

## **RMEX 2.0 RELEASE NOTE UPDATES**

The following are recent changes to RMEx 2.

May 9, 2011 – **Queue Consolidations** – We have added a “w” option for phone selection. This will select accounts with no home or cell, but with only a work phone from the account detail screen. We have also added a time zone selection (WMCE) for I-Tel users.

May 9, 2011 – **Account Audits** – We have added phone selections c and w to the account audits. This will behave in the same way as on the queue consolidations..

May 10, 2011 – **Contact series options/I-Tel** - If you run the contact series option to move accounts to a dialer campaign, you can now run the immediate option AND exclude accounts worked within X number of days. While this field has been available for the nightly option, we have now included this field in the run now option. Go to the I-Tel menu and select ‘Contact series option’. Then select ‘Create selections and run option now’. The field is called ‘Omit if worked within days’.

### **August 21, 2011 – Description Code System Controls -**

Include balance for collectors (N=No) - This new option allows you to omit (hide) an individual account’s balance from the Account Detail screen’s linked balance and from the qualifying amount on the F9-Payment Arrangement screen. If the Description Code exists on any account within a linked group and is accessed by anyone that is set up as a collector in System Security, the linked balance and qualifying amount will NOT reflect that account’s balance.

### **August 21, 2011 – Account Detail Screens -**

F15-Phone Info. From Linked Accounts screen - We have added cell phone fields.

F3-Information Duplication – We have added the ability to duplicate the cell and home phones independently across linked accounts. A “C” will duplicate the cell phone, an “H” will duplicate the home phone and a “Y” will duplicate both numbers.

August 21, 2011 – **Note codes added by system** - We have added a new note code 9X - for cell phone changes.

August 21, 2011 – **Tab+ Screen** – F5-Format - This new option allows you to display the phone code description that has been set up in the “Other phones” system

controls. This option, when selected, will be remembered by the program, until you revert back to the old format.

**August 21, 2011 – TabQ Screens - Multiple Co-signers screen** – We have changed the screen heading to - Multiple Co-Signers / Other responsible parties

**August 21, 2011 – System Parameters** - There are new options on the System Parameters, system control file.

No linking – This option allows you to stop the linking of an account to existing accounts if a specific description code is present on the existing account(s). The description code must reside on each account within the existing linked group in order to prevent the new account from linking.

No Primary change – This option allows you to stop the changing of a primary account from occurring if a specific description code exists on a linked group of accounts. We will expect the description code to be on the primary.

NOTE: For manual linking or manual primary change, the message “Description code does not allow linking or primary change” will appear to the user who is trying to link the accounts or trying to change the primary account

**August 21, 2011 – Smart Codes - ? Logic:**

CLOSECBOTH - Allows you to select and make decisions on the existence of both a close code and a secondary close code. Enter the selection criteria as close code then secondary close code (separated by a space).

E.g. CLOSECBOTH EQ A 96

A=close code (space) 96=secondary close code

**September 4, 2011 – Work items:**

Some time ago, we introduced the concept of a “Work item”. This could be specified in the smart code window, and the account would be saved in a special “queue” that could be worked by the user at a later time. We have expanded that functionality. You can now set up a work item from within the smart code logic. On the first “back screen” of a smart code (Page 5) you can define a work item and a User ID to associate that work item with. If the User ID is not specified, the User ID of the person who applied the smart code is

used.

Here is an example.

Mark as work item (Y) for user Y COLL02

#### **September 4, 2011 – Smart Codes:**

On the second back screen of the smart codes (Page 6), we have added an option Left message (Y,A,R). This will be used to indicate that a message was left. “Y” means any message. That could be by a dialer or an agent. “A” means the agent left a message, and “R” will mean a message was left with the right party. Presently, this field is used in a new module we have created for automatically managing maximum calls for a day or a period, at the debtor or phone number level. This module has not been documented. It is being tested at a few client sites, and you may see some references to it within some menu items.

#### **September 20, 2011 – Smart Codes:**

We have made some changes to the way you can move through a smart code without having to press F12 (update). F12 will log information on the audit files. We needed a method of moving through a smart code, including the X and ? logic screens, for viewing the information only. This can now be done using the ENTER and page down keys, depending on where you are within the smart code.

