RMEx Management Training: Internal Reports To Manage Your Productivity

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Agenda

- Determining The Information Needed To Manage Your Internal Operations And Results
- Viewing Reports Based On Data From:
  - Agents
    - Reports To View Agent Productivity
  - Collections
    - Understanding Account Processing – A Quick Overview
    - Reports To View Collections
  - Clients
    - Reports To View Activity by Client
- Using Comparison Reports

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Determining The Information Needed To Manage Your Internal Operations And Results - Agents

What are individual agents doing?

What did they agents generate in terms of promises and “money”

Can an agent be followed while they work? (listen to them /display the account they were working)

Can agent goals be set, and can agents see where they are against their goals?

What did agents accomplish for your company?

In a pooled environment, what was their individual productivity?

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Reports To View Agent Productivity

- Details Of Work Done By A Collector (Smart code analysis)
- Time Management Reports
- Audit Accounts Being Worked (while agents are working)

Your RMEx solution. . . . .

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Agent Reports: Collector Reports: Details Of Work Done By A Collector

RMEx Main Menu > Management Menu > Account processing review > User productivity - Smart code analysis

- Prints a list of Smart codes applied by the user,
- Omits duplicates of the same Smart code applied to the same account
- Includes different Smart codes applied to the same account (since the report is an analysis of all the smart codes used)
- Counts the same debtor more than once if different smart codes were applied to the same account

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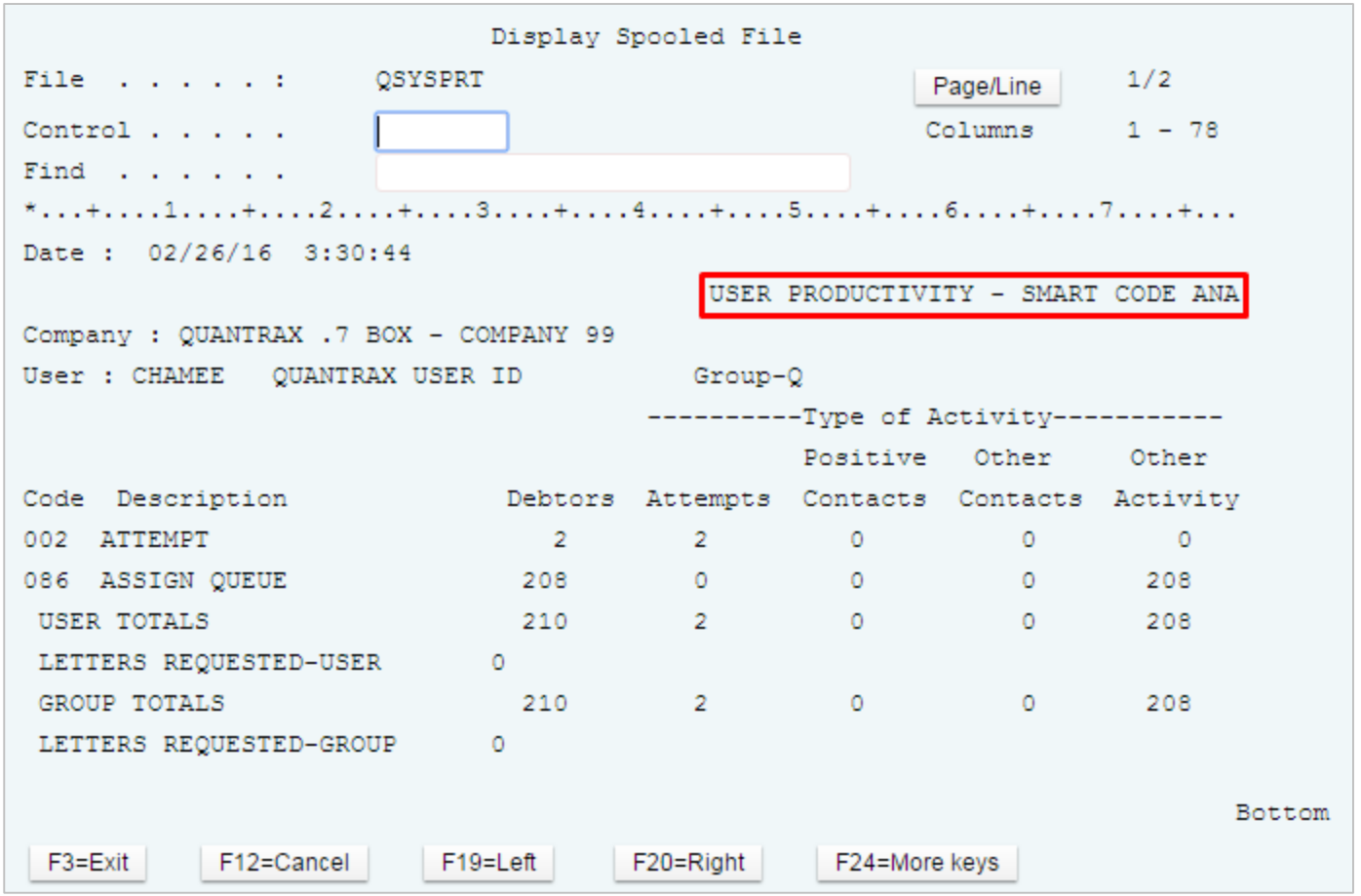
Agent Reports: Details Of Work Done By A Collector *(continued)*

RMEx Main Menu > Management Menu > Account processing review > User productivity - Smart code analysis

- Based on the type of smart codes applied (attempts, positive contacts, etc.)



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Date :  02/26/16  3:30:44

                                        USER PRODUCTIVITY - SMART CODE ANA

Company : QUANTRAX .7 BOX - COMPANY 99
User : CHAMEE   QUANTRAX USER ID          Group-Q
                                    ----------Type of Activity-----------
                                              Positive   Other      Other
Code  Description             Debtors  Attempts Contacts  Contacts  Activity
002   ATTEMPT                       2         2         0         0         0
086   ASSIGN QUEUE                208         0         0         0       208
 USER TOTALS                      210         2         0         0       208
 LETTERS REQUESTED-USER         0
 GROUP TOTALS                     210         2         0         0       208
 LETTERS REQUESTED-GROUP        0

                                                                      Bottom
F3=Exit     F12=Cancel     F19=Left     F20=Right     F24=More keys
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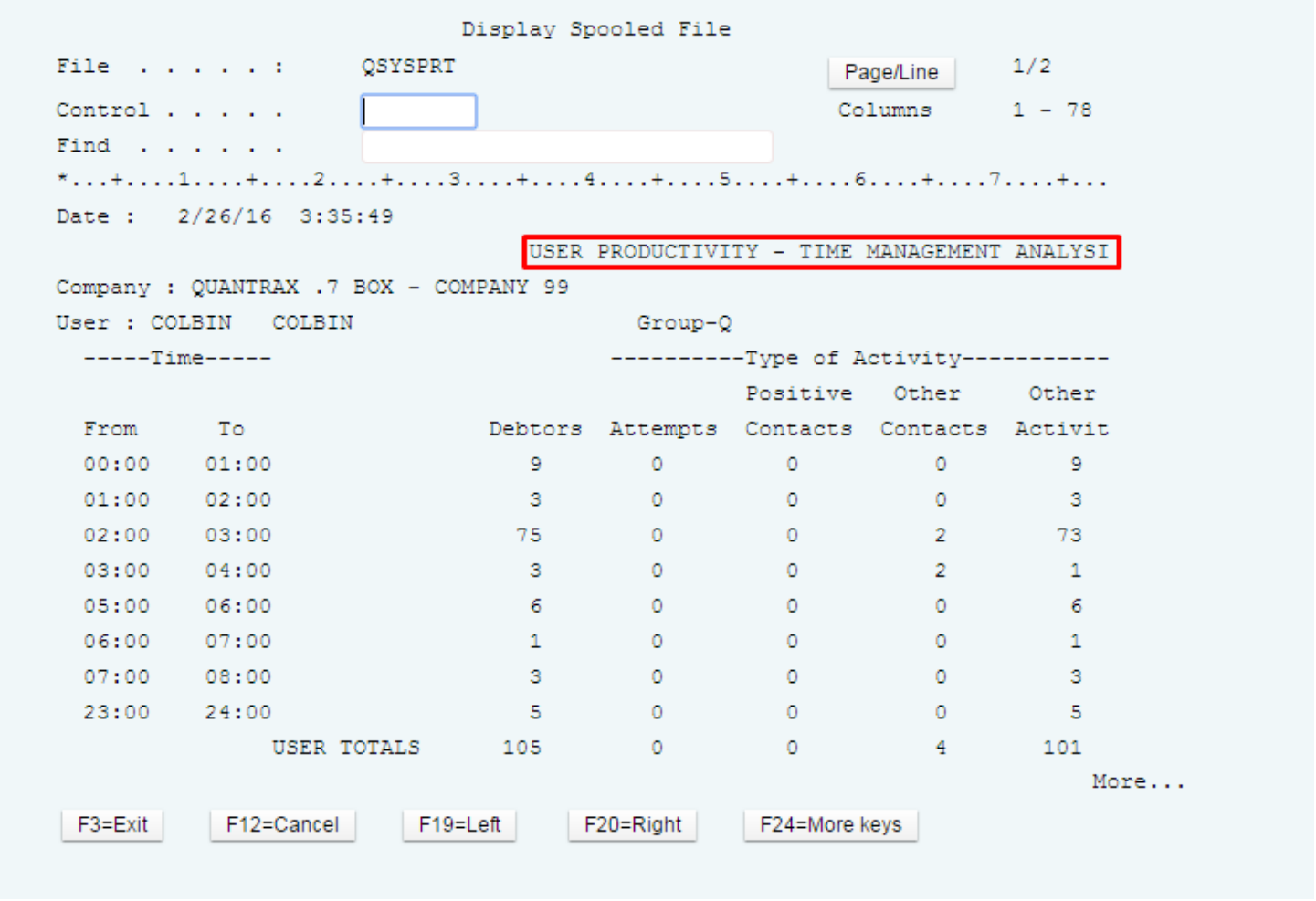
Agent Reports: Time Management Reports

RMEx Main Menu > Management Menu > Account processing review > User productivity – Time Management Reports

- Based on the type of smart codes applied (attempts, positive contacts, etc.)



