

Smart Codes – Creating a Smart Code (Back pages)

- Unlike the “Action Lines” in that they will ONLY get applied if the “Selection Criteria” found what you are looking for. The rules on these back pages WILL get applied, regardless of what you are looking for.
- When this Smart Code is applied you can always sent a letter, add a note to the account, date the account for a follow-up, set the account up for a weekend.
- You can either force the collector, give the collector the option or not allow the collector to send a letter, notate the account, enter a follow-up date. You can also allow them to enter a follow-up date BUT set a maximum. You can freeze an account into it’s current Time Frame and specify IF you want the collector notes or Smart Code notes to get applied to ALL of the linked accounts.

Smart Codes pg/5

Smart Code	614	Override		Type (A,P,C,N,O) C
Description	LINE PORTED TO CELL			
		(+)		
Standard letter	<input type="checkbox"/>	Std. note/code	<input type="checkbox"/>	<input type="checkbox"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/>	X-code (Y,b) <input type="checkbox"/>
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/>	Follow-up (Y,N,P,A,b) <input type="checkbox"/>
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/>	Duplicate notes (Y,P,A) <input type="checkbox"/>
Add a follow-up date	<input type="checkbox"/>	days before last post-dated check		
Allow with phone and no prior ATTEMPT (N=No)	<input type="checkbox"/>		<input type="checkbox"/>	No prior CONTACT (N=No) <input type="checkbox"/>
Special authority needed (A-Z)	<input type="checkbox"/>		<input type="checkbox"/>	Not allowed (Y) <input type="checkbox"/>
Do not allow if no decisions are met (Y)	<input type="checkbox"/>		<input type="checkbox"/>	Show UDW (or Q,*) <input type="checkbox"/>
				Screen code/Condition <input type="checkbox"/>
Recall time (Y,N,b)	<input type="checkbox"/>			
Advance to next Y,D	<input type="checkbox"/>	Max.link bal	.00	Stop contact series (Y,P) <input type="checkbox"/>
For prior payment look up S/Code	<input type="checkbox"/>			Return to owner (Y) <input type="checkbox"/>
If linked accounts exist look up	<input type="checkbox"/>			Open linked cases (Y,L,A) <input type="checkbox"/>
Cost associated with code	<input type="checkbox"/>		.00	
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>			Duplicate on ALL (Y) <input type="checkbox"/>
Change QCat to <input type="checkbox"/>	Change ACat to <input type="checkbox"/>			Eligible to split Comm.(Y) <input type="checkbox"/>
Move owner to split (Y)	<input type="checkbox"/>			Clear split collector (Y) <input type="checkbox"/>
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>			Change split to <input type="checkbox"/>
				Move split to owner (Y) <input type="checkbox"/>

Page Keys

Smart Codes – Creating a Smart Code (Back pages)

- You can specify a date for the account to be presented to the collector IF there is a Post Dated Check on the account.
- Do not allow this Smart Code to be applied to the account if there is a phone number on the account and there was never an attempt to contact the debtor or if there has never been a contact.
- You can set up a security level in order for the user to be able to apply this Smart Code.
- If you want to not allow anyone to apply this Smart Code, put a “Y” in “Not allowed”.
- Do not allow if no decisions are met. VERY IMPORTANT. Remember, the back pages get applied regardless if whether you find what your looking for on the Selection Criteria. IF you ONLY want the back pages applied IF you found what you’re looking for, put a “Y” in this filed.

