



RMEx Secure E-Mail[®] Series User Guide

RME x Secure E-Mail® Series- User Guide

Table of Contents

Overview - RME x Secure E-Mail® Series – Phase 1	3
Setting-Up RME x Secure E-Mail® Series On Your System	3
Setting-Up Users	4
Uploading and Assigning Graphics/Text Files To RME x	4
Setting-Up Letterheads	8
Setting-Up Cover Pages	9
Setting-Up Letters	11
Taking Actions Based On Consumer Interactions	12

RME Secure E-Mail® Series- User Guide

Overview - RME Secure E-Mail® Series – Phase 1

This feature allows our clients to send consumer letters via secure e-mail. In addition, it allows users to go beyond traditional e-mailing by providing the advantages of modern and user-friendly features of technology that will allow allowing your business to grow.

Before setting up RME Secure E-Mail Series® on your system you should have completed the following tasks:

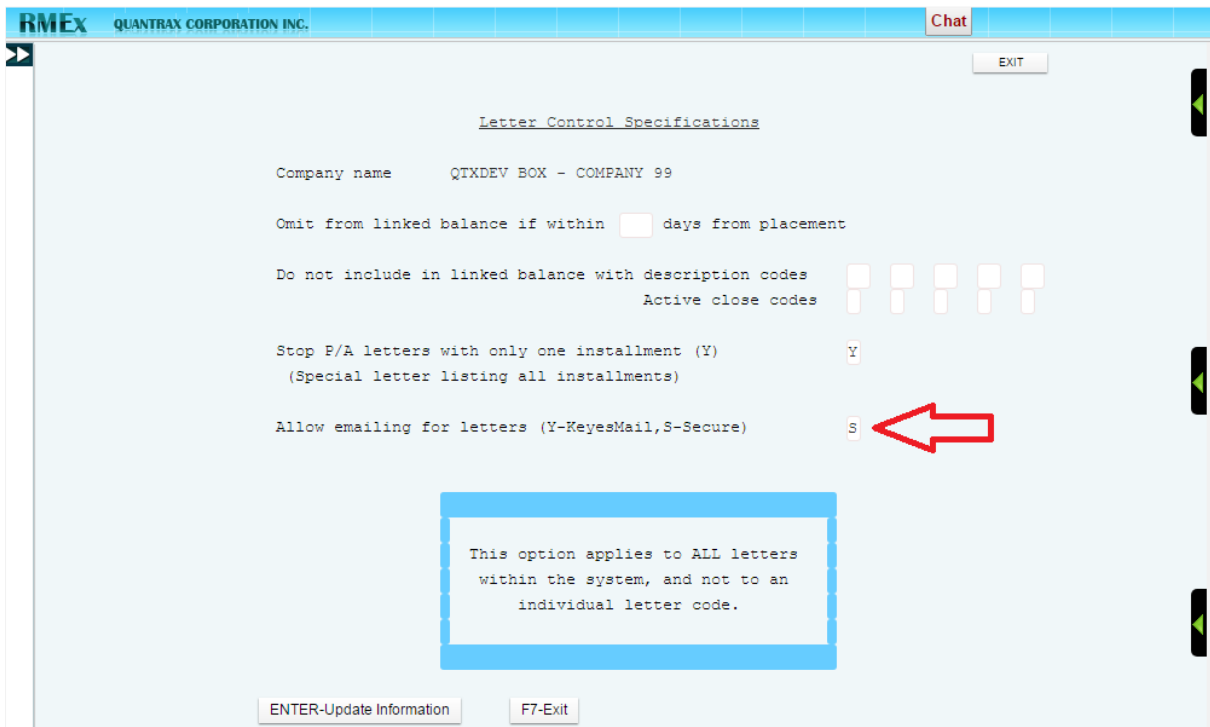
1. Review product information [here](#).
2. Create your cover pages and letterheads to be used with the product. Instructions can be found via this link, [RME Secure E-Mail Series® - Getting Started Guide](#).
3. Setup RME to e-mail letters (adding e-mail addresses, etc.); a list of Knowledgebase articles can be found [here](#).

