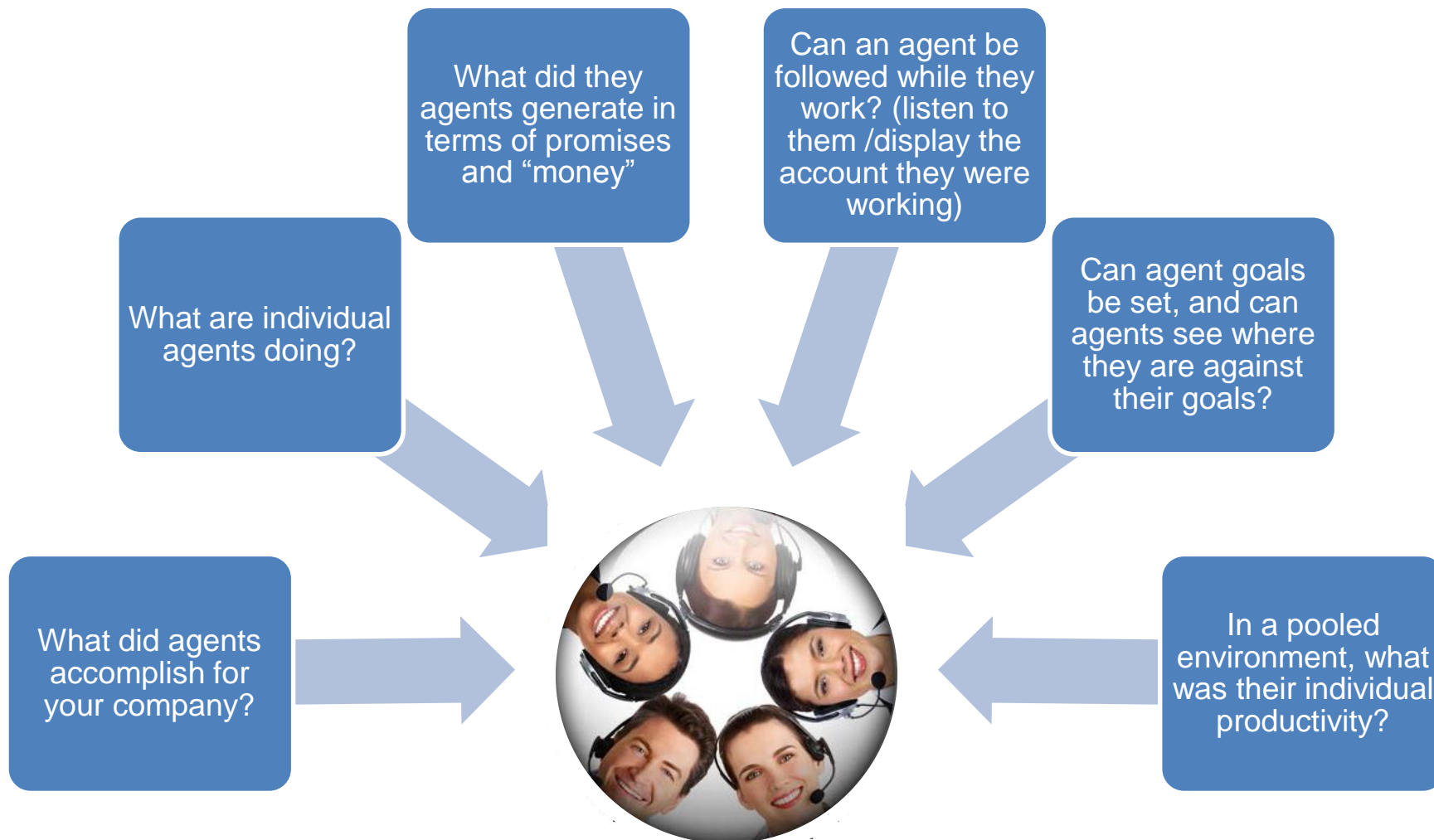


RME_x Management Training: Internal Reports To Manage Your Productivity



- 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

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



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 RME_x solution.

