

# Account Processing Quick Start

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’)

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”

**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)*

## 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

**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	-----Time Frame-----		
			A	M	P
***	Broken promises				
000	STANDARD	4	4	0	0
103	HOT "MONEY WORKING"	0	1	0	0
996	PAYING ACCOUNTS				1
***	Dated follow-up				
1000	STANDARD				0
103	HOT "MONEY WORKING"				
130	REQ RECALL				
1995	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				

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

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

**Function Keys and accessing information:** REMEMBER: Function key **F12** 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.*

F1: Inquiry	F12: Update
F2: Attorney	F14: DC
F3: Duplication	F15: Phone
F4: Skip	F16: Other Info
F5: Linked Accts	F17: Legal
F6: Full Legal	F20: Recalls
F7: Exit	F21: Primary
F8: Contacts	F22: Client Info
F9: PIA	F23: Payments
F10: Second Scrm	F24: Client Type
F11: Notes	Tab Q
Update	Tab +

**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

ENTER
ATTN
PAGEUP
PAGEDN
EXIT
HELP
CALENDAR
EVENTS
Direct Check
Call History

**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

Clickable 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

<b>F11</b> Function Key	<b>*NOTES-Expanded view*</b>				
	<b>Guarantor</b>	LOPEZ	CLAUDIO	<b>Case#</b>	000862310
	<b>Date</b>	S/C	<b>Notes</b>	<b>Time</b>	<b>UserID</b>
	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	
<b>F9 from F11</b>	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	*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	
F24 to see other linked info	*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			
4 09/10/07	LOPEZ CLAUDIO	80.00	80.00	321-1111	756-2084			

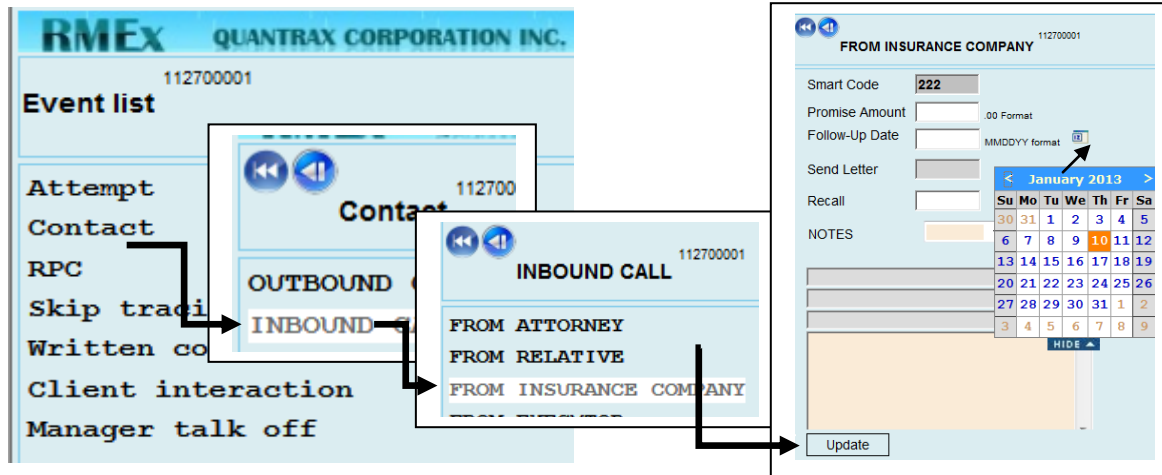
## Second Account Detail Screen (F10)

Balance types with the total due below.	Primary Bal <input type="text" value="780.00"/> Interest <input type="text" value="102.50"/> bal1 <input type="text"/> bal2 <input type="text"/> bal3 <input type="text"/> bal4 <input type="text"/> bal9 <input type="text"/> bal10 <input type="text" value="45.00"/> Total due <input type="text" value="927.50"/>	-Interest Rate -Credit reporting info -Number of attempt and contacts.	Int.Rate/Freq <input type="text" value="6.000000"/> <input type="text" value="D"/> Int.Pending <input type="checkbox"/> Cred.Rept <input type="text" value="Reported-NEW"/> Last decision Att <input type="text" value="6"/> Con <input type="text" value="1"/>
	Contact Series & Smart Code Series <i>Tip: Sequence 9          means its done</i>	Contact Series <input type="text" value="04"/> Sequence # <input type="text" value="9"/> Next <input type="text" value="9/10/10"/> S/Code Series <input type="text" value="AA"/> Sequence # <input type="text" value="4"/> Next <input type="text" value="6/30/12"/> More <input type="checkbox"/> <input type="checkbox"/>	+ next to "More" to see additional Smart Code Series.