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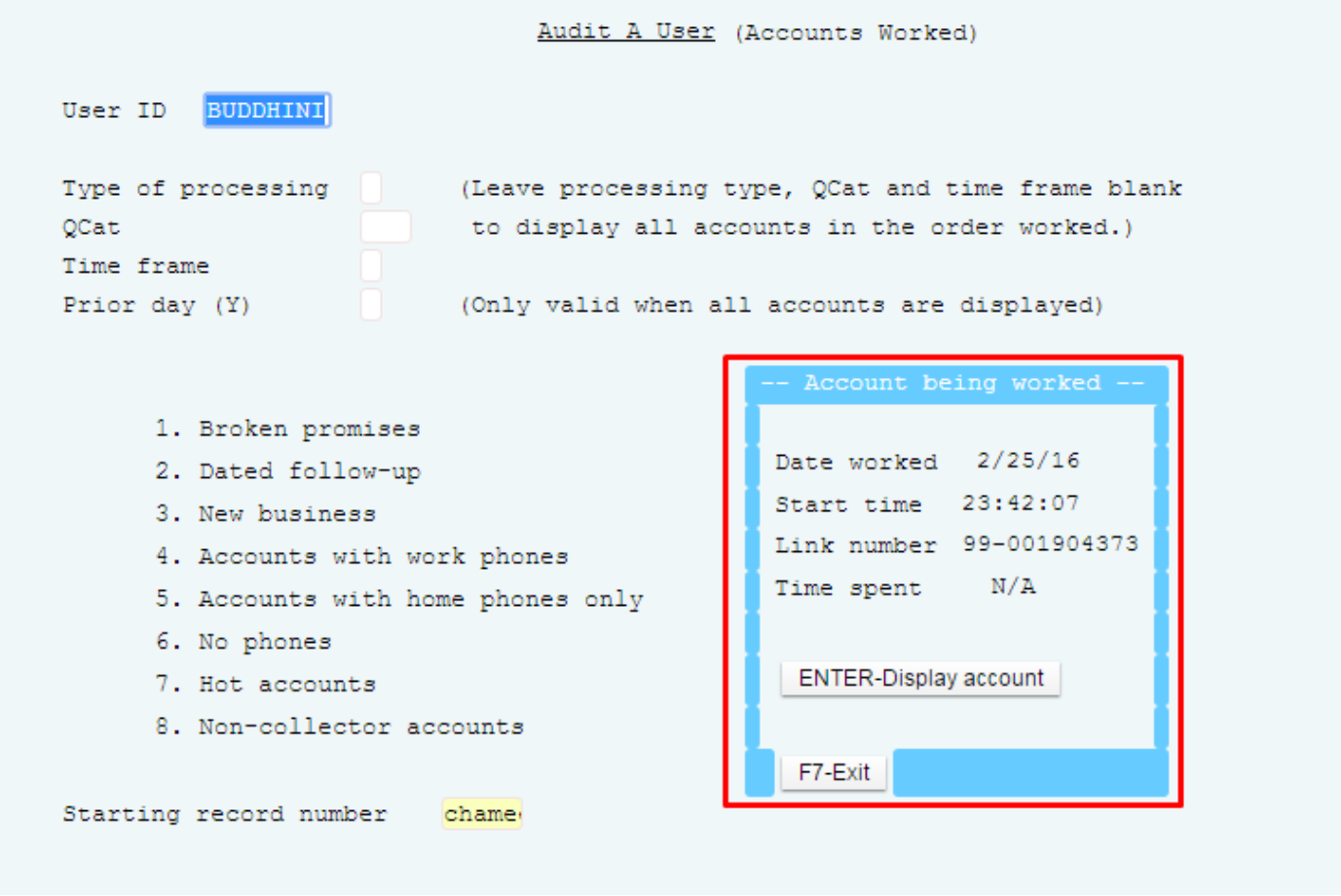
Date :   2/26/16  3:35:49
                                  USER PRODUCTIVITY - TIME MANAGEMENT ANALYSI
Company : QUANTRAX .7 BOX - COMPANY 99
User : COLBIN   COLBIN                      Group-Q
  -----Time-----                          ----------Type of Activity-----------
                                                    Positive   Other     Other
  From      To                   Debtors  Attempts  Contacts  Contacts  Activit
  00:00    01:00                    9        0         0          0         9
  01:00    02:00                    3        0         0          0         3
  02:00    03:00                   75        0         0          2        73
  03:00    04:00                    3        0         0          2         1
  05:00    06:00                    6        0         0          0         6
  06:00    07:00                    1        0         0          0         1
  07:00    08:00                    3        0         0          0         3
  23:00    24:00                    5        0         0          0         5
                USER TOTALS       105        0         0          4       101
                                                                          More...
F3=Exit    F12=Cancel    F19=Left    F20=Right    F24=More keys
```

Agent Reports: Audit Accounts Being Worked

Management Menu > Smart Code/User Audit Options > Audit a user (worked)

- Audits an agent while they work
- Allows you to listen to agents and display the account they are working on
- Enter User ID, then press **F10-Most recent account**



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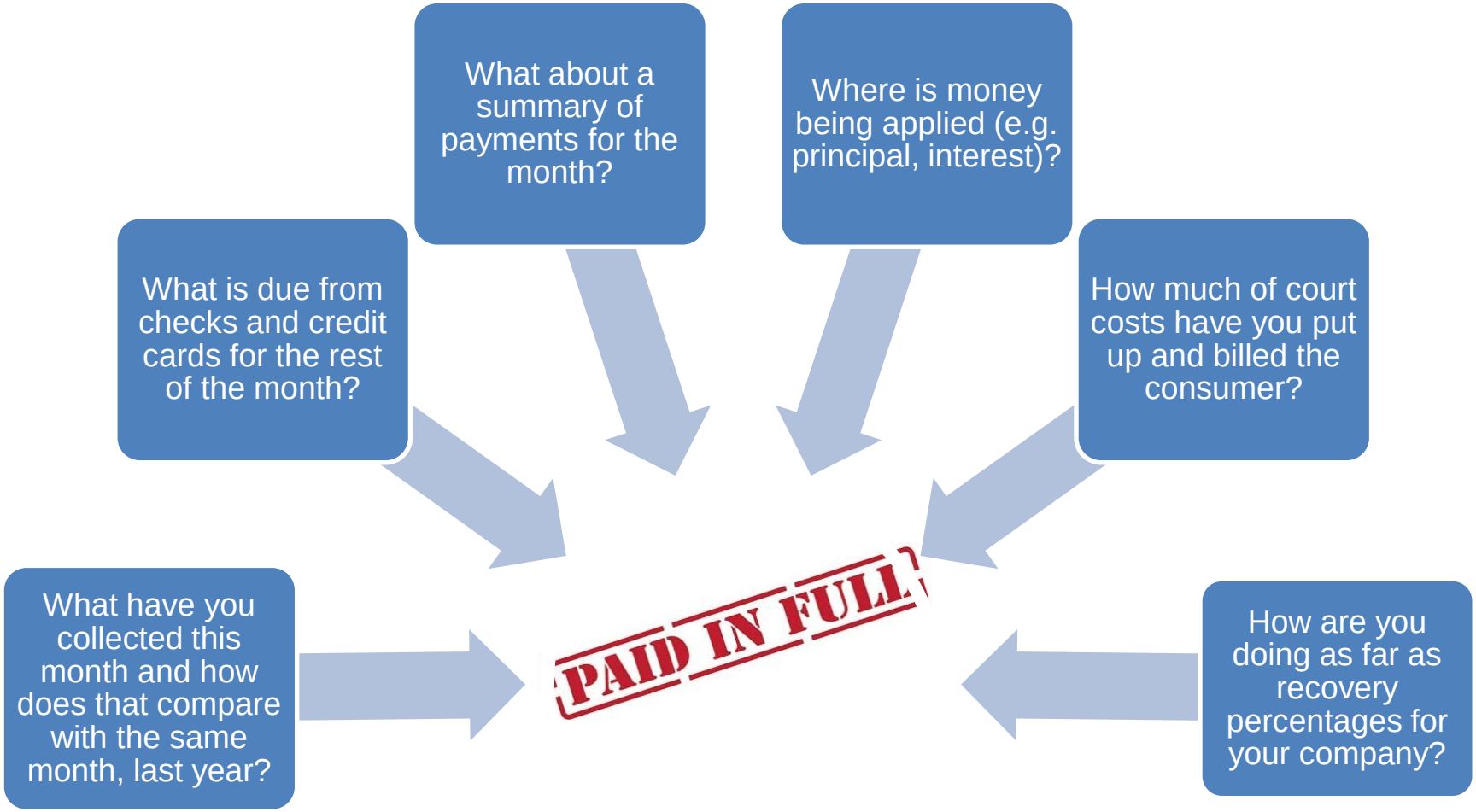
Determining The Information Needed To Manage Your Internal Operations And Results - Collections



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Reports To View Collections

- Reports
  - Daily Payment Report Options
  - Payments By Collector For Period
  - Daily Collector Activity Summary