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

RME_x 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

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

RME.x Main Menu > Management Menu > Account processing review > User productivity - Smart code analysis

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

Display Spooled File

File : QSYSVRT Page/Line 1/2
Control : Columns 1 - 78
Find :
*...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...
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

Code	Description	Debtors	Attempts	-----Type of Activity-----		
				Positive Contacts	Other Contacts	Other 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



Agent Reports: Time Management Reports

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

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

Display Spooled File

File : QSYSPRT Page/Line 1/2
 Control : Columns 1 - 78
 Find :
 *...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...
 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-----				
From	To	Debtors	Attempts	Positive Contacts	Other Contacts	Other 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...



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**

Audit A User (Accounts Worked)

User ID

Type of processing (Leave processing type, QCat and time frame blank
QCat to display all accounts in the order worked.)
Time frame
Prior day (Y) (Only valid when all accounts are displayed)

1. Broken promises
2. Dated follow-up
3. New business
4. Accounts with work phones
5. Accounts with home phones only
6. No phones
7. Hot accounts
8. Non-collector accounts

Starting record number

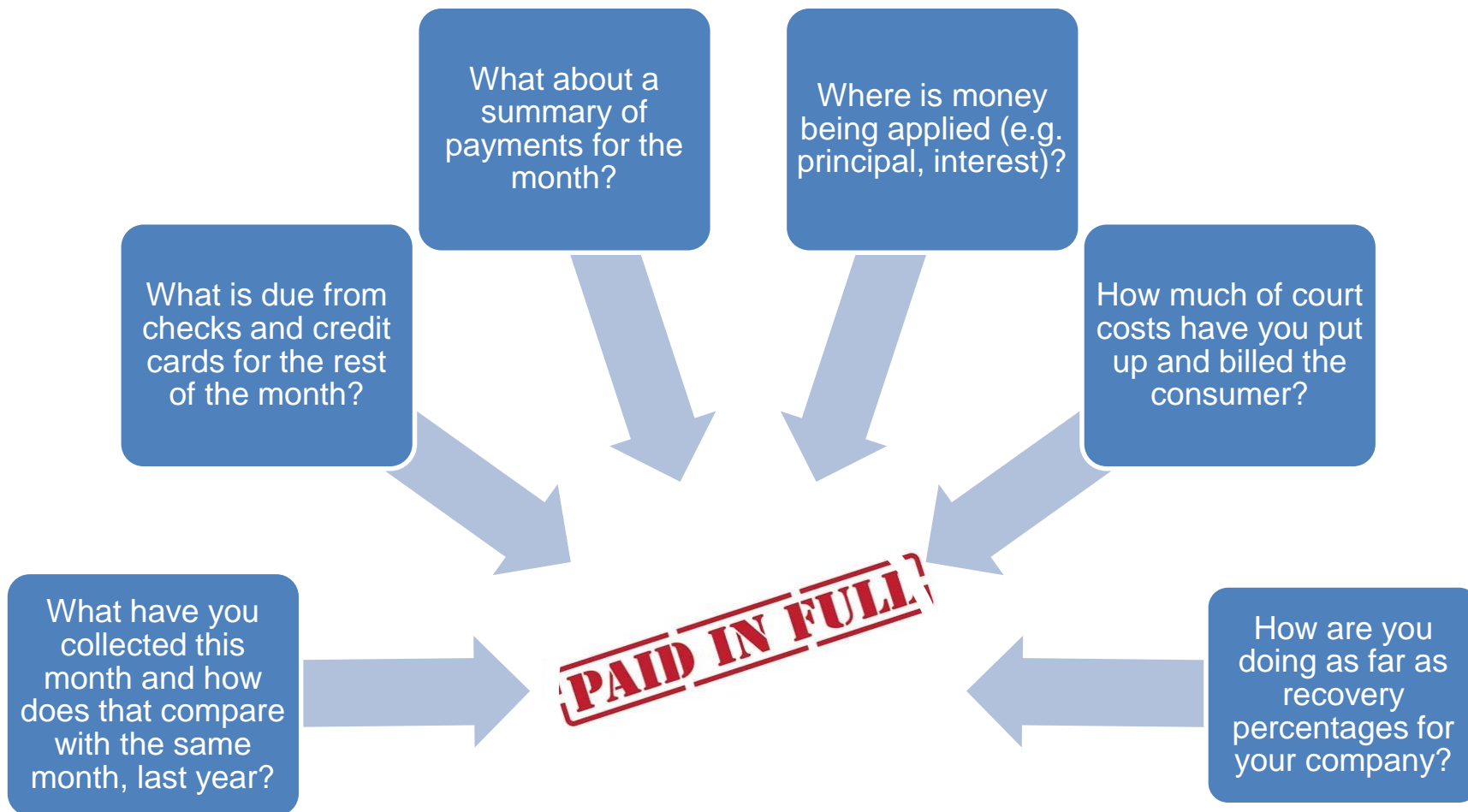
-- Account being worked --

Date worked 2/25/16
Start time 23:42:07
Link number 99-001904373
Time spent N/A

ENTER-Display account

F7-Exit

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



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 RME.x solution.



Collection Reports: Daily Payment Report Options

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

Daily Payment Report Options

1. Payment Detail list
2. Payment Summary
