CONFIGURATION TRAINING OUTLINE

SYSTEM NAVIGATION

- **Snapshot View**
- **Worklist View**
- **Search Panel**
  - **Type**
    - **Debtor**
    - **Account**
    - **Victim**
  - **Field**
    - **Select appropriate field to search**
    - **Select necessary comparison from available options**
    - **Enter value to compare**
  - **Add custom search fields if necessary**
  - ***Clear button* – clears search criteria**
- **Search Results**
  - **Retrieve Search Results from**
    Navigate to *View→Search Results Panel*
  - **To see all searches since you logged in**
    Navigate to *View→Saved Search Results Panel*
- **Debtor History – Stores last 20 debtors you have worked. This history is kept even when you log out and back in.**
- **Actions Panel – Changes depending on which Folder is active *(Actions will be covered in detail later)***
- **Debtor Folder – Always open on the last active Tab**
- **Account Folder – Always open on the last active Tab**
- **Pin/Unpin Search/Actions Panels**
  - **Use the push-pin icon in the upper right corner of the panel to Pin or Unpin that panel**
  - **Right-click in the colored area at the top of the panel for other options**
    - **Floating**
    - **Dockable**
    - **Tabbed Document**
- **All *Views/Panels* may be accessed or retrieved in the *View Menu***

ORGANIZATION SETUP

Navigate to *Administration→Organization Setup*

Information

- **Contact**
- **Mailing**

Settings

- **Background**
  - **Add or Remove a Logo**
  - **Set background color**
- **Collector**
  - **Set performance goals period**
  - **Enter Fiscal year start date**
  - **Set Next Work Date limits**
- **Correspondence**
  - **Set path for saved letters**
  - **Set save location when auto attaching letters**
  - **Set option to exclude zero balance/closed accounts from letter request screen**
  - **Assign a letter series to new debtors automatically**
  - **Set a default email account for all email correspondence**
- **Data Entry**
  - **Turn on "Auto-populate city, state, and county from zip code"**
  - **Set populate in ALL CAPS, if desired**
  - **Enable Multi-city selection**
  - **Turn on "Auto-populate date fields with current date on field entry"**
- **General**
  - **Set default debtor type**
  - **Set max number of search results**
  - **Set snapshot refresh minutes**
  - **Set database connection timeout**
  - **Set time to build work lists**
- **Interest**
  - **Current Month**
  - **Previous Month**

- **Labels**
  - **Customize Debtor tab label**
  - **Customize Account tab labels**
  - **Customize Victim labels**
  - **Customize Line Item labels**

- **Notes**
  - **Note initial values – places the initial value entered into the notes rather than just changed values**
  - **Enable important notes**
  - **Set initial cursor position for entering notes**

- **Payments and Receipts**
  - **Enable payment receipts**
  - **Enable payment fee**
  - **Use custom receipt number**
  - **Allow line item overpayment**
  - **Enable Post Hold – *allows you to post a payment to a debtor without applying it to a specific Account until later***
  - **Enable duplicate payment detection**
  - **Enable auto allocation for payments and adjustments**
  - **Exclude zero balance and closed Accounts on payment and adjustment screens**

- **Purge Settings**
  - **Set intervals between debtor deletion and removal from the database**
  - **Set intervals between Account deletion and removal from the database**
  - **Set ad hoc work list deletion days**
  - **Setup the number of days to keep credit card information**
  - **Set number of days to keep import logs**

- **Reference Numbers**
  - **Change label for Debtor Reference 1**
  - **Change labels for Account Reference 1, 2 and 3**
  - **Set Account Reference to display in screens**
  - **Set Victim Reference to display in screens**

Custom Fields

- **Debtor**
  Navigate to *Administration→Debtor→Define Debtor Custom Fields*

- **Account**
  Navigate to *Administration→Account→Define Account Custom Fields*