  - Audit Accounts Worked
  - Daily And Month-to-date Payment Report
  - Activity History By Company

Your RMEx solution. . . . .

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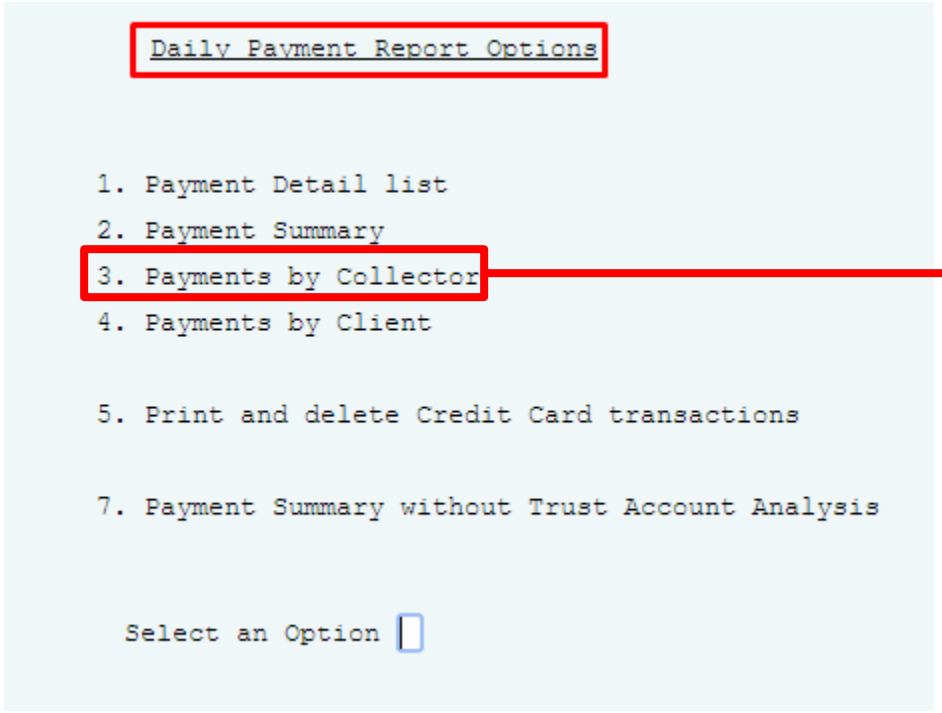
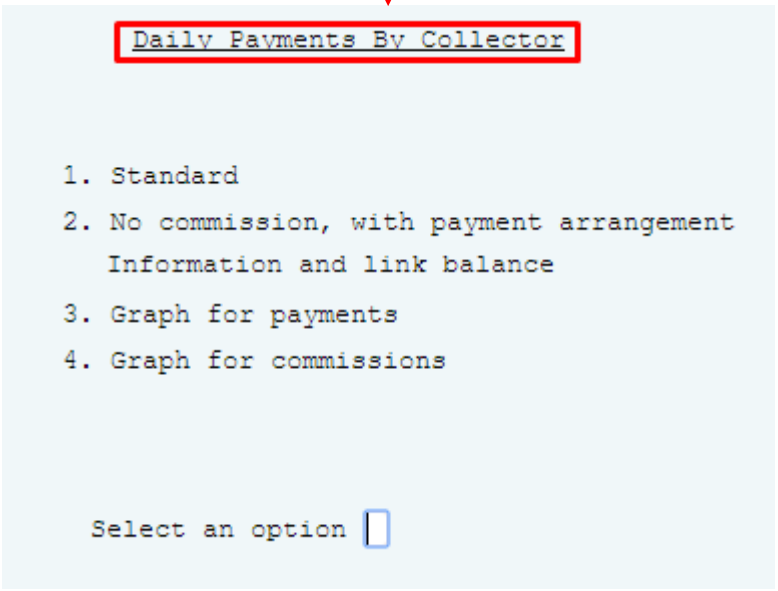
Collection Reports: Daily Payment Report Options

RMEx Main Menu > Payment transaction menu > Daily payment report options





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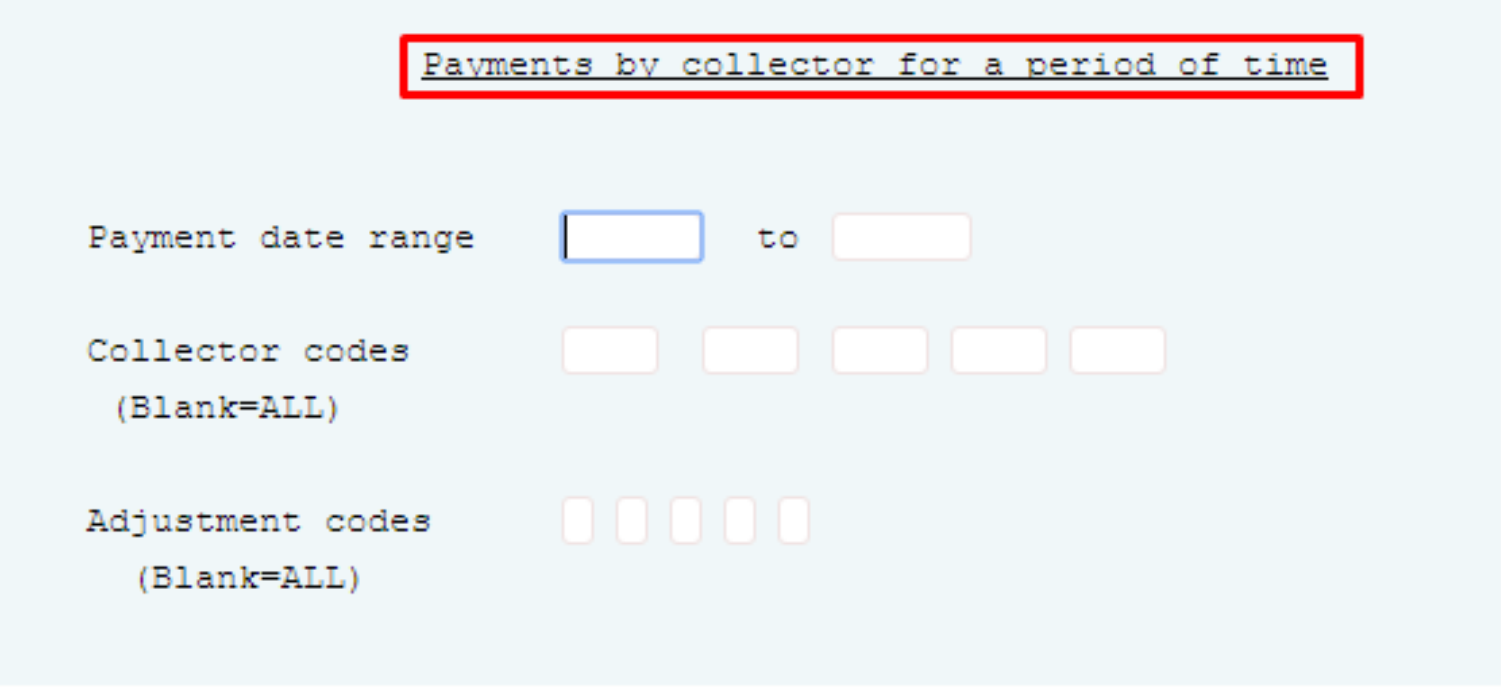
Collection Reports: Payments By Collector For Period

RMEx Main Menu > Payment transaction menu > Payments by collector for period



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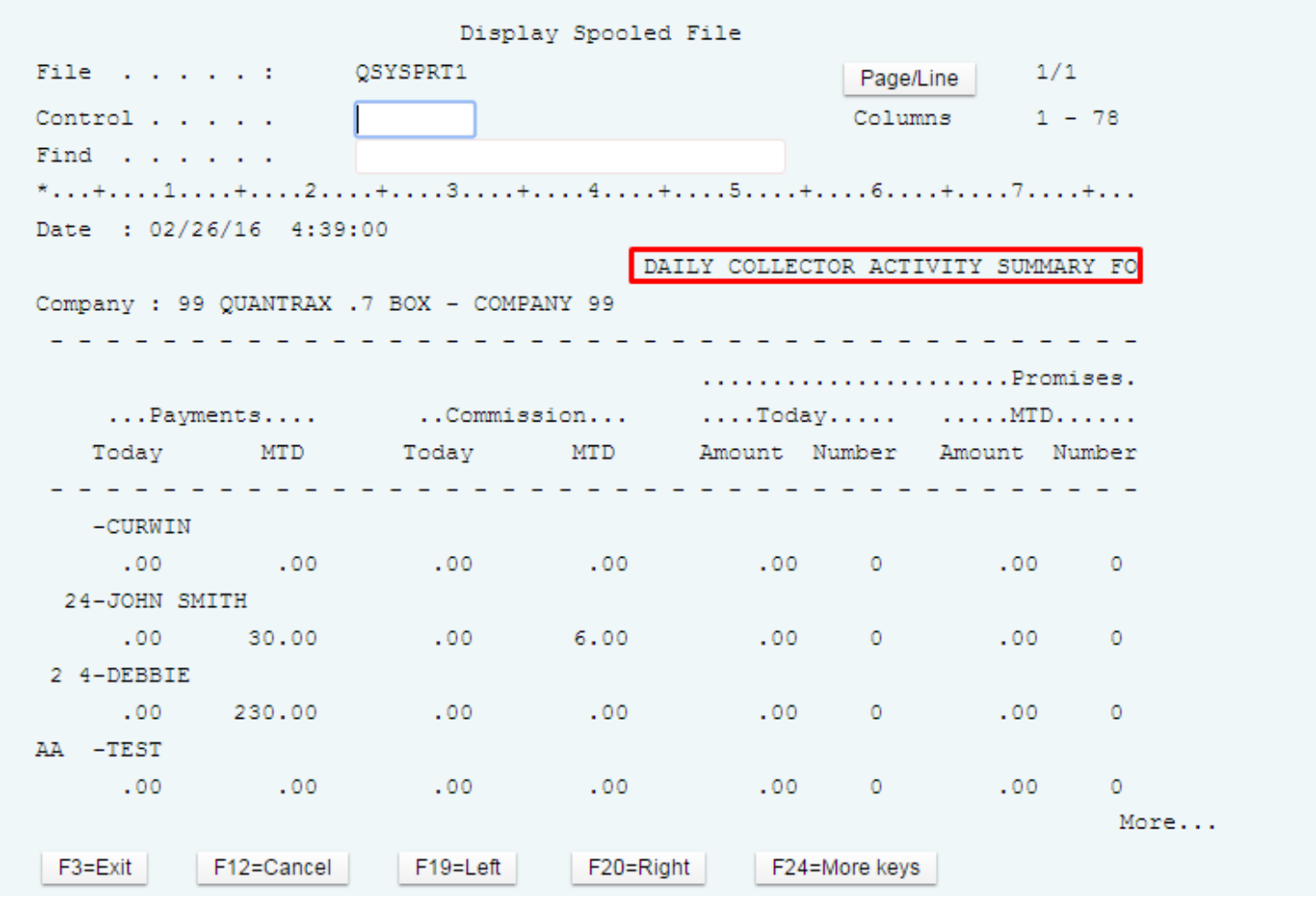
Collection Reports: Daily Collector Activity Summary

Management Menu > Collector set up/Analysis > Daily collector activity summary

- Shows new business, efforts and results in one report



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*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+...
Date  : 02/26/16  4:39:00
                                          DAILY COLLECTOR ACTIVITY SUMMARY FC
Company : 99 QUANTRAX .7 BOX - COMPANY 99
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
                                                    .....................Promises.
     ...Payments....       ..Commission...      ....Today.....    .....MTD......
    Today       MTD       Today       MTD      Amount  Number    Amount  Number
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
    -CURWIN
      .00        .00        .00        .00         .00     0         .00     0
  24-JOHN SMITH
      .00      30.00        .00       6.00         .00     0         .00     0
 2 4-DEBBIE
      .00     230.00        .00        .00         .00     0         .00     0
AA  -TEST
      .00        .00        .00        .00         .00     0         .00     0
                                                                        More...
 F3=Exit     F12=Cancel     F19=Left     F20=Right     F24=More keys
```