#### **September 20, 2011 – Accessing client inquiry from an account:**

Some of you have managers or supervisors who may need to look up a client while in an account. There are function keys to show some of the client information, but if you have access to client inquiry, why not allow you to get there while in an account? What do you now do? You open another session! A “CL” in the smart code field will now display the client inquiry for that account!

#### **September 20, 2011 – Bankruptcy information:**

We have made changes to the way you enter bankruptcy information. In the case where you have an account that is associated with the new bankruptcy information (which is often the case), you can go into the “Add new information” option and use F3 to do a search. That will bring up account inquiry. Why key in the data that is already on RMEx? Access the account and exit. You will return to the bankruptcy entry screen. You will see a message “F10 – Get data from last account”. F10 will fill your screen with the available information from RMEx (New, address, social, attorney).

#### **September 20, 2011 – I-Tel changes:**

In order to keep up with changes in compliance requirements, we have added the following changes.

- Before you launch a manual call (A-Tab etc.) we will use the home, work, cell, the number you are calling (in the case of a D-Tab) and the debtor's state, to see if we can place the call based on all of that data. If we cannot, we will issue an error message. With regard to toll-free numbers, we are much more restricted. The default allowed calling times we have used for a toll-numbers is 2 PM to 8 PM. This meant that if you had a work number that was toll-free, and the home number was in the east coast, you could not call that account until 2 PM using our dialer! Good, but not good too. We have made a change. On the dialer system control file, you can now specify that 800 numbers should not be used for time zone calculations.

Omit 800 numbers for time zones – N=with other numbers, A = Always.

This will apply to manual calls and predictive and progressive dialing too. If the toll-free number is the ONLY number we are dealing with, we will default to the 2PM to 8 PM times, unless you have an “A” in the new option, which will mean – Always ignore 800 numbers for time zone calculations.

- We have introduced code to restrict the number of calls that can be placed to a phone number, type of number (home, work, cell, non-debtor) or the debtor, in a day, or a period of time. You will see references to this within the code. We have not yet documented this area – Please do not attempt to use it until notified. As a part of this, when in predictive or preview, “challenging” agent behavior will need to be restricted. One example is agents trying to launch calls while another call is in progress. We have added changes to request that an agent disconnect the active call, if they try to make additional calls, when there is an active call. This will only apply to cases where the maximum call rules are in effect.

We have made a change that applies to everyone. If an agent tries to make a dialer call to an account that has been “cached” by the dialer for a predictive call (placed in the “ready to be called” area), they will receive an error message “SC-4050 Account is selected for predictive

- - call is not allowed”.

### September 20, 2011 – Queue consolidations

We have an interesting change in Queue Consolidations. You can have an account with no numbers on the account detail screen, but numbers in the Tab+. These may be third parties you want to call in preview mode. How do you isolate these accounts that are in the “No phones”? Easy! Now you can now use a “+” for phone code, to mean “Select if there is no home, work or cell, but there is at least one good number in Tab +”!

**September 20, 2011 – Daily payment totals for a period**

This option (Payments menu, then Option 13 and then Option 8) is used by many, to determine where they are, in terms of payments and fees. You also try to compare where you are, to last year. We have now included last year’s information to the display. Yes, it will take a little longer to display, but it is well worth the wait. Here is a sample screen.

Day	Amount	Sub-total	Day	Amount	Sub-total
1			18		138,091.30
2	12,740.49	12,740.49	19	13,372.20	151,463.50
3		12,740.49	20	10,538.34	162,001.84
4		12,740.49	21	27,250.47	189,252.31
5		12,740.49	22	13,266.07	202,518.38
6	21,903.25	34,643.74	23	12,351.03	214,869.41
7	22,244.90	56,888.64	24		
8	8,157.12	65,045.76	25		
9	10,439.44	75,485.20	26		
10		75,485.20	27		
11		75,485.20	28		
12	15,510.90	90,996.10	29		
13	7,884.01	98,880.11	30		
14	14,089.51	112,969.62			
15	10,230.20	123,199.82			
16	14,891.48	138,091.30		214,869.41	
17		138,091.30			
				At day 23 in 09/10	222,394.24
				Currently at 97 % at day 23	
				Total for 09/10	310,342.42

ENTER-Display Commissions F7-Exit

> 01/001

**September 20, 2011 – Tab+ phones – changing a bad number**

Presently, you cannot make a bad number a good one (change lower to upper case). This was done for a reason. You do not want collectors calling numbers that you decided should not be called. But there are exceptions. We want you to be able to decide what numbers can be changed. At the phone code level (I-Tel menu and option 6) we will now allow you to say that that phone code can be changed from a lower case to an upper case code.