- **Victim**
  Navigate to *Administration→Victim→Define Victim Custom Fields*

  - **Click in the first available "Display Name" field and type your custom field name.**
  - **Click in the "Type" field and choose the appropriate data type from the drop down list.**
    - **Code – Provides a list of Code Types**
      If the code option you need does not exist, you must set up Custom Code Listings in: *Administration→Other→Define Code Types*
      - **Click the "+" below the *Code Types* box to setup your Custom Code List**
      - **Click in the *Code Column* at the bottom of the screen to add the items.**
      - **If you require other columns of information you may add the Column Name in the Value field in the top box. This immediately creates a column in the bottom "*Codes*" box.**
      - **You may choose to display either the *Code* column or the *New* column in the dropdown list that users see.**
      - **Note that you have the option to allow the use of an empty value if that is appropriate. Check the box in the upper right corner.**
    - **Date – Use for all date fields**
    - **Float – Numbers with decimals that are not $ amounts**
    - **Integer – Number with no decimals**
    - **Money – Numbers will be in $ format**
    - **String – Any combination of numbers or letters**

  - **If you use the Code option, click in the Code field and choose the appropriate Code List.**
  - **You may adjust the "Maximum Size" by clicking in that field and changing accordingly.**
  - **You may also set this field up to be "Viewable" or not and to be "Editable" or not. Click in the field to change the default answer.**
  - **You may delete a custom field that was setup by mistake and is not already in use by highlighting it and clicking the "-" button.**
  - **You may also rearrange the order the custom fields using the arrow buttons.**
  - **"Save Changes" when done**

Templates

- **Debtor**
  Navigate to *Administration→Debtor→Define Debtor Templates*
  - **VIEW DEBTOR – Controls the Debtor View Folder**
  - **EDIT DEBTOR – Controls the Debtor Edit Screen**
  - **Indicate which debtor type – *Individual* or *Company* – that this custom field is for. If it is to display for both types, leave this column blank.**
  - **May add custom tabs if needed**

- **Account**
  Navigate to *Administration→Account→Define Account Templates*
  - **VIEW ACCOUNT – Controls the Account View Folder**
  - **EDIT ACCOUNT – Controls the Account Edit Screen**
  - **May add custom tabs if needed**

- **Victim**
  Navigate to *Administration→Victim→Define Victim Templates*
  - **VIEW VICTIM – Controls the Victim View Folder**
  - **EDIT VICTIM – Controls the Victim Edit Screen**

Security

- **Define Roles**
  Navigate to *Administration→Collector→Setup→Define Roles*
  - **By default there will be an *ADIMINISTRATOR ROLE* setup.**
  - ***Add a new Role* definition by clicking the "+"at the bottom of the Roles box.**
    - **Enter the *name* of your new role and click OK.**
    - **The new role will then be highlighted so you can select the appropriate privileges.**
    - **To include ALL options under one of the main categories, click in the box.**
    - **To choose only specific items from a main category click the '+' to expand the listing.**
  - ***Copy an existing Role* to a new name and make the necessary adjustments to the privileges. Click on the Copy button between the "+" and "-" buttons below the Role box.**
  - **Click the "Save Changes" button when done.**

- **Define Users**
  Navigate to *Administration→Collector→Setup→Define Users*
  - **By default there will be an *ADMINISTRATOR USER* setup.**
  - **Add a new User by clicking the "+" at the bottom of the Users box.**

- **Enter the new user name and password and click OK.**
- **The new user will be highlighted so you may begin entering the pertinent information in for this user.**
- **CONTACT INFORMATION tab has the person's name, title, address, phone, email, etc. Fill in what you would like here.**
- **COLLECTOR SETUP tab is where you define this user's Role, additional permissions, bins to access along with their supervisor relationship.**
- **TEMPLATES tab allows you to point them to custom View and Edit Templates as needed.**
- **UI SETTINGS tab contains options for using wizards, access to edit contact types, edit/delete notes and their default view setting.**
- **EMAIL SETUP tab is where you setup the user to be able to send emails using Revenue Results.**
- **Note the "*Change User Password*" button which allows you to change a user's password when necessary.**

