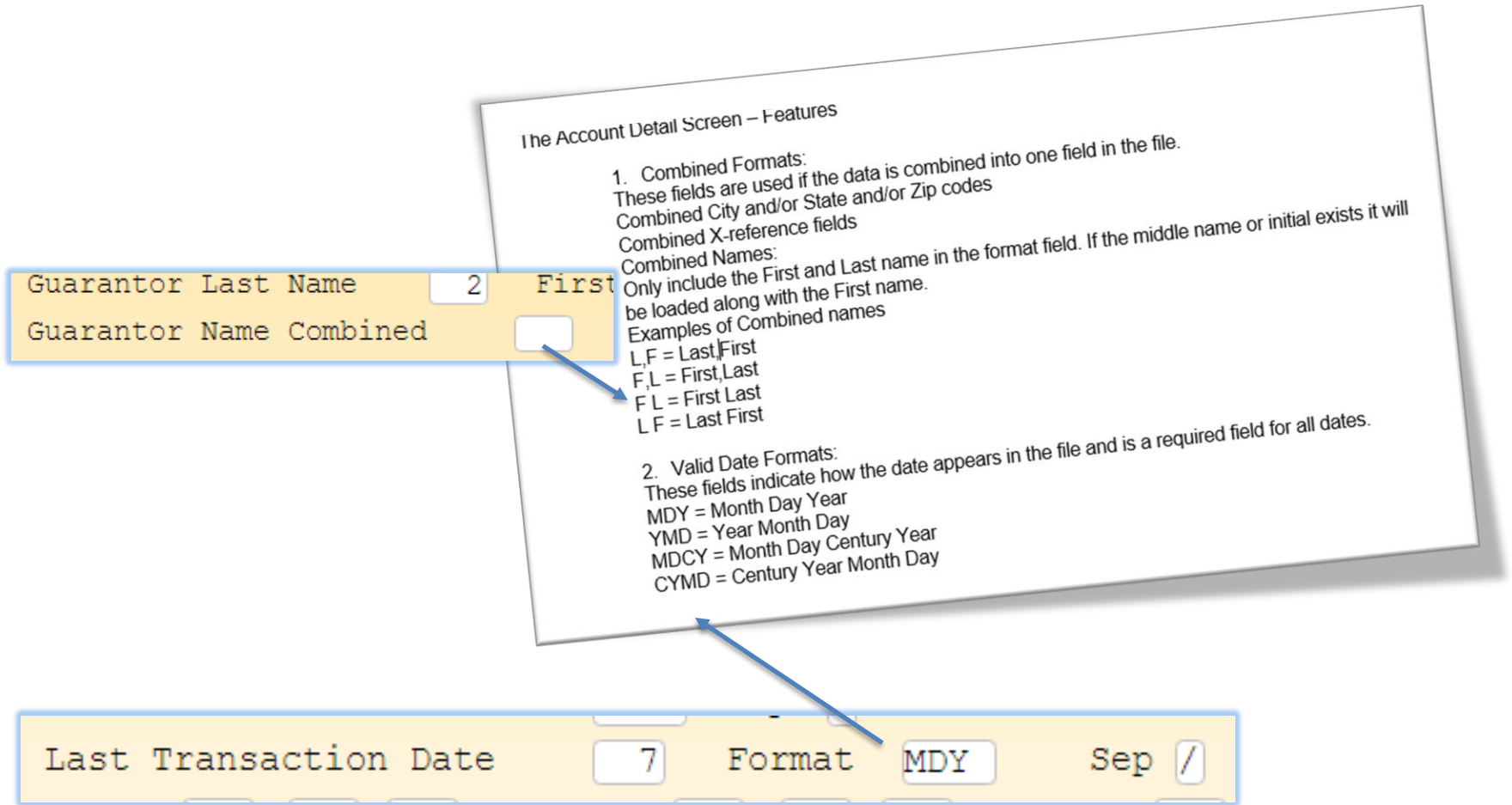
External Score Fields 1st, 2nd, 3rd, 4th, 5th

Original Creditor Original Account#

Delinquency Date Format Sep

I-Load – Mapping Data to Account Detail Screens

Documentation for I-Load for Details



The Account Detail Screen – Features

1. Combined Formats:
These fields are used if the data is combined into one field in the file.
Combined City and/or State and/or Zip codes
Combined X-reference fields
Combined Names:
Only include the First and Last name in the format field. If the middle name or initial exists it will be loaded along with the First name.
Examples of Combined names
L,F = Last,First
F,L = First,Last
F L = First Last
L F = Last First

2. Valid Date Formats:
These fields indicate how the date appears in the file and is a required field for all dates.
MDY = Month Day Year
YMD = Year Month Day
MDCY = Month Day Century Year
CYMD = Century Year Month Day

