Account Processing Quick Start

----- WARNING -----
Month-end reset option has not been run for last month.

Sign on with your UserID pressing “Enter” for each message, unless a message tells you otherwise.
NOTE: If you cannot get past the login try clicking Internet Explorer Compatibility Mode. CLICK HERE

(If you do not see the blue torn sheet, hit the ‘ALT’ key, then Tools, then ‘Compatibility Mode’)

MENU: COLMNU
-Account Processing (Collection Men

1. Display accounts to be work
2. Preview dialing

(Tip: Left mouse click option 1)

Ready for option 1

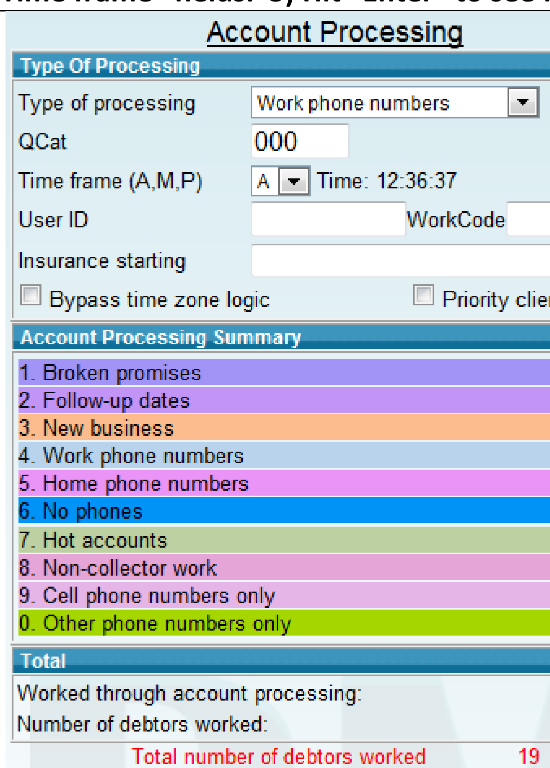
Quantrax RMEx GUI

Collectors generally start at the “Account processing menu” so from there, in the “Ready for option” put a “1” to “Display accounts to be worked” and hit “Enter”. NOTE: you can also left mouse click on the menu option “"1. Display accounts to be worked"

<u>TIP: Lost after taking an option? F7 from will bring you back to a Menu (As long as a message is not telling you otherwise</u>)

Presenting Accounts to Work from within “Account Processing”:

1) Hit F2 to see where accounts are located. 2) Fill in the “Type of processing”, “Qcat”, and “Time frame” fields. 3) Hit “Enter” to see first account



First Hit F2 To see accounts to be worked -->

Tip: F2 Then F10: *More information about Work maps, number worked, and current status.*

Processing Types: Main Buckets where similar accounts are grouped, such as New Business, Broken Promises, etc

Qcat: Processing types are broken down into sub-queues to make it easier to find accounts

Time Frame: Accounts can be presented by time of day. Select accounts in AM, Mid-day or PM.

USERID/WorkCode: Only use if working someone else’s accounts

Bypass time zone logic: Present accounts not yet eligible to be worked due to time zones

F2 Screen:

QCat	Description	With phones	A	M	P
			------Time	Frame------	
***	Broken promises				
000	STANDARD	4	4	0	0
103	HOT "MONEY WORKING"	0	1	0	0
996	PAYING ACCOUNTS				1
***	Dated follow-up				
000	STANDARD				0
103	HOT "MONEY WORKING"				
130	REQ RECALL				
995	PAYMENT ARRANGEMENT	2			
***	New business				
999	NO PHONES	0			
***	Work phones				
000	STANDARD	1785	1784	1	0
001	MANAGER REVIEW	0	1	0	0
996	PAYING ACCOUNTS	55	55	0	0
***	Home phones only				

Processing types

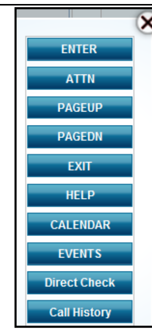
QCats

Number of accounts to be worked in each “<u>Time frame</u>” (A M P)

Function Keys and accessing information: **REMEMBER: Function key <u>F12</u> saves (Updates) any new information you enter on the account. You will lose what you typed if you do not hit F12**

Escape Key OR ◀ on top right: Displays other areas of the account.
Tip: Clickable Icons will be presented. You can also use the Function keys on your keyboard to go to that location if function keys are listed.

