**Transforming Automation Into Profits Using RMEx  
(e-learning course 101)**

**Objective**: This course is designed for aspiring Knowledge Engineers or as a refresher for an experienced user

**Audience**: Aspiring Knowledge Engineers

**Length:** Four- 3.5 hour WebEx sessions

**Date**: June 4th, 6th, 10th and 12th from 1:00 – 4:30pm EST (two 10-15 min breaks)

**Cost**: $600/per company (special "encore performance" rate). A **minimum** of six companies must be registered by **May 21st** for the class to be delivered.

**Prerequisite:** Review current Web-based Management Training prior to taking class for basic familiarization of screens and topics. <http://quantrax.com/kb/Management_Training/QtxWebTraining/TrainingVids.html>

**DAY 1**

**Module 1**: Introduction: Overview Of Using RMEx For Collections

High-level discussion of the collection process related to RMEx. In this section you will learn how each step and role in the collection process can be performed within RMEx.

**Addition** 3 – 5 minutes discussion about dialer, campaigns, benefits

**Module 2**: The Collector’s World: Overview of Account Details Screen

This quick demo of RMEx’s Account Inquiry Screen will give you an idea of what Collectors see, how they will work, and help you to decide how to setup their process. Relate appropriate screens and fields to the RMEx setup.

**Addition:** Account Processing Basics

* **Account Processing > Display Accounts to be Worked** (VERY,VERY, High level processing types)
* **Inquiry Menu > Account Detail Screen**

**Module 3:** Organizing Your Company and Giving Staff Access (Only) to the Information They Need

Discuss how to setup your system and security for maximum defense to ensure that staff is viewing the necessary information for them to do their job.

* **System Control 1**
  + **Company Info**
  + **System Parameters**
  + **System Security**

**Module 4**: Engineering Written Correspondence

Learn how to create and manage basic collection letters; understand the different letter types and compliance options available to your organization (letter codes).

* **System Control 2 > Form Type**
* **System Control 1 > Letter Codes**
* **System Control 1 > Letter Format Menu**
* **System Control 1> Letter Translation Tables**
* **System Control 2> Letter Control by User**
* **System Control 1 > Post-dated Checks**

**DAY 2**

**Module 5**: Harness the Power of Automated Communications

Learn how to use and setup Quantrax’s Contact Series to send letters, make calls, close accounts based on account information such as its balance.

* **System Control Menu 1**
  + **Contact series by client**
  + **Contact series definition**

**MOVED**: to Returned Mail to SmartCodes (Module 9). Will mention that this is covered in a later module for a more complete explanation of how to handle this feature

**Module 6:** Establishing Your Collection Team

Learn how to setup your collectors in RMEx for optimal productivity and profitability using the wide range of options available to you at the collector level.

**Module 7:** Streamline Your Collection Process for Maximum Profitability

Navigate and setup RMEx system controls, for your organization to streamline the process to attain payments and fees.

**REMOVED**: topic of Commission Codes from curriculum, this will be part of Advanced Class (102)  
**MOVE**: Client Classifications and Remitting Codes to Client (Module 11) section

**Module 8**: Work The Debtor Not The Debt

Learn how to effectively manage debtors with multiple accounts.

**DAY 3**

**Module 9:** Automating The Collection Process for Efficiency and Consistency

Make your rookie collector work accounts like an industry expert. Learn how to use Quantrax’s Smart codes to automatically take actions on accounts to accelerate the working account process and enforce work standards for items such as account documentation.

**ADDITION**: Final Smart Code Example will be with Returned Mail to SmartCodes and add a returned mail exercise

**DAY 4:**

**Module 10**: Getting The Right Accounts Worked (The Right Account for The Right Collector)

Learn how to identify and target the right accounts to build into your collectors work queue(s). Understand the importance of phone number management, calling multiple numbers, when to use messaging, how to target right party contacts and create a cell strategy. Explore how incorporate scoring into your decision making process and understand how this is managed through the “Nightly Process.”

**Module 11:** Building a Better Client

Learn how to setup up your clients and sales staff to manage and organize your accounts.

**ADDITION**: Client Classifications and Remitting Codes to Client (Module 11) section