

RME_x Management Training: Generating Reports For Your Clients



- Review the different types of reports to give your clients a perspective of your accounts and overall performance
- Generate and send reports automatically to your clients
- Deliver reports to clients via printing or email

RME.x Client Reports

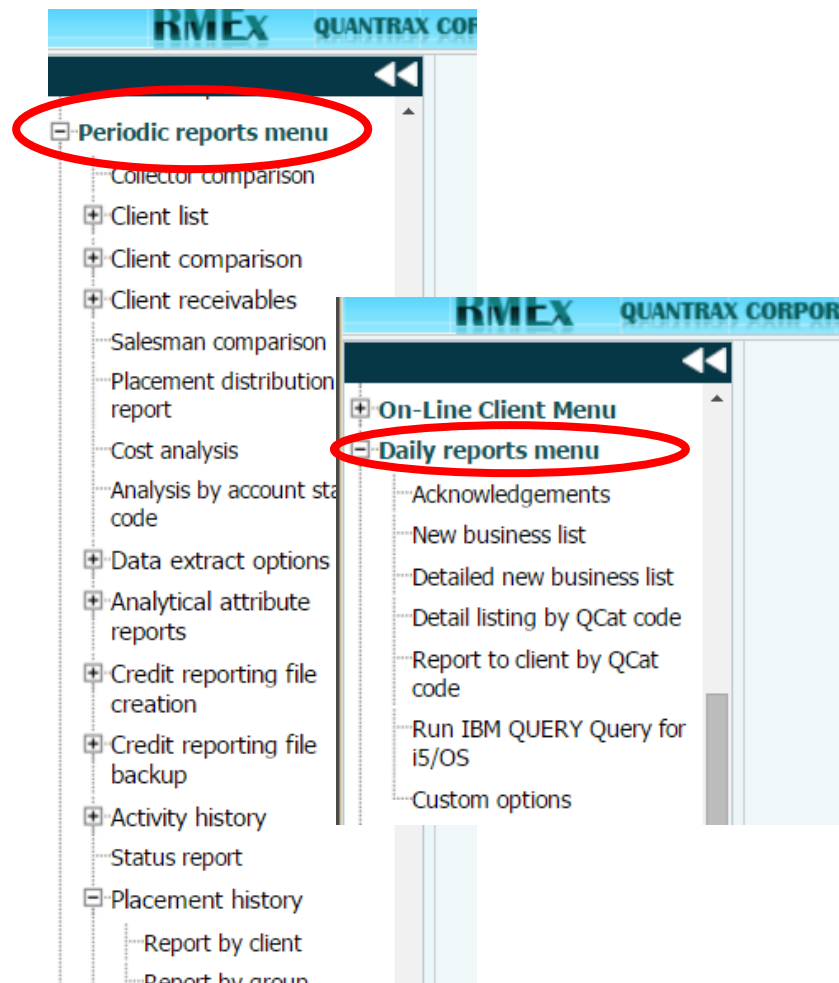
- ❑ Client reports can be used to analyze and report on new placements, account statuses, closed accounts, and recovery analysis based on placement periods



Your RME.x solution.

RME.x Client Reports

- ❑ Reports are found in their logical locations and can be run **manually**
- ❑ Reports like acknowledgements can be created **automatically**





Client Reports – Add/Edit Email Options

Management > Client update > Page 3 - E-mailing options > Press Enter

STANDARD REPORTS	(Y)	Frequency	(M,Q)	Type	Reporting Area	
Status Report	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Reporting Division	<input type="text"/>
Close-out Report	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Consolidation Code	<input type="text"/>
Activity History	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	(must be a Client Code)	
Regression Report	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Pre-Collect type	<input type="text"/>
Acknowledgement (D,M)	Y		<input type="checkbox"/>	<input type="checkbox"/>	E-mailing options (Y)	<input checked="" type="checkbox"/>
Placement History	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Send to Web Server?(Y)	<input type="checkbox"/>