Callout 1: Guarantor Last Name [2] First
Guarantor Name Combined []

Callout 2: Last Transaction Date [7] Format [MDY] Sep [/]

I-Load – The New Business File

Load format maintenance
 -File Loading Information-

Format name SPRINGFIELD HOSPITAL PRIMARY

Description

File name

File library

File folder

File link

Is this a fixed length file? (Y)

OR

Is it a TAB delimited file? (Y)

OR

Is it another type of delimited file? (Y)

If so, what is the delimiter? (NOTE - Use | for |)

Start at record

File Name: The load can only use a file with this exact name

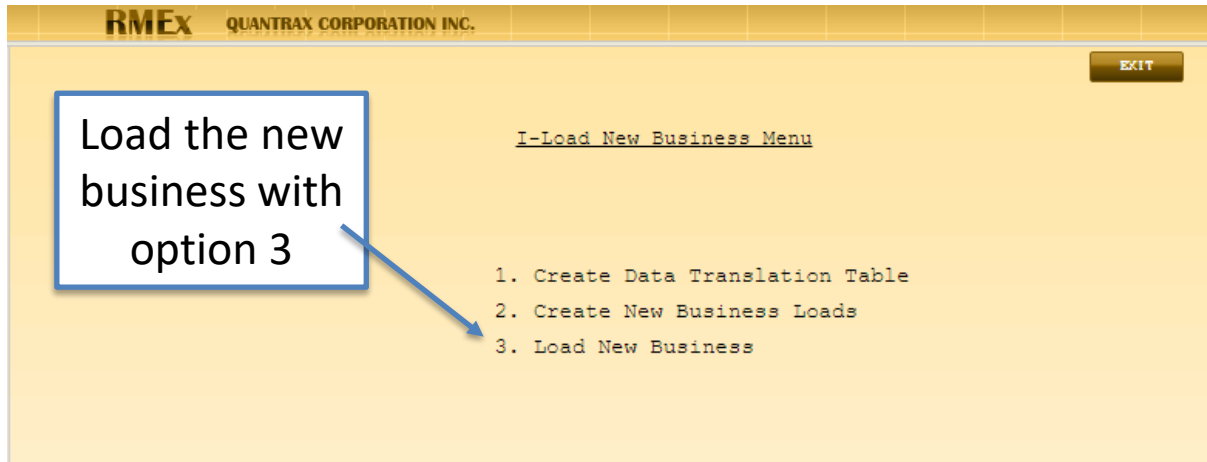
File Library: This is where the file must be loaded

What type of file is it?

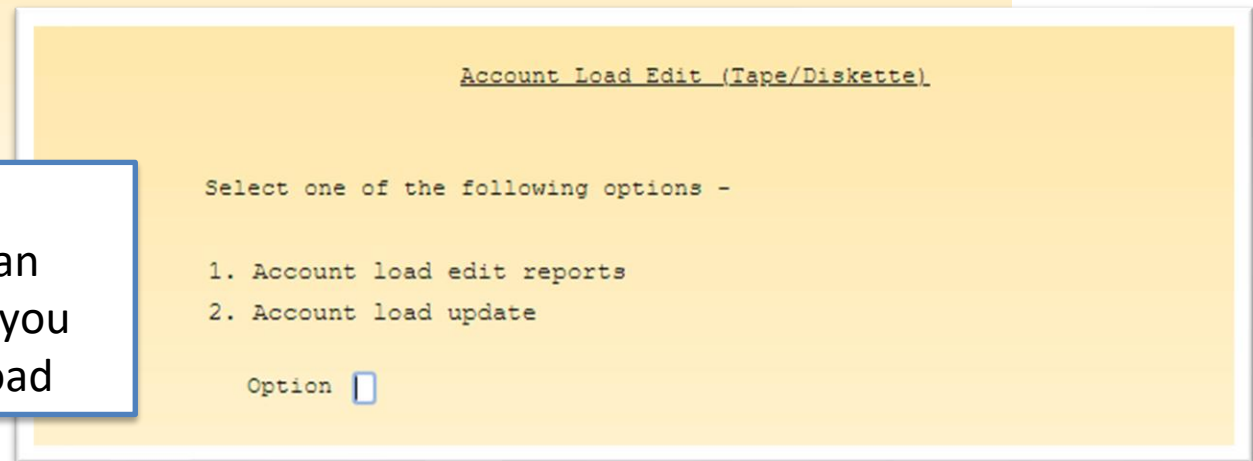
Do not forget to update when you are done