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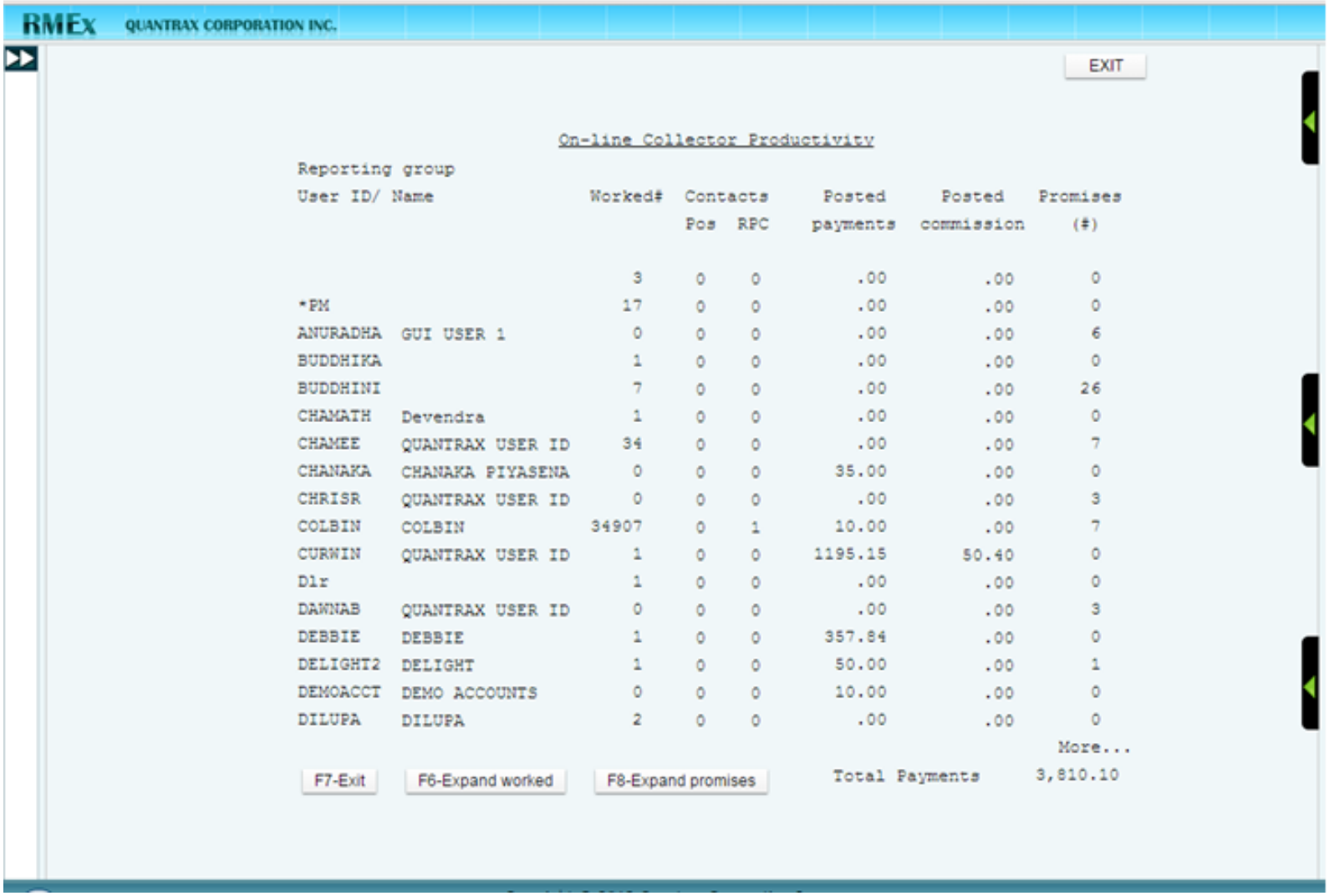
Collection Reports: Audit Accounts Worked