Client E-mail Options

Company Name Quantrax RME_x (01)
 Client Code 000001

REPORTS TO BE E-MAILED

Select	Report Name	E-mail Setup
<input checked="" type="checkbox"/>	Acknowledgements	Y
<input type="checkbox"/>	Status Report	
<input type="checkbox"/>	Close-out Report	
<input type="checkbox"/>	Activity History	
<input type="checkbox"/>	Regression Report	
<input type="checkbox"/>	Placement History	
<input type="checkbox"/>	Client Statements	
<input type="checkbox"/>	Report to client by QCat	

Client Reports– Setup Email Options

Client E-mail Options

Company Name Quantrax RME x (01)
Client Code 000001

REPORTS TO BE E-MAILED

Select	Report Name	E-mail Setup
<input checked="" type="checkbox"/>	Acknowledgements	Y
<input type="checkbox"/>	Status Report	
<input type="checkbox"/>	Close-out Report	
<input type="checkbox"/>	Activity History	
<input type="checkbox"/>	Regression Report	
<input type="checkbox"/>	Placement History	
<input type="checkbox"/>	Client Statements	
<input type="checkbox"/>	Report to client by QCat	

Client E-mail Options

Company Name Quantrax RME x (01)
Client Code 000001

E-MAIL INFORMATION for Acknowledgements

E-mail Address dawnab@quantrax.com
CC
BCC

Report to D. Barge * Conversion Type 6

Subject Acknowledgement Report Encr (Y) Comp (Y)

Message text Management Training Example

* Conversion Types
2-EToA 3-IMG
4-RTF 5-MAP
6-PDF

F1-New Selection F7-Exit F12-Update

Client Reports – Print Manually Using Acknowledgements

Daily reports menu > Acknowledgements

Acknowledgements

Select one of the following

1. Accounts entered TODAY (Daily Acknowledgement clients)
2. Accounts entered within a RANGE OF DATES (Monthly Acknowledgement clients)
3. Accounts entered within a RANGE OF DATES (Daily Acknowledgement clients)

Option 3

For option 1, 2 or 3 enter the following -

Client numbers (if individual clients are required)

Enter the following (not for Option 1)

Placement date range to

If individual clients are required, enter code for Report Type
and enter code for Pre-Collect Report Type

Include inactive closes, which do not remove from placement (Y)

ACKNOWLEDGEMENTS have completed



Printing Manually: Example of Acknowledgement

Daily reports menu > Acknowledgements

Date : 03/03/16	QUANTRAX .7 BOX - COMPANY 99	Page : 1	
Req by COLBIN	106/5 MONGOMERY AVENUE BETHESDA, MD 20817 (301) 555-5555		
COLBIN'S CLIENT		Client # : 265246	
NOW HIT F12		REF-	
1111 MAIN STREET			
BETHESDA MD 20814			
Account Acknowledgement from 10/01/15 to 12/31/15			
Name	Your Account#	Date Placed	Amount Placed
ANOTHER, TEST		11/30/15	100.00
CASTRO, LESLIE		11/30/15	155.00
GERMAN, ROSEMARY		11/30/15	103.30
HERNANDEZ, SAMANTHA		11/30/15	1188.54
LNAME1, FNAME1 K	3597059	12/13/15	56.05
LNAME2, FNAME2 L	3664173	12/13/15	1032.40
LNAME3, FNAME3 C	3679826	12/13/15	76.11
LNAME4, FNAME4 R	3646132	12/13/15	20.00
LNAME5, FNAME5 D	3654194	12/13/15	50.00
LOCKBOX1, LINK	1	11/10/15	122.00
LOCKBOX1, LINK	2	11/10/15	30.00
LOCKBOX2, LINK	3	11/10/15	152.00
LOCKBOX2, LINK	4	11/10/15	48.00
MANFREDI, NUAMI		11/30/15	560.00
NORMAL, CONSUMER	2015113002	11/30/15	100.00
ONE DAY, MORE	22	11/30/15	125.00
OVERPAYMENT, ONE	1117201501	11/16/15	100.00
OVERPAYMENT, TWO	1117201502	11/16/15	100.00
PATIENT 1, TEST 1 L	1010530	12/13/15	75.96
PATIENT 10, TEST 10 L	1012564	12/13/15	301.10
PATIENT 11, TEST 11 J	1014080	12/13/15	25.13
PATIENT 12, TEST 12	1014323	12/13/15	716.65
PATIENT 2, TEST 2 I	2025304	12/13/15	88.25
PATIENT 3, TEST 3 O	1020965	12/13/15	640.90
PATIENT 4, TEST 4 A	1011623	12/13/15	40.00
PATIENT 4, TEST 4 A	1007201	12/13/15	40.00
PATIENT 4, TEST 4 A	1013292	12/13/15	37.65
PATIENT 4, TEST 4 A	1009511	12/13/15	50.00
PATIENT 5, TEST 5 M	1013402	12/13/15	1479.68
PATIENT 6, TEST 6 M	1010666	12/13/15	374.85
PATIENT 7, TEST 7 A	2024023	12/13/15	71.47
PATIENT 8, TEST 8 D	1013077	12/13/15	202.87
PATIENT 9, TEST 9 A	1020717	12/13/15	801.85
TEST, ANOTHER UDW FIN	2015102701	10/27/15	10.00
Total Accounts 34		Total Amount Assigned	9,074.76

