



RMEEx 2.0 RELEASE NOTES

ACCOUNT CRAWLER

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What if you wanted to present accounts that have had a positive contact in the last sixty days, but have had no payment in the last 15 days? How would you run a report for this data every 90 days? How would you tackle this job right now? The Smart Code Series would work – but we wanted to make this process easier and more flexible.

Account Crawler allows you to review your *entire* inventory of accounts and take actions on the accounts you select. You can select accounts based on whether they have payments, check or credit card transactions pending, promises or payment arrangements, positive contacts, right party contacts or different types of phone numbers. Notice the order. The menu of items takes you from more likely to pay to less likely to pay. This is how the system is structured. It looks first for attributes on an account that are most likely to result in a payment.

The system reads open accounts in link number order and matches each account with the criteria you have specified. If an account matches one of the criteria entered, then the system applies the corresponding smart code. However, the smart code is applied to the specific account that matched the criteria. The smart code can be applied at the debtor level if needed – setting the smart code up to duplicate for links. Once an account has met a condition, the system continues and moves on to the next *open linked* account.

This feature runs at the company level, so you can specify different conditions and different smart codes for each company. The Account Crawler can run at any time or can be scheduled. Please note that this feature examines every account in your system so the processing time could take some time. If the process has not completed its run, it will resume the next day. If the process takes days to run, there is an option to run the set-up 'X' number of days after the prior run completes. This is by company, so if company 01 completes in 2 days and company 04 completes in 6 days, the set up will allow you to start the process over 10 days later for company 01 and 20 days later for company 04.

A report is also furnished showing the start time and end for each company; the first link number and the last linked number processed and the number accounts and debtors analyzed. This will make it easy review how many accounts were processed. The report is placed on hold in the print spool. This feature will be started at the end of the nightly process, by the nightly process. The nightly would then start the process at the time stipulated. If we are already in the time range specified it would start the process. If there is a job waiting or running already, the job would be cancelled and a new job would be submitted.

There is also an option to add the smart codes applied to the smart code history file (SCTRACH or write audit notes). You may elect not to do this if you are running the same smart code many times. This option needs to be carefully reviewed.

Go to the second control menu and select smart code series options.
Then select account crawling options.



RMEx QUANTRAX CORPORATION INC.

Account Crawling options

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

	Apply Smart Code	Override
Payment within 30 days	400	100
60 days	401	101
With check or credit card transactions pending	402	102
With promise or payment arrangement	403	103
Positive contact within 50 days	404	104
100 days	405	105
RPC within 50 days	406	106
100 days	407	107
With phones (Home or work)	408	108
With cell phone on detail screen	409	109
Without phones (Home or work)	410	110

Bypass if placed within 40 days

Smart codes at debtor level only (Y)

Days to wait at end of company 20

Process between 545 and 2325

Add to smart code history (Y)

Run on (MTWTFSS) Y Y Y

ENTER-Update information F7-Exit Next run date 2/16/11

- Payment within *must* be entered in ascending sequence
- Positive contact and RPC days *must* be entered in ascending sequence
- With Phones, with Cell phone and Without phones looks at ALL links
- You can bypass the checking of new accounts by using “Bypass if placed within ___ days
- Bypass if placed within X days could match a linked account. Does not mean we will not take action on another linked account
- Can apply a smart code to an account in a linked group that qualifies or to a primary account – but only if Y is in “Smart codes at Debtor level only
- Days to wait at end of company tells the system to wait X number of days before running the process again for a specific company
- Process between allows you to state the start time and end time to run the job
- The time to run must be set up to have this process run
- ‘Add to smart code history’. This is very important to note - if a Y is added, the smart code notes will be added to the history file. You could potentially add millions of notes nightly or if not used you will not be able to know why an account was changed if you do not allow notes to be added
- ‘Run on’ allows you to run this processes on a selected day only. If blank this option will run every day, unless you have the ‘days to wait at end of company’ filled in, then it will run every so many days on the given days entered
- Next Run Date shows you the NEXT run date the ‘Account Crawler’ is scheduled to run (at the company level)

A quick reminder – The account crawler:

- ✓ Looks at *all* accounts in system
- ✓ Stops and applies the smart code and override at first decision met (moves from top to bottom)

- ✓ Uses calendar days not the number of nightly's that will process
- ✓ Produces a report which will be spooled when the account crawler process has completed its run. If the crawler did not go through all of the accounts in a single day, it will continue the next night picking up where it left off – continuing until it runs through all accounts
- ✓ If running multiple companies, will run for each company at a different time or can be run at the same time
- ✓ May need to be run when no one is working on the system. So setting the start time to run after the nightly has completed and ending the process prior to start of business is recommended
- Will allow a smart code to be applied IF criteria in that smart code is met, to accounts that did not qualify for *any* of the criteria on the screen -
Coming Soon

You can use the Account Crawler for a variety of purposes. For example, you can make sure that all accounts with prior payments or promises are assigned to agents, all accounts with no RPC's are sent to the dialer, and all accounts with no phone numbers are sent to a data scrubbing vendor.