Contacting Consumers
Quick Reference Guide

Quantrax CORPORATION | **RMEx** Receivables Management Expert

To manage phone numbers in RMEx – Account Detail screen

- *Inquiry menu > Account inquiry > Account Detail screen*
- (Other Phones) *Inquiry menu > Account inquiry > Account detail screen > Tab - ✛*
- (Linked Accounts) *Inquiry menu > Account inquiry > Account detail screen > F5-Linked Accounts > F24-Alt. Format*

To creates Queues -the Work Map (Account Processing):

- *Account processing menu > F2-Work Map*
- *Account processing menu > Work Map inquiry*

-Work Maps display the collector's accounts to be worked

-Consists of Processing Types = "buckets" that organize accounts

To creates QCat Codes):

- *System Control menu 2 > QCat Codes > By Company*
- *System Control menu 2 > QCat Codes > By User*

-Consists of Processing Types = "buckets" that organize accounts

-Processing Types can be broken down to have "sub-buckets" or categories called QCats (Queue Categories)

To setup a cell phone scrubbing:

System Control menu 3 > Cell phone scrubbing option

To create a Contact Series:

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

To setup Queue Consolidation:

- *Management menu > I-Tel menu > Queue consolidation*
- *System Control Menu 1 > Contact series by client*

To setup Right Party Console (RPC):

I-Tel Options menu > Right Party Contact Console – Page 1

-Manages cell phone strategy; setup rules at campaign level
-Makes attempts to different types of numbers to ensure that each number receives the same number attempts each made at a different time in the day

- *I-Tel Options menu > Right Party Contact Console – Page 2*

-Target different types of phone numbers in account management

To setup Inconvenient Times to Call Consumer:

- *Account Detail screen > Other phones" screen (Tab+) > F2*

-Use option S/Code for inconvenient times, to set up when a smart code is applied and inconvenient times are entered on any of the consumer's accounts

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To setup Smart Codes:

- *System Control menu 1 > Smart codes*
- *System Control menu 2 > Smart Code Series Option > Smart Code Series Definition*

-Automate accounts to be worked in future

- *System Control menu 2 > Smart Code Series Option > Account Crawling Options*

-Run inventory of accounts

- *Management menu > Smart code/User audit options > Display Accounts For Audit > Run Account List For Audit*