- **When done setting up your users click the "Save Changes and Close" button.**

- **User Security Settings**
  Navigate to *Administration→Organization Setup→User Security*
  - **Inactivity Timeout**
  - **Password Expiration**
  - **Keep password history for**
  - **Minimum password length**
  - **Lock user account after X bad attempts**
  - **Require Mixed case**
  - **Require numbers**
  - **Require special characters**
  - **Enable password reset via email**

Valuable Tools

- **Define Note Views**
  Navigate to *Administration→Other→Define Note Views*
  - **This option allows you to narrow your note line view to only those which meet the criteria chosen, such as Payment History.**
  - **You may create your own Predefined Note Views as well.**

- **Pre-defined Notes**
  Navigate to *Administration→Other→Define Code Types→Note Text Debtor* or *Note Text Account*
  - **Click on the first empty field under the CODE column in the bottom box.**
  - **Enter the name of the Pre-defined not that you are creating. This is what will appear in the drop down box for collectors.**
  - **Type in a Description if desired.**
  - **Type the note you would like to appear with this Pre-defined note is selected in the text column. This is what will appear in the notes on the Debtor or Account.**

- **Define Searches**
  Navigate to *Administration→Other→Define Searches*
  - **Add custom fields to the Search fields**
  - **Customize your Search Results view**

- **Define Restricted Fields**
  Navigate to *Administration→Other→Define Restricted Fields*
  - **Enter Account, Debtor or Victim fields that need to be masked, such as SSN.**
  - **Click in the first blank field under Field and choose the appropriate field from the drop down list.**
  - **This data will appear on the screen as ***** instead of the actual data.**
  - **Remove a field restriction.**
  - **Define users who can view the Restricted Fields**
    Navigate to *Administration→Collector→Setup→Define Users*
    - **Highlight the user and click on the Security Tab**
    - **Click the box that says "User has permission to view restricted fields"**

- **Define Snapshot**
  Navigate to *Administration→Other→Define Default Snapshot*
  - **Choose Account Types to include in the stats.**
  - **Choose which Bins to include in the stats.**
  - **To display which Bins and Account Types are included in the stats, check the "Display checked bins and Account types in report footer" box.**
  - **Allow users to Customize their Snapshot view**
    Navigate to *Administration→Collector→Setup→Define Users*
    - **Click on the UI Settings tab and check the box next to "Allow user to customize snapshot"**
    - **Click on the blue '*gear*' icon above the pie chart on the *Snapshot View* to customize.**

- **Define Code Types**
  Navigate to *Administration→Other→Define Code Types*
  - **Most of these are customizable.**
  - **Note the "Allow an empty value in the editors" option. Checking this box will allow the field in question to be blank otherwise the user is forced to choose one of the options from the drop down box.**
  - **You may also choose which field displays in the drop down list – *typically it is either the Code you setup or the Description.***
  - **To remove an existing Code that is not currently in use, highlight it and click the "-" button.**
  - **When the "Sorted in the editors" button is unchecked it allows you to control the order in which the Codes display in the drop down box. Use the arrow buttons to move them up or down. If it is checked, the sorting is done automatically by the system.**

Setup Account Types

Navigate to *Administration→Account→Define Account Types*

- **Add New Account Type**
  - **Click the "+" to add a new one**
  - **Click the Copy button to copy an existing setup to a new name**
  - **Enter the new Account type name**
  - **Fill in contact information as desired on Contact Information tab**
  - **Fill in pertinent information on the Settings tab**
    - **This Account type is exempt from auto forwarding – check to make it exempt**
    - **This Account type charges interest – check to set up interest details**
      - **Choose appropriate "Interest Type"**
        - **Daily**
        - **Monthly 30/360 (interest rate is divided by 12 and applied the 1st of the month)**
        - **Monthly Actual/365 Fixed (interest rate is divided by 365 and applied the 1st of the month for the number of days in that month)**
      - **Choose "Normal Delinquency" which is the number of days that this Account type is past due before being considered delinquent**
      - **Choose "Report Class" if applicable. This is used with some of the add-on modules**
      - **Choose "Payment Allocation Priority" which is the payoff order for this Account type if you use Account Type Priority Allocation Rule**
- **Rename Account Type**
  - **Use the "Rename" button to rename an existing Account Type**
  - **Type in the new name when prompted**
- **Remove existing Account Type with the "-" sign**
- **Choose custom *View/Edit Templates* as needed on the *Templates* tab**

