***(Sent as body of email)***

Hello **CLIENT NAME** Team,

Below is the status of tasks as of 9/7/16.

Please see tasks list below.  We have already “**Completed”** some of the basic tasks but we need to keep the momentum going.

Please note the items marked “**To Be Completed**” and ***Reply ALL*** with the artifacts that are requested.

Items in **BLUE** = Comments from client

**QUANTRAX TASKS**

* **(Completed)** Set you up as a client on our internal system
* We will need:
	+ **(Completed)** Company name
	+ **(Completed)** Mailing address
	+ **(Completed)** Shipping address
	+ **(Completed)**  Key contacts, with e-mail addresses and phone numbers,
	+ **(Completed)** Key contacts, with e-mail addresses and phone numbers,
	+ **(Completed)** for emergency or after hours contact (for Eric, Kim, and Terri; we have Peter’s)
* **(Open – TBD – To be explained in 9/8 meeting)** For a premise based system, we would send you instructions on how to load our software and database on to your system. This could happen very quickly if you have in-house hardware  -
* **(Open - TBD)** You would need to provide us with a PC server for our GUI operations. This needs to be sourced. Larger companies will typically have a server they can quickly deploy for this purpose permanently or temporarily. Quantrax needs to make a plan to set this up to work with your system.
* **~~N/A For a hosted system, or if you did not have your premise based hardware, we would set you up on our hosted system. You would use that for training, and we could transfer that data onto your premise-based system at a later time~~**
* **(Open - TBD)** Provide client with a high-level implementation plan with targeted dates
* **(Open - TBD)** Set a start date for RMEx management training

**CLIENT TASKS**

* **(To Be Completed-Requesting)** Please send a few dates/times (after month end) that are available for your team to meet with us to review potential custom work and prepare specifications.
	1. **(Completed)** The 1st meeting will be about 45 minutes
	2. Let’s start with 3 more 1 hour
		+ **(Completed)** Scheduled meeting for 9/8 @ 10am EST  (focus of discussion is technical, re: sample files and layouts sent by MBB to Quantrax
		+ **(Open - TBD)** Scheduled meeting for TBA
		+ **(Open - TBD)** Scheduled meeting for TBA
* **(Completed)** Designate a management team to learn RMEx. You would need knowledge engineers (smart, analytical, with collections knowledge, computer literate, logical, able to work with people) and collection management experience, on this team
* **(Completed)** Set up one e-mail address we can use to communicate with that team (you manage the distribution list)
* **(Completed)** MBB please send us: Conversion data” (test data and file layouts – see bullets below)
	1. **(Completed)** See attached Letters file worksheet and fill-out
	2. **(Completed)** Send examples of vendor letter files **–**
	3. **(Completed)** Send examples of client statements
	4. **(Completed)**
* List of your current business process you currently do with your current system (Available for our 1st meeting after your month-end processing)
* List of current uses of the dialer (Available for our 1st meeting after your month-end processing)
* List of possible Custom

  List of any processes that you do now and that you think Quantrax does not have a part of the base system (Example,  your university client with the daily manual process of loading 24 different files)

  List of what other process you want to use the dialer for

* **(Completed)** Complete reading of the Quantrax Implementation documentation you received earlier this week
* **(Open - TBD)** Commit the required resources for the duration of the implementation plan – we can be flexible with times, but prefer to do our work prior to 2 PM each day
* **(Open - TBD)** Work with us to set up a secure connection between Quantrax and your system
	+ **(Completed)**

Once you send me your availability dates/times to meet, I will send Outlook invitations our next meeting to discuss the “**Open – TBD”** tasks and we will get started with conversion process.

Please feel free to contact me if you have further questions.