RMEX 3.0 RELEASE NOTE UPDATES

The following are recent changes to RMEx 3.

September 13, 2012 – **Many programs** – Change size and position of pop-up screens (scripts, state warnings, client pop-ups) to standardize GUI screens.

September 24, 2012 – **GUI configurations** – Handle delay on predictive campaign screen pops due to HATS configuration.

September 25, 2012 – **Contact series by linked balance** – New feature added to system controls after contact series by client option. Allows you to change the contact series based on linked balance. Documentation to follow.

October 1, 2012 – **Client update** – Update e-mail options information when client is copied.

October 9, 2012 – **Account Inquiry programs** – Fix lock up when SS# search was used with new X option to look for other matching socials.

October 10, 2012 – **Work maps – new cell and other phone processing types** – Fixed problems with new processing types not showing on work maps.

October 12, 2012 – **Tab+ phones** – Corrected a problem with some phone numbers not showing on Tab+ when the “Consolidate Tab+ phones on primary” option was used.

October 15, 2012 – **Display all phones (F15 from account inquiry)** – Added new field to allow user to go to the account that had a specific cell phone.

October 27, 2012 – **Time zone logic for I-Tel** – Corrected a rare problem with time zones when you use option to use ALL phones including Tab+ for time zone calculation.

Version 3.0 was updated on the FTP site - November 1, 2012 at 14.00 PM EST

November 1, 2012 – **Maximum calls – New enhancements** – The field CARCF3 in the client master (SCCLNT) can be updated with a "Y" to non-display and protect phone numbers on the account detain screen, and the Tab+ screen when you have reached the maximum calls allowed. This will prevent collectors from launching manual calls after the limit has been reached. This works only for users defined a "collectors". When the phone numbers are not displayed and are protected, the "Category" for the queue will show *NO CALLS* in red. Several programs were changed.

November 2, 2012 – **Time zones when accounts are worked through regular queues (Option 1 from Account Processing menu)** – If you used I-Tel, and were in an area other than the eastern time zone, you would not be able to call some accounts before 9 AM (it should have been 8 AM). This has been addressed. We were not aware of this because most users may have been using the "Y" option to bypass time zone checking.

On preview / power dialing with I-Tel, when accounts were temporarily bypassed because it was too early or too late to call, a note was added. This is not necessary and has been removed.

Version 3.0 (Fix library) was updated on the FTP site - November 2, 2012 at 16.00 PM EST

November 2, 2012 – **Settlement letters** – When printed in nightly, they would not go into pending, but would print, never showing up on the letters printed or letters failed reports. We now send these settlement letter to "Letters pending". They will show on reports and print when selected letters are generated.

November 2, 2012 – **Work map report** – The option from the management menu, did not include the new processing types. (MGWKMP)

November 2, 2012 – **Audit a user options** – These options (accounts worked and to be worked from the Management Menu) did not allow you to enter the new processing types. This was corrected (MGVIEW and MGVIET)

November 5, 2012 – **Smart code – adding a payment transaction** – On new smart codes, the amount would not display. This has been corrected (USW015)

November 8, 2012 – **Placement history and activity history –** Irrespective of the client master being set up for these reports, we have a method of running these reports for ALL clients. For the standard reports (Option 1 from the menus) select option 9 and enter client 999999 and you will get a report for ALL clients. You can use the other selection options too.

November 9, 2012 – **Expanding maximum calls and time zone logic –** For I-Tel users, we have some important changes. To further strengthen our compliance logic, we have added two new client-based features. The field CARCF3 in the client file (SCCLNT) can be set to "Y" (we have not yet allowed access to this through client update) to indicate that when maximum calls for the debtor has been reached, all phone numbers should be protected and not displayed (account detail screen and other phones screen). The field that shows the work mode (Inquiry, Hm.Phones etc.) on the account detail screen will show ** NO CALLS ** when this happens. This is only for users defined as "Collectors".

What about time zones? If a collector pulls up an account and it should not be called based on the numbers on the account detail screen OR all the numbers on the account, based on the option All numbers (TAB+/ Phones) in the I-Tel system controls, we will not show existing information and will protect all phone numbers. The field that drives this is CARCF2 in SCCLNT (we have not yet allowed access to this through client update). It must be set to "Y". The work mode field will show *Out of TZ* when this happens. These options give you additional compliance features to stop collectors from making costly mistakes.