Setup Line Item Types

- **Navigate to *Administration→Other→Define Code Types→*Line Item Type**
- **Click in the first blank row of the "Codes" box and enter the name of the new line item**
- **Enter a "Y" in the Charge Interest column if this Line Item is interest bearing**
- **Enter a payoff priority in the Priority column to set the payoff priority**
- **Accounting Code, Description and Maintain Zero Balance are optional**

Financial Transactions

- **Allocation Rules**
  Navigate to *Administration→Payment→Define Payment Allocation Rules*
  - **Apply payments to *Account types* based on:**
    - **Pro rata - This means "proportional". Pro rata applies the % ratio between the Account balance and payment amount to line items.**
    - **Equal split - Evenly splits the payment to each Account type**
    - **Account type priority - When setting up a Account Type there is an option to assign a priority to the Account Type. If a Account Type has priority of 1 and another has a priority of 2 or higher, the Account with a priority 1 will be paid on first.**
    - **Do not apply by Account Type - prevents Account Type from impacting payment allocation**
  - **Apply payments to *Accounts* based on:**
    - **Age of the account (Entered date) - Pays the oldest Account first, based on the date the Account was entered into the system**
    - **Age of the account (Assessment date) - Pays the oldest Account first, based on the date the Account was assigned to your organization**
  - **Apply payments to the *Line Items* based on:**
    - **Line Item priority - Pays the line item with the highest priority first.**
    - **Oldest first - Payment applies to the oldest line item first, until paid off, and then applies payment to the next oldest line item. If two or more line items are of an equal date, then the payment allocates pro rata amongst the two line items.**

- **Receipts**
  Navigate to *Administration→Payment→Define Payment Receipts*
  - **Use the "+" to add a new receipt**
  - ***Copy* button**
  - **Use the "-" to remove an unused receipt**
  - **Merge Fields tab**
  - **Launch Word button**
  - **Enable Receipt Printing**
    Administration→Organization Setup→Payments and Receipts
- **Using Payment Custom fields**
  Navigate to *Administration→Payment→ Define Payment Custom Fields*
  - **Display on the payment entry screen (left side under comment) as soon as created.**
  - **Can be used as Merge Fields for Receipts.**
  - **Appear in Debtor notes with the payment information.**
  - **These fields can be searched on and used in custom reporting.**
  - **May be added to the Financial Transactions tab on either Debtor or Account.**
- **Overpayments**
  - **Processing Setup**
    Navigate to *Administration→Payment→Overpayment Processing Setup*
  - **Create Overpayment File**
    Navigate to *Operations→Payments→Overpayment Processing*
- **Reversals and Reversal Post Date**
  Navigate to *Debtor Action Panel→Enter Reversals*
  - **The system will default with the Post Date as the Reversal Date, but you may change it if desired.**
  - **If you charge interest you will want to use the payment date.**
  - **Your report date ranges will key off of the Reversal date you choose to use.**
  - **Action noted in Debtor notes, Payment History Tab, Line Item View on Account.**
  - **If you use payment imports, you may also reverse payments from a duplicate import from *Operations→Mass Action* and choose Payment Import Reversal.**

- **Adjustments**
  Navigate to *Debtor Action Panel→Enter Adjustments*
  - **Enter either a *positive* or *negative* amount.**
  - **Choose Reason**
    - **May add custom reasons as needed in**

      Administration→Other→Define Code Types→Adjustment Reason
  - **Enter a comment if desired.**
  - **Allocate adjustment amount accordingly.**
  - **You may also add a new Line Item for the adjustment. (Use the "*Add new line item"* button)**
  - **Apply the new charge to the original charge amount if desired. (*New Line Item Charge Amt* – click "*Apply new line items to charged amount*" box)**
  - **System tracks the allocation amount for you.**
  - **"Post and Do Another" is available to allow you to post multiple transactions in a row. It is available for Payments and Adjustments.**
  - **"Search Debtors" button allows you to search for a different debtor to post to**