Management Menu > Smart Code/User Audit Options > Activity dashboard

- Displays the # of accounts worked, contacts etc.



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Collection Reports: Daily And Month-to-date Payment Report

Payment Transaction Menu > Payment reports for period > Daily Payment totals for a period (Inquiry)

- ❑ Know exactly where you are each day of the month

Payments for Jan-16

Day	Amount	Sub-total	Day	Amount	Sub-total
1			18		56,100.08
2			19		56,100.08
3			20	900.00	57,000.08
4			21	130.00	57,130.08
5			22		57,130.08
6	45,780.00	45,780.00	23		57,130.08
7		45,780.00	24		57,130.08
8		45,780.00	25	1,100.00	58,230.08
9		45,780.00	26		58,230.08
10	5,800.00	51,580.00	27		58,230.08
11	3,580.08	55,160.08	28	30.00	58,260.08
12		55,160.08	29		
13	40.00	55,200.08	30		
14	900.00	56,100.08	31		
15		56,100.08			
16		56,100.08		58,260.08	
17		56,100.08			

Money-Balance of month 26,550.35

At day 28 in 01/15 2,121.54

Currently at 2746 % at day 28

Total for 01/15 4,253.18

ENTER-Display commissions F7-Exit

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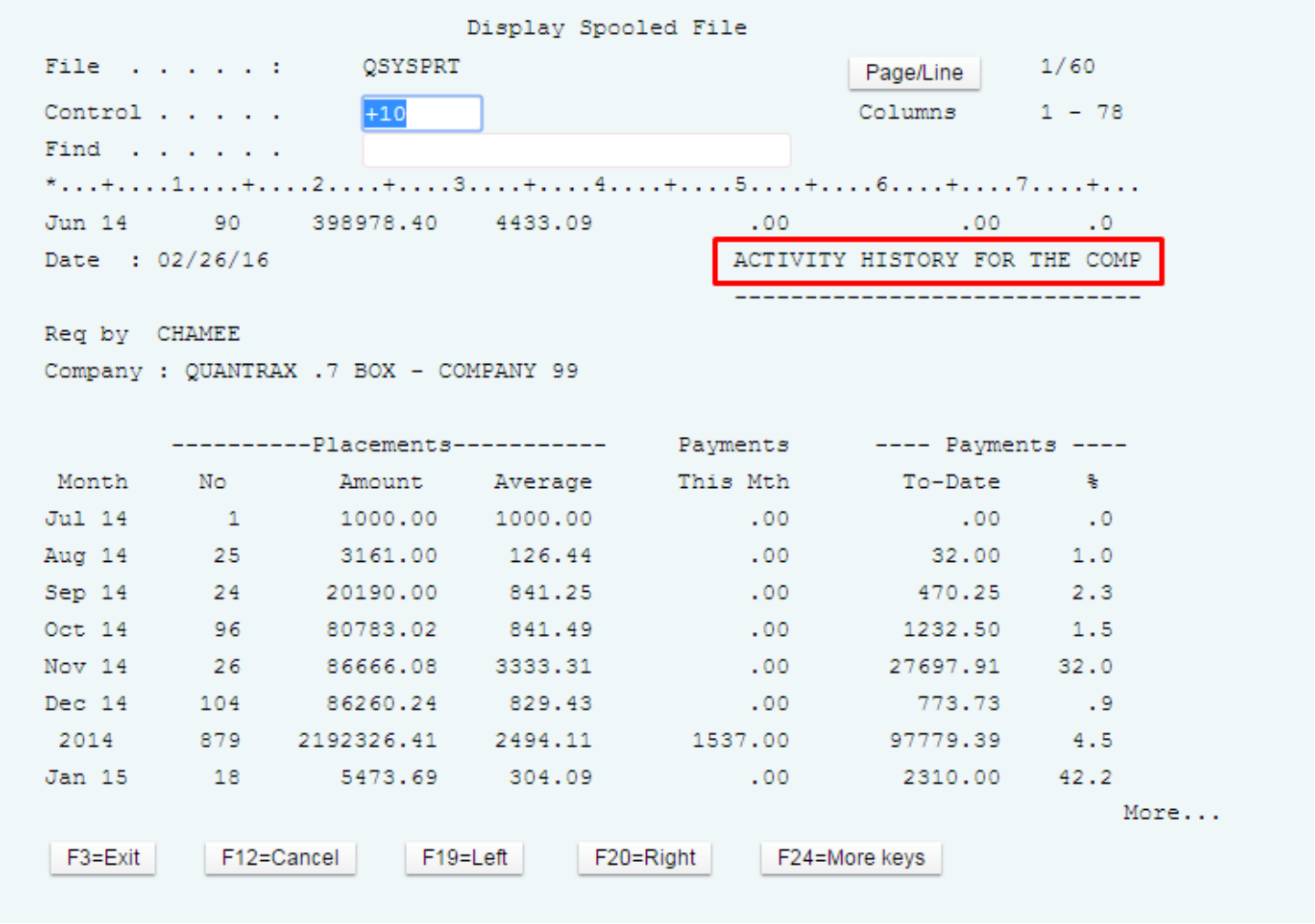
Collection Reports: Activity History By Company

Management Menu > Company statistics options > Activity history by Company



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Jun 14      90     398978.40    4433.09           .00            .00      .0
Date  : 02/26/16                                 ACTIVITY HISTORY FOR THE COMP
                                                 ----------------------------
Req by  CHAMEE
Company : QUANTRAX .7 BOX - COMPANY 99

         ----------Placements-----------     Payments      ---- Payments ----
 Month     No        Amount     Average      This Mth        To-Date      %
Jul 14       1       1000.00    1000.00           .00            .00      .0
Aug 14      25       3161.00     126.44           .00          32.00     1.0
Sep 14      24      20190.00     841.25           .00         470.25     2.3
Oct 14      96      80783.02     841.49           .00        1232.50     1.5
Nov 14      26      86666.08    3333.31           .00       27697.91    32.0
Dec 14     104      86260.24     829.43           .00         773.73      .9
 2014      879    2192326.41    2494.11       1537.00       97779.39     4.5
Jan 15      18       5473.69     304.09           .00        2310.00    42.2
                                                                          More...
F3=Exit    F12=Cancel    F19=Left    F20=Right    F24=More keys
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Determining The Information Needed To Manage Your Internal Operations And Results - Clients

Am I spending a lot on some clients, but not justifying the expense?

Who are my most profitable clients? What about a summary of payments for the month?

How quickly are you recovering money for your clients?

Do you have the ability to look at some of your key clients and monitor them frequently?

Where are your future payments coming from (e.g. checks, credit cards)

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Reports To View Activity by Client

- Analysis Of Payments Pending
- Company Statistics
  - Placement History By Company
- Executive Dashboard Options
- Account List For Audit
- Payments By Client For Period
- Client Comparison Reports

Your RMEx solution. . . . .

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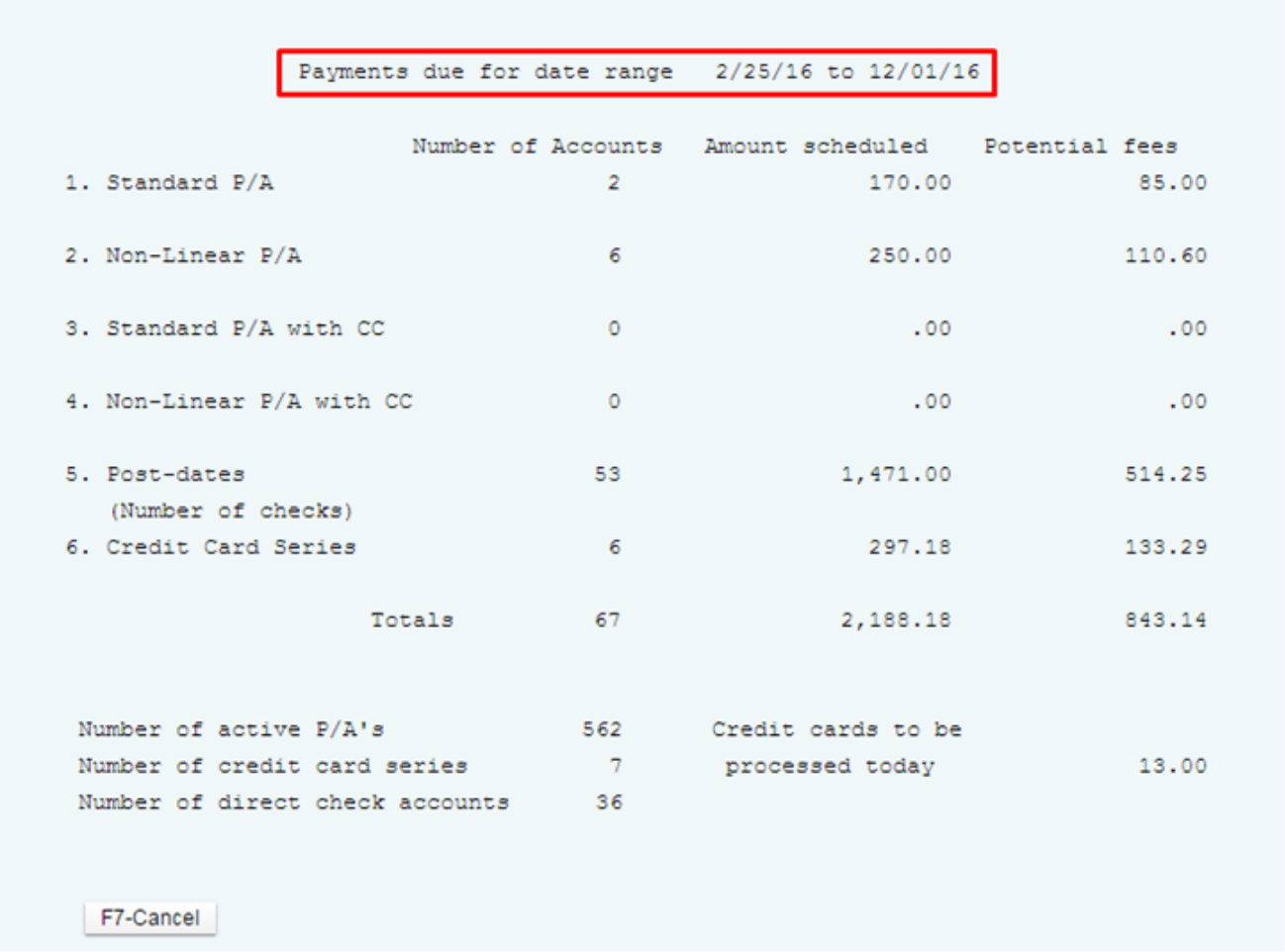
Internal Client Reports: What IS Expected For The Rest Of The Month - Analysis Of Payments Pending

Payment Transaction Menu > Payment reports for period > Analysis of pending payments

- Shows where your future payments are coming from (checks, credit cards, etc.)



Payments due for date range 2/25/16 to 12/01/16

	Number of Accounts	Amount scheduled	Potential fees
1. Standard P/A	2	170.00	85.00
2. Non-Linear P/A	6	250.00	110.60
3. Standard P/A with CC	0	.00	.00
4. Non-Linear P/A with CC	0	.00	.00
5. Post-dates (Number of checks)	53	1,471.00	514.25
6. Credit Card Series	6	297.18	133.29
Totals	67	2,188.18	843.14

Number of active P/A's	562	Credit cards to be processed today	13.00
Number of credit card series	7		
Number of direct check accounts	36		