Example of Close-Out Report

Periodic Reports > Close-out report

The field *Reason* is user- defined by Close code or Description code

Date : 03/03/16 5:35:27
Req by COLBIN

QUANTRAX .7 BOX - COMPANY 99
106/5 MONGOMERY AVENUE
BETHESDA, MD 20817
(301) 555-5555

Page : 1

COLBIN'S CLIENT
NOW HIT F12
1111 MAIN STREET
BETHESDA MD 20814

Client # : 265246

CLOSE-OUT REPORT FOR PERIOD 10/01/15 TO 12/31/15 REF-

Name	Client Account#	-----Placed-----		Balance	Reason	Our Acct#
----	-----	Date	Amount	-----	-----	-----
EARL, MARY T	44997	10/23/13	102.12	102.12	DISPUTED AGAIN	001684292
FERRELL, MELISSA	13092569	03/18/14	1,035.00	977.69	PLACED IN ERROR	001881618
KEENE, LANI	23145	10/23/13	59.56	59.56	PLACED IN ERROR	001684315
LASTT, FIRST	333666999	12/19/13	500.00	497.00	PHASE1 DONE	001881104
MINOR, CONSUMER	2015113001	11/30/15	100.00	100.00	PLACED IN ERROR	001898732
ONE DAY, LESS	211251251251	11/30/15	25.00	25.00	PLACED IN ERROR	001898735
PETER, HAYDEN	20131912	12/18/13	250.00	243.00	PHASE1 DONE	001881103
				Total of	2,004.37 from	7 account (s)
				Total of	2,004.37 from	7 account (s)

Closed Accounts - Close-Out Report

Periodic Reports >Close-out report

Close-out Report

Select one of the following

1. Monthly Clients
2. Quarterly Clients

Option

----- OR -----

Client numbers (if individual clients are required)

Close-out date range to (Must be entered)

If individual clients are required, enter Report Type

For individual clients, if client numbers are GROUP NUMBERS, enter "Y"

If a combined report is required for a Group, enter "Y"

Close codes to be omitted Select "I" to include (not omit)

Quantrax RMEx (01)



Closed Codes- Close-Out Report

System Control 1 >Close Codes

- Closed accounts can be reported with user-defined description
- Close codes can be omitted from the Close out report

Close Codes

Company name Quantrax RME_x (01)

Close code 1

Description PIF

Short description PIF

Remove from placement amount (Y)

Inactive balance (Y) Active for statistics (Y)

Collector credit for payment (Y) Y Collector credit if one

Max.days for credit after close linked account is open (Y)

Open on payment transaction (Y,P) Open through Smart Codes N

Bankruptcy or deceased (B,D) (N=No)

Stop letters (Y) Y **Omit from reports (Y,S,C)**

Days to wait before purging Smart Codes not allowed (Y)