- **Cancel/Reactivate Accounts**
  Navigate to *Operations→Account→Cancel Account* – or *Reactivate Account*
  - **CANCEL ACCOUNTS**
    - **Must be on the Debtor Folder when Cancelling Accounts**
    - **Choose which Account to cancel from the list**
    - **Select one of the pre-defined cancellation reasons**
    - **Click the *Cancel Account(s)* button**
    - **Set up Cancellation Reasons in *Administration→Other→Define Code Types – Cancellation Reason***
    - **Activity is tracked in the Notes on both the Debtor and the Account**
  - **REACTIVATE ACCOUNTS**
    - **Must be on the Debtor Folder when Reactivating Accounts**
    - **Choose which Account to reactivate from the list of cancelled Accounts**
    - **Select a new status for the Account**
    - **Click *Reactivate Account(s)* button**
    - **Activity is tracked in the Notes on both the Debtor and the Account**

Payment Plans

- **Define Payment Plan Rules**
  Navigate to ***Administration→Payment→Define Payment Plan Rules***

- **CONTROLS:**
  - **Minimum plan balance**
  - **Minimum payment amount**
  - **Maximum # of payments**
  - **Enable payment plan setup fee**
  - **Recalculate payment plans upon payment**
  - **Recalculate payment plans upon adjustment**
- **PAYMENT PLAN CORRESPONDENCE:**
  - **Agreement Letter**
  - **Reminder Letter**
  - **Delinquent Letter**

❖ **Creating Plans**
Debtor Action "Payment Plans"

- **Click "+" button to add a new plan**
- **Choose Account(s) to include when prompted**
- **Enter either *Payment Amount* or *Number of Payments***
- **Click the "Setup Fee" box if you charge a Setup Fee**
- **Change *Payment Type* if applicable**
- **Select "*Terms*" – *typically Monthly***
- **Enter *First Payment Date***
- **Select *Alt First Payment Date* and *Amount* if applicable**
- **Use "*Preview Payment Plan Letter*" button as needed**
- **Print Payment Plan with the "*Printer*" icon**

❖ **Ways to Edit the Plan**

- **Click on "Pencil" icon to edit the plan.**
- **Change payment amount.**
- **Change terms.**
- **Manually change a single payment amount.**

Collector Setup

❖ **Collector Bins**
Navigate to *Administration→Collector→Setup→Bins*

- **Rename an Existing Collector Bin by clicking on the name to be changed in the "Collector Bins" area.**
- **Collectors**

Navigate to *Administration→Collector→Setup→Define Users – Collector Setup Tab*

- **Supervisors**
  Navigate to *Administration→Collector→Setup→Define Users – Collector Setup Tab – Supervisor section of screen.*
- **Initial Methodology**
  Navigate to *Administration→Collector→Assignments→Initial Methodology*
  - **BY ACCOUNT TYPE**
  - **BY ATTRIBUTES – *use a custom field if desired***
  - **BY LAST NAME/COMPANY NAME – alphabetic assignment**
  - **BY BALANCE**

- **Assign Primary Collectors**
  Navigate to *Administration→Collector→Assignments→Assign Primary Collectors*
  - **Sets the "default" collector for the bin which is used in payment screen, correspondence, etc.**
  - **"COLPrime" merge field will place the name of the Primary Collector assigned to the bin in the correspondence.**
  - **Other collectors may still work this bin.**