F7-Cancel

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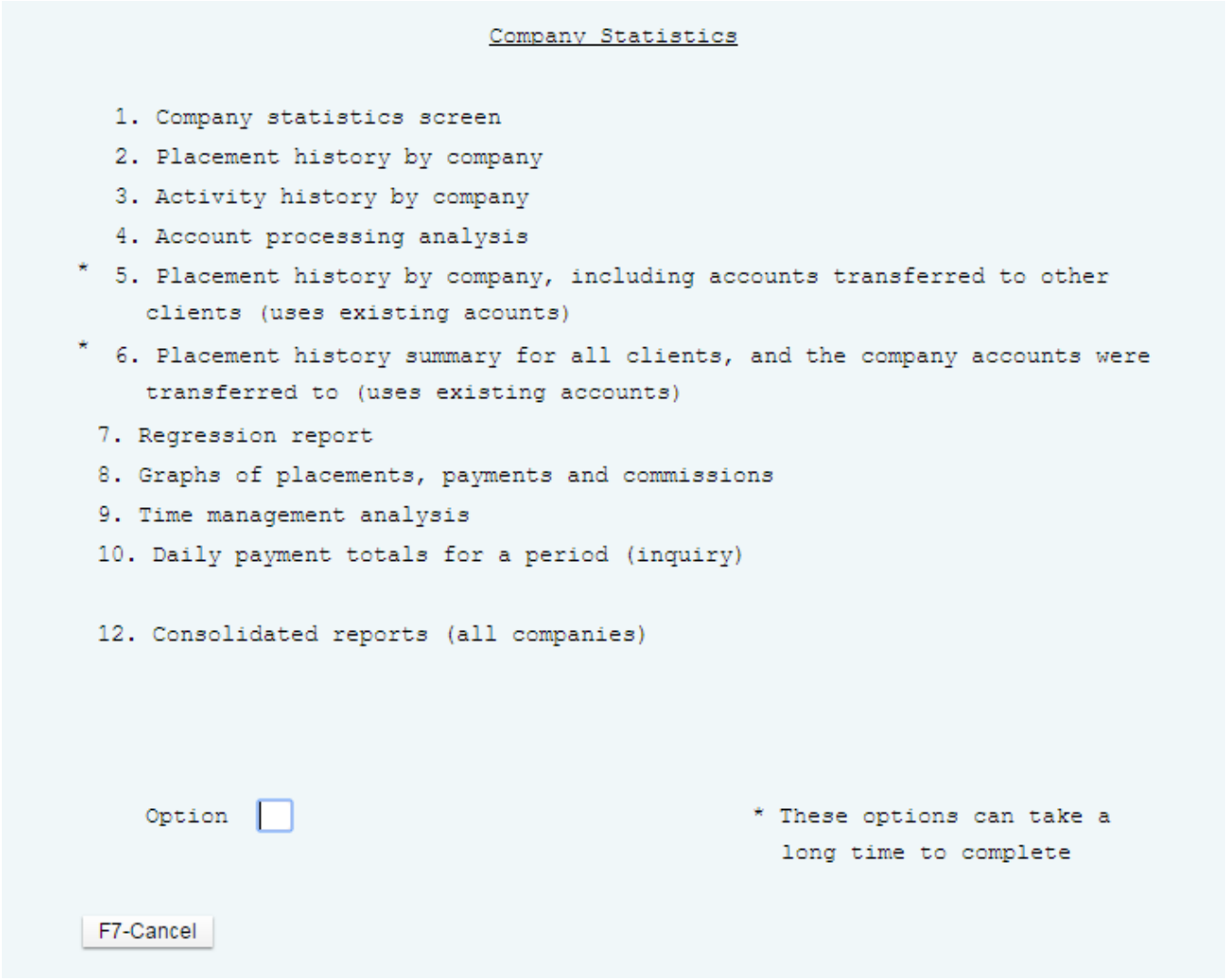
Internal Client Reports: Company Statistics

Management Menu > Company statistics options

- Displays company information, placement history, activity history, daily payment totals



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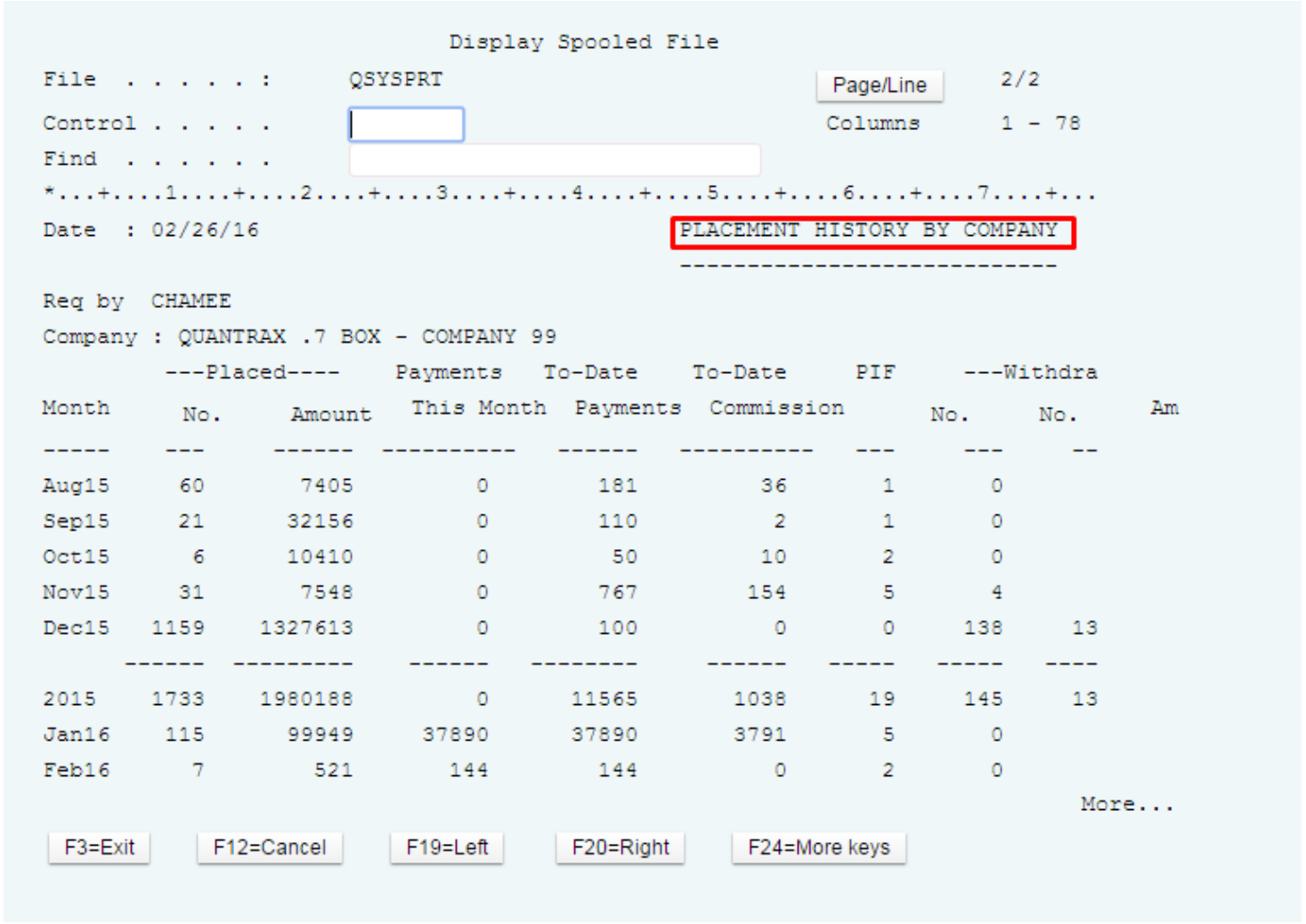
Internal Client Reports: Placement History By Company

Management Menu > Company statistics options >Placement history by Company



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Date : 02/26/16 PLACEMENT HISTORY BY COMPANY

Req by CHAMEE

Company : QUANTRAX .7 BOX - COMPANY 99

Month	---Placed---- No.	Amount	Payments This Month	To-Date Payments	To-Date Commission	PIF No.	---Withdra No.	Am
Aug15	60	7405	0	181	36	1	0	
Sep15	21	32156	0	110	2	1	0	
Oct15	6	10410	0	50	10	2	0	
Nov15	31	7548	0	767	154	5	4	
Dec15	1159	1327613	0	100	0	0	138	13
2015	1733	1980188	0	11565	1038	19	145	13
Jan16	115	99949	37890	37890	3791	5	0	
Feb16	7	521	144	144	0	2	0	

More...

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys

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Internal Client Reports: Executive Dashboard Options

RMEx Main menu > (right- bottom) >Executive Dashboard

- Displays what individual agents are doing
- Shows what was generated in terms of promises and “money” (checks and credit cards)
- Shows what is happening now with effort, money promised on the phone and payments posted, etc.

Executive Dashboard

Widget Customization

Select
Add
Number worked(#)
Money promised($)
Promises(#)
All cash
Remove

Filter data

Reporting group code
ALL
Select only collectors (for accounts worked)
No
Select only collectors
No
Refine

8,960 CHAMEE NUMBER WORKED(#)	1,450.00 CHAMEE MONEY PROMISED($)	20 CHAMEE PROMISES(#)	20,445 INTGUI3 ALL CASH

Agent Productivity

Name	Collector	Number worked(#)	Positive contacts	RPC	Attempts	Payments posted	Promises(#)	Money promises(#)	Money promised($)	Total promised($)	All cash
BUDDHIKA NUWAN	BUDDHIKA	8,433	0	0	0	0.00	0	0	88.00	0.00	0.00
CHAMEE	CHAMEE	8,960	560	250	1	88,888.80	20	6	1,450.00	555.55	150.00
CLERICAL PERSON	CLERICAL	0	0	0	0	102.00	0	0	0.00	0.00	0.00
COLBIN	COLBIN	8,959	6	6	428	30.00	0	48	1,381.00	9,455.22	2,109.22
AMANDA & MARGARET	CURWIN	0	0	0	0	1,077,132.25	0	1	0.00	10.00	0.00
DAVID	DAVID	6,281	0	0	1	160.14	0	0	75.00	80.00	75.00
DEBBIE	DEBBIE	15	0	0	1	2,361.31	0	9	230.00	285.00	280.00
DELIGHT TEST	DELIGHT2	1	0	0	0	675.00	0	2	11.00	11.00	11.00
EMIL	EMIL	22	0	0	1	0.00	0	26	1,267.00	2,172.00	2,367.00
HESHINI	HESHINI	19	0	0	5	0.00	0	10	577.00	3,468.23	2,068.23
GUI USER	INTGUI	0	0	0	0	140.00	0	0	0.00	0.00	0.00
JOSEPH LIBO	INTGUI3	63	0	0	26	0.00	0	27	257.00	20,620.00	20,445.00
BILL COLLECTOR	JAMIE	9	0	0	3	0.00	0	5	525.00	625.00	525.00
ISABELLE MANCUSO	KRISHAN	1	0	0	0	15,550.25	0	15	1,370.23	1,570.23	1,570.23
TEST	MAYT	0	0	0	0	112.00	0	0	0.00	0.00	0.00
BILL COLLECTOR	PATL	0	0	0	0	30.00	0	0	0.00	0.00	0.00
		33,141	566	256	838	1,185,526.75	20	161	7,399.95	39,610.23	30,236