Status report description CLOSED - PIF

F1-New Selection F3-Search F7-Exit Special Code (D,N)

Description Codes - Close-Out Report

System Control 1 > Description codes

- ❑ Description codes can provide a user-defined description

Description Codes

Company name	Quantrax RME _x	(01)
Code	PF	
Description	<input type="text" value="PIF"/>	
Description for status report	<input type="text"/>	
Description for close report	CLOSED - PIF	
Language translation (Y)	<input type="checkbox"/>	
Can not be added by user (Y)	<input checked="" type="checkbox"/>	
Can not be removed by user (Y)	<input checked="" type="checkbox"/>	
Do not duplicate on links (N)	<input type="checkbox"/>	Payments allowed (N=No) <input type="checkbox"/>
Do NOT remove if new code is to be added to account and all codes are used (Y)	<input checked="" type="checkbox"/>	Include balance for collectors (N=No) <input type="checkbox"/>
Special warning message -----> (User will need special authority for access)	<input type="text"/> <input type="text"/> <input type="text"/>	
Expand Event (ANb)	<input type="checkbox"/>	Allow access if special authority is at least <input type="checkbox"/>
Smart codes to advance	<input type="checkbox"/>	<input type="checkbox"/>

F1-New Selection F3-Search F7-Exit Delete 'D'



Example of Status Report

Periodic Reports > Status report

❑ Status reports are designed to inform the client the status of their account

Date : 03/03/16 5:37:10		QUANTRAX .7 BOX - COMPANY 99			Page : 1	
Req by COLBIN		106/5 MONGOMERY AVENUE BETHESDA, MD 20817 (301) 555-5555				
COLBIN'S CLIENT NOW HIT F12 1111 MAIN STREET BETHESDA MD 20814				Client # : 265246		
STATUS REPORT					REF-	
Name	Your Account#	-----Placed----- Date	Amount	Balance Amount	Comments	Our Account#
ADAN, ABDIWALI A	WF6835618643	10/16/13	8763.06	8763.06	ACTIVE - BEING PURSUED	99-001684013
ALBA, JESSICA	963852070	03/27/14	8712.00	8712.00	ACTIVE - BEING PURSUED	99-001881705
ALBINO, EVELYNN	13090309	03/18/14	767.70	767.70	ACTIVE - BEING PURSUED	99-001881592
ALLAN, WILSON	2014032804	03/28/14	100.00	100.00	ACTIVE - BEING PURSUED	99-001881733
ALLEN, JIMMIE	13088169	03/18/14	125.00	125.00	ACTIVE - BEING PURSUED	99-001881583
ALLEN, JIMMIE	13100185	03/18/14	125.00	125.00	ACTIVE - BEING PURSUED	99-001881664
ALLIED RETAIL I, NNOVATIO	309307051-DUB1366391	01/10/16	167.82	167.82	ACTIVE - BEING PURSUED	99-001905237
ALLIED RETAIL I, NNOVATIO	309307051-DUB1367982	01/10/16	139.05	139.05	ACTIVE - BEING PURSUED	99-001905238
ALLIED RETAIL I, NNOVATIO	309307051-DUB1375002	01/10/16	607.85	607.85	ACTIVE - BEING PURSUED	99-001905239
ALMEIDA, JANAKI	35645454545	07/21/13	800.00	800.00	ACTIVE - BEING PURSUED	99-001682789
ANDERSON, MERLIN	546756857687	03/27/14	2500.00	2500.00	ACTIVE - BEING PURSUED	99-001881719
ANDERSON, SILVIA	9876543	03/27/14	600.00	600.00	ACTIVE - BEING PURSUED	99-001881720
ANDREA V, GARCIA CASTILLO	1430900991	07/14/15	196.66	196.66	ACTIVE - BEING PURSUED	99-001891172
ANDREWS, BELINDA	79877441136	03/27/14	1500.00	1500.00	ACTIVE - BEING PURSUED	99-001881713
ANDREWS, BELINDA	9441110048749	03/27/14	1000.00	1000.00	ACTIVE - BEING PURSUED	99-001881714
ANDREWS, BELINDA	9411004477	03/27/14	2000.00	2000.00	ACTIVE - BEING PURSUED	99-001881715
ANDREWS, RAYAN	64534573486	07/21/13	600.00	590.00	ACTIVE - BEING PURSUED	99-001682796
ANOTHER, TEST	2014042407	04/24/14	500.00	.00	ACTIVE - BEING PURSUED	99-001881763
ANOTHER, TEST		11/30/15	100.00	100.00	ACTIVE - BEING PURSUED	99-001898734
ARON, FINCH	2014030301	03/03/14	30.00	30.00	ACTIVE - BEING PURSUED	99-001881417
ARON, FINCH	2014030302	03/03/14	35.00	35.00	ACTIVE - BEING PURSUED	99-001881418
ASAVEDU, LOSIANA	754764748854	07/21/13	900.00	900.00	ACTIVE - BEING PURSUED	99-001682791
ASH, BLAINE	13092103	03/18/14	50.00	50.00	ACTIVE - BEING PURSUED	99-001881609
ASHCRAFT, SHATIA	13091658	03/18/14	779.80	779.80	ACTIVE - BEING PURSUED	99-001881604