## TabQ and the Other Phone Window

Smart Code <input type="text"/>	<b>The field the field NEXT to the smart code field</b> is used to access additional areas of an account. Start with the Cursor in the Smart code window, then hit your TAB key														
<b>Tab then Q</b> Called the "TabQ window" -Credit cards -Co-signers -Bankruptcy etc	<ol style="list-style-type: none"> <li>1. Credit Report</li> <li>2. Additional Info.</li> <li>3. Multiple Cosigners</li> <li>4. Credit Card Payments</li> <li>5. User-defined Windows</li> <li>6. Special Address Info.</li> <li>7. Print a letter</li> <li>8. Bankruptcy Inquiry</li> <li>9. Letter (custom text)</li> <li>10. Settlement Letters</li> <li>11. Additional Acct. Info.</li> <li>12. Address Changes</li> </ol>	<b>Tab then +</b> takes you to the "Other Phones Window". <i>Tips: Tab then = will          also bring you here.</i>  <i>Hit Alt+F1 for          additional phone          options</i>	<table border="1" style="width: 100%;"> <thead> <tr> <th>Debtor#s</th> <th>3</th> <th>Attempts today</th> </tr> </thead> <tbody> <tr> <td>C</td> <td>240</td> <td>5552032</td> </tr> <tr> <td>W</td> <td>301</td> <td>5551212</td> </tr> <tr> <td>H</td> <td>301</td> <td>6572084</td> </tr> </tbody> </table>	Debtor#s	3	Attempts today	C	240	5552032	W	301	5551212	H	301	6572084
Debtor#s	3	Attempts today													
C	240	5552032													
W	301	5551212													
H	301	6572084													

**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?



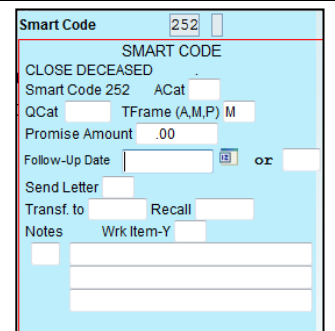
**Events** are used to guide you when defining what has happened on an account.

### 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

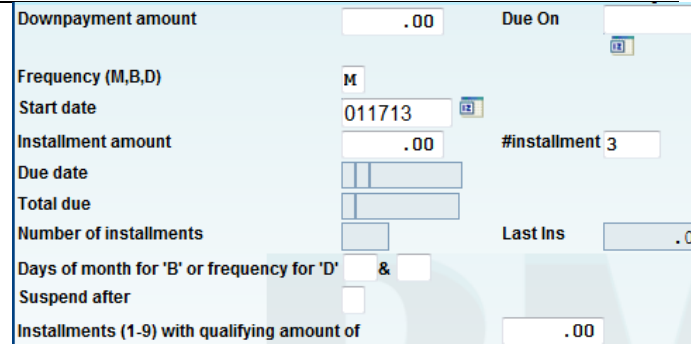


### Payment Arrangements (F9 Function key)

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	<b>DIRECT CHECK INFORMATION</b> Balance 13163.37							
	Bank	ALACA BANK AND TRUST			City	ARIGHAM	State	MA
	Name	JOHNSON	JOSEPH	Address	4 1\2 E HIGHLAND ST			
	J/Nm				LYNN	MA	0190	
Account #	32132132131321		Type	S,D	Routing #	1233321		
					Fraction			
<b>Date</b>		<b>Check #</b>	<b>Amount</b>	<b>Date</b>		<b>Check #</b>	<b>Amount</b>	
011613		123	100				.00	
			.00				.00	

**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	Card # 122124121221 106		Do you want to use this card for a payment arrangement? (Y)
	Name JOSEPH JOHNSON		
	Exp (MM/YY) 12 / 17 Last 4		For a one-time payment...
	We process (Y) <input checked="" type="checkbox"/> VISA and Card Type		Amount 100
Retain Info. (Y) <input type="checkbox"/>			