**October 2, 2011 – Smart Codes System Controls**

We now allow you to enter lower case letters in all of the note fields.

**October 24, 2011 – Daily payment totals for a period**

This option (Payments menu, then Option 13 and then Option 8) has been enhanced to show the “Money” for the balance of the month. This is the same number you will see on

the executive dashboard, when the “Money” options are selected. On a single screen, you will now be able to see the payments posted for the month, and the money expected for the rest of the month.

#### **October 24, 2011 – Area code warnings**

Cell phone on the account detail screen, has been added to the numbers checked for warnings, provided the option is selected on the states system control file. Only home and work numbers were checked in prior releases.

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#### **Version 2.2 January 20th, 2012**

#### **January 23, 2012 – ? logic in smart codes - Days since last payment**

Error in days since last payment on individual account, was corrected. 999 added to never had a payment. County code logic was also changed.

#### **January 24, 2012 – Payment transactions through smart codes.**

A problem with PIF's not being opened when balance was changed, was corrected. Programs - ACTCO1 and WAPCOD

#### **January 24, 2012 – New program created**

Programs ZCHKQPHN1C and ZCHKQPHN1 created to check phone numbers in SCCQUE, SCCQUEN1 and any TQ file, against accounts and Tab+. Parameter is file name.

#### **January 24, 2012 – Account processing - Maximum calls**

Change to max calls logic and updating of queues when debtor maximum was reached. (WAPINQ and SYNCQUEU)

#### **January 26, 2012 – Changing primaries - Inactive “I option”**

Due to a bug, inactive closes were not changing. This was corrected in program LINKXCH. This will take care of problem, going forward. To correct old accounts, client should run the program that looks at the entire database. This will take some time to run, but can be run with users on the system, or during a weekend. Program to call is SBMJOB CMD(CALL LINKXCHA)

#### **January 26, 2012 – Account posting - blank area codes**

Provided the flag OPF011 in SCSYSOP2 is Y, we will check for zero area codes in home, work or cell. If we can find the debtor state and phone number prefix in the I-Tel time zone file, we will then use that area code from that record in the phone numbers without area code. (ACMUPD and ACLODP)

One-time program CALL ZUPDARCODE can be submitted.

This program does not update Tab+ numbers. Numbers without an area code are not usually updated in Tab+ by the system. To update the Tab+ with the updated numbers, you will need to submit CALL ZUPDGHWC

Both of these jobs could run for a while depending in the number of accounts in your system.

**January 31, 2012 – New program ZNOTEDEAU to delete audit notes**

Provided a program to delete audit notes on a closed account and open accounts. Open accounts - notes before a specified date (Parm in MMDDYY format) are delete.

**January 31, 2012 – Calculating interest from full legal screen (F13)**

Problems in this option when a start date was specified were corrected (WACLEF)

**February 3, 2012 – Removing phones through a smart code**

This option was updating Tab+ on links but only removing SOME of the bad phone numbers from the account detail screen on the linked accounts. This was corrected (ACTCO1)

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Version 2.2 was updated on the FTP site - February 3, 2012

**February 4, 2012 – Limiting access to Tab+ numbers (bad numbers)**

In this day of compliance and new regulations, making it difficult for a collector to break the rules has become more important. There are more phone numbers and it is easier to make mistakes than in the past. We have an additional feature to help you to stop collectors from calling numbers that have been disabled. We will accomplish by “masking” all bad numbers. At the company level, you are able to specify that disabled numbers in the Tab+ should be masked for everyone, or for collectors only. This option will be added to the system parameters (not in this update). The user can update this field themselves or contact Quantrax for help. The field used for this flag is OPF012 in SCSYSOP2 (Y or C for everyone or collectors only). You can also set up this option based on a client. This option has been added to the client master update (last screen).

If the user is not supposed to see the disabled number, due to the company or client rules, the number will be masked on the Tab+ screen with “9999” in the last 4 characters of the phone number. We have protected existing numbers from change, as a part of this update.