Status Report Descriptions

Periodic Reports > Status report

The status report description can be obtained by one of the following ways:

- If the account is closed, the comment is obtained from the Secondary Close code if applicable; if not then the Close code is used
- If the account has an Account Status code where the *description for status report* field was added by a Smart code
- If it was entered in the Description code
- If the account is in *legal* (not pre-legal)
- If the address is bad and there are no phone numbers, the account is shown as a *Skip*
- Collector (owner) code, where you want to let the client know the account is being handled by a special unit
 - An example of the use of this may be a skip tracing unit
- If no description is found from the above, the account is described as active and being worked

Active Accounts – Status Report

Periodic Reports > Status report

Status reports are designed to inform the client the status of their accounts

Status Report

Select one of the following

1. Monthly Clients
2. Quarterly Clients

Option

----- OR -----

Client numbers (if individual clients are required)

Placement date range to (Blank=ALL)

If individual clients are required, enter code for Report Type 1

For individual clients, if client numbers are GROUP NUMBERS, enter "Y"

If a combined report is required for a Group, enter "Y"

Print landscape (Y)

F7-Cancel Quantrax RME.x (01)

Report Type

..... Status Reports

- b No closes, sort by name
- 1 No closes, sort by Client Account#
- 2 With closes, sort by name
- 3 With closes, sort by Client Account#
- 4 No closes, sort by name with last payment information
- 5 With closes, sort by name with last payment information
- 6 No closes. Last Pmt.info. by name
- 7 With closes. Last Pmt.info. by name
- 8 No closes. Last Pmt.info. by Cl.Acct#
- 9 With closes. Last Pmt.info by Cl.Acct#
- A Similar to "2", no "Status"

More...

