Loading New Business Quick Reference Guide

To view account information:

Main Account Information:

- ***Inquiry menu > Account Detail Screen***

2nd Account Detail Screen:

- ***Inquiry Screen> Account Detail Screen > F10-Second Account Detail Screen Information***

Phone Numbers (Other Phones):

- ***Inquiry menu > Account inquiry> Account detail screen > Tab +***

Other Info (medical, insurance, etc.):

- ***Inquiry menu > Account inquiry> Account detail screen > F16 – Other Info***

Access Multiple Notes Screens:

- ***Inquiry menu > Account inquiry> Account detail screen > F11- Notes***

Additional Account Detail Options (**Tab Q**):

- ***Inquiry menu > Account inquiry> Account detail screen > Tab Q***

User-defined Windows (UDW):

- ***Inquiry menu > Account inquiry> Account detail screen > Tab Q > 5 - User-defined Windows***

Multiple Cosigners:

- ***Inquiry menu > Account inquiry> Account detail screen > Tab Q > 3- Multiple Cosigners***

To setup your client:

Client Profile/Demographics:

- ***Management Menu > Client update (Page 1)***

Client Statement Info, Fess and Commission Info:

- ***Management Menu > Client update (Page 2)***

Set up Placement Info, Collector Assignments and Standard Reports:

- ***Management Menu > Client update (Page 3)***

Creating a Contact Series:

- ***System Control 1 > Contact series definition***

Creating a Contact Series:

- ***System Control 1 > Contact series by client***

Creating a Contact Series:

- ***System Control 1 > Collector work groups***

Rules to Link Multiple Accounts for a Single Consumer:

- ***System Control 1 > Account linking parameters***

To work efficiently:

Adding Descriptive Info to Accounts:

- ***System Control 1 > Description codes***

Organizing Accounts to be Worked:

- ***System Control 2 > QCat codes***

Automating Processes:

- ***System Control 1 > Smart codes***

To load business:

Allowing Clients to Enter Account Info, Payments and Post:

-A manual process for smaller companies

- ***On-Line Client Menu***

Loading Business Through I-Load:

- ***Special options menu > I-Load Options***

Loading New Business with Custom Code:

-Clients send their details to **project@quantrax.com** in the form of a flat file or delimited file

-Quantrax will write new business loads according to the specification (after clarifying with the client) and will transmit the code to the client's modification library

-Clients with electronic loads, should convert them for the new system and test prior to the date of final conversion