Smart Codes		pg/5	Type (A,P,C,N,O) C	
Smart Code	614	Override		
Description	LINE PORTED TO CELL			
		(+)		
Standard letter	<input type="checkbox"/>	Std. note/code	<input type="checkbox"/>	<input type="checkbox"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/>	X-code (Y,b) <input type="checkbox"/>
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/>	Follow-up (Y,N,P,A,b) <input type="checkbox"/>
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/>	Duplicate notes (Y,P,A) <input type="checkbox"/>
Add a follow-up date	<input type="checkbox"/>	days before last post-dated check		
Allow with phone and no prior ATTEMPT (N=No)	<input type="checkbox"/>	No prior CONTACT (N=No)	<input type="checkbox"/>	<input type="checkbox"/>
Special authority needed (A-Z)	<input type="checkbox"/>	Not allowed (Y)	<input type="checkbox"/>	<input type="checkbox"/>
Do not allow if no decisions are met (Y)	<input type="checkbox"/>	Show UDW (or Q,*)	<input type="checkbox"/>	<input type="checkbox"/>
		Screen code/Condition	<input type="checkbox"/>	<input type="checkbox"/>
Recall time (Y,N,b)	<input type="checkbox"/>			
Advance to next Y,D	<input type="checkbox"/>	Max.link bal	.00	Stop contact series (Y,P) <input type="checkbox"/>
For prior payment look up S/Code	<input type="checkbox"/>			Return to owner (Y) <input type="checkbox"/>
If linked accounts exist look up	<input type="checkbox"/>			Open linked cases (Y,L,A) <input type="checkbox"/>
Cost associated with code	<input type="checkbox"/>		.00	
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>			Duplicate on ALL (Y) <input type="checkbox"/>
Change QCat to <input type="checkbox"/>	Change ACat to <input type="checkbox"/>			Eligible to split Comm.(Y) <input type="checkbox"/>
Move owner to split (Y)	<input type="checkbox"/>			Clear split collector (Y) <input type="checkbox"/>
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>			Change split to <input type="checkbox"/>
				Move split to owner (Y) <input type="checkbox"/>

F1-New Selection F3-Search F12-Update Page Keys

Smart Codes – Creating a Smart Code (Back pages)

- We have User Defined Windows” You can have them displayed to the user. You can also present certain windows to the user when they use this Smart Code. The windows are based on the Function Keys. For example, F9 is the Payment Arrangement window and you could have that presented to the user automatically.
- You can force the user to enter a Recall Time.
- You can force the user to do more than this one Smart Code based on the balance of the debt.
- You can stop a Contact Series
- Apply a completely different Smart Code if there has been a prior payment on the account.
- If the account is with a different worker than the owner, you can return the account back to the owner. (change the Worker Code to that of the Owner.

Smart Code		614		Smart Codes pg/5		Override		Type (A,P,C,N,O) C	
Description	LINE PORTED TO CELL								
				(+)					
Standard letter	<input type="checkbox"/>	Std. note/code	<input type="checkbox"/>						
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/>	X-code (Y,b)	<input type="checkbox"/>				
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/>	Follow-up (Y,N,P,A,b)	<input type="checkbox"/>				
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/>	Duplicate notes (Y,P,A)	<input type="checkbox"/>				
Add a follow-up date	<input type="checkbox"/>	days before last post-dated check							
Allow with phone and no prior ATTEMPT (N=No)	<input type="checkbox"/>	No prior CONTACT (N=No)	<input type="checkbox"/>						
Special authority needed (A-Z)	<input type="checkbox"/>	Not allowed (Y)	<input type="checkbox"/>						
Do not allow if no decisions are met (Y)	<input type="checkbox"/>	Show UDW (or Q,*)	<input type="checkbox"/>	Screen code/Condition	<input type="checkbox"/>				
Recall time (Y,N,b)	<input type="checkbox"/>								
Advance to next Y,D	<input type="checkbox"/>	Max.link bal	.00	Stop contact series (Y,P)	<input type="checkbox"/>				
For prior payment look up S/Code	<input type="checkbox"/>			Return to owner (Y)	<input type="checkbox"/>				
If linked accounts exist look up	<input type="checkbox"/>			Open linked cases (Y,L,A)	<input type="checkbox"/>				
Cost associated with code			.00						
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>			Duplicate on ALL (Y)	<input type="checkbox"/>				
Change QCat to	<input type="checkbox"/>	Change ACat to	<input type="checkbox"/>	Eligible to split Comm.(Y)	<input type="checkbox"/>				
Move owner to split (Y)	<input type="checkbox"/>			Clear split collector (Y)	<input type="checkbox"/>				
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>			Change split to	<input type="checkbox"/>				
				Move split to owner (Y)	<input type="checkbox"/>				
		F1-New Selection	F3-Search	F12-Update	Page Keys				

Smart Codes – Creating a Smart Code (Back pages)

- If there are linked accounts, you can apply a completely different Smart Code.
- You can assign a cost to each and every Smart Code.
- Duplicate for other Cases and Duplicate on all refers to the behavior of the Smart Code on the linked accounts. When I apply this Smart Code to an account that has multiple debts, do you want to automatically apply this Smart Code on ALL of the debts?
- You can change the QCat and Acat on the account.
- You can move the Worker Code to that of the Split Collector, move the Owner to Split, clear the Split Collector, move the userid of the person working the account to that of the Owner or Worker, change the Split Collector to a specific collector and move the Split Collector to that of the Owner.