Example of Placement History

Periodic Reports > Placement history > Report by client

☐ A statistical report that analyzes batches of placements

PLACEMENT HISTORY

Month	---Placed---		Payments This Month	To-Date Payments	To-Date Commission	PIF No.	---Withdrawn---		---Closed---		Recovery %	---Active---	
	No.	Amount					No.	Amount	No.	Amount		No.	Amount
2012	1	100	0	34	0	0	0	0	0	0	34.0	1	66
2013	212	179299	5	4348	0	5	2	99	32	61131	2.4	173	113619
Jan 14	30	25030	0	110	0	40	0	0	8	6670	.4	18	2220
Feb 14	12	4096	0	35	0	0	0	0	0	0	.9	12	4180
Mar 14	284	227673	826	1100	0	2	2	1733	8	20218	.5	272	203072
Apr 14	12	4042	0	1663	0	1	0	0	0	0	41.1	11	2379
May 14	14	2922	0	2494	0	0	0	0	0	0	85.3	14	428
Jun 14	11	8325	0	0	0	2	0	0	5	425		4	5900
Aug 14	24	3061	0	0	0	4	0	0	0	0		20	2531
Sep 14	10	1190	0	450	0	3	0	0	0	0	37.8	7	282
Oct 14	18	4056	0	710	0	6	0	0	2	200	17.5	10	3146
Nov 14	4	5500	0	860	0	1	0	0	1	190	15.6	2	3650
Dec 14	15	54556	0	52	0	14	0	0	0	0	.1	1	48
2014	434	340451	826	7474	0	73	2	1733	24	27703	2.2	335	227836
Jan 15	6	755	0	0	0	0	0	0	1	100		5	655
Feb 15	11	8125	0	0	0	0	0	0	0	0		11	8125
Mar 15	2	100200	0	0	0	0	0	0	0	0		2	100027
Apr 15	5	340	0	0	0	0	0	0	1	50		4	290
Jun 15	2	200	0	0	0	0	0	0	0	0		2	200
Jul 15	45	11513	0	0	0	0	0	0	0	0		45	11513
Aug 15	5	3061	0	0	0	0	0	0	0	0		5	2699
Sep 15	10	2440	0	0	0	0	0	0	0	0		10	2450
Oct 15	1	10	0	0	0	0	0	0	0	0		1	10
Nov 15	15	3008	0	325	0	3	2	125	0	0	11.3	10	2558
Dec 15	20	6180	0	0	0	0	0	0	0	0		20	6180
2015	122	135832	0	325	0	3	2	125	2	150	.2	115	134707
Jan 16	49	8333	0	0	0	0	0	0	0	0		49	8333
Feb 16	2	200	0	0	0	0	0	0	0	0		2	200
2016	51	8533	0	0	0	0	0	0	0	0		51	8533
	820	664215	831	12181	0	81	6	1957	58	88984	1.8	675	484761



Example of Placement History

Periodic Reports > Placement history > Report by client

Close Code affects the Placement History

Remove from placement amount (Y)	Y	
Inactive balance (Y)	Y	Active for statistics (Y)

PLACEMENT HISTORY

Month	---Placed---	Payments	To-Date	To-Date	PIF	---Withdrawn--	---Closed---	Recovery	---Active---	
	No.	Amount	This Month	Payments	Commission	No.	Amount	%	No.	
									Amount	
2012	1	100	0	34	0	0	0	34.0	1	66
2013	212	179299	5	4348	0	5	99	2.4	173	113619
Jan 14	30	25030	0	110	0	40	0	.4	18	2220
Feb 14	12	4096	0	35	0	0	0	.9	12	4180
Mar 14	284	227673	826	1100	0	2	1733	.5	272	203072
Apr 14	12	4042	0	1663	0	1	0	41.1	11	2379
May 14	14	2922	0	2494	0	0	0	85.3	14	428
Jun 14	11	8325	0	0	0	2	0		4	5900
Aug 14	24	3061	0	0	0	4	0		20	2531
Sep 14	10	1190	0	450	0	3	0	37.8	7	282
Oct 14	18	4056	0	710	0	6	0	17.5	10	3146
Nov 14	4	5500	0	860	0	1	0	15.6	2	3650
Dec 14	15	54556	0	52	0	14	0	.1	1	48
2014	434	340451	826	7474	0	73	1733	2.2	335	227836
Jan 15	6	755	0	0	0	0	0		5	655
Feb 15	11	8125	0	0	0	0	0		11	8125
Mar 15	2	100200	0	0	0	0	0		2	100027
Apr 15	5	340	0	0	0	0	0		4	290
Jun 15	2	200	0	0	0	0	0		2	200
Jul 15	45	11513	0	0	0	0	0		45	11513
Aug 15	5	3061	0	0	0	0	0		5	2699
Sep 15	10	2440	0	0	0	0	0		10	2450
Oct 15	1	10	0	0	0	0	0		1	10
Nov 15	15	3008	0	325	0	3	125	11.3	10	2558
Dec 15	20	6180	0	0	0	0	0		20	6180
2015	122	135832	0	325	0	3	125	.2	115	134707
Jan 16	49	8333	0	0	0	0	0		49	8333
Feb 16	2	200	0	0	0	0	0		2	200
2016	51	8533	0	0	0	0	0		51	8533
	820	664215	831	12181	0	81	1957	1.8	675	484761