3. Payments by Collector
4. Payments by Client
5. Print and delete Credit Card transactions
7. Payment Summary without Trust Account Analysis

Select an Option

Daily Payments By Collector

1. Standard
2. No commission, with payment arrangement Information and link balance
3. Graph for payments
4. Graph for commissions

Select an option



Collection Reports: Payments By Collector For Period

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

Payments by collector for a period of time

Payment date range

to

Collector codes

(Blank=ALL)

Adjustment codes

(Blank=ALL)



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

Display Spooled File

File : QSYSPRT1 Page/Line 1/1

Control Columns 1 - 78

Find

*...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...

Date : 02/26/16 4:39:00

DAILY COLLECTOR ACTIVITY SUMMARY FO

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



Collection Reports: Audit Accounts Worked

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

- ☐ Displays the # of accounts worked, contacts etc.

RME _x QUANTRAX CORPORATION INC.							
EXIT							
<u>On-line Collector Productivity</u>							
Reporting group							
User ID/ Name	Worked#	Contacts	Posted	Posted	Posted	Posted	Promises
		Pos	RPC	payments	commission		(#)
	3	0	0	.00	.00		0
*PM	17	0	0	.00	.00		0
ANURADHA GUI USER 1	0	0	0	.00	.00		6
BUDDHIKA	1	0	0	.00	.00		0
BUDDHINI	7	0	0	.00	.00		26
CHAMATH Devendra	1	0	0	.00	.00		0
CHAMEE QUANTRAX USER ID	34	0	0	.00	.00		7
CHANAKA CHANAKA PIYASENA	0	0	0	35.00	.00		0
CHRISR QUANTRAX USER ID	0	0	0	.00	.00		3
COLBIN COLBIN	34907	0	1	10.00	.00		7
CURWIN QUANTRAX USER ID	1	0	0	1195.15	50.40		0
Dlx	1	0	0	.00	.00		0
DAWNAB QUANTRAX USER ID	0	0	0	.00	.00		3
DEBBIE DEBBIE	1	0	0	357.84	.00		0
DELIGHT2 DELIGHT	1	0	0	50.00	.00		1
DEMOACCT DEMO ACCOUNTS	0	0	0	10.00	.00		0
DILUPA DILUPA	2	0	0	.00	.00		0
							More...
F7-Exit		F6-Expand worked		F8-Expand promises		Total Payments	3,810.10

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					
<u>Day</u>	<u>Amount</u>	<u>Sub-total</u>	<u>Day</u>	<u>Amount</u>	<u>Sub-total</u>
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