(Programs WACPHONE, WAAPHOFM, UCLNT, UCLNTFM, ICLNT, ICLNTFM)

**February 5, 2012 – Analyzing linked accounts by docket number (court case number)**

If you have linked accounts with different court case numbers, you can now get the total balance for each court case number (stored on the F6 full legal screen) by using F5 from the full legal screen. This will display a screen similar to the options from within the linked account summary. You can then press ENTER to view totals by worker, QCat and balance types.

**February 6, 2012 – Queue consolidations**

How do you remember or quickly look up the parameters associated with a queue? You can now place your cursor on the UserID, processing type, QCat or time frame and press F3 (Search) to display a list of your campaigns! Selecting a campaign will populate the queue parameters on the consolidation screen!

**February 6, 2012 – Queue consolidations**

This affects I-Tel users. We have temporarily changed the end time to call, from 5 minutes before the calculated time (e.g 9 PM) to 15 minutes before the calculated time. This has been done on queue building, recreating work queues and queue building from the account audit. (COLDR2WK, COLDR2WKCN and WINQUE). This was done to stop an account being cached before, say 9 PM, sitting in cache for 7 minutes and a call being launched after 9 PM. We are working on the dialer stopping the launching of a call after the calculated end time, in the case where it was cached but not called for a while.

**February 8, 2012 – Max calls counting**

A problem with max calls logic, that primarily affected preview, has been addressed. If the debtor maximum was reached before the phone number limit, the number could still have been called. This was more probable when many different numbers were called in preview, for the same account. We have made a change to address this. (ITMAXCA)

**February 9, 2012 – Changing primary accounts**

When a primary is changed from the account summary, we update the account showing the old and new primary in the notes. We have also added the client account number to the notes to help clients who deal with that field more often than the case number. This change was made earlier, but was not documented.

**February 10, 2012 – Changing primary accounts (withdrawn)**

This code was reversed. It caused problems with the linked accounts display not showing the correct accounts when accounts were viewed and the list was re-displayed. (WACSUM)



**February 10, 2012 – Nightly processing (Contact series)**

All of the Smart codes applied earlier in nightly (say through linking) may not have been processed by the time that the contact series processing runs. We have made changes to process all smart codes prior to the starting of the contact series processing. (NIGHTLY is the program - if sent, user must cancel and restart nightly processing)

**February 13, 2012 – Account processing - recreating queues by worker**

We added “maximum calls” logic to the program that re-creates queues. We will not allow accounts to be added to a queue that is associated with a campaign that is running. If an account is already in the queue, we will not allow it to be rebuilt. We do delete accounts if they have not been worked, prior to adding accounts to the queues. If an account was worked, we do not want to work it again, unless you have used an option to allow it to be reworked. This logic was in the program but was not in the correct place. (COLDR2WKC�)

**February 13, 2012 – Letter processing**

A relatively rare problem with letter processing was corrected. It was possible to have an error in a letter processing program, when certain attorney letters were involved. This was corrected. The program would issue a “Record update before input” error message. (LETPRA).

**February 14, 2012 – Maximum calls and messages**

If maximum calls options are set up, check for maximum messages and display a warning screen when a user tries to launch a new call. (WAPINQ, and new programs ITMAXMG\*)

**February 16, 2012 – Work queue creation in nightly processing**

A rare problem with the system not being able to clear SCCQUE in COLDRIUQCL in the dedicated part of nightly processing was addressed by calling a program COLDLTQF within COLDRIUQCL. (COLDRIUQCL and COLDLTQF)

**February 16, 2012 – Credit card processing - creating payment transactions**

Individual credit card transactions or transactions set up via the I-Tel IVR would not get into a payment batch or file for access through payment entry. This was addressed in CRDPYRPTBA and CRDPYRPTBF)

**February 21, 2012 – Changes to look at all phones or debtor phones only, on account detail screen and all Tab+ numbers, when time zones are computed for I-Tel**

This change has been made and can be activated by updating the field OPF008 in SCSYSOP2 with A for All, or D for debtor numbers only. Many programs were changed to accomplish this.

**February 22, 2012 – Recreating work queues by worker**

A bug in the recent changes that stopped accounts from being updated, was corrected.