Up Arrow Key Or ◀ on bottom right : To access Help and other features
Tip:
***ATTN** accesses an account Inquiry screen*
***HELP button:** Make sure the cursors in the field or area in question*



Account Detail at a Glance

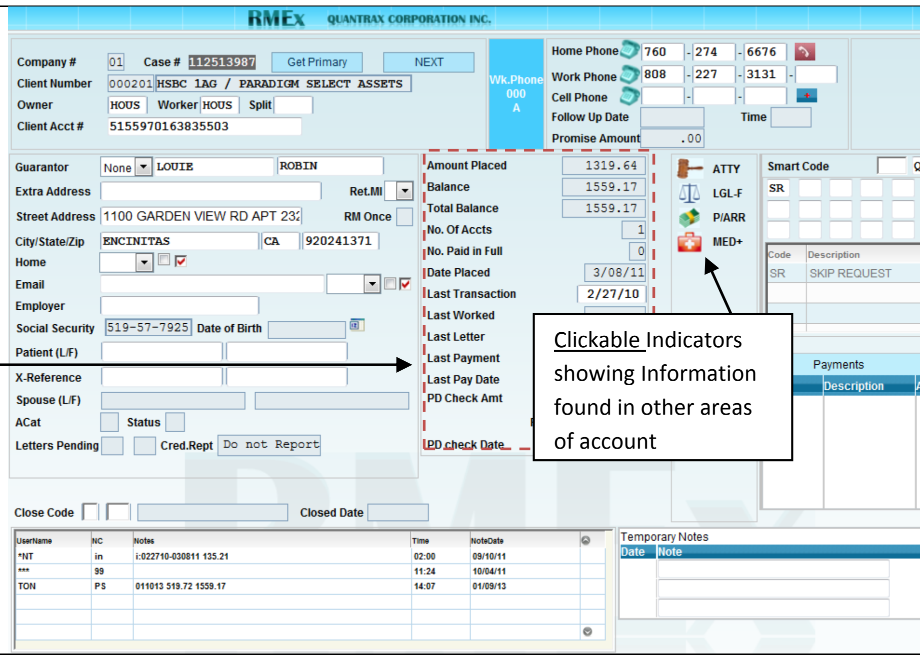
-**Case Number**
-Client
-Owner/Worker

-**Debtors name and address**

-**Placed Amount**
-**Balance Owed**
-**Date Placed**
-**Post Date Chks**
-**etc**

-Close Code

-**Last 5 notes on an account**



<u>Clickable</u> Indicators showing information found in other areas of account

-Home #
-Work #
-Cell #

-**SMARTCODE**
-Other Phones

-Description Codes

-**Payments**

-Temp Notes

Full Notes (F11 Function key) Hit Alt+F1 to see other function keys for things like Letter history, a summary of notes from linked accounts, etc

F11 Function Key

NOTES-Expanded view

Guarantor	LOPEZ	CLAUDIO	Case#	000862310
Date	**S/C**	**Notes**	**Time**	**UserID**
10/14/10		Letter Failed - Z1	09:27	***
10/14/10		Med.info. not complete	09:27	***
10/21/10		Owner-Split : 2 4 -	13:00	*LK

