



Smart Codes – What is a Smart Code

- It is an Action. It is the collector telling the system what just occurred.
- They allow the agents to make the same decision that the manager or owner would make if THEY were working the account.
- They will help you in stopping the overworking and under working of accounts.
- They are totally user defined.
- They can behave differently based on clients, collectors, Acats (type of accounts), whether they are in a Contact Series or not.
- They can make decisions today based on what you may find in the future.
- They are you!

Smart Codes

Company code

Company name IOU OWE-IT COLLECT SERVICES, INC. RMEx

Smart Code

Client override (Override code with search shows Smart Codes with that (or other) override. Override "BASE" shows standard S/Codes only.)

Page# for existing code

If a new code is to be created based on an existing code, enter the following -

Existing Smart Code

Client override

Company code (if different)

If decisions and actions are to be copied from one Smart Code to another -

Copy from Smart Code Copy to Smart Code

Client override Client override

F3-Search F5-Where used? F6-SC/Seq Message F7-Exit F19-Exit/print all codes



Smart Codes – What is a Smart Code

- Smart Codes can be applied to an account manually by a user.
- They can be applied by the system behind the scenes. For example, your clerical person tells the system that mail has returned, the system behind the scene can apply a Smart Code and make the same decisions you would IF you were able to look at every piece of returned mail.
- Again behind the scenes the system can apply a Smart Code, for example, if an account links or not, or when a promise or payment arrangement has broken, among other areas
- A Smart Code can apply another Smart Code.
- There are also many other areas where the system can apply a Smart Code behind the scenes. More examples will be given as you go through the System Controls.

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Smart Codes – Creating a Smart Code

- Smart Code – This is the Smart Code you are creating. It is a three character numeric field.
- You can make the Smart Code behave differently by using an override.
- If you are revising a Smart Code, you can go directly to that page.
- You can copy an existing Smart Code to create a new one.
- If you want to copy the decisions from an existing Smart Code, you can do that as well.

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Copy from Smart Code Copy to Smart Code

Client override Client override

F3-Search F5-Where used? F6-SC/Seq Message F7-Exit F19-Exit/print all codes



Smart Codes – Creating a Smart Code

- Description is displayed when you are doing a search.
- Type, is used to indicate what type of Smart Code this is. (Attempt, Positive Contact, Contact, Negative Contact, Other type of activity.
- The first five lines that you see are the “Selection Criteria”, what are you looking for? Each line of Selection Criteria has a corresponding “Action Line” (bottom five lines), what do you want to do?
- A Smart Code can have multiple selection and action lines (20 per Smart Code). Once the Smart Code has found something you are looking for, it stops looking and does the appropriate action.
- In order for a Selection Line to be used, you MUST have something in the field “Sel (YWPRS) A Smart Code can be applied on an account multiple times and here you can tell the system to ONLY do this line once regardless of how many times this Smart Code is applied.

Smart Codes pg/1

Smart Code 614 Last used 12/16/10 Override Type (A,P,C,N,O) C

Description CONTACTED DEBTOR Special notes

Category RPC (Y) Called us (Y)

SELECTION CRITERIA

Sel.X	Age	-Ac/Plcmt\$-		-Lk/Plc\$-		Lett	SS	Ds	--Days--		Phon	#	Cd
		From	To	From	To				Not	No			
YWPRS						ers	YN	Cd	wrk	pmt	YN	At/Con	
R													

ACTION

Send	Note to be added	Send to	Change	Follow-	Close	Des	
Let.	(or S/Code to apply)	worker	owner	up days	acct	Cd	QCat
<input type="checkbox"/>	CONTACTED THE DEBTOR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page Up/Down Use Bal. for Plcmt (Y) Age code

Look up



Smart Codes – Creating a Smart Code (Selection Criteria)

- On the Selection Line you can look for one item or multiple items (this and this and this) or you could look for nothing and just do something.
- You can look for the age of an account, the account balance, the balance from all the accounts (Linked Balance), look to see if certain letters have been sent, if you have a place of employment, social security number, if certain Description Codes are on the account or not, how long since the account has been worked, how long since the last payment, whether you have a good address or not, how many attempts have you made to reach the debtor or how many times you have contacted them. If the contact was the debtor contacting you.

Smart Codes pg/1

Smart Code 614 Last used 12/16/10 Override Type (A,P,C,N,O) C

Description CONTACTED DEBTOR Special notes

Category RPC (Y) Called us (Y)

SELECTION CRITERIA

Sel.X	Age	-Ac/Plcmt\$-		-Lk/Plc\$-		Lett	SS	Ds	--Days--		Phon	#	Cd
		From	To	From	To				Not	No			
YWPRS						ers	YN	Cd	wrk	pmt	YN	At/Con	
R													

ACTION

Send	Note to be added (or S/Code to apply)	Send to worker	Change owner	Follow- up days	Close acct	Des Cd	+
Let.	CONTACTED THE DEBTOR						

Page Up/Down

Use Bal. for Plcmt (Y) Age code Look up

- There are many more things you can look for by putting an "X" or "?" in the Sel field. This will be covered in a separate training session.



Smart Codes – Creating a Smart Code (Action Line)

- Once you have found what you're looking for, what do you want to do?
- You can send a letter, put a note on the account, send the account to a different worker, change the owner, put a follow-up date on the account, close it, add a Description Code and change the QCat.
- By putting a "+" in the field next to the QCat, you can also start, stop and restart a Contact series, start a Smart Code Series, change the Status Code, apply additional Smart Codes and change the Internal Score.
- Note: You can change the selection criteria "Placement Amount" to look for the Current Balance amount on an account

Smart Codes pg/1

Smart Code 614 Last used 12/16/10 Override Type (A,P,C,N,O) C

Description CONTACTED DEBTOR Special notes

Category RPC (Y) Called us (Y)

SELECTION CRITERIA POE --Days-- Addr

Sel.X	Age	-Ac/Plcmt\$-		-Lk/Plc\$-		Let	SS	Ds	Not	No	Phon	#	Cd
YWPRS		From	To	From	To	ers	YN	Cd	wrk	pmt	YN	At/Con	
R													

ACTION

Send	Note to be added (or S/Code to apply)	Send to worker	Change owner	Follow-up days	Close acct	Des Cd	QCat	+
<input type="checkbox"/>	CONTACTED THE DEBTOR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page Up/Down Use Bal. for Plcmt (Y) Age code

Look up



Smart Codes – Creating a Smart Code (Action Line)

- Using the “Age Code” You also have flexibility on searching for age from with the selection criteria. Such as how old the account was when your client gave it to you, how long you have had the account in your system, what is the oldest account in your system plus other options.
- Each Smart Code has four identical pages as you are looking at right now.
- Previously, we mentioned that if you put an “X” or “?” in the “Sel” field, you would have many more options. We will cover this now.
- An “X” will only display one additional selection screen to you and the “?” will give you two additional selection screens. For this training session, we will use the “?”

Smart Codes pg/1

Smart Code 614 Last used 12/16/10 Override Type (A,P,C,N,O) C

Description CONTACTED DEBTOR Special notes

Category RPC (Y) Called us (Y)

SELECTION CRITERIA

Sel.X	Age	-Ac/Plcmt\$-		-Lk/Plc\$-		Lett	SS	Ds	--Days--		Phon	#	Cd
		From	To	From	To				Not	No			
YWPRS						ers	YN	Cd	wrk	pmt	YN	At/Con	
R													

ACTION

Send	Note to be added (or S/Code to apply)	Send to worker	Change owner	Follow- up days	Close acct	Des Cd	QC Cat	+
Let.	CONTACTED THE DEBTOR							

Page Up/Down Use Bal. for Plcmt (Y) Age code

Look up



Smart Codes – Creating a Smart Code (? Mark Logic & Additional Selection Criteria)

- This screen is broken down into two areas. One area, the top part, is looking at the individual account, while the bottom part looks at the “Debtor”, meaning all of debtors the linked accounts.
- In addition to your selection criteria from the previous screen, you can also look to see if there is a cell phone or home phone or work phone number on the account. Where the debtor lives, what your potential commission is, see where your cost for working the account is in relation to your potential commission and what the Status of the account is.
- The bottom portion looks at all of the linked accounts to see if you have a phone number on ANY of the accounts, if you have a place of employment, spouse information, good address on any account, SS#, ever contacted the debtor, had a positive contact at least once, if the debtor is on a payment arrangement and current or not, external scores exists, has been credit reported and has post dated checks on file.

Smart Codes										pg/x								
Smart Code	614									Override	Type (A,P,C,N,O)	C						
Description	LINE PORTED TO CELL																	
SELECTION CRITERIA LINE										6	POE	--Days--		Addr				
Sel.X Age	-Ac/Plcmt\$-		-Lk/Plc\$-		Let	SS	Ds	Not	No	Phon	#	Cde						
	From	To	From	To	ers	YN	Cd	wrk	pmt	YN	At/Con							
<u>R</u>	-	-	-	-	-	-	-	-	-	-	-	-						
Cell phone exists (Y,N)	<input type="checkbox"/>																	
Home phone exists (Y,N)	<input type="checkbox"/>																	
POE is equal to	<input type="text"/>																	
Debtor state is one of	<input type="text"/>																	
Debtor zip code is one of	<input type="text"/>																	
Potential commission is more than	.00	Cost exceeds				% of commission												
Account status is / is not	<input type="text"/>																	
LINKED ACCOUNTS																		
Number of linked accounts exceeds	<input type="text"/>																	
POE exists on one account (Y,N)	<input type="checkbox"/>																	
Phone# exists on one account (Y,N)	<input type="checkbox"/>																	
Debtor was contacted once (Y,N)	<input type="checkbox"/>																	
Debtor reported to C/bureau (Y,N)	<input type="checkbox"/>																	
Is on P/arr. and current (Y,R,N)	<input type="checkbox"/>																	
Spouse SS# exists on one acct. (Y,N)											<input type="checkbox"/>							
Address exists on one account (Y,N)											<input type="checkbox"/>							
SS# exists on one account (Y,N)											<input type="checkbox"/>							
Pos.contact on one account (Y,N)											<input type="checkbox"/>							
Score (Ext) exceeds											<input type="text"/>							
Score (Ext) is less than											<input type="text"/>							
Has post-dated check (Y,N)											<input type="checkbox"/>							

ENTER-Return to previous screen



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"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/> X-code (Y,b)
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/> Follow-up (Y,N,P,A,b)
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/> Duplicate notes (Y,P,A)
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	<input type="checkbox"/> Stop contact series (Y,P)
For prior payment look up S/Code	<input type="checkbox"/>		<input type="checkbox"/> Return to owner (Y)
If linked accounts exist look up	<input type="checkbox"/>		<input type="checkbox"/> Open linked cases (Y,L,A)
Cost associated with code	<input type="checkbox"/>	.00	
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>		<input type="checkbox"/> Duplicate on ALL (Y)
Change QCat to <input type="checkbox"/>	Change ACat to <input type="checkbox"/>		<input type="checkbox"/> Eligible to split Comm.(Y)
Move owner to split (Y)	<input type="checkbox"/>		<input type="checkbox"/> Clear split collector (Y)
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>		<input type="checkbox"/> Change split to <input type="text"/>
			<input type="checkbox"/> Move split to owner (Y)

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

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"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/>
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/>
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<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	<input type="checkbox"/>
For prior payment look up S/Code	<input type="checkbox"/>	.00	Stop contact series (Y,P)
If linked accounts exist look up	<input type="checkbox"/>		Return to owner (Y)
Cost associated with code	<input type="checkbox"/>	.00	Open linked cases (Y,L,A)
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>		Duplicate on ALL (Y)
Change QCat to <input type="checkbox"/>	Change ACat to <input type="checkbox"/>		Eligible to split Comm.(Y)
Move owner to split (Y)	<input type="checkbox"/>		Clear split collector (Y)
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>		Change split to <input type="checkbox"/>
			Move split to owner (Y)

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 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"/>
Standard follow-up days	<input type="checkbox"/>	Next weekend (Y)	<input type="checkbox"/> X-code (Y,b)
Notes (Y,N,b)	<input type="checkbox"/>	Letter (Y,N,b)	<input type="checkbox"/> Follow-up (Y,N,P,A,b)
Maximum future days	<input type="checkbox"/>	Stop T/frame (YAMP)	<input type="checkbox"/> Duplicate notes (Y,P,A)
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)
For prior payment look up S/Code	<input type="checkbox"/>		Return to owner (Y)
If linked accounts exist look up	<input type="checkbox"/>		Open linked cases (Y,L,A)
Cost associated with code	<input type="checkbox"/>	.00	
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>		Duplicate on ALL (Y)
Change QCat to <input type="checkbox"/>	Change ACat to <input type="checkbox"/>		Eligible to split Comm.(Y)
Move owner to split (Y)	<input type="checkbox"/>		Clear split collector (Y)
Move UserID to split/own/wkr (YOW)	<input type="checkbox"/>		Change split to <input type="checkbox"/>
			Move split to owner (Y)

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

Smart Code 614 Description LINE PORTED TO CELL Type (A,P,C,N,O) C

(+)

Standard letter	<input type="checkbox"/>	Std. note/code	<input type="checkbox"/>	<input type="text"/>	<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"/>	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	<input type="text" value=".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"/>		<input type="text" value=".00"/>		
Duplicate for other cases (Y,C,A,G)	<input type="checkbox"/>			Duplicate on ALL (Y)	<input type="checkbox"/>
Change QCat to	<input type="text"/>	Change ACat to	<input type="text"/>	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="text"/>
				Move split to owner (Y)	<input type="checkbox"/>

 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"/>	<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	<input type="checkbox"/>	Make decisions on legals (Y)	<input type="checkbox"/>
Force user to verify (Y)	<input type="checkbox"/>	<input type="checkbox"/>	Unlink account (Y,R)	<input type="checkbox"/>
Keep follow-up date (Y)	<input type="checkbox"/>	<input type="checkbox"/>	Do not update date last worked (Y)	<input type="checkbox"/>
Smart Code for duplicated cases	<input type="checkbox"/>	<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	<input type="checkbox"/>	Stop Smart Code series (Y,1-6)	<input type="checkbox"/>
Re-start S/Code series (Y, 1-6)	<input type="checkbox"/>	<input type="checkbox"/>	Transfer to client	<input type="checkbox"/>
Transfer to company	<input type="checkbox"/>	<input type="checkbox"/>	Transfer notes (Y) <input type="checkbox"/> Oth.inf (Y/D)	<input type="checkbox"/>
Close code for existing account	<input type="checkbox"/>	<input type="checkbox"/>	Transfer secondary balances (Y)	<input type="checkbox"/>
Keep existing commission rate (Y)	<input type="checkbox"/>	<input type="checkbox"/>	Reset decisions (Y,A)	<input type="checkbox"/>
Do not transfer duplicates (N)	<input type="checkbox"/>	<input type="checkbox"/>	Adj.code <input type="checkbox"/> Amount (optional)	<input type="checkbox"/>
Reset attempts, contacts (Y,A,C)	<input type="checkbox"/>	<input type="checkbox"/>	25	
Add payment code	55 Balance type <input type="checkbox"/>	<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

Smart Code 614	Override		Type (A,P,C,N,O)	C
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"/>	<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"/>		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)	<input type="text" value="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="text" value="AT"/> <input type="text" value="DD"/> <input type="text" value="MV"/> <input type="text" value="NT"/> <input type="text" value="PC"/> <input type="text" value="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="text" value=""/>
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="text" value="55"/> Balance type	<input type="checkbox"/>		Adj.code <input type="checkbox"/> Amount (optional)	<input type="text" value="25"/>

F1-New Selection
F3-Search
F12-Update
Page keys
Delete Code (D)



Smart Codes – Creating a Smart Code (Back pages)

- You can start, stop or restart a Smart Code Series.
- You can transfer the account to a different Company and Client Number.
- If you are transferring the account to a different Company and Client Number, you can close it with a specific Close Code and when transferring it, do you want to keep the existing commission rate and transfer the secondary Balances .
- You can stop transferring a duplicate account.
- We keep track of attempts and contacts and decisions on the accounts based on prior Smart Codes. You have the option of resetting the attempts, contacts and decisions.
- You can also adjust a debtors balance thru a Smart Code. You will need to specify the Payment Code, Adjustment Code and the amount.

Smart Codes pg/6

Smart Code 614	Override		Type (A,P,C,N,O)	C
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"/>	<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"/>		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)	<input type="checkbox"/>	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) <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 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)



Smart Codes – Creating a Smart Code (Back pages)

- “ Recalculate commission”, Utilize placed date”, Change Fee Code” and “Substitute commission code for Fee Code” all work hand in hand with each other.
- You can change (recalculate) the commission rate on the account either based on a new Fee Code being applied by this Smart Code or based on the rates you have at the Client Master file.
- If you are changing the Fee Code, you can use the placement date for calculating the age of the account.
- You can change the existing Fee Code to a new one or change the existing Commission Code by substituting the Fee Code for a Commission Code.

Smart Codes pg/7

Smart Code	614	Override	Type (A,P,C,N,O)	C
Description	LINE PORTED TO CELL			
Recalculate commission (Y)	<input type="checkbox"/>		Substitute commission	
Utilize placed date for age (Y)	<input type="checkbox"/>		code for fee code (Y)	<input type="checkbox"/>
Change fee code to	<input type="text"/>			
Forward to agency number	<input type="text"/>		Recall from forwarding agency (Y)	<input type="checkbox"/>
Forwarding rate	.00	%		
Change account status code to	<input type="checkbox"/>		Change owner based on first open account (YPT) Worker (*S,*D)	<input type="checkbox"/>
Change worker code using Work group code (Y)	<input type="checkbox"/>		Change owner code using Work group code (Y,X)	<input type="checkbox"/>
Delete from account processing (Y)	<input type="checkbox"/>		Smart Codes needed	<input type="checkbox"/>
			Applied within	<input type="checkbox"/>
Credit report as new account (Y)	<input type="checkbox"/>		Fax standard letter to client (Y)	<input type="checkbox"/>
Stop mail (Y,N)	<input type="checkbox"/>		Clear letters pending (Y)	<input type="checkbox"/>
Code for additional Smart Codes	<input type="text"/>		Stop/Start interest (Y/S,N)	<input type="checkbox"/>
Change internal score to	69		Interest rate & frequency	.000 <input type="checkbox"/>



Smart Codes – Creating a Smart Code (Back pages)

- You can forward accounts to another agency or a law firm through a Smart Code.
- Forwarding agency number has to be a client that you have set up in the client master file.
- You can specify what the forwarding agencies commission rate will be.
- You can also “Recall” an account that has been forwarded. The Smart Code will remove the forwarded agencies code from the account.
- The Status Code can be changed.
- You can change the Owners and the Workers based on the Owner or Worker of the first open account.

Smart Codes pg/7

Smart Code	614	Override	Type (A,P,C,N,O)	C
Description	LINE PORTED TO CELL			
Recalculate commission (Y)	<input type="checkbox"/>			
Utilize placed date for age (Y)	<input type="checkbox"/>	Substitute commission		
Change fee code to	<input type="text"/>	code for fee code (Y)		<input type="checkbox"/>
Forward to agency number	<input type="text"/>			
Forwarding rate	.00	% Recall from forwarding agency (Y)		<input type="checkbox"/>
Change account status code to	<input type="text"/>	Change owner based on first open		<input type="checkbox"/>
		account (YPT) Worker (*S,*D)		<input type="checkbox"/>
Change worker code using		Change owner code using		
Work group code (Y)	<input type="checkbox"/>	Work group code (Y,X)		<input type="checkbox"/>
Delete from account processing (Y)	<input type="checkbox"/>	Smart Codes needed	<input type="text"/>	<input type="text"/>
		Applied within	<input type="text"/>	<input type="text"/>
Credit report as new account (Y)	<input type="checkbox"/>	Fax standard letter to client (Y)		<input type="checkbox"/>
Stop mail (Y,N)	<input type="checkbox"/>	Clear letters pending (Y)		<input type="checkbox"/>
Code for additional Smart Codes	<input type="text"/>	Stop/Start interest (Y/S,N)		<input type="checkbox"/>
Change internal score to	69	Interest rate & frequency	.000	<input type="checkbox"/>



Smart Codes – Creating a Smart Code (Back pages)

- You can change the Worker and the Owner based on a Work Group. Meaning, that you are not changing the owner or worker to a specific person but reassigning the account through a Work Group. These two fields are tied to the Action Line of the Smart Code.
- Delete from account processing will remove the account for a collectors Work Queue.
- This Smart Code will not be able to be applied if any of the Smart Codes Needed are not found on the account.
- If you had the account flagged as “Do not report” and have decided to report it, you can credit report it as “New”.
- You can Fax a letter to the debtor but you MUST have IBM’s faxing software installed.

Smart Codes pg/7

Smart Code	614	Override	Type (A,P,C,N,O)	C
Description	LINE PORTED TO CELL			
Recalculate commission (Y)	<input type="checkbox"/>			
Utilize placed date for age (Y)	<input type="checkbox"/>	Substitute commission		
Change fee code to	<input type="text"/>	code for fee code (Y)		<input type="checkbox"/>
Forward to agency number	<input type="text"/>			
Forwarding rate	.00	% Recall from forwarding agency (Y)		<input type="checkbox"/>
Change account status code to	<input type="text"/>	Change owner based on first open		<input type="checkbox"/>
		account (YPT) Worker (*S,*D)		<input type="checkbox"/>
Change worker code using		Change owner code using		
Work group code (Y)	<input type="checkbox"/>	Work group code (Y,X)		<input type="checkbox"/>
Delete from account processing (Y)	<input type="checkbox"/>	Smart Codes needed	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
		Applied within	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Credit report as new account (Y)	<input type="checkbox"/>	Fax standard letter to client (Y)		<input type="checkbox"/>
Stop mail (Y,N)	<input type="checkbox"/>	Clear letters pending (Y)		<input type="checkbox"/>
Code for additional Smart Codes	<input type="text"/>	Stop/Start interest (Y/S,N)		<input type="checkbox"/>
Change internal score to	69	Interest rate & frequency	.000	<input type="checkbox"/>



Smart Codes – Creating a Smart Code (Back pages)

- If you want to stop mail from going out on an account you can by putting a “Y” in Stop mail or an “N” if you want to remove the Stop flag.
- If a letter has been requested and not processed (pending) you can delete that letter.
- Code for additional Smart Code, will allow you to automatically apply additional Smart Codes.
- You can stop or start the calculation of interest on an account and you can specify the interest rate and frequency.
- The internal score can also be changed.

Smart Codes pg/7

Smart Code	614	Override	Type (A,P,C,N,O)	C
Description	LINE PORTED TO CELL			
Recalculate commission (Y)	<input type="checkbox"/>	Substitute commission		
Utilize placed date for age (Y)	<input type="checkbox"/>	code for fee code (Y)		<input type="checkbox"/>
Change fee code to	<input type="text"/>			
Forward to agency number	<input type="text"/>	Recall from forwarding agency (Y)		<input type="checkbox"/>
Forwarding rate	.00 %			
Change account status code to	<input type="checkbox"/>	Change owner based on first open account (YPT) Worker (*S,*D)		<input type="checkbox"/>
Change worker code using Work group code (Y)	<input type="checkbox"/>	Change owner code using Work group code (Y,X)		<input type="checkbox"/>
Delete from account processing (Y)	<input type="checkbox"/>	Smart Codes needed	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Credit report as new account (Y)	<input type="checkbox"/>	Applied within	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Stop mail (Y,N)	<input type="checkbox"/>	Fax standard letter to client (Y)		<input type="checkbox"/>
Code for additional Smart Codes	<input type="text"/>	Clear letters pending (Y)		<input type="checkbox"/>
Change internal score to	69	Stop/Start interest (Y/S,N)		<input type="checkbox"/>
		Interest rate & frequency	.000	<input type="checkbox"/>

