

CAMS

Software Release, Version: 9506

This document is an overview of enhancement and maintenance changes to the C.A.M.S. Collection Agency Management Software. Please refer to the technical reference manual documentation update pages for detailed information on the subject matter.

Be sure to backup your data system prior to insatlling this upgrade.

ALL USERS MUST BE SIGNED OUT OF THE SYSTEM,
WHILE INSTALLING THIS UPGRADE!

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ENHANCEMENTS

CARDLESS WORK FLOW MANAGEMENT

This facility has been developed to provide a layer of computer controls governing Cardless Collector inventory.

The level of inventory can be specified and maintained. A feeder system has been developed that transfer accounts into collector files when they are needed.

Accounts can be taken away from Collectors based on No-Promise, No-Payment or the Activity-Codes entered. This prevents the accounts from going into a holding pattern and moves them along for further processing.

FOLLOW-UPS (High to Low Balance)

The Cardless Follow-Up system has been upgraded with a selection for working follow-up accounts based on Account-Balance.

SALES LEAD FACILITY

A facility has been developed for Sales-Leads. This has been added as a sub menu to the Sales Menu.

The major components are:

Lead-Entry - includes maintenance, lookups and access to the notes screen for historical event comments.

Lead-Follow-Up - force feeds the leads based on Next-Contact-Date.

Print-Letters - interfaces with the mail merge facility for printing letters and reports.

END-OF-DAY FILE EXPANSIONS

The end of day routine has been upgraded to provide the option to carry out file expansions. For files with pointers, the appropriate rebuild is run as well.

GROUP DEBTOR COLLECTOR TRANSFERS

The Master-Account option has been renamed to Separate-Pass-For-Master-Accounts. A new option Select-Multiple-Accounts has been added. The purpose of select multiple accounts is to allow account groups to be transferred once a member of group passes the selection criteria test. The separate pass for master accounts provides access to master that have no links.

CLIENT STATUS, LABELS & PROFILE

A status-code field has been added to the client profile. This is used as a selection option for printing labels and profile documents.

Client Label run had been upgraded with the option to print in Client-Code sequence.

Client Label and profile options have been upgraded so that all options are presented up front as opposed to a series of prompts. This makes it more user friendly.

MANAGEMENT REVIEW

This facility has been upgraded by providing options to review accounts of a Specific-Review-Desk or accounts on a Specific-Desk. These options are used to focus the review on a specific group of accounts.

DEBTOR STATUS REPORT

This report has been upgraded in many ways. The Selection-Criteria facility has been added to the front end. The purpose of the report is to print in Debtor-Name or Debtor-Status-Code sequence with a focus on Telephone-Numbers. The option to print in Debtor-Status-Code sequence has been added. Options that allow the report to focus on telephone-numbers for inclusion, exclusion and totals has been added. A Summary/Detail option has been added to get totals by status without printing the detail.

COLLECTOR DEBTOR STATUS REPORT

This report has been upgraded in many ways. The Selection-Criteria facility has been added to the front end. The purpose of this report is to print collector inventory by Cardless-Status. The option to include New-Business has been added. Options that pertain to Multiple-Accounts enable the report to show inventory from a Client or a Collector perspective and to show the sub-accounts under the master. A Summary/Detail option has been added to get totals by status without printing the detail.

CLIENT ANALYSIS, COMBINED CLIENTS (ACTUARY)

This report has been upgraded with a summary page that combines figures for all clients by analysis period (month/year). It's primary purpose is to show the drift in collections in contrast to placements. This page is produced by running a Summary version for all clients.

DEBTOR ATTORNEY STATUS REPORT

This report has been upgraded to select based on either Sue-County, Defendant-County or Second-Defendant-County Codes in place of the Attorney-Code. The amounts shown include Cost.

DEBTOR LETTER HISTORY REPORT

This report has been upgraded to provide for Specific-Client and Summary-Detail options. When the date range is specified, only the letters that fall within the range are printed and totaled. Totals are printed by Client. The Client's-Account-Code has been added to the detail.

PAYMENT-EXPECTED DATE

This date has been added to the Debtor Profile. Payment-Expected has been renamed as Payment-Due. Used in conjunction with payment schedules. Unlike the Trigger-Date the Due-Date will not be updated on Broken-Promise, it's value is retained for broken promise letters. Token D77 has been added for Due-Date.