F9 from F11

Contact Series	
Z2	11/29/10

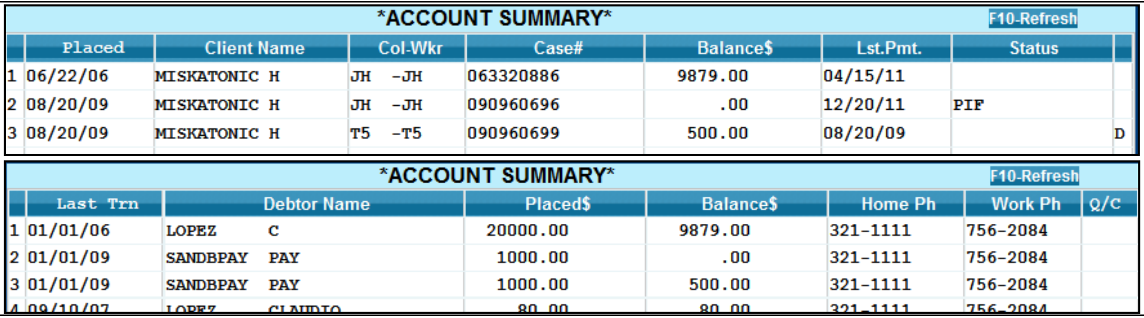
Selected	
AA	02/27/12
Z1	02/27/12

Shows the First 3 contact series letters, and the first 6 Selected letters (Sent by Smart Code) on an account

F5 Linked Account Summery

F5 for Linked accounts

F24 to see other linked info



ACCOUNT SUMMARY F10-Refresh

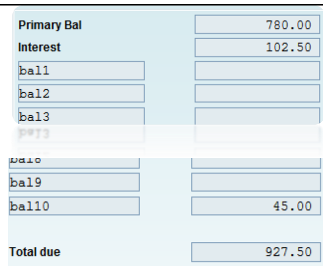
	Placed	Client Name	Col-Wkr	Case#	Balance$	Lst.Pmt.	Status	
1	06/22/06	MISKATONIC H	JH -JH	063320886	9879.00	04/15/11		
2	08/20/09	MISKATONIC H	JH -JH	090960696	.00	12/20/11	PIF	
3	08/20/09	MISKATONIC H	T5 -T5	090960699	500.00	08/20/09		D

ACCOUNT SUMMARY F10-Refresh

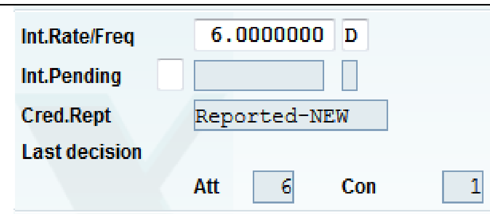
	Last Trn	Debtor Name	Placed$	Balance$	Home Ph	Work Ph	Q/C
1	01/01/06	LOPEZ C	20000.00	9879.00	321-1111	756-2084	
2	01/01/09	SANDBPAY PAY	1000.00	.00	321-1111	756-2084	
3	01/01/09	SANDBPAY PAY	1000.00	500.00	321-1111	756-2084	

Second Account Detail Screen (F10)

Balance types with the total due below.

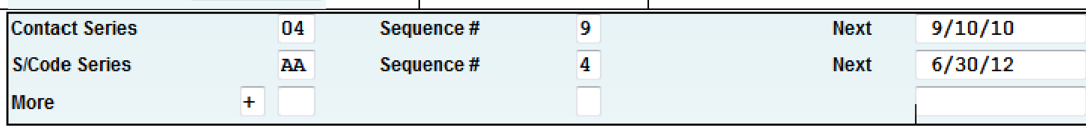


-Interest Rate
-Credit reporting info
-Number of attempt and contacts.



Contact Series & Smart Code Series

Tip: Sequence 9 means its done

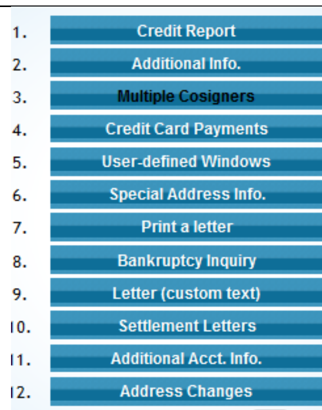


\+ next to “More” to see additional Smart Code Series.