Setting-Up RME Secure E-Mail® Series On Your System

Once you have completed *steps 1- 3* above, you can then start setting up RME Secure E-Mail Series® in your system.

To turn on RME Secure E-Mail Series®:

1. Go to on you need to **System Control Menu > Letter Codes**
2. Press **F7-EXIT**, to exit Letter Codes and move to the *Letter Request Options Screen*
3. Press **F7-EXIT** again to get to the *Letter Control Specifications Screen*
4. Set **Allow emailing for letters** to **S(ecure)**
5. Press **ENTER** to Update Information, then **F7-EXIT**



RMEEx QUANTRAX CORPORATION INC. Chat


Letter Control Specifications

Company name QTXDEV BOX - COMPANY 99

Omit from linked balance if within days from placement

Do not include in linked balance with description codes
Active close codes

Stop P/A letters with only one installment (Y)
(Special letter listing all installments) Y

Allow emailing for letters (Y-KeyesMail,S-Secure) S 

This option applies to ALL letters within the system, and not to an individual letter code.

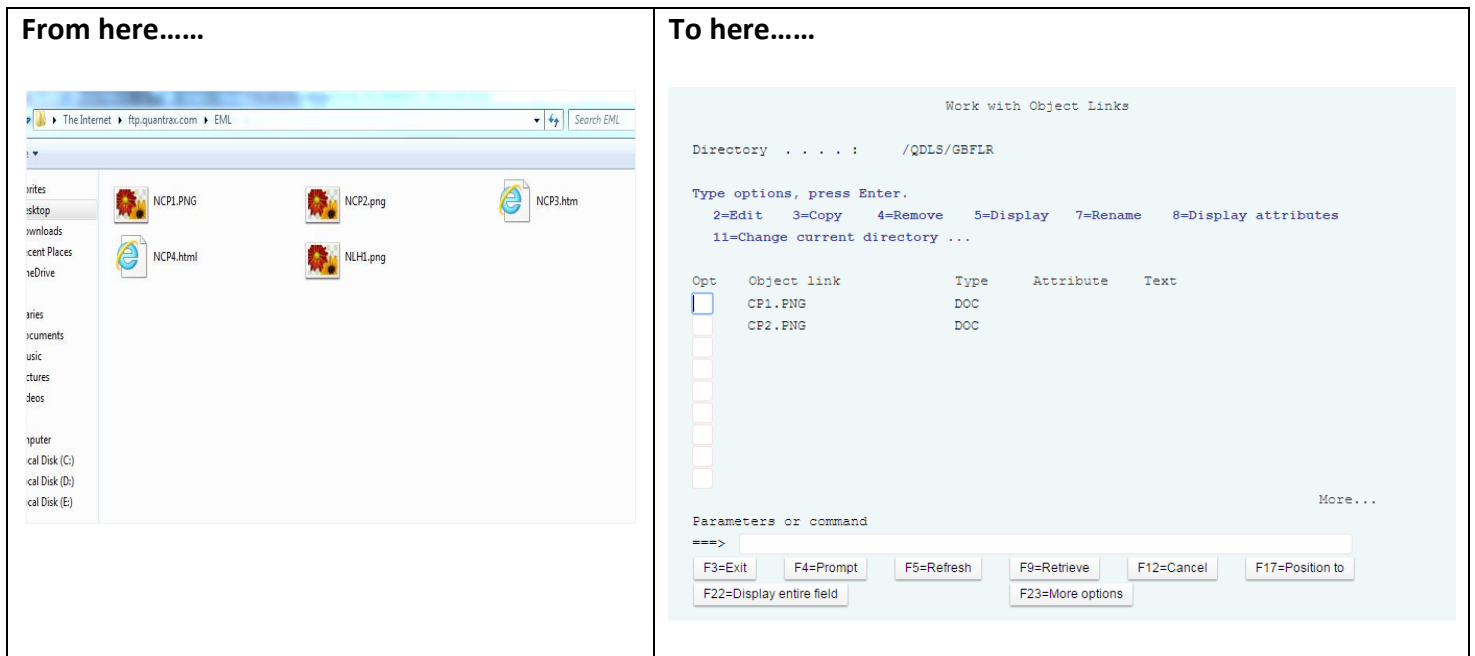
Setting-Up Users

We recommend allowing only one or two employees in your organization to be able to maintain the secure e-mailing system controls. Quantrax will be adding the user profiles for this version, so please **provide Quantrax** with the users that you wish to allow changing secure e-mailing controls.

Uploading and Assigning Graphics/Text Files To RMEEx

Before you define your cover pages and letterheads, you need to load the graphics and text you previously designed, into RMEEx.

To transfer your graphic/text files into the folder GBFLR in the IFS on your IBM I server (AS400). For those who are familiar with IBM Client access and different third party FTP interfaces, this will actually be an easy task, where you will simply need to grab and drop(or use a transfer feature) to get the file to the destination from your PC folder.



The command line method to transfer the documents through your Quantrax FTP folder is as follows:

1. From AS400 command line, type the command **FTP RMTSYS(FTP.QUANTRAX.COM)**.
2. Provide your *user name*, press **ENTER**.
3. Provide your *password*, press **ENTER**.
4. Type command **NAMEFMT 1**.
5. Type command **cd EML** (Here EML is folder in the ftp site which contains your documents.).
6. Type command **lcd /QDLS/GBFLR** (This sets the local directory to GBFLR, where the images/documents should be transferred to).