Collection Reports: Activity History By Company

Management Menu > Company statistics options > Activity history by Company

Display Spooled File

File : QSYSVRT Page/Line 1/60
 Control : Columns 1 - 78
 Find :

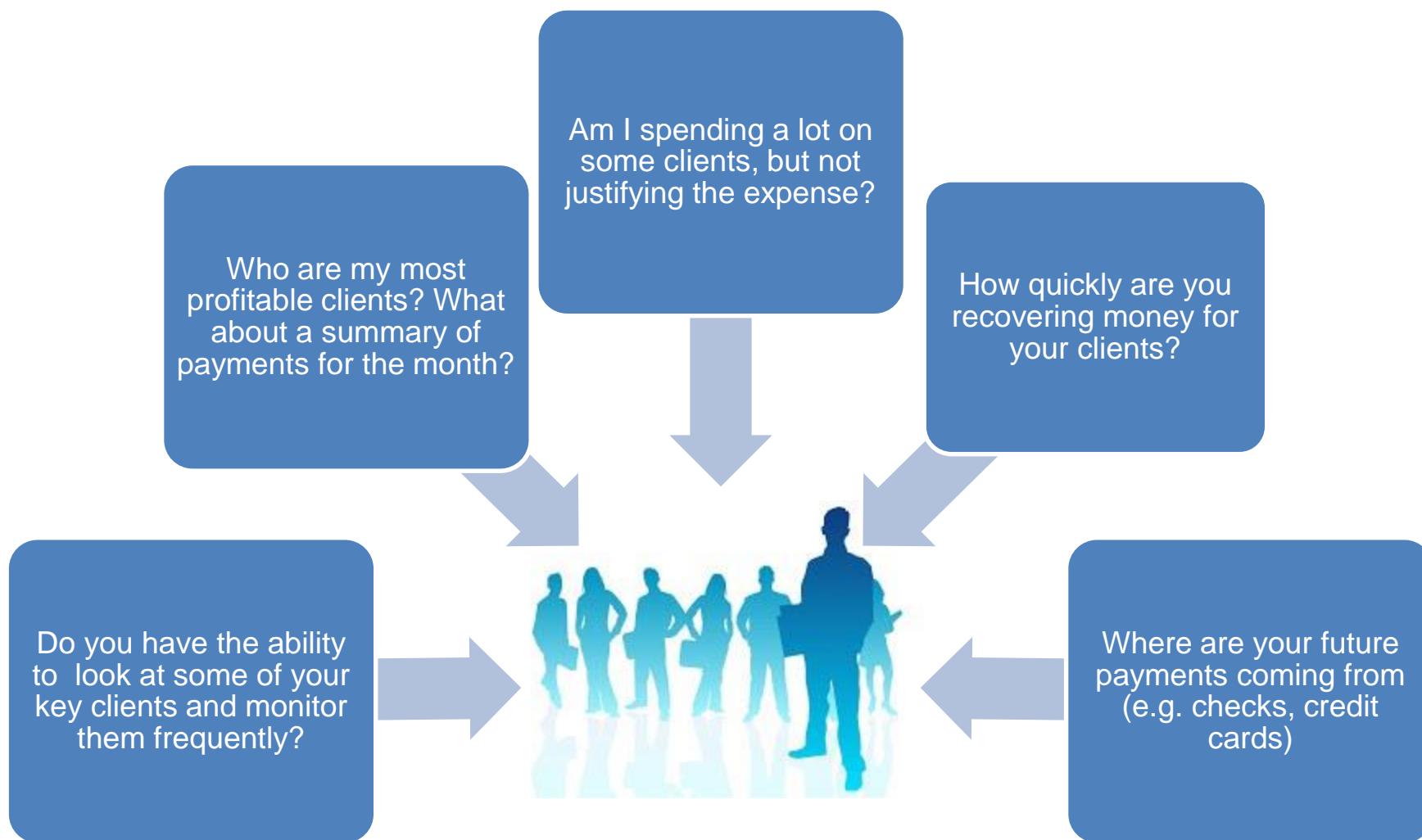
*...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...
 Jun 14 90 398978.40 4433.09 .00 .00 .0
 Date : 02/26/16 ACTIVITY HISTORY FOR THE COMP

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...