I-Load – Access the I-Load Options

Menu path: Main> Special options menu> I-Load options> Create New Business Loads

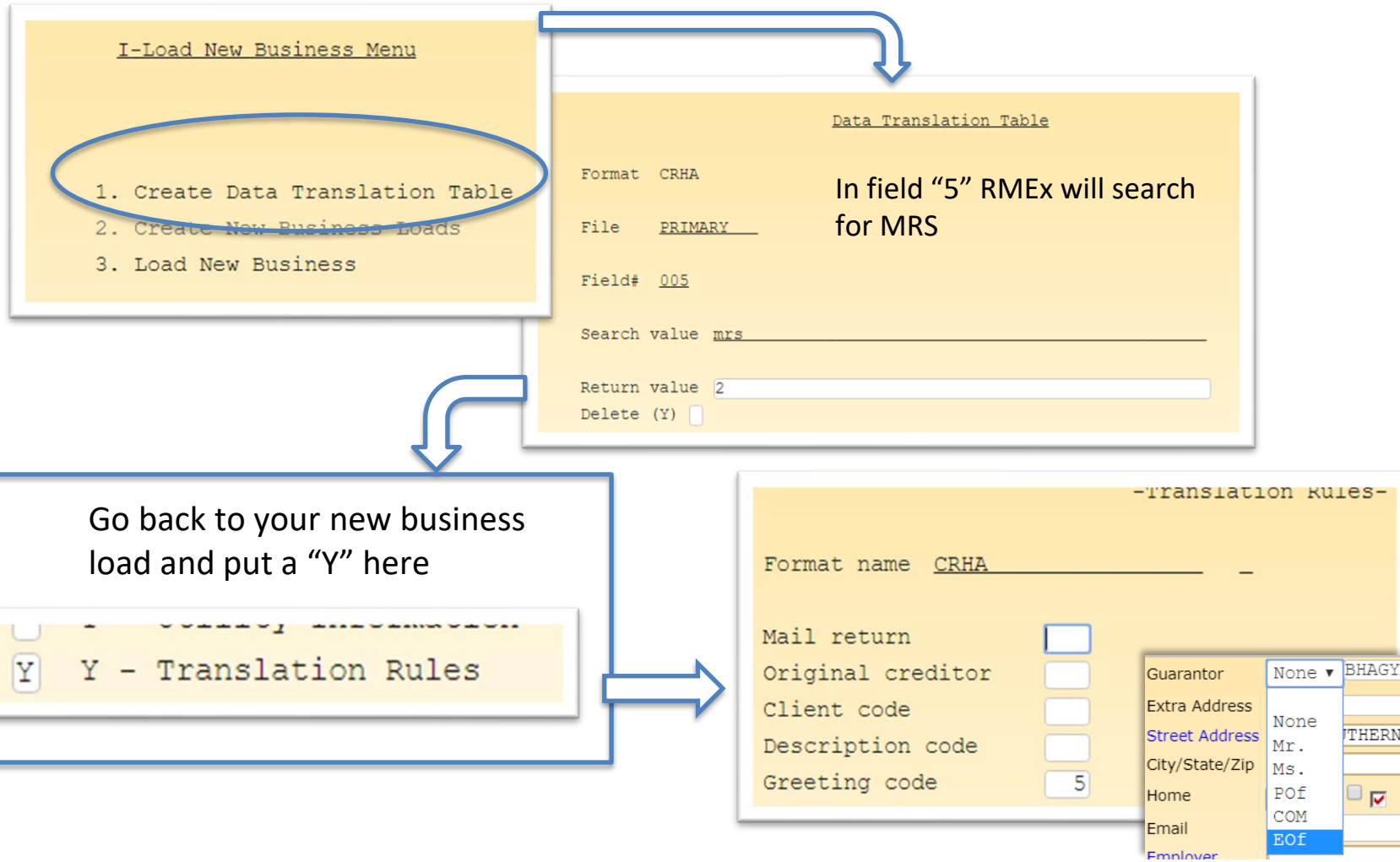


Then take the Special Options Menu to run an account load edit like you would for any other load



I-Load: Other options

Translation Tables Lets you look in a column for a specific value such as any consumer in the file with "RETURN MAIL"



I-Load: Fixed Length File Specs

- Fixed Length means that the information in a file will be counted over from the left an exact number of spaces

- Y - Translation Rules
- Y - File Loading Information
- Y - Fixed Length File Specs
- Y - Secondary Files
- Y - Multi Record File

Load format maintenance
-Fixed Length File Specs-

Format name			MISKA			MISKA			MISKA		
#	Str	Len	#	Str	Len	#	Str	Len	#	Str	Le
1.	3	15	2.	20	15	3.	39	4	4.	46	1

Guarantors last name starts in position 3 of the file and is 15 characters long.

Then in the on the "Account Detail" you can say look in "1" of the file for POE

Load Format Mainten
-Account Detail

Format Name		MISKA		MISKA	
Guarantor Last Name	1	First Name	2		

I-Load



**A Powerful Tool to Help
Stay in the Lead**

RME_x Training: I-Load

Thank you!