Smart Codes		pg/5	Type (A,P,C,N,O) C	
Smart Code	614	Override		
Description	LINE PORTED TO CELL			
		(+)		
Standard letter	<input type="checkbox"/>	Std. note/code	<input type="checkbox"/>	<input type="checkbox"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/>	X-code (Y,b) <input type="checkbox"/>
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/>	Follow-up (Y,N,P,A,b) <input type="checkbox"/>
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/>	Duplicate notes (Y,P,A) <input type="checkbox"/>
Add a follow-up date	<input type="checkbox"/>	days before last post-dated check		
Allow with phone and no prior ATTEMPT (N=No)	<input type="checkbox"/>		<input type="checkbox"/>	No prior CONTACT (N=No) <input type="checkbox"/>
Special authority needed (A-Z)	<input type="checkbox"/>		<input type="checkbox"/>	Not allowed (Y) <input type="checkbox"/>
Do not allow if no decisions are met (Y)	<input type="checkbox"/>		<input type="checkbox"/>	Show UDW (or Q,*) <input type="checkbox"/>
				Screen code/Condition <input type="checkbox"/>
Recall time (Y,N,b)	<input type="checkbox"/>			
Advance to next Y,D	<input type="checkbox"/>	Max.link bal	.00	Stop contact series (Y,P) <input type="checkbox"/>
For prior payment look up S/Code	<input type="checkbox"/>			Return to owner (Y) <input type="checkbox"/>
If linked accounts exist look up	<input type="checkbox"/>			Open linked cases (Y,L,A) <input type="checkbox"/>
Cost associated with code	<input type="checkbox"/>		.00	
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>			Duplicate on ALL (Y) <input type="checkbox"/>
Change QCat to	<input type="checkbox"/>	Change ACat to	<input type="checkbox"/>	Eligible to split Comm.(Y) <input type="checkbox"/>
Move owner to split (Y)	<input type="checkbox"/>			Clear split collector (Y) <input type="checkbox"/>
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>			Change split to <input type="checkbox"/>
				Move split to owner (Y) <input type="checkbox"/>

F1-New Selection F3-Search F12-Update Page Keys

Smart Codes – Creating a Smart Code (Back pages)

- Do you want Description Codes applied or removed right away to the accounts or wait until the Smart Code is processed. Generally within 2 minutes. You can remove a group of Description Codes, remove individual Description Codes, add them or stop (do NOT allow the Smart Code to be applied if certain description Codes exists on the account)
- You can look to see if a Description Codes exists on ANY of the linked accounts and remove ALL Description Codes.
- You can stop a Smart Code from being applied based on a certain QCat or Acat existing on the account.
- Start or restart a Contact Series.
- If you want this Smart Code to be able to be applied to a legal account, you must specify that.