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



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 RME.x solution.

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	
Number of credit card series	7	processed today	13.00
Number of direct check accounts	36		

F7-Cancel



Internal Client Reports: Company Statistics

Management Menu > Company statistics options

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

Company Statistics

1. Company statistics screen
2. Placement history by company
3. Activity history by company
4. Account processing analysis
- * 5. Placement history by company, including accounts transferred to other clients (uses existing accounts)
- * 6. Placement history summary for all clients, and the company accounts were transferred to (uses existing accounts)
7. Regression report
8. Graphs of placements, payments and commissions
9. Time management analysis
10. Daily payment totals for a period (inquiry)

12. Consolidated reports (all companies)

Option

* These options can take a long time to complete

F7-Cancel

Internal Client Reports: Placement History By Company

Management Menu > Company statistics options > Placement history by Company

Display Spooled File

File : QSYSPRT Page/Line 2/2
 Control : Columns 1 - 78
 Find :
 *...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...
 Date : 02/26/16 PLACEMENT HISTORY BY COMPANY


Req by CHAMEE
 Company : QUANTRAX .7 BOX - COMPANY 99

Month	---Placed---		Payments	To-Date	To-Date	PIF	---Withdra		Am
	No.	Amount	This Month	Payments	Commission		No.	No.	
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...



Internal Client Reports: Executive Dashboard Options

RME_x 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.

RECEIVABLES MANAGEMENT EXPERT

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QUANTRAX SUPPORT INFORMATION

Holiday Schedule Setup

Collector & Client rankings

Company Analysis

Executive Dashboard

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

Agent Productivity

Name	Collector	Number worked(#)	Positive contacts	RPC	Attempts	Payments posted	Promises(#)	Money promises(#)	Money promised(\$)	Total promised(\$)	All cash
BUDDHIKA NLMVAN	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	265.00	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	INTGUI3	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

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

Account list for Audit

Sort 1-3

<input type="checkbox"/>	Client code	<input type="text" value="14"/>	to	<input type="text" value="14"/>	Client code is Group# (Y)	<input type="checkbox"/>	only (LYN)	<input type="checkbox"/>
<input type="checkbox"/>	Forwarded agency code	<input type="text"/>			Client consolidation code	<input type="text"/>		
<input type="checkbox"/>	Balance range (\$)	<input type="text"/>	to	<input type="text"/>	Desc.Cd (I/O, Code)	<input type="text"/>		<input type="checkbox"/>
<input type="checkbox"/>	Worked (999999=None)	<input type="text"/>	-	<input type="text"/>	H	<input type="checkbox"/>	R/M flag (Y,S,N=blank)	<input type="checkbox"/>
<input type="checkbox"/>	Last transaction date from	<input type="text" value="010115"/>	to	<input type="text" value="010116"/>	Att (YN#)	<input type="checkbox"/>	Con (YN#)	<input type="checkbox"/>
<input type="checkbox"/>	Follow-up date	<input type="text"/>	to	<input type="text"/>	Legal (I/O, L/P)	<input type="text"/>		<input type="checkbox"/>
<input type="checkbox"/>	Age from placement (days)	<input type="text"/>	to	<input type="text"/>	OR dates	<input type="text"/>	to	<input type="text"/>
<input type="checkbox"/>	Primary insurance	<input type="text"/>						
<input type="checkbox"/>	Secondary insurance	<input type="text"/>						
<input type="checkbox"/>	Owner code (O, Code)	<input type="text"/>			POE (with *)	<input type="text"/>		
<input type="checkbox"/>	Worker code (O, Code)	<input type="text" value="I"/>		<input type="text" value="ISHA"/>			Client, owner or worker code must be entered.	
<input type="checkbox"/>	Internal score	<input type="text"/>	to	<input type="text"/>				
<input type="checkbox"/>	External score	<input type="text"/>	to	<input type="text"/>	Score type	<input type="text"/>		
<input type="checkbox"/>	Select states (I,O)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Payment arrangement (Y/N)	<input type="text" value="Y"/>			P/D checks (Y/N)	<input type="checkbox"/>	RPC-YN	<input type="checkbox"/>
<input type="checkbox"/>	Promise to pay (Y/N,b)	<input type="text"/>			Close date range	<input type="text"/>	to	<input type="text"/>
<input type="checkbox"/>	Closes (Y-Include O=Only)	<input type="text"/>			Close codes (Blank=ALL)	<input type="text"/>		
<input type="checkbox"/>	Cosigner (Y,N)	<input type="text"/>			Phone (YXACHWN+0cw)	<input type="text"/>	Sec.Cls	<input type="checkbox"/>
<input type="checkbox"/>	Include if payment within	<input type="text"/>			Omit if payment within	<input type="text"/>	days	
<input type="checkbox"/>	QCAt Code (I/O, Code)	<input type="text"/>			ACat Code (I/O, Code)	<input type="text"/>	Batch	<input type="text"/>