**February 23, 2012 – Changing the primary during nightly processing**

We have made a change to look at new accounts that may have linked to existing accounts. Previously, we did not consider new business, unless it was the primary. If there is a new open account, and the primary is closed, we will consider the logic and change the primary.

If you wish to re-run the program that changes primaries for existing accounts, you should do it before nightly processing is run. You should set up the new system control file, get to a command line in RMEx and key in the following. (Programs LINKXCH and LINKXCHNB)

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sbmjob cmd(call linkxcha)
```

The job will be submitted and will run for a long time depending on the size of your account file and your processor speed (could be in excess of an hour). You must check the job to make sure it has completed before proceeding. If you want to run this option at a later time, you can follow these same instructions. The program can be run at any time, but we suggest you run it when users are not on the system. You can have the Smart Code processing program running.

**February 28, 2012 – Payment arrangements - non-linear converting to standard**

The option to convert non-linear payment arrangements to a standard arrangement does not seem to be working. We are investigating this and will have a correction.

**February 28, 2012 – Dashboard changes**

Changes were made to the dashboard to address some errors.

**February 28, 2012 – Clearing file SCITCALD**

This file was being archived, but not cleared on some systems. Code changes were made. Programs are CLRDDL (RPG), ENDJOBSC and CLRDYPRDCL (CL's)

**February 28, 2012 – Time zone shifting**

Queue consolidations changed to handle time zone shifting for best time to call, based on last RPC or attempt time. This is for future use. Program ZLASTATDT was created to calculate last attempt date for accounts with an attempt within the last year.

**February 29, 2012 – Collector goals**

The display calculating remaining days was not handling leap years. (COLGOL)

**February 29, 2012 – Smart Codes and ? logic**

Days between placement and first attempt (where “attempt” is any attempt or contact based on Smart Code) was added. If there is no attempt on the account (not links) 99999 is returned.

**March 1, 2012 – Tab+ phones**

Corrected a display issue when there were no phone numbers. (WACPHONE)

**March 2, 2012 – Post-dated check letters**

When dummy check numbers were assigned for payments with no check number, the dummy check number was not deleted when the letter failed. (LETPRA)

**March 7, 2012 – Deleting additional information (F16) information**

Added notes with old data when records were deleted. (WACAIF)

**March 9, 2012 – Tab+ phones**

Corrected a problem with calling using “.” and a problem with permission field not being cleared. (WACPHONE)

**March 12, 2012 – Full legal information (F6)**

Corrected a problem with interest not being calculated on active closes, when interest option was used (WACLEF)

**March 12, 2012 – Time zone logic for I-Tel**

Several programs were changed because of DST-related problems.

**March 16, 2012 – Account audit list**

Added “h” option for phones - home phone only (WINQGRP1N)

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Version 2.2 was updated on the FTP site - March 22, 2012

**March 23, 2012 – Queue resorting**

Change made to address the time zone being incorrectly displayed from Campaign Manager queue resorting and F12 to display accounts (COLWPRC)

**March 25, 2012 – Queue checking for changes in primary**

Created program ZCHKQLNK to check names on SCCQUE against names on SCACCT.

**March 30, 2012 – State System control file**

Field to use times for calculating time zones was added and activated (used with I-Tel) USW039

**April 4, 2012 – Client inquiry**

Added all smart code overrides to the program (ICLNT and ICLNTFM)

**April 4, 2012 – Credit Reporting**

If an account is not reported because it is placed too close to the last transaction date, it will not show as “Do not report” as opposed to “New Pending”. (CRDREPM2)

**April 4, 2012 – Account detail screen**

- The status “Error” displayed for credit reporting was changed to “Withdrawn”. (Several programs)

- On the cell scrub if the override was not allowed, the user could use F12 to update numbers that should not have been added. This was addressed.

**April 9, 2012 – Account detail screen**

A note will be added when the last transaction date is changed (Several programs)

**April 10, 2012 – Tab+ screen**

A problem with the permission field duplicating on other numbers was corrected (WACPHONE)

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Version 2.2 was updated on the FTP site - April 10, 2012 at 12.21PM EST

**April 11, 2012 – Account detail screen**

The bankruptcy warning message could be displayed multiple times if there were different socials within the same linked group. This was changed. The warning will only be displayed once for a linked group. (Several programs)