Smart Codes		pg/6	Type (A,P,C,N,O)	C
Smart Code	614	Override		
Description	LINE PORTED TO CELL			
Immediate update of Desc.Code	N=No	<input type="checkbox"/>	Desc.code group to remove	<input type="checkbox"/>
Desc.codes to be added		<input type="checkbox"/>	Desc.codes to remove	<input type="checkbox"/>
Stop decisions on codes		<input type="checkbox"/>	Desc.codes needed	<input type="checkbox"/>
Remove all description codes (Y)		<input type="checkbox"/>	Check linked accounts (Y)	<input type="checkbox"/>
No decisions with QCat/ACat (N)		<input type="checkbox"/>	(for desc.codes in sel.criteria)	
Start contact series (or *S,*R)	01		Make decisions on legals (Y)	<input type="checkbox"/>
Force user to verify (Y)		<input type="checkbox"/>	Unlink account (Y,R)	<input type="checkbox"/>
Keep follow-up date (Y)		<input type="checkbox"/>	Do not update date last worked (Y)	<input type="checkbox"/>
Smart Code for duplicated cases		<input type="checkbox"/>	Transfer immediately (Y,O,S)	<input type="checkbox"/>
Start S/Code series	AT DD MV NT PC PL		Stop Smart Code series (Y,1-6)	<input type="checkbox"/>
Re-start S/Code series (Y, 1-6)		<input type="checkbox"/>	Transfer to client	<input type="checkbox"/>
Transfer to company		<input type="checkbox"/>	Transfer notes (Y) Oth.inf (Y/D)	<input type="checkbox"/>
Close code for existing account		<input type="checkbox"/>	Transfer secondary balances (Y)	<input type="checkbox"/>
Keep existing commission rate (Y)		<input type="checkbox"/>	Reset decisions (Y,A)	<input type="checkbox"/>
Do not transfer duplicates (N)		<input type="checkbox"/>		
Reset attempts, contacts (Y,A,C)		<input type="checkbox"/>		
Add payment code	55 Balance type	<input type="checkbox"/>	Adj.code	<input type="checkbox"/>
			Amount (optional)	25
F1-New Selection		F3-Search	F12-Update	Page keys
				Delete Code (D) <input type="checkbox"/>

Smart Codes – Creating a Smart Code (Back pages)

- You can force the user to verify that this is the correct Smart Code they are trying to apply on the account.
- You can unlink the account and have it run through the linking process during the Nightly Process.
- If you don't want to remove and existing follow-up date, you need to tell the system.
- **IMPORTANT:** Do not update date last worked. You really need to think about this option.
- You can apply a different Smart Code on the linked accounts.
- When this Smart Code is applied, you can transfer the account immediately to the Owner, Worker or Split Collector.,

Smart Codes		pg/6	Type (A,P,C,N,O)	C
Smart Code	614	Override		
Description	LINE PORTED TO CELL			
Immediate update of Desc.Code N=No		<input type="checkbox"/>	Desc.code group to remove	<input type="checkbox"/>
Desc.codes to be added		<input type="checkbox"/>	Desc.codes to remove	<input type="checkbox"/>
Stop decisions on codes	<input type="checkbox"/>	<input type="checkbox"/>	Desc.codes needed	<input type="checkbox"/>
Remove all description codes (Y)	<input type="checkbox"/>	<input type="checkbox"/>	Check linked accounts (Y)	<input type="checkbox"/>
No decisions with QCat/ACat (N)	<input type="checkbox"/>	<input type="checkbox"/>	(for desc.codes in sel.criteria)	
Start contact series (or *S,*R)	01		Make decisions on legals (Y)	<input type="checkbox"/>
Force user to verify (Y)	<input type="checkbox"/>		Unlink account (Y,R)	<input type="checkbox"/>
Keep follow-up date (Y)	<input type="checkbox"/>		Do not update date last worked (Y)	<input type="checkbox"/>
Smart Code for duplicated cases	<input type="checkbox"/>		Transfer immediately (Y,O,S)	<input type="checkbox"/>
Start S/Code series	<input type="checkbox"/> AT <input type="checkbox"/> DD <input type="checkbox"/> MV <input type="checkbox"/> NT <input type="checkbox"/> PC <input type="checkbox"/> PL		Stop Smart Code series (Y,1-6)	<input type="checkbox"/>
Re-start S/Code series (Y, 1-6)	<input type="checkbox"/>		Transfer to client	<input type="checkbox"/>
Transfer to company	<input type="checkbox"/>		Transfer notes (Y) <input type="checkbox"/> Oth.inf (Y/D)	<input type="checkbox"/>
Close code for existing account	<input type="checkbox"/>		Transfer secondary balances (Y)	<input type="checkbox"/>
Keep existing commission rate (Y)	<input type="checkbox"/>		Reset decisions (Y,A)	<input type="checkbox"/>
Do not transfer duplicates (N)	<input type="checkbox"/>			
Reset attempts, contacts (Y,A,C)	<input type="checkbox"/>			
Add payment code	<input type="checkbox"/> 55 Balance type	<input type="checkbox"/>	Adj.code <input type="checkbox"/> Amount (optional)	<input type="checkbox"/> 25
F1-New Selection		F3-Search	F12-Update	Page keys
				Delete Code (D) <input type="checkbox"/>