7. Type command **get NCP1.PNG C1.PNG** (Here NCP1.PNG is the file name in the ftp site and C1.PNG is the name we want the file to be in once transferred to GBFLR).
8. Repeat *step 7* to transfer all your files and type command **quit** to end your ftp session.

RME x Secure E-Mail® Series- User Guide

Once the files have been loaded into RME x you need to assign them by doing the following;

1. Go to **System Control Menu 4>Secure E-Mailing>Maintain Standard Graphics.**
2. Type option (Opt) **1** with a two character Graphic ID to define your newly loaded graphic.

B290 Telex/Fax - Graphics Id maintenance

Position to Id . . .

Type option, press Enter.

1=Create 2=Change 3=Copy 4=Delete 6=Print 8=Attributes

Graphics

Opt	Id	Number	Description
1	A3		
<input type="checkbox"/>	A1	1000024	Test Image 01
<input type="checkbox"/>	A2	1000026	Standard Cover Page for all letters
<input type="checkbox"/>	CA	1000014	COVER PAGE TEST 2
<input type="checkbox"/>	CB	1000015	Quantrax letter to demo to RD
<input type="checkbox"/>	CC	1000017	TEST LETTERHEAD 2 FOR RD
<input type="checkbox"/>	CD	0000001	Connection Diagram
<input type="checkbox"/>	CP	1000012	cover pg 1
<input type="checkbox"/>	C1	1000019	New RD test 01
<input type="checkbox"/>	HA	1000013	HTML TEST COVER 1
<input type="checkbox"/>	HB	1000016	TEST HTML TO SEND TO RD
<input type="checkbox"/>	HC	1000018	TEST HTML 2 for RD
<input type="checkbox"/>	HD	1000020	new RD test html 1

F1=Help F3=Exit F5=Refresh F11=Change sequence F12=Cancel

3. Type option (Opt) 2 to import your PNG/HTML graphic/document you loaded into GBFLR.

```
B290                               Telex/Fax - Graphics Id maintenance

Position to Id . . .      _  _

Type option, press Enter.
  1=Create  2=Ch  .....
Graphics    :                Create a graphics Id                :
Opt Id Number :                :
  1  A3       :  Select one:                :
  -  A1 1000024 :                :
  -  A2 1000026 :  2 ←                :
  -  CA 1000014 :                :
  -  CB 1000015 :  1. Import from PCX/BMP File on AS/400 host.    :
  -  CC 1000017 : → 2. Import from JPG/PNG/PDF/HTML File on AS/400 host. :
  -  CD 0000001 :  3. Import from received fax page entire.        :
  -  CP 1000012 :  4. Import from existing G3 file.                :
  -  C1 1000019 :                :
  -  HA 1000013 :                :
  -  HB 1000016 :  F1=Help  F12=Cancel                :
  -  HC 1000018 :                :
  -  HD 1000020 : .....                :
```