Placement History Report

Periodic Reports > Placement history > Report by client

- Analyze recoveries by period of placement

Placement History

Select one of the following

1. Monthly clients
2. Quarterly clients

Option

----- OR -----

Client numbers (if individual clients are required) 000001

If individual clients are required, enter code for report type

Omit transactions before Month Year

Starting month for fiscal year (Leave blank for January)

Print group report when applicable, for option 1 or 2 (Y)

Years of detail (Default is 2, 9=All)

Reporting area Reporting division Consolidation code

Activity History Report

Periodic Reports > Activity history > Report by client

Analyzes placements and payments by placement period and month of activity

Month	-----Placements-----			Payments This Mth	---- Payments ----		To-Date Commission	Comm Rate %	Unit Yield	---Total Payments---		
	No	Amount	Average		To-Date	%				In Period	%	YTD
2012	1	100.00	100.00	.00	34.00	34.0	.00	.0	.00	.00	N/A	.0
2013	210	179200.38	853.34	5.00	4348.52	2.4	.15	.0	.00	3223.00	N/A	1.8
2014	432	338720.68	784.08	826.00	7474.50	2.2	.00	.0	.00	3468.25	N/A	1.0
Jan 15	6	755.44	125.91	.00	.00	.0	.00	.0	.00	.00	.0	.0
Feb 15	11	8125.00	738.64	.00	.00	.0	.00	.0	.00	.00	.0	.0
Mar 15	2	100200.00	50100.00	.00	.00	.0	.00	.0	.00	.00	.0	.0
Apr 15	5	340.00	68.00	.00	.00	.0	.00	.0	.00	.00	.0	.0
May 15	0	.00	.00	.00	.00	.0	.00	.0	.00	159.00	.0	.1
Jun 15	2	200.00	100.00	.00	.00	.0	.00	.0	.00	.00	.0	.1
Jul 15	45	11513.94	255.87	.00	.00	.0	.00	.0	.00	4470.77	38.8	3.8
Aug 15	5	3061.99	612.40	.00	.00	.0	.00	.0	.00	.00	.0	3.7
Sep 15	10	2440.00	244.00	.00	.00	.0	.00	.0	.00	.00	.0	3.7
Oct 15	1	10.00	10.00	.00	.00	.0	.00	.0	.00	.00	.0	3.7
Nov 15	13	2883.84	221.83	.00	325.00	11.3	.00	.0	.00	.00	.0	3.6
Dec 15	20	6180.92	309.05	.00	.00	.0	.00	.0	.00	.00	.0	3.4
2015	120	135711.13	1130.93	.00	325.00	.2	.00	.0	.00	4629.77	N/A	3.4
Jan 16	49	8333.34	170.07	.00	.00	.0	.00	.0	.00	831.00	10.0	10.0
Feb 16	2	200.00	100.00	.00	.00	.0	.00	.0	.00	.00	.0	9.7
2016	51	8533.34	167.32	.00	.00	.0	.00	.0	.00	831.00	N/A	9.7
TOTALS	814	662265.53	813.59	831.00	12182.02	1.8	.15	.0	.00	12152.02	N/A	N/A

Activity History Report

Periodic Reports > Activity history > Report by client

- Analyze recoveries by period of placement

Activity History Report

Select one of the following

1. Monthly Clients
2. Quarterly Clients

Option

----- OR -----

Client numbers (if individual clients are required)

If individual clients are required, enter code for Report Type

Omit transactions before Month Year
Omit transactions after Month Year

Years of detail (Default is 2, 9=All)

Reporting Area Reporting Division Consolidation Code

Analyzing Recoveries

Periodic Reports > Placement history > Report by zip code

- ❑ Reviewing placement history options can be reported by: zip code, amount placed, service dates, etc.