**April 12, 2012 – Queue checking for changes in primary**

Created program ZCHKQLNK2 to check phone numbers called in SCCALLC2 against numbers in SCPHMAS. Parameter is date in CCYYMMDD format.

**April 12, 2012 – Recreating queues by worker**

A rare problem, with an account being queued with the wrong link number was corrected. This could cause a phone call to be launched on a number that did not belong to the account that was presented. (COLDR2WKCN)

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Version 2.2 was updated on the FTP site - April 13, 2012 at 2.10PM EST

**April 20, 2012 – Letter translation by description codes**

A problem was corrected and affected several different programs used for letters.

**April 26, 2012 – Land/Cell indicator on Tab+ screen**

A problem with this code not showing was corrected (WACPHONE)

**April 30, 2012 – Tab+ phone consolidation**

The options that consolidate Tab+ numbers on the primary, will also copy the “phone number details (SCPHONE)” to the primary account, when this occurs for the Tab+ information. Several programs were changed.

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Version 2.2 was updated on the FTP site - May 3, 2012 at 4.30PM EST

**May 3, 2012 – Credit reporting**

We have changed the description on inactive closes from Credit Reporting Error to Credit Reported - Withdrawn. (CRDREPM2 and CRDRM2R)

**May 4, 2012 – I-Tel - long distance codes on SCCQUE**

A problem with the long distance codes being reset in the queue file was corrected (ITDIAL2)

**May 8, 2012 – Tab+ phone inquiry**

We had added F8 to allow you to displayed the allowed calling period for each number on the Tab+ screen. (WACPHONE and WACPHONTZ as well as the screens)

**May 8, 2012 – ? logic on smart codes**

We have added days client last payment to client on an individual account. (SMCDINQP)

**May 11, 2012 – Account audit**

A problem with follow up date selection was corrected (WINQGRP1N)

**May 12, 2012 – Linking**

For linking by social, we have made changes to handle only the last 4 of the SS# being provided. The system will be able to figure out when the SS# has only the last 4, and matches another account with only the last 4 too - BUT the debtor is a different person! (It's all in the intelligence!) Note - If a new account has only the last 4, we presently do NOT try to match that to an account with the full SS#. We always consider all the provided numbers, and try to match that to an existing account with the same numbers.

**May 15, 2012 – Payment arrangements**

If a non-linear payment arrangement is deleted in nightly processing, a note will be added. (NTPARR)

**May 16, 2012 – Events**

We will allow the description of the main events to be changed.

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Version 2.2 was updated on the FTP site - May 24, 2012 at 9.00AM EST

**May 29, 2012 – Multiple placement date changes**

Fixed a problem with the note text (MSPLDT)

**May 30, 2012 – Tab+ screen**

An incorrect message that a changed or new land line “could be a land line” was fixed. Update was not allowed in this case and was corrected. (WACPHONE)

**May 30, 2012 – Payment entry**

For balance type X we will not print individual accounts, since the payment is only distributed during the edit list process. Only our case number and amount credited will be shown on the receipt (PAYEN1)

**June 1, 2012 – Client update - copying clients**

When you copy an existing client into a new client, we will now be copying the e-mail options (UCLNT)

**June 5, 2012 – Account entry**

On manual account entry, you will be warned if the social you are entering matches an existing account (ACMENT)

**June 9, 2012 – Credit card series**

We have added a new field called “Flex card (Y)”. This can be used to indicate a credit card that has specifically been issued to pay off a medical debt. You can now add two notes for new or existing entries (in the past one note could be added when information was changed). We have also edited for multiple transactions with the same date. This will not be allowed. (WACCPE and WACCRQFM)

**June 23, 2012 – Tab Q display**

If there were address changes, the address changes history option was not highlighted. This was corrected and the menu option was changed to “Address changes”.

**June 23, 2012 – Letter translation by client group number**

We have added a new option to delete letter translations for inactive clients - F20-Delete all inactive clients. This option will only delete the letter translation tables for any code that has a "D" in the Client Update field "Delete 'D' ".

**July 22, 2012 – Standard credit card screen**

Do not move to primary unless “We process” flag is on. This will keep client cards on the account they were entered on.

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Version 2.2 was updated on the FTP site - July 23, 2012 at 11.00 PM EST