DEBTOR ADDRESS CHANGE REPORT

This report has been added to the Debtor On-Demand Report Menu. The purpose is to provide clients with address changes.

CREDIT BUREAU METRO - PAID UP ACCOUNTS

The Debtor Payment posting program has been changed to handle paid-up accounts that do not have the status of 'PF'. Specifically settled-in-fulls and paid-up legals/forwards. These accounts will be treated like 'PF' in regards to ordering a paid-up collection account transaction as opposed to a payment/balance update.

CARDLESS ACTIVITY REPORT

This report has been enhanced to provide inventory balances for the accounts worked. The number of accounts, dollar balance and amount promised are printed. A column for Desk-Code or User-Initial has been finalized.

TIME ZONE RECOVERY REPORT

This report has been developed to provide an analysis of recovery. The analysis is broken down by Time Zone. For each month within the specified Calendar-Year, a line is printed that shows business placed followed by a breakdown of the amount collected in each month through the end of the year. It combines accounts and payments from the active system as well as history.

LOAN PAYMENT COUPON BOOKLETS

This facility has been enhanced to do a permanent store of the loan payment information. The booklet 'MPB' can be ordered like a letter and then printed in a continuous run.

The Debtor Payment Posting has been updated with the Keyword 'LOAN'. This is used to select a specific loan payment for posting. The amount applied to interest is based on the selected payment as opposed to the Interest-Balance on the account.

DEBTOR PROFILE POP-UP WINDOWS

The profile has been updated with a reverse video effect on the field name tags to point out which windows have info in them. The Debtor-Name is also displayed in reverse video to make it stand out.

CARDLESS SCREENING CRITERIA

Specific Time Zone has been added to the criteria for working selected accounts in the cardless.

SYSTEM LOG

The System Log has been modified to provide for easier maintenance. A distinction has been made between the more important low volume entries and the high volume entries. The option to print all the low volume entries in one run has been provided.

SKIP-TRACING

The Skip facility has been changed in the following ways:

- The Skip-Status 'S' will no longer flash as a result of being placed in the queue. Flash is used to draw attention to it only after the results have come back.
- The Skip-Status is updated to 'X' when flushed from the queue.

This is to make clear, which entries are not being processed with results.

CLIENT-DEBTOR-STATUS REPORT

The following options have been added:

- Option to include Combine closed accounts.
- Option to enter for a specific Business-Code.

CLIENT & COLLECTOR STATISTICS SCREENS

The On-Hold category has been replaced with Accumulated and Compounded Interest statistics. For Client units the Interest-Recovery (Current-Month & To-Date) are displayed. For Collector units the Business-Balance is displayed.

DEBTOR SELECTION CRITERIA SCREEN

The Status-Code selection line on the Criteria screen has been upgraded to provide for Mail-Return, Skip-Trace status, Credit-Bureau and Credit-Bureau status fields.

COST-ADVANCE PROCESSING

The posting of a pay direct to accounts that have cost, when the cost has been advanced has been modified to generate an adjustment code for the remittance report, for memo purposes.

Cost posting and cost return posting areas have been changed so that they specifically call for Cost-Advance and Cost-Return codes instead of calling for an Adjustment-Code.

The COST-ADVANCE option on the Client-Profile has been extended to include the NF-(Y/N) option. This option prevents check reversals from doing Cost-Advance on NSF Costs. It alerts the operator when cost is recovered on accounts with NF cost so that the operator can stop the return.

LEGAL FACILITY

The legal facility has been enhanced with a field that is used to determine if suit is in County or District court. This field has a relationship with the Sue-County only. The District-Court-Name has been added to the legal county table, in the district court section.

Print tokens have been added:

L48 - Used to print the IN-COUNTY-COURT or IN-DISTRICT-COURT.

L49 - Used to print the DISTRICT-NAME (via Sue-County Code).

L50 - Used to print the DISTRICT-NAME (via Sue-County Code), (only when In-District-Court).

COLLECTOR NUMBER-OF-ACCOUNTS REPORT

This report has been modified by breaking down new business into actual new accounts and accounts new to the unit. An In-Both column has been added that shows accounts that have entries in follow-up and in business. Column heading have been updated for clarity.