TabQ and the Other Phone Window

<u>**The field the field NEXT to the smart code field**</u> is used to access additional areas of an account. Start with the Cursor in the Smart code window, then hit your TAB key

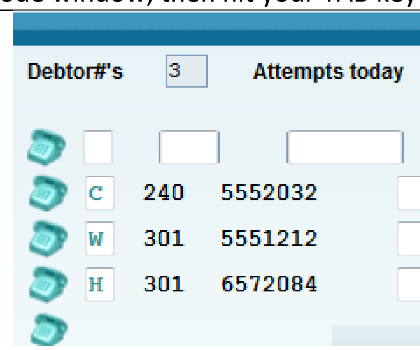
Tab then Q Called the “TabQ window”
-Credit cards
-Co-signers
-Bankruptcy
etc



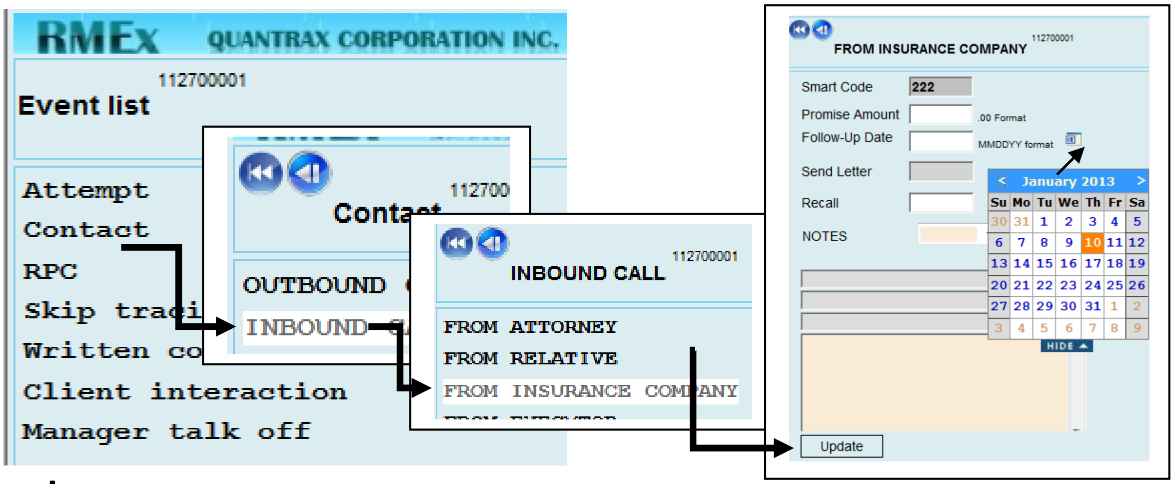
Tab then + takes you to the “Other Phones Window”.

Tips: Tab then = will also bring you here.

Hit Alt+F1 for additional phone options



Using Events and Smart codes: So all you need to do is work the account and report the outcome. Seems too simple doesn’t it?



Events are used to guide you when defining what has happened on an account.

Smart Codes

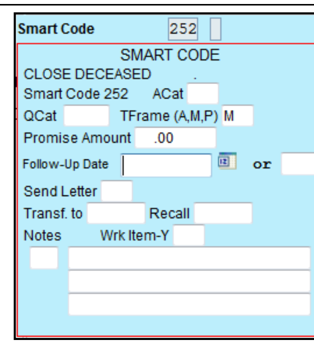
Smart Codes are an action taken on an account and can be manually applied from the "Smart code" field. They also have the ability, based on how they are setup, to advance you to the next account. *Notice, the last window on the Events above looks like a Smart Code window. That's because Events can also apply Smart Codes*

Tips from the Smart code windows online Help:

-Transfer to: Sends account immediately to anyone working in Account Processing

- **Recall:** Uses military time (5:30pm=1730). Also, to see account in one hour and fifteen minutes enter "115" <field exit>, (can be used for up to 3 hours this way).

-**Existing Follow-up dates and/or promises** can be removed using all nines (999999) in the field



Payment Arrangements (F9 Function key)

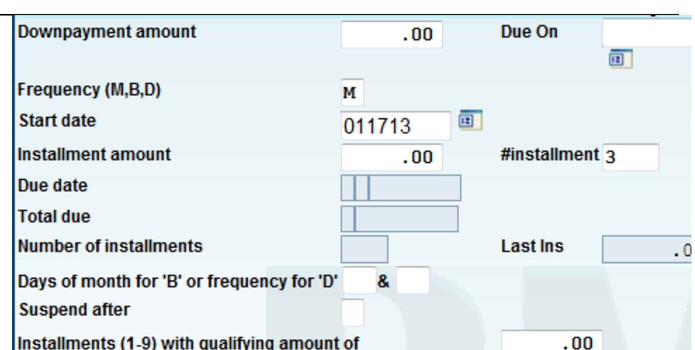
Minimum setup:

