

Cell Phone Scrub

For RMEx Users

This document is a quick start guide to help you with the steps needed for the regular running of your cell phone scrub. Section 3 is designed to help you with the setting up of the cell phone scrub options for the 1st time. For details, concepts, and the purchasing of the cell scrub database files, see the RMEx1 Documentation in the client section of Quantrax.com.

NOTE: If this is the first time running a cell scrub, you will need to start at Section “3) Running the Cell Scrub for the 1st Time.” You will also want to review the newer RMEx release documentation for any changes or updates.

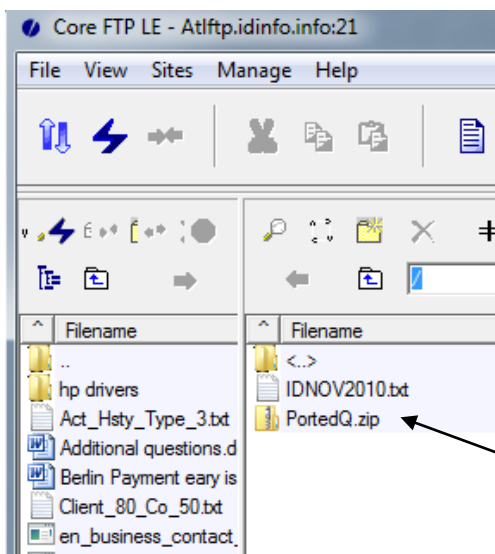
- 1) **Downloading the Files Needed for the Cell Phone Scrub (Using FTP)** – Describes a process for downloading the cell phone data from the vender site and moving it to the iSeries.
- 2) **Daily/Regular Cell Scrub** – This will show all the steps needed for running the Cell Scrub on a regular basis,
- 3) **Running the Cell Scrub for the 1st Time** – These are the steps you will need to take the first time you run the Cell Phone Scrub.

1) Downloading the Files Needed for the Cell Phone Scrub.

IMS or Interactive Data will provide you with three files: the cell block identifier, cell phones ported to land lines and land lines ported to cell phones.

In the example below, we use CoreFTP (Found in the download section of the Quantrax.com Knowledgebase) to perform the downloads from the vendor FTP site. When signing into Interactive Data's FTP, site you will see two files: **PortedQ.zip** and **IDxxxx10.txt**

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PortedQ.zip contains 2 files:

CELL-TO-LAN.TXT

LAN-TO-CELL.TXT

These are the ones that will be used on a regular basis.

IDxxxx10.txt is used for the "Cell Block Identifier". This is not updated as often.

Files as seen on Interactive Data's FTP Site using CoreFTP

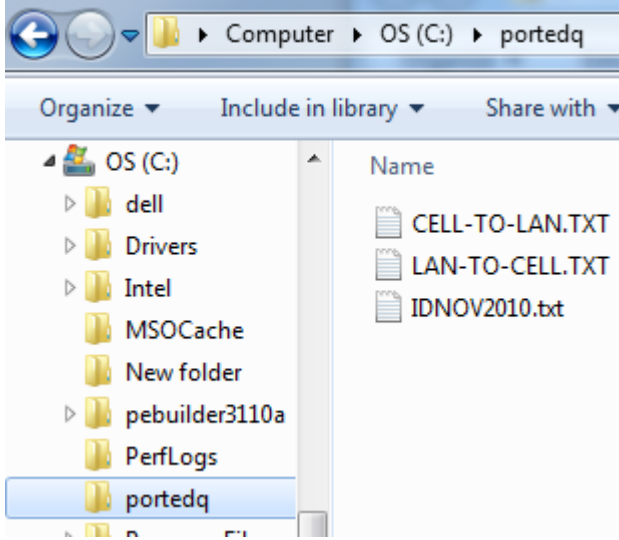
Download these two files to your PC.

Moving These Files to the iSeries

Once these files are on your computer, you will need to transfer them to the iSeries.

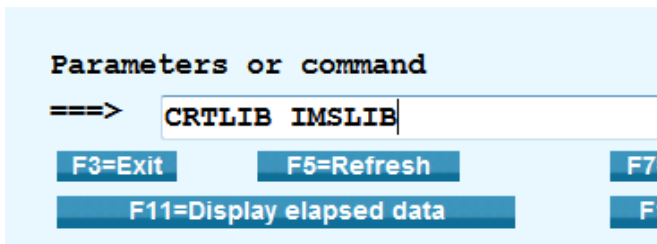
To use the examples below, you will need to create a folder called "portedq" under C:\ and (Unzip &) place the files there. (c:\portedq), .