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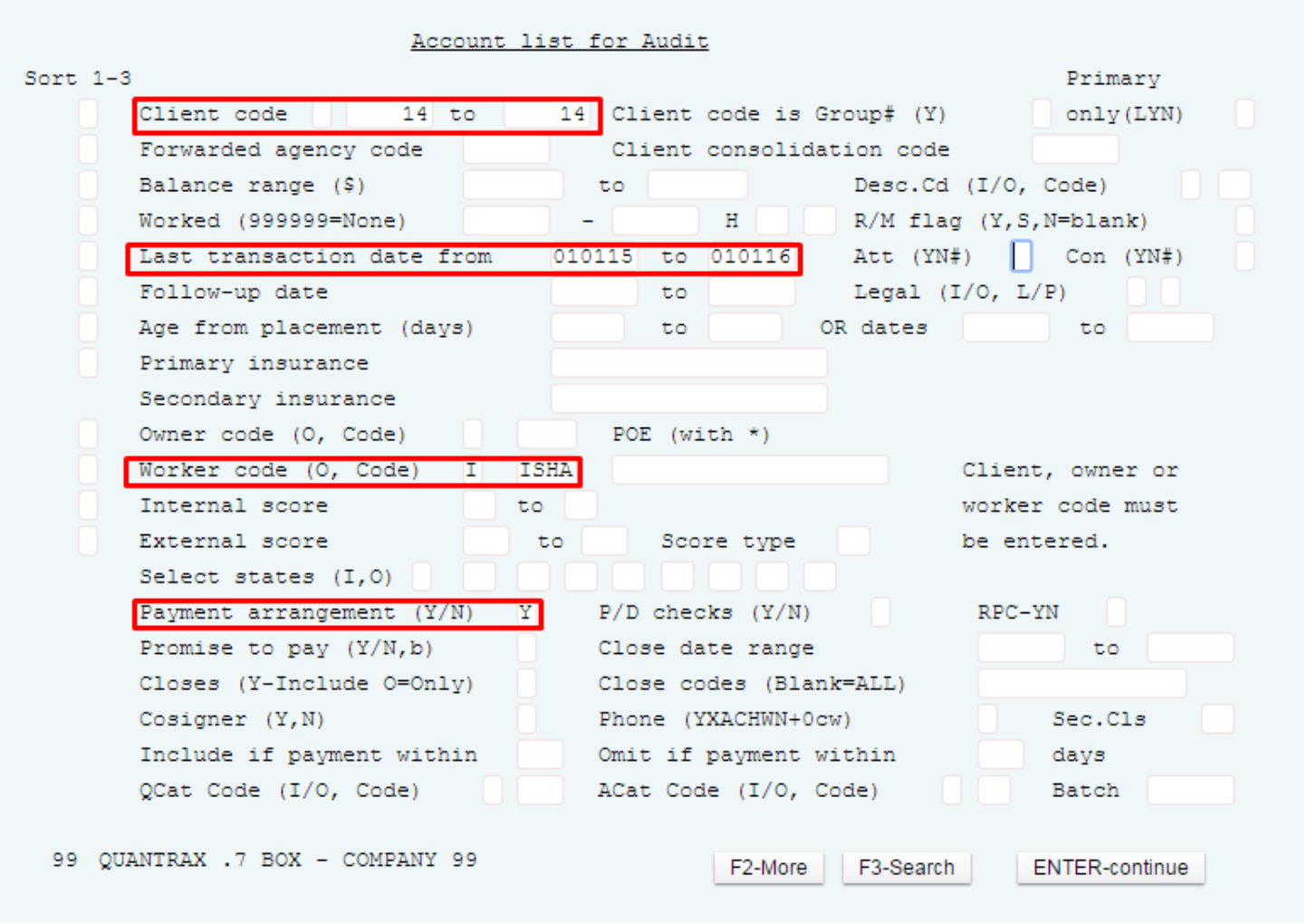
Internal Client Reports: Analyzing A Collector's Inventory - Account List For Audit

Management Menu > Smart Code/User audit options > Display accounts for audit

- Use to analyze your accounts and to target groups of accounts



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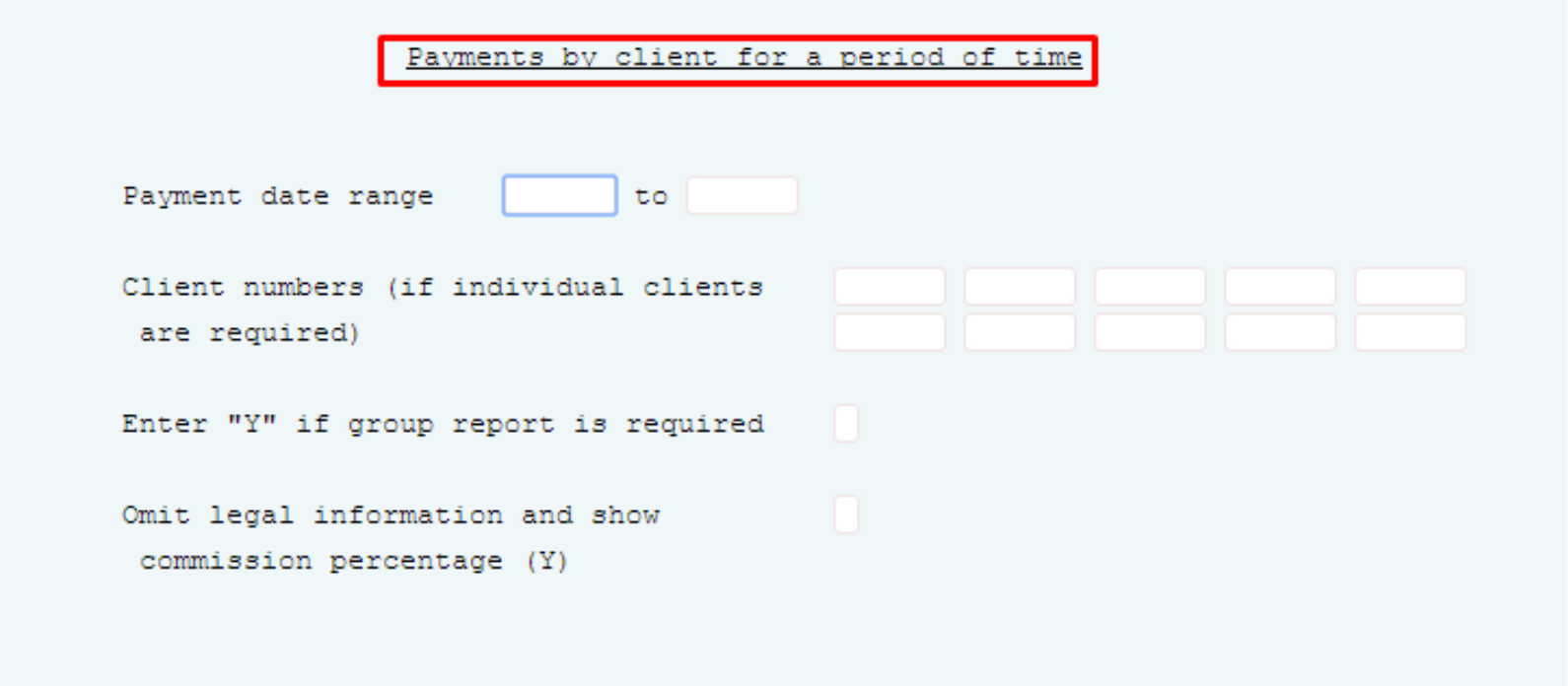
Internal Client Reports: Payments By Client For Period

