
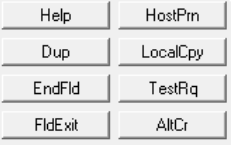


Setting Up A Company – Quick Reference Guide

<p>To add your company profiles: <i>System Control 1 > Company Information</i></p> <ul style="list-style-type: none"> • Adding Company Name • Adding Address • Adding Phone • Setting System Availability Times for Users To Login • Creating Special Access to Certain Areas In System 	<p>To setup system rules: <i>System Control 1 > System Parameters</i></p> <ul style="list-style-type: none"> • Defining system defaults • Creating system warnings for accounts • Customizing your company based on your process 	<p>To add users: <i>System Control 1 > System Security</i></p> <ul style="list-style-type: none"> • Creating users and giving them access to RMEx Menus
<p>To setup collector characteristics: <i>Management Menu > Collector Update</i></p> <ul style="list-style-type: none"> • Defining Collector Profile 	<p>To establish how accounts are worked: <i>System Control 1 > Collector Workgroups</i></p> <ul style="list-style-type: none"> • Setting up a non-pooled environment vs. pooled environment • Setting up credits for payment for one worker • Setting up credits for payments for multiple workers 	<p>To setup how payments are distributed: <i>System Control Menu 1 > Balance Types</i></p> <ul style="list-style-type: none"> • Setting Up Distribution Order • Defining Collector credit • Establishing what to include in Client Statements • Distributing Commissions, Interest and Forwarded agency commission
<p>To close accounts: <i>System Control 1 > Close Codes > Close Code</i> <i>System Control 1 > Close Codes > Secondary Close Code</i></p> <ul style="list-style-type: none"> • Setting up close codes • Active vs. Inactive closed accounts • Using secondary close codes 	<p>To adjust GUI screen size:</p> <ul style="list-style-type: none"> <input type="checkbox"/> CTRL+ (plus sign) makes screen larger <input type="checkbox"/> CTRL – (minus sign) makes screen smaller <input type="checkbox"/> CTRL and Mouse: Press CTRL and use the wheel scroll on your Mouse for quick sizing 	<p>To access RMEx’s Help: Place cursor in field in question then:</p> <ul style="list-style-type: none"> <input type="checkbox"/> In <u>GUI</u>, click <i>middle</i>, then click HELP <input type="checkbox"/> In <u>Green screen</u>, right-click, then select <i>Pad 2</i> and click HELP   <p>○ Pad 1 ◉ Pad 2</p>