99 QUANTRAX .7 BOX - COMPANY 99

Internal Client Reports: Payments By Client For Period

RME.x Main Menu > Payment transaction menu > Payments by client for period

Payments by client for a period of time

Payment date range to

Client numbers (if individual clients are required)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter "Y" if group report is required

Omit legal information and show commission percentage (Y)

RME.x Main Menu > Periodic reports menu > Client comparison

OR

RME.x Main Menu > Month-end processing menu > Month-end reports > Client comparison report

Display Spooled File

File : QSYSVRT Page/Line 1/2
 Control : Columns 1 - 78
 Find :
 *...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...
 Date : 2/26/16 2:48:57

CLIENT COMPARISON REPORT

Company : QUANTRAX .7 BOX - COMPANY 99

Client Name	----Active----		---Monthly---		----Yearly----	
	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



Internal Client Reports: Salesman Comparison Report

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

- ☐ Ability to sort by various options

Salesman Comparison Report

Select one of the following Options

1. Sort by Client Name
2. Sort by Client Number
3. Sort by Search Name

Option

Starting Period for Y-T-D Information

Salesman code (blank=ALL)

Display Spooled File

File : QSYSPRT1 Page/Line 1/1

Control : Columns 1 - 78

Find :

*...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...

Date : 02/26/16 4:12:12

Req by CHAMEE

SALESMAN COMPARISON REPORT-SUMMARY F

Company : QUANTRAX .7 BOX - COMPANY 99

Salesman	----Active-----		----Monthly----		----Yearly-----	
	Amount	Number	Amount	Number	Amount	Number
No Salesman	5334754	2192	600	1	31440	46
D DEBBIE	68986	366	0	0	0	0
D1 TEST SALESMAN COMPA	1074911	32	0	0	20582	8
JH JAMIE	12679001	23957	300	2	49680	26
M1 MICHELLE	77884361	47307	77499	70	509511	358
PL PAT	5801	10	0	0	0	0
01 JAMIE	5462446	5764	0	0	24402	25
10 PAT LEONHART	76385	41	0	0	0	0
20 ALLEN DAVIDSON	18444372	4646	21550	42	1465625	1400

More...

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

Internal Client Reports: Collector Comparison Report

RME.x Main Menu > Periodic reports menu > Collector comparison

OR

RME.x Main Menu > Month-end processing menu > Month-end reports > Collector comparison report

Display Spooled File

File : QSYSVRT 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

Collector	-----Agency-----		-----Employee	
	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

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?

RMEx Management Training: Internal Reports To Manage Your Productivity

Thank you!