Work Lists

- **Work List Rules**
  Navigate to *Administration→Work List→Define Work List Rules*
  - **And/Or Statements**
    - **And means the following criteria must be true**
    - **Or means one of the "Or" values must be true for *that Attribute***
- **Work List View**
  Navigate to *Administration→Work List→Define Work List View*
- **Manually Creating Work Lists**
  Navigate to *Work Lists→Create a Work List*
- **Working Work Lists**
  Navigate to *View→Work List View*
  - **Highlight the Work List**
  - **Use the "Start Working List" Action or double-click on the debtor you wish to start with**
  - **Perform desired action(s)**
  - **Use the "Next Step" action to enter a Next Work Date and a reminder for what you want to do with this debtor next time it appears on your work list.**
  - **From the Debtor Folder use the "Next Debtor on List" Action to move to the next debtor.**
  - **From *Work List Folder* note that worked debtors have a check-mark by them, the debtor currently being worked has a flag by it and the next debtor on the list has an arrow by it.**

Workflow

- **Automate the life cycle of your Accounts using Workflow**
- **Tasks/Actions are triggered by specific Events combined with detailed criteria**
- **Define Workflow Rules**
  Navigate to *Administration→Define Workflow Rules*
- **Workflow Types**
  - **Debtor**
  - **Account**
  - **Victim**
- **Events to use**
  - **Click the "+" button to add a new Event**
  - **Note the different Events available for Debtor, Account and Victim Workflow Types**
  - **Once you choose your Event, the appropriate *Event Options* are made available**
  - **Set up the "*Conditions*" for the Event with as many criteria as needed**
    - **Sets are evaluated in order so start with the most specific criteria first**
    - **Each Set is associated with its own Actions**
  - **Add Actions to this Event with the "+" button in the Actions section**
- **An *unlimited number of Workflows* may be set up for each Workflow Type**

Correspondence

- **Define Letters**
  Navigate to *Administration→Correspondence→Define Letters*
    - **Click "+" to add a new letter**
    - **Click the "Copy" button to copy an existing letter to a new name**
    - **Click the "-" button to delete a letter**
    - **Settings Tab**
      - **Select Printer to Use for This Letter**
      - **Use the … to get to Advanced Printer Settings**
        - **Select Printer Tray**
        - **Set Paper Size**
        - **Indicate to Print Colors**
      - **Set Default Email Subject**
      - **Set Minimum Balance**
      - **Set Number of Copies**
      - **Check appropriate boxes to set other letter options**
    - **Statuses Tab**
      - ***Uncheck* Debtor and Account Statuses that can receive this letter**
      - **Set Payment Plan statuses that would prevent sending**
    - **Merge Fields Tab**
      - ***TO* Merge Fields**
        - Allows you to send letters to ***any contact*** the debtor may have
        - When these Address fields are used they will pull from whichever address is selected when sending the letter, including the debtor's address.
        - Creates flexibility
      - ***Co-Responsible Debtor* Merge Fields**
        - Found under the Account Folder
        - ACCTCoResponsible = All Debtors/Primary Debtor's Address
        - ACCTCoResponsibleBal = Co-Responsible Debt ONLY
      - ***Wrench* icon in upper right corner activates when a modifiable Merge Field is Active. Click on it to review choices and make a format selection.**
    - ***Launch Word* button**
- **Define Letter Series**
  Navigate to *Administration→Correspondence→Define Letter Series*
    - **This Letter is perpetual – setup the same letter to go out monthly or quarterly**

- **Choose Account Types for this Series**
- **Enter the Letter Names and appropriate intervals**

- **Mass Letter Request**
  Navigate to *Operations→Correspondence→Mass Letter Request*
  - **"*One letter per debtor*" – Will send only one letter for each debtor**
  - **"*Include all qualifying accounts*" – The letter will contain all Accounts which meet the letter's restrictions**

Technical Functions

- **Importing**
  - **Creating an Import Template**
    Navigate to ***Administration→Other→Define Import Templates***
    - **Type: Debtor, Payment, Adjustment**
    - **Click the "+" button to add a new template**
    - **Use the "*Pencil*" button to edit an existing template**
    - **Use the "*Copy*" button to copy an existing one to a new name**
    - **Use the "-" button to delete an unused template**
    - **Template Definition Tab**
    - **Import Settings Tab**
    - **Matching Tab**
  - ***Running the Import***
    Navigate to *Operations→Import* (*choose specific type*)
  - **Import log and Failures Logs**
    Navigate to *Operations→Import→View Previous Logs*
  - **Debtor only imports for demographics**
    - **Change Import Mode to *Debtors Only***
    - **Removes all Account-specific fields from the Selected Fields section**