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Using FTP to transfer the files from the PC to the iSeries using a DOS command prompt

Note: the first time moving the Cell Phone files to the iSeries, you will need to create a library on the iSeries called "IMSLIB". This is done by using the CRTLIB option on the iSeries using this command 'CRTLIB IMSLIB' and hitting Enter.



Then on the PC

Windows XP - This can be done from Windows XP by clicking on the Start Button, going the Run box and typing "CMD" and hitting enter

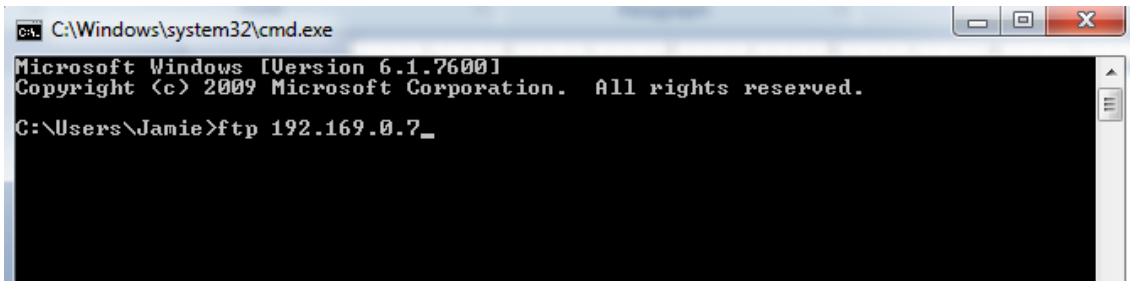
Windows 7 – Start Button→ Type 'cmd' and hit enter

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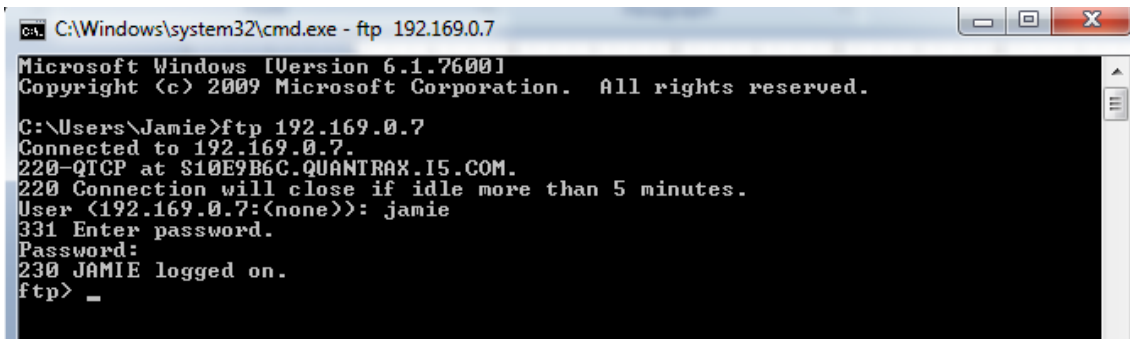


This will present you with a DOS command box.

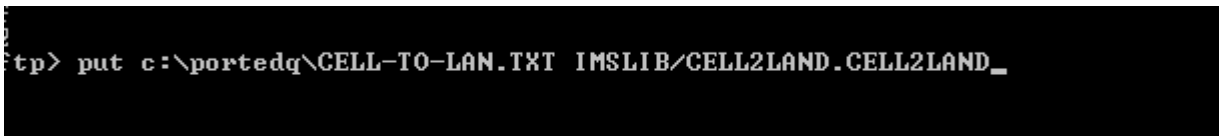
Type FTP and the IP Address of your iSeries and hit enter



Enter your user-id and password for your iSeries



You are now ready to transfer the files using the FTP 'PUT' command. This command will move the files from your PC to the iSeries



put c:\portedq\CELL-TO-LAN.TXT IMSLIB\CELL2LAND.CELL2LAND

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```
put c:\portedq\LAN-TO-CELL.TXT IMSLIB/LAND2CELL.LAND2CELL
```

```
put c:\portedq\IDDOCT2010.txt IMSLIB/cellblock.cellblock (This is only updated occasionally by the Data suppliers. Make sure to use the supplied name for the file)
```

If you have entered the commands correctly you will get a message that your files have been moved successfully.

Repeat this step for any other files you will be transferring.