RMEx Main Menu > Payment transaction menu > Payments by client for period



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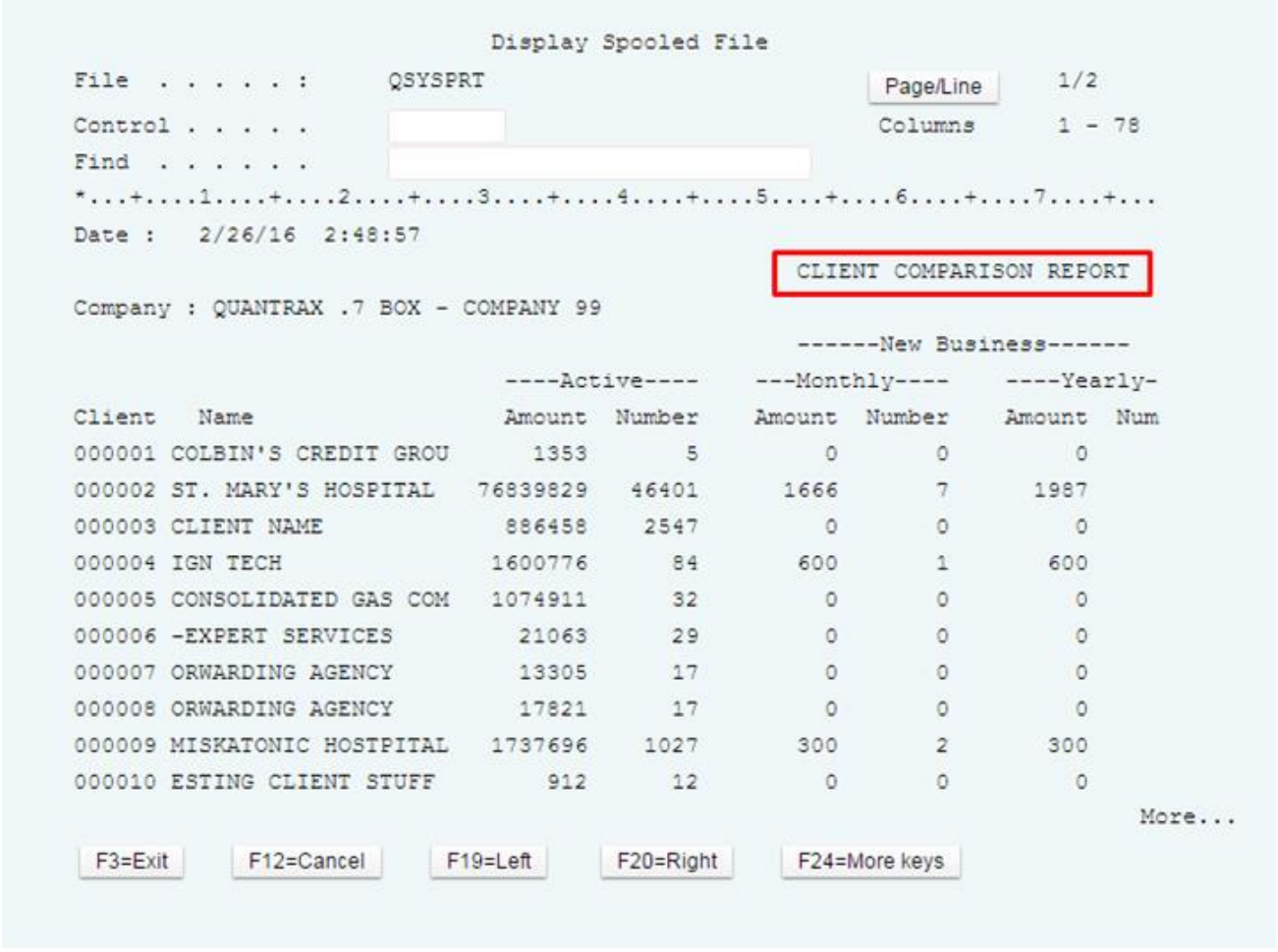
Internal Client Reports: Client Comparison Reports

RMEx Main Menu > Periodic reports menu > Client comparison

OR

RMEx Main Menu > Month-end processing menu > Month-end reports > Client comparison report



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Date : 2/26/16 2:48:57

CLIENT COMPARISON REPORT

Company : QUANTRAX .7 BOX - COMPANY 99

		----Active----		------New Business------ ---Monthly----		----Yearly-	
Client	Name	Amount	Number	Amount	Number	Amount	Num
000001	COLBIN'S CREDIT GROU	1353	5	0	0	0	
000002	ST. MARY'S HOSPITAL	76839829	46401	1666	7	1987	
000003	CLIENT NAME	886458	2547	0	0	0	
000004	IGN TECH	1600776	84	600	1	600	
000005	CONSOLIDATED GAS COM	1074911	32	0	0	0	
000006	-EXPERT SERVICES	21063	29	0	0	0	
000007	ORWARDING AGENCY	13305	17	0	0	0	
000008	ORWARDING AGENCY	17821	17	0	0	0	
000009	MISKATONIC HOSTPITAL	1737696	1027	300	2	300	
000010	ESTING CLIENT STUFF	912	12	0	0	0	

More...

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys

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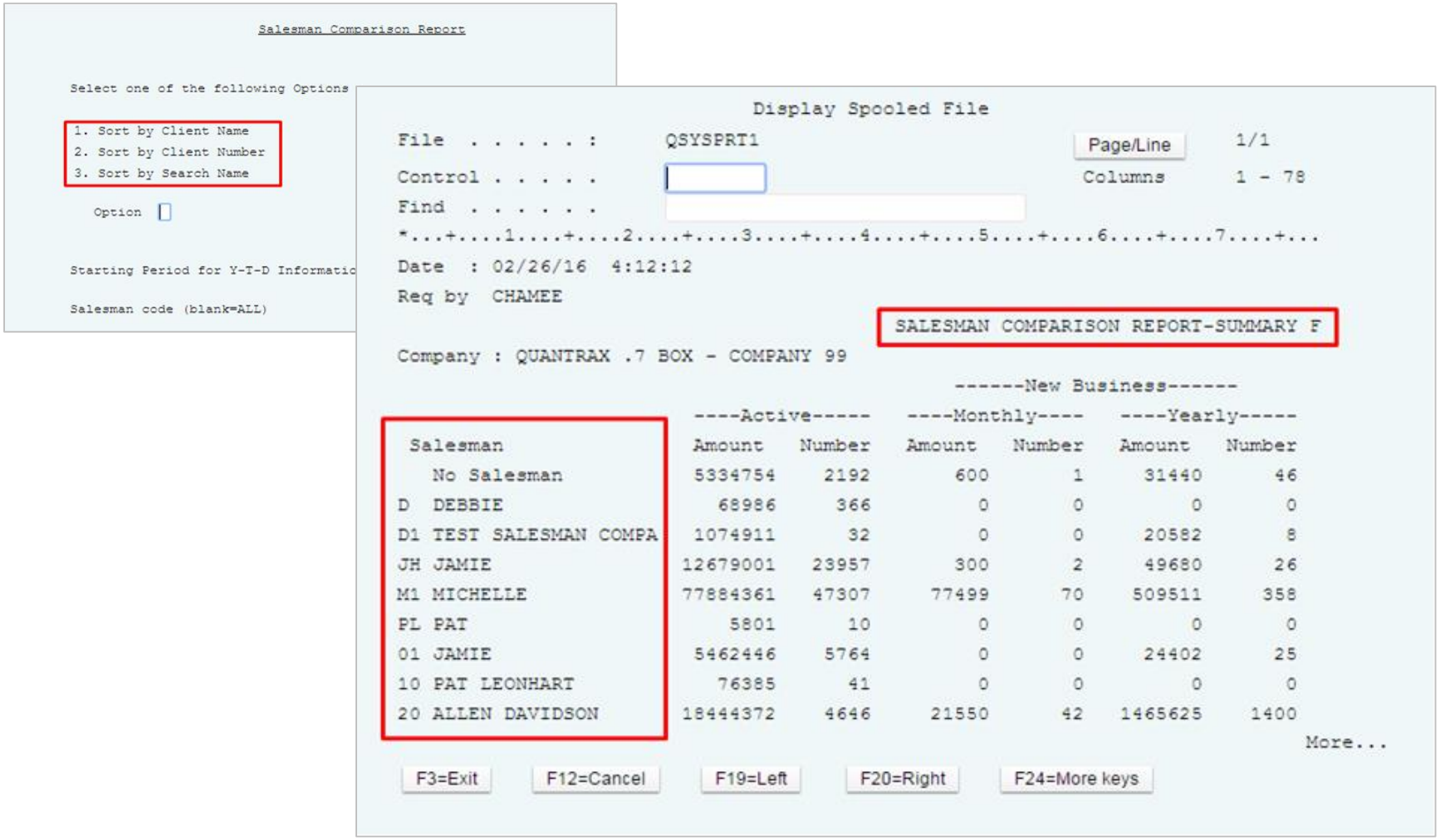
Internal Client Reports: Salesman Comparison Report

RMEx Main Menu > Month-end processing menu > Month-end reports > Salesman comparison report

- Ability to sort by various options



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Internal Client Reports: Collector Comparison Report

RMEx Main Menu > Periodic reports menu > Collector comparison

OR

RMEx Main Menu > Month-end processing menu > Month-end reports > Collector comparison report

```
                              Display Spooled File
File  . . . . . :     QSYSPRT                          Page/Line      1/2
Control . . . . .                                      Columns        1 - 78
Find  . . . . . .
*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+...
Date  : 02/26/16  3:57:05
Req by  CHAMEE
                                     COLLECTOR COMPARISON FROM 01/01/16 TO 0
Company : QUANTRAX .7 BOX - COMPANY 99

                                    -------Agency--------       ------Employee
 Collector                          Payment     Commission       Payment     Com
BCPL PATS ACCOUNTS                  1000.00       1234.51        1000.00

DMB  DAVID                           721.00           .00         721.00

NB   NEW BUSINESS                     20.00          2.47          20.00

   TOTAL WITHOUT FWD.AGENCY         1741.00       1236.98        1741.00
   FWD.AGENCY TOTAL                                                 .00
Date  : 02/26/16  3:57:05
                                                                    More...
 F3=Exit     F12=Cancel     F19=Left     F20=Right     F24=More keys
```

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Exercises – Internal Reports To Manage Your Productivity

In your system, use COMPANY 98

Print and review the following reports:

1. Daily Collector Activity report – What information does this report provide?
2. Smart code analysis – how can this report be useful?
3. Time management analysis – what can you learn from this report?
4. Collector Comparison – What information does this report provide and how is this useful?

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RMEx Management Training: Internal Reports To Manage Your Productivity

Thank you!

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