- **Scheduled Events**
  Navigate to *Administration→Other→Define Scheduler Events*

  - **Type**
    - **CORRESPONDENCE – Prints all previously requested letters which are in the queue**
    - **EXPORT – Requires a SQL script**
    - **IMPORT**
    - **INFORMATION PROVIDER – Automatically processes batch files**
    - **MASS LETTER REQUEST – Uses a query to request the letter of your choice**
    - **MASS STATEMENT REQUEST – Uses a query to request the statement of your choice**
    - **REPORT – Automatically prints the report of your choice**
    - **FORWARD/RECALL**
    - **WEB PAYMENT EXPORT**
    - **WEB PAYMENT IMPORT**

- **Database Maintenance**
  Navigate to *Administration→Other→Define Database Maintenance*

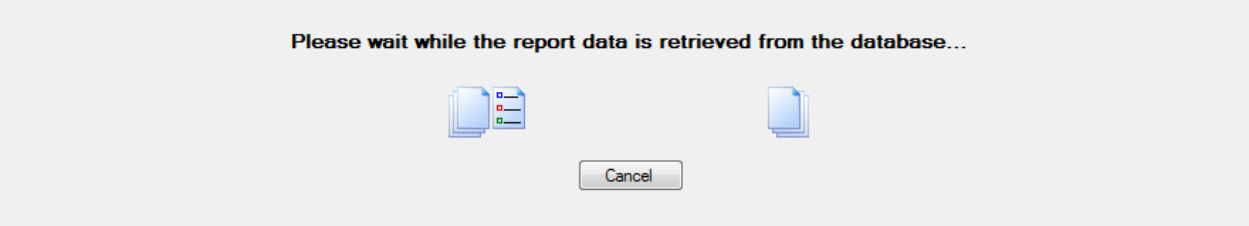
  - **Choose a time to run this Event**
  - **Midnight to 3am is blocked out for the Nightly Process**

REPORTS

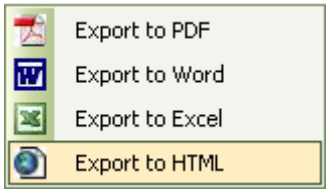
- **Standard Reports – There are many standard Revenue Results reports available**
  - ***Accessing Reports***
    - **All Revenue Results Reports may be accessed from the Reports menu with the exception of the Snapshot.**
    - **Many users are setup with the Snapshot Screen as their default view, but if not the Snapshot Screen can be accessed from *View→Snapshot View*.**
    - **The Administrator of the RR application is able to control which reports are available to which Roles via *Administration→Collector→Setup→Define Roles*.**
  - ***Standard Report Options***
    - **Report Buttons:**
      - Use this button

to run the report once your report preferences have been set.
      - Use this button

to print your report when you are ready to produce a hard copy.
    - **Select Multiple Options:**
      - Use *Ctrl-click* to select or deselect more than one individual option
      - Use *Shift-click* to select a group of options at once (from starting *Shift-click* through ending *Shift-click*)
    - **Cancel Report Button:**
      - Click the ***Cancel*** button to quit out of the report.



- ***Export Options:***
  - ***Right click*** **anywhere on the report to bring up these Export options:**



  - **If there are arrows to the right of each Export Option, you may also choose to email reports. This feature requires both setup and permissions in order to be made available. It will open up the choices *To Disk* and *To Email* when you highlight the option.**
    - ***To Disk*** allows you to save the report in a particular location.
    - ***To Email*** opens up a new email and attaches the report so that you may send it.

❖ **Report Menu Options *(displayed at the top of the report results)*:**

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

1 – Table of Contents or Thumbnail View
2 – Print Report
3 – Find/Search Option
4 – Single Page View
5 – Multi-Page View
6 – Continuous Scroll On/Off
7 – Zoom Out
8 – Zoom In