SKIP-TRACE INTERFACE

The interface has been updated for XAUTO version 4. The Match file processing provides for the option to update nonexistent or bad home phones with the number obtained from a primary match. The option to process master accounts in place of the subs has been added.

M.T.D. CLIENT-PAYMENT AND COLLECTOR-PAYMENT REPORTS

These procedures have been upgraded by bringing all the options together up front as opposed to a series of questions. A date range feature has been added when the focus is once a specific month. A summary option has been added to the client-payment report.

REPORT-VERSIONS

A version of the M.T.D. Client Payment report that shows complete commission detail has been added. A version of the Acknowledgment that shows an Interest column has been added.

DEBTOR DELETE

This procedure has been upgraded to provide for mass deletes based on Client and Placed-Date.

MAINTENANCE

- The Collector-Profile has been updated with better terminology. Desk-Type field has been added to qualify what the desk is used for.
- The Letter-Look-Up (LL) and the Chronological (N) windows show the English letter descriptions for letter entries.
- Referring Physician and Id have been added to the Supplier window in Medical. Print tokens m57 and m58 have been added.
- The Confirmation report has been renamed Acknowledgment, this is standard naming convention.
- The Client-Statements printed on plain paper have been centered to fit on 80 column laser printer. The Remittance description has been removed to make it look centered.
- Interest computations are not performed on New-Business until it is batched. This corrects problems with double and one-sided updates when computing and changing interest before the account balance is batched in. First-Letters may have to be queued.

- Memo entries for user 'sys' are made by the Multiple Account link and unlink procedures. The Client transfer procedure was modified to make the transfer memo entry for all accounts.
- Payment posting has been modified to update the Bank-Deposit field when accounts are forward out.
- Credit Bureau Metro facility modified to provide for Credit-Grantor-Code in the header record.
- Print Token 'nul' developed to print a portion (word) of constant text with a font as opposed to the entire line.
- Payment Posting has been modified to update the Debtor-Status code to 'PY' on partial payments even when it's not 'AA'.
- Term-Code maintenance modified to permit change to the Dollar/Age field.
- Cardless Number-Of-Accounts report, has been modified to show a finer breakdown of the accounts. The heading have changed.
- Trigger-Date on profile has been changed so that office users can change it without the restriction imposed on collectors by Max-Trigger-Days.

<ul style="list-style-type: none"> - Times-Up prompt has been put into a pop-up window. - Client-Name has been modified with a Commercial qualification field. - Payment Posting has been changed to display the commission-rate, regular and forward, being applied before hitting enter to post. - Mail-Merge Print-Sequence options, option to print in sequence of Account-Number within Form-Type has been added. The screen has been changed to not show the sequences until after the specifics. - Smart-alk version field has been added to configuration menu. The interface has been updated to look at the version. - Tel-Tone dialer. The build campaign procedure has been modified not to remove entries from follow-up. The call progress monitor has been updated to turn the microphone on sooner. 	<ul style="list-style-type: none"> - The Match report has been modified to run faster. - Contact and Title fields have been added to Commercial names. - A message has been added to cardless follow-ups to notify when normal work is complete and only timed accounts remain. - Text Flow Right Margin, for wide documents can be expanded for a section of text based on the placement of the second tilde. - The option to produce separate pages for Paid-Agency and Paid-Direct has been added to the MTD Client Debtor Payment report. - Archive and Hardcopy(h) procedures have been expanded to provide for the data stored in debtor pop up windows. - Debtor-Add Importing has been updated to provide better handling of an input file with claims assigned to multiple client units.
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CONVERSION PROCEDURE

INSTALLATION:

Refer to the 'Installing your Application Software' procedure in Introduction section of your manual.

1 - Run Conversion program: "**CAZ9408A**"

This will first clear Payment-Due-Date, then prime it from based on Trigger-Date, for accounts that are in payment schedules.

2 - Run Conversion program: "**CAZ9501A**"

This will prime Client-Profile fields.

- Cost-Advance: NSF(Y/N), if cost-advance is set to 'Y' then this new field is also set to 'Y' otherwise it is set to 'N'.

- Client-Name-Qualifier: if position 15 of the name is not a space then the client-name is set to commercial otherwise it is Last-Name First-Name.

3 - Run the Cardless Follow-Up File Re-Build to prime the High-To-Low.