F1=Help F3=Exit F5=Refresh F11=Change sequence F12=Cancel



RMEx Secure E-Mail® Series- User Guide

The two character **Graphic ID** defined above will be the letterhead code and can be assigned with letter codes directly; this will be explained later in the documentation.

Setting-Up Cover Pages

If the loaded document/Image is to be used as a cover page, then only the **Letterhead** option requires to be changed as **1** while everything else is kept at the default value.

NOTE: Do not forget to give a description to your graphic.

C290	Telex/Fax - Graphics Id	change
Graphics Id	A2 1000026	
Description	<input type="text" value="Standard Cover Page for all letters"/>	
Alias	<input type="text"/>	
Profile : Co. (4)	<input type="checkbox"/>	(In any of these profile fields, "*" is
Div. (3)	<input type="checkbox"/>	a wild card)
Dept. (2)	<input type="text"/>	
User. (1)	<input type="text" value="KASUN"/>	
Use authority match. .	<input type="text" value="5"/>	(0=suspended, 1 - 4 graduated criteria
Change authority match. .	<input type="text" value="5"/>	5=no restrictions on use)
Delete authority match. .	<input type="text" value="5"/>	
Graphic type.	<input type="text" value="0"/>	(0=graphic, 1=form overlay)
Graphic orientation . . .	<input type="text" value="0"/>	(0=portrait, 1=landscape)
Letterhead.	<input type="text" value="1"/>	 (0=never, 1=may be, 2=only)
Associated footer	<input type="checkbox"/>	
Required left margin. . .	<input type="text"/>	(Left margin offset for text at 10 cpi)

RME x Secure E-Mail® Series- User Guide

Setting-Up Letters

1. Assign your cover page and letterheads with letters through **System Control Menu>Letter Codes>Page 3** (Letter or document codes screen).

Letter or document codes

Company name	QTXDEV BOX - COMPANY 99		
Letter/document	CB	Description	COLBIN'S TEST LETTER
This is a stored document (Y)	<input type="checkbox"/>		
Document name contains text	<input type="text"/>		
Print both sides (Y)	<input type="checkbox"/>		
Front overlay	<input type="text"/>		
Front overlay library	<input type="text"/>		
Back overlay	<input type="text"/>		
Back overlay library	<input type="text"/>		
Word template code	<input type="checkbox"/>		
Subject line for secure email	<input type="text" value="Testing RME x Secure E-mailing"/>		
Secure email Cover ID	<input type="text" value="HD"/>		
Secure email Letterhead Code 1	<input type="text" value="QA"/>		
Secure email Letterhead Code 2	<input type="text"/>		

NOTE: When two letterheads are assigned with a letter, the first page of the letter will contain *Letterhead 01* while *Letterhead 02* will continue through the rest of the pages. The letter subject line will contain 11 digit RME x account number (comp + case number) together with the letter code in addition to the subject that you have defined above.

Based on consumer interaction on the sent e-mail, RME x will take action on the consumer accounts.

RMEx Secure E-Mail® Series- User Guide

Taking Actions Based On Consumer Interactions

The user can apply smart codes to each of the following user interactions. The assigned smart codes will get applied to the accounts interactively and automatically based on consumer interaction.

- E-mail sent
- E-mail viewed
- Attachment downloaded
- E-mail deleted

Secure E-mailing : Consumer Interactions

Sent mail status	Smart code
Email sent	101
Email viewed	303
Attachment downloaded	505
Email deleted	707

F7-Exit