Placement History by Zip Code

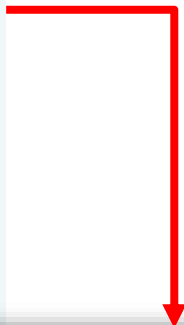
Client numbers to include
 (Blank=All)

Zip Code range to

Enter report type

Placement date range to
 (Blank=ALL)

If no information is entered, all accounts will be analyzed and the option could take a long time to complete.



Date : 03/03/16 Page : 1

PLACEMENT HISTORY BY ZIP CODE

Company : QUANTRAX .7 BOX - COMPANY 99

Client# : 265246

Zip	---Placed---		-Average-	To-Date	To-Date	PIF	---Withdrawn---	---	---Closed---	Recovery	---	---	
	No.	Amount	Bal.	Age	Payments	Commission	No.	Amount	No.	Amount	%	---Active---	
												No.	Amount
12352	6	1037	172	163	0	0	0	0	0	0		6	1037
12356	1	12	12	7	0	0	0	0	0	0		1	12
12415	1	100	100	920	0	0	0	0	0	0		1	100
12452	1	100	100	96	0	0	0	0	0	0		1	100
12455	1	100	100	32	4	0	0	0	0	0	4.0	1	96
12456	1	1000	1000	381	0	0	0	0	1	1000		0	0
12456	1	300	300	130	0	0	0	0	1	300		0	0

Analyzing Recoveries – How Quickly Are You Recovering For A Client

Periodic Reports > Regression report

Regression Report

Select one of the following

1. Monthly Clients
2. Quarterly Clients

Option

----- OR -----

Client Number (if ONE client is required)

If one client is required, enter code for Report Type

If Group Report is required, enter "Y" (for one client or ALL clients)

Some of the information required for these reports are updated during the month-end reset. These reports should therefore be run after the month-end reset has been run.

Analyzing Recoveries – How Quickly Are You Recovering For A Client

Periodic Reports > Regression report

- Analyzes payments received by month for groups of placements (grouped by month of placement)
- Only contains reportable balances
- Placements do not include withdrawn accounts

TESTING GUI/PAR SELECT
APT 500
1111 MAIN STREET
BETHESDA MD 20814

Client # : 000002 REF-B

REGRESSION ANALYSIS FOR PERIOD ENDING 04/30/14

Month	Amount Placed	No. Placed	-----Months-----											
			1	2	3	4	5	6	7	8	9	10	11	12
May 13	301100	27	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	3.08%
\$ COLLECTED														9300
Jun 13	264568	244	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.64%	
\$ COLLECTED													1695	
Jul 13	26407658	42	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	
\$ COLLECTED													100	
Aug 13	86227	62	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	6.22%		
\$ COLLECTED												5371		
Sep 13	108	1	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	
\$ COLLECTED														
Oct 13	21239	18	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	
\$ COLLECTED														
Nov 13	14388	65	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	
\$ COLLECTED														
Dec 13	36390	28	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	.00%	
\$ COLLECTED														
Jan 14	711	3	.00%	.00%	.00%	5.27%								
\$ COLLECTED						37								
Feb 14	20650	23	.00%	.00%	.00%									
\$ COLLECTED														
Mar 14	96158	26	.00%	.00%										
\$ COLLECTED														
Apr 14	2010	10	.00%											
\$ COLLECTED														
Total Collected in Apr 14				.00										

Exercises – Generating Reports For Your Clients

In your system, use **COMPANY 98**

1. Where are the key client reports?
2. Status Report - Run and review a Status Report. How would you use a status report?
3. Close-out Report – Run this report. Why would an account NOT appear on this report even though that account was closed?
4. Run a Placement History report.
 - a. What is the differences between a withdrawn account and a closed account?
 - b. How is the recovery percentage calculated?
5. Run a Regression Report - How can this report be used to determine how much effort to put into a client's accounts?
6. Run an Acknowledgement report and a New Business report, some info is the same some is different. Without just listing the fields, what is the overall differences for these reports?

RMEx Management Training: Generating Reports For Your Clients

Thank you!