November 9, 2012 – **Cell phones –** With rapid changes in area of cell phone requirements, we have added more flexibility. Please remember that our design is that you place cell phones you have obtained permission to call in the cell phone field on the account detail screen. For those of you who are willing to take a risk and have the system move cell phones (Type C) from the other phones (Tab+ screen) to the account details, we have some changes. This was a request from several users at our conference.

There are two new fields on the second page of the system parameters.

From account details, get cell phones from links (Y)
In nightly update primary with cell phones from links (Y)

The first option will fetch cell phones (Type C) from the other phones screens when a cell number is removed. (This happens now with home and work phones) The second option will copy cell phones from links and the other phones screen into the account detail screens during nightly processing, when queues are created (This happens now with home and work phones). Once again, please use these options with caution!

November 9, 2012 – **Queue consolidations –** The new processing types C and X could not be entered in the selection. This was corrected. (Programs ITQCON, ITQCONC and ITQCONC5)

November 13, 2012 – **New campaign merging option from queue consolidations (Option 11) –** The option may produce an error because a file SCITQMER does not exist. We need to create this file in the data library. DDS is in SCLIB. It may not have been in some early installs.

November 13, 2012 – **New processing types for other phones can not be worked –** This has been addressed. Accounts would not come up. (COLDRI and ITDIAL2). The audit notes would not display codes 9 and 0 for the processing type (They showed C and X). This was also changed.

November 13, 2012 – **Working from queues or in campaigns**
Code was added, but for future release. There is a new feature that forces a collector to use a specific smart code or one of several smart codes, to move to the next account. This is based on the existence of certain smart codes. The smart codes needed are set up at the description code level, and one of the required smart codes (up to 5 can be set up per description code) must have been entered that day for the user to proceed to the next account (WAPINQ)

November 14, 2012 – **Creating queues from account audit**
A rare problem with other phone numbers being incorrectly formatted in SCCQUE was addressed. (WINQUE)

November 14, 2012 – **Account processing queues**
Accounts with cell phones only and in QCat 000 were remaining there, within Hot Accounts. This was changed. They will now show in QCat 991 within Hot Accounts. (COLDR2WK and COLDR2WKCN)

November 14, 2012 – **Activity dashboard**
Retain history for 2 years (on a go forward basis). We had made changes to only retain information for a few months. You may have lost some history, but it will start to build up after this update.

November 16, 2012 – **Account inquiry**
Due to a change we made, account inquiry was not showing the QCat and time frame for a short period. This code would not have been sent out to any client. The issue was corrected.

Version 3.0 (Fix library) was updated on the FTP site - November 16, 2012 at 16.00 PM EST

November 17, 2012 – **Time zone feature**
The new feature to mask phone numbers based on time zones was saying out of time zone when NO numbers were present on an account. This was corrected.

November 20, 2012 – **Audit notes and queue information**
The account worked flag (QWORKF) was sometimes showing incorrectly. This was a display issue, not a data issue, and was corrected in WACN2TAU.

November 21, 2012 – **Smart Codes (Changing workers)**
When changing owner codes in the decision lines, if you used work groups, the worker would not change when you used the *D logic for worker code. Corrected in ACTCO1.

November 21, 2012 – **Nightly processing and account audits**
Saved audits will be deleted after a month. This was added to nightly processing.

November 22, 2012 – **Smart codes (Change to “Not allowed” field)**
On the first of the back screens on a smart code, the field “Not allowed” can now be a “C”. C will mean do not allow if the account is closed.

November 23, 2012 – **Work maps (Current status display)**
In a recent release, we better managed accounts that were out of time zone. We can now bypass them and show them when the accounts are eligible to be called. These accounts were marked (“t” in QWORKF) and considered worked when the work map “Current status” was displayed (F10 from the work maps within “Audit a user”). We have added a column called “Out of time zone” to that display. You may see 20 in “Available to work” and the collector may run out of work for that queue. The “Out of time zone” column should show 20 in this case! (Program DYWKMP)

Here is information on how we manage accounts based on this feature. This is applicable to manual queues, preview and power dialing, where our programs select accounts to be worked. There is a field “Bypass time logic YMT” on the selection screen. These option mean :

Y = This option will present accounts that would otherwise be omitted due to the State Options System Controls field "No working before or after" a specific time. It also by-passes the time zone file logic.