```
ftp> put c:\portedq\CELL-TO-LAN.TXT IMSLIB/CELL2LAND.CELL2LAND
200 PORT subcommand request successful.
150 Sending file to member CELL2LAND in file CELL2LAND in library IMSLIB.
226 File transfer completed successfully.
ftp: 14427488 bytes sent in 17.44Seconds 827.36Kbytes/sec.
ftp> _
```

Once the files have been created, check that they were correctly copied to the iSeries.

The commands to display the three files are:

```
DSPPFM FILE(IMSLIB/CELLBLOCK)
```

```
DSPPFM FILE(IMSLIB/CELL2LAND)
```

```
DSPPFM FILE(IMSLIB/LAND2CELL)
```

Make sure you see data in the files. For the first file, you should see the first seven numbers of a phone number in each record. The other two files will contain a phone number and a date.

2) Daily/Regular Cell Phone Scrub

This procedure describes how to run the processes that updates the telephone numbers on RMEEx with the latest status. We have used the files from Interactive Data as examples in these procedures.

You will need to run this procedure regularly: how often will depend on how quickly you want to update your database. Some clients run this every day and others every few days. It is recommended that you run the procedure at least once per week. For larger clients who use predictive dialers, we recommend that you run these processes daily.

Running the Update Processes on RMEEx

Once you have completed the download from the vendor's FTP site and uploaded the new data to your i5, you are ready to run the update from the UT menu on RMEEx

Note: It is best NOT to run these options when users are updating phone numbers on the system. It is possible to do so, but if a number on an account is being updated by a user, that number may be skipped/not updated during the cell phone scrub.

1. Sign on to RMEEx and go to the Utilities menu by entering UT on any RMEEx menu.
2. Then take option 15 - Additional options, then option 16 - Cell phone scrub options
3. Then run option 12 or 14 based on where you get your data.

12. Convert data from IMS after new files are received - - - - -
14. Convert data from Interactive Data after new files are received

Note: Options 12 and 14 use files CELLBLOCK, CELL2LAND and LAND2CELL in IMSLIB

4. **(Jump to step 5 unless):** At this point, you must decide whether or not you wish to run the **"Cell Block Identifier"**. Note that this option is rarely run after the initial implementation of cell phone scrubbing. However, if you are implementing cell phone scrubbing for the first time, or you have not run a scrub for what you have determined is an unacceptable span of time, you would run the following two options at this point.

Run option 1 and then 2.

1. Convert cell numbers from account detail screen (One-time)
2. Convert cell numbers from Tab+ screen (One-time)

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5. Finally, run either option 3 or 4, based on where you get your data

```
3. Update system after new data is received for ported numbers - IMS
4. Update system after new data is received for ported numbers - ID
   (For options 3 and 4 files must be CELL2LAND and LAND2CELL in IMSLIB)
```

3) Running the Cell Scrub for the 1st Time

We have added features to allow you to manage calls to cell phones. There is a great deal of controversy about this subject, but we have given our clients the ability to manage this area and "stay within any applicable rules and laws". Provided you have an updated database of cell phone numbers, we have the programming to stop you from calling a cell phone using a dialer or even using manual dialing.

The key to the design is:

- Making sure that cell numbers do not get loaded into home or work phones which can be loaded into dialer campaigns or manually dialed.
- Since the Tab+ numbers can also be automatically or manually dialed, these must also be managed carefully.
- Known cell numbers must be carefully managed. You may only be able to call a cell if you obtain permission to do so. You may have many possible cell numbers on an account.
- If a debtor does give you permission to call a cell phone, you could place that number in the cell phone field on the account detail screen. The cell number on the account detail screen would then always be a "safe" number to call.
- We need to frequently check if cell numbers have been ported to land lines. This will allow these numbers to be called on a dialer.
- Other potential cell numbers can be stored on the Tab+ window.

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Remember, YOU can control where your phone numbers get loaded, whether it be through electronic loads or custom interfaces. Quantrax will not take responsibility for numbers that get loaded through custom interfaces or as a result of the cell phone data base being inaccurate. You must instruct us to modify any custom interfaces we may have built for you.

To use the cell phone scrub you will need to purchase a database of cell numbers. Quantrax has found two sources for such a database, which can be found in the RMEEx version 1.0 documentation.

Before running the Cell Phone Scrub you will first need to define the different types of phone codes used on accounts as to whether they are Home, Work, and Cell.

The "Other Phones System Control File" can be found within the I-Tel menu option, but for this example you can also access this menu from the 3rd System Control Menu option "18. Other phones".

Once you are in this menu, if you do an F3 search at a minimum you will see the H-Home, C-Cell and W-Work. Take the "H" for Home and you will see his screen. NOTE: Only use letters, D is reserved for (D)elele.

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(Phone code if cell number is a land line) If the system removes the work phone on the account detail screen, you can enter a new phone code you would like to assign to that number for the tab+ phone window in the field **"Phone code if work number is changed"**. If no code is specified here the system will use "C" as a default.

Phone code if cell number is a land line: When you run the one time phone scrub option off the utility menu, per the Phone Scrub install documentaion, if it is determined that the number in the cell phone field on the account detail screen is NOT a cell phone, the system will remove it and assign the phone code you have specified here in the tab+ window.

Phone code if land line ports to cell: If it has been determined that a land line has been converted to a cell phone you can specify a unique phone code here. If this field is left blank the system will default to a "C" phone code if the number is currently an "H" or "W". If the number is any other phone code the system will mark it as bad (lower case).

Phone code if cell phone ports to land line: If it has been determined that a cell phone has been ported (converted) to a land line you can specify a unique phone code here. If this field is left blank the system will default to an "H" phone code.

Move to cell number (Y): If it is determined the number in the home phone field on the account detail screen is a cell phone and you want it moved to the cell phone field, enter a "Y" here. NOTE: If a number already exists in the cell phone field the system will remove the number from the home field and assigned phone code "C" to

For new accounts, move Home to Cell# if cell: On new placements, if it is determined the number in the home phone field on the account detail screen is a cell phone and you want it moved to the cell phone field, enter a "Y" here. NOTE: If a number already exists in the cell phone field the system will remove the number from the home field and assigned phone code "C" to it in the tab+

Smart code to be applied: Gives you the ability to apply a smart code if the cell phone scrub takes an action on an account.

Warn user when cell number is set up In the Home or Work field: If the number entered into the home OR work phone field is a cell phone and you want to prevent the user from entering this number, put a "Y" here. The system will warn the user of this information.

To allow the user to override this warning and enter the number anyway, you must have a "Y" in the field **Allow override**.

IMPORTANT NOTE - If you allow users to override the warnings and enter a cell number into, say, a home phone, the next time you run an update option for ported numbers, the system WILL recognize the cell number in the home phone and move it to the Tab+ as explained in the documentation. *The purpose of the module is to ensure that cell numbers are clearly designated and separated within the system. You should not allow users to override the warnings, since this defeats the objectives.*

(Last ported number update) Here we show the last time a Phone Scrub was run.

F10 Validate Number: Lets you manually enter a number to see if it's a cell number or a land line

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Check for a cell number

Phone number

Cell? NO

As you set this up, Please be very careful! Cell phone Data is updated based on how you have set up the Scrub options and the phone codes. These options WILL be used to update your database. *Recovery is difficult if you have not set up the information correctly and the programs are run.*

Running the Scrub

By this point, if you have already purchased your Database of Cell Phone numbers, and added these files to your iSeries (See section 1) **Downloading the Files Needed for the Cell Phone Scrub (Using FTP)** , you are now ready to run the conversion programs for your phone numbers on the account detail screen and the Tab+ screens.

Note: *It is best NOT to run these options when users are updating phone numbers on the system. It is possible to do so, but if a number on an account is being updated by a user, that number may be skipped/not updated during the cell phone scrub.*

- 1) Go to the Utilities menu by entering UT on any RMEEx menu.
- 2) Then take option 15 - Additional options, then option 16 – Cell
- 3) phone scrub options
- 4) Then run option 12 (IMS Data) or 14 (Interactive Data) based on where you get your data. (If you have not done this yet)

12. Convert data from IMS after new files are received - - - - -
14. Convert data from Interactive Data after new files are received

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- 5) Run the “**Cell Block Identifier**”. **Normally, you will omit this step.** Note that this option is rarely run after the initial implementation of cell phone scrubbing. However, if you are implementing cell phone scrubbing for the first time, you must run the following two options at this point.

Run option 1 and then 2 (Both can run at the same time, one right after the other)

- 1. Convert cell numbers from account detail screen (One-time)**
- 2. Convert cell numbers from Tab+ screen (One-time)**

Finally you may want to REBUILD THE WORKQUES FOR ALL COMPANYS from the UT OPTION to move the accounts to the correct locations in the workmaps based on the phone number changes on an account.

In Short these are the steps to be taken.

- 1) Purchase the Database of Cell Numbers and load these files to your iSeries
- 2) Setup phone codes for Home Work and Cell
- 3) Setup Other Phone System Control File option
- 4) Run the One time Program after loading Cell Phone update files
- 5) Download an Updated database of Cell Numbers from your vender, and run the Cell Phone Scrub update on a regular basis.