-"Frequency" (Month, Bi-Monthly, Daily)

-"Start Date"

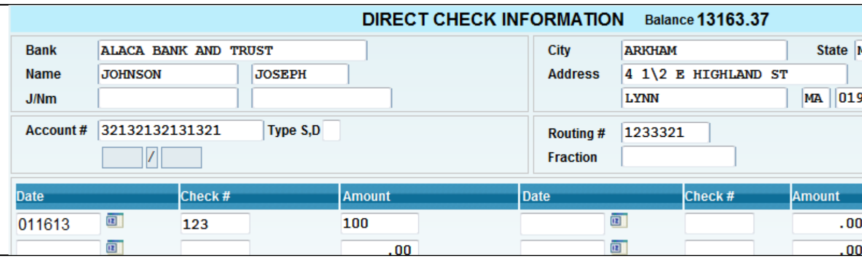
-"Installment amount OR #Installments"

WORKS LIKE A CALCULATOR: With Frequency and Start date filled in (Ex) a "12" in #Installments, Hit "Enter" and it will calculate the installment amount. Instead of Installments you can put the Amount and it will calculate the number of Installments.



Direct Check (found off the payment arrangement screen F9 then F14)

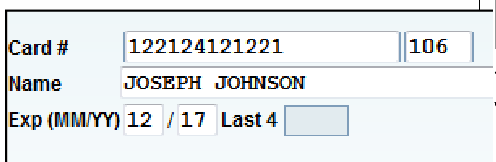
Requires:
-Account Number
-Routing number
-Date for Payment
-Check Number
-Amount

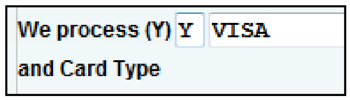


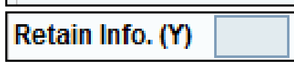
Credit Card (CC from the Smart code field)

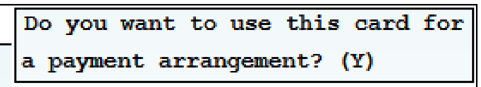
-Fill in the "Card #"
-"Name"
-"Exp. Date"
-"We Process" if your company processes CC's
-"Retain Info" if you want to store CC info on this screen for later use

-Hit "F12" for next options

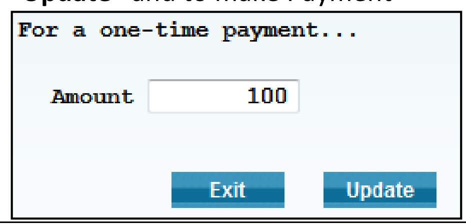








-**Payment Arrangement?** If "Yes" You will be take to the P/A Screen.
If not for P/A Enter amount and hit **"Update"** and to make Payment



Trouble shooting:

- GUI does not present, or not presenting properly.
  - Always confirm you are using the correct URL (GUI Address)
  - Try using Chrome
  - If Using Internet Explorer, make sure compatibility Mode is turned on
  - If using Internet Explorer, disable all plugins. For more information see the Quantrax Support Knowledge Base called "GUI and Internet Explore: Fixing issues and reviewing compatibility mode and plugins"
  - Confirm if others are having this issue, and present this and the details to you IT Administrator.
- You cannot see all of the GUI screen, or there may be scroll bars on the bottom that you must drag to see the rest of the screen
  - On the Account Detail Screen, make sure the Menu Navigation is closed by clicking the double green arrows at the top left.
  - Adjust your GUI screen size. In most browsers you can make the GUI larger and smaller by holding down the Control (CTRL) Key and hitting the + and – on the keyboard to adjust the side. Also, if you are using a mouse with a scroll wheel on it, holding the CTRL key and moving the wheel can adjust the size.
- Events or Document Viewer not presenting.
  - Confirm you are using the correct URL (GUI Address)
  - See if others are having the same issue. If so contact your administrator
  - Have your administrator confirm your security settings are not blocking your access to the "QServer"