M = This option will warn the user that it is "too early" or "too late" to call the account and will NOT present the account.

T = This option will warn the user that it is "too early" or "too late" to call the account, but will present the account.

The reason for having these options is to allow a user to review accounts that may be out of time zone because of bad phone numbers or time zone data.

Account bypassed are marked with a ‘t‘ in QWORKF and are checked at 5 minutes past the hour to see if they are eligible to be worked. Whenever a user selects a new set of options the “t” flags are cleared.

November 23, 2012 – **Manual queues and preview (Time zone logic)**
When accounts were bypassed temporarily due to being out of timezone, they would not be presented until the right time EVEN IF you went back into the queue and selected one of the options to bypass time zone logic. We have made changes to show the accounts when the bypass time zone options are selected. (COLDRI and ITDIAL2)

November 26, 2012 – **Call compliance reports**
Client account number was replaced by client code and User ID. User ID is obtained by reading the last user notes for the day. Client code is from the linked account.

November 26, 2012 – **Post-dated letters**
If a P/D reminder is required and the payment was set up for a specific case (Apply to case number option), a note will be added to the specified account, saying “Letter scheduled P/D”. This does not mean the letter was generated. It is going to help from an audit position since only the primary was updated when the letter was sent.

Version 3.0 (Fix library) was updated on the FTP site - November 27, 2012 at 13.00 PM EST

November 27, 2012 – **Account access based on states**
Changes were made. Access was sometimes allowed when it should not have been. This option is within the options on “System Security”.

November 28, 2012 – **Account audits – adding to queues**
An issue with dialer holds getting into the queues was addressed.

November 28, 2012 – **Auditing accounts worked and to be worked**
A problem with cell phone duplication (F3 option) was corrected.

November 28, 2012 – **Maximum calls by state**
The system was designed to allow you to enter default rules for all states. This is done by entering the rules for the state code “Blank”. You could not enter blank in the state code field. This has been corrected.

November 30, 2012 – **Account access for states by User ID**
This was a new option to allow only some users to work accounts in some states. You could set up users and the states they could work or not work. We have added a feature that makes the use of this option much more practical. In the User ID field you can now specify “Use *DEFAULT for all users not set up in this file”. That entry *DEFAULT will be used for all users who are NOT set up on the table. If only 3 users are licensed in Idaho, you would allow access to those three users, and set up *DEFAULT with no access to Idaho.

December 2, 2012 – **Other phones being loaded when they were disabled on a linked account**
We already have features that check new accounts loaded, and if there is a home, work or cell that is already disabled on a linked account, we disable the new numbers too! This was not being done for accounts loaded into the other phones (Tab+). We have changed this. These numbers will also be checked and disabled if they are already marked as bad or disabled. If you have custom programs that load new numbers, we will need to update those modifications. If you have a problem with linked accounts having some accounts with a good number, while another has the same number disabled, you could have unpredictable results in some of the processing of phone numbers. We have a program that will correct this. You need to submit CALL ZUPDBADDUB. It could run

for a very long time depending on the number of records in your additional phone numbers. A report is produced. Please put it on hold!

December 4, 2012 – **Time zone changes**
We have included changes to mask individual, disabled phone numbers are out of time zone. There is a set up to activate these changes and this has not been made available at this time. We will be documenting and releasing this code in the future.

December 4, 2012 – **Statistics on client inquiry graphs**
We have corrected a rare problem caused by changing client codes on accounts.

December 5, 2012 – **Changing sort on an I-Tel campaign**
We have corrected a problem with sort codes and sorting by age.

Version 3.0 (Fix library) was updated on the FTP site - December 6, 2012 at 16.00 PM EST

December 7, 2012 – **A/R detail and summary reports**
We have added an option to omit up to 5 remit codes when the reports are run.

December 13, 2012 – **Link phones inquiry (F15 from account details)**
When multiple accounts were looked up, the account information on the top part of the screen would show from a prior account. This was a display issue. (WACPHOFM was changed)