**Quantrax Corporation Inc**. Due date: \_\_\_\_\_\_\_\_\_\_

***RMEx***

**IMPLEMENTATION**

**Phase III:**

1. **Online Training**
2. **On site management Training**
3. **System control setup**
4. **Data mapping**

**This information must be returned to Quantrax before the due date. Any delay in returning this information could cause the final conversion to be moved to a later date.**

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**Step 1**

**On-line Training**

RMEx contains several web based on-line training modules. When the AS/400 and RMEx have been installed, key management personnel, collectors, and payment processing staff will need to review the appropriate training modules to become familiar with the features of RMEx. ***This needs to be completed prior to Quantrax’s on-site Management training****.* This can be found at our website at <http://Quantrax.com/> in the “For our client” section under Web Based Training.

1. **Management training** - **At least** **two people will be required to review and understand** this module
2. **Payment training** - At least two people will be required to review and understand this module.
3. **Collector Training** - Collector training should also be reviewed by the key management personnel, since it presents the manner in which account information is stored and accessed within RMEx. More information on this area can be found within the manual “Preparing for RMEx”.

*Team work will be very important in creating your collection strategy’s. At least two people in your management team will be required to review the training material. It is strongly suggested that you do not put the entire system setup on one person’s shoulders.*

Responsible Party: **CLIENT**

Notes

**Step 2**

**On-site Management Training**

Quantrax will schedule an on site for approximately 3 days to train key personnel in planning for RMEx and setting up the knowledge base. It is advantageous that prior to this, you identify the people who will be playing the key management roles in the implementation of RMEx as well as the setup and maintenance of the system.

Responsible Party: **QUANTRAX**

Notes

**Step 3**

**Setup System Control File and letter setup**

While RMEx allows you to create significant levels of automation, the process should not be rushed. You are very likely to re-engineer your business, as you understand the full potential of RMEx. The automation should be developed along with the changes to your business.

While most operational areas of the system can be set up after the system in production, the letters to be used and their content should be planned and set up in advance. If you use a letter printing service, there will be less work involved than having to set up your letters to be printed in house. There is usually no conversion that is possible for your letters.

Use the worksheets provided below to help you document your RMEx Setup

Responsible Party: **CLIENT**

Notes

**Step 4**

**Data Mapping for Conversion - Sent to Projects To Write Conversion Programs**

In addition to information about your accounts and statistics, we will need a table from your current system which will map your Close Codes, Collector Codes, and Secondary balance types (if in use) etc. to those that you will set up in RMEx. We will also need a map of your Payment Codes. RMEx Payment Codes have very specific meanings; so do notattempt to create new ones to suit the way you used to do business. The forms that we have created may or may not suit your particular conversion and can be adjusted and created as needed. Please use these forms to make the conversion as efficient as possible. You will need to create “Default Code” for each of the tables, in case a code on an account is not listed on the tables.

Responsible Party: **CLIENT**

Notes

Use the following for mapping important information into RMEx.

**Balance Types**

| **Old Bal. Types** | **New Bal. Types** | **Comments** |
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**Notes:**

**Close Codes**

The Close code is a one-character field in RMEx. Except for Paid-in-full (Code 1) all other codes are user-defined.

| **Old Close Code** | **New Close Code** | **Comments** |
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**Notes:**

**Collector Codes**

**(Two-character field in RMEx)**

| **Old Coll. Code** | **New Coll. Code** | **Comments** |
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**Notes:**

**Payment Codes**

(Two-Character field in RMEx)

| **Old Payment Code** | **New Payment Code** | **Comments** |
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**Notes:**

**Status Codes**

(One Character Field in RMEx)

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| **Old Status Code** | **New Status Code** | **Comments** |
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**Notes:**

**Description Code**

You can convert special conditions by adding description codes at the time of conversion.

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| **Condition** | **Description Code to add** | **Comments** |
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**Notes:**

**QCat Codes**

You can convert special conditions or statuses by setting up QCat Codes. Remember that QCat Codes are used to classify and sub-classify accounts within work queues.

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| **Condition** | **QCat Code to add** | **Comments** |
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**Notes:**

**Other areas**

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| **Old System** | **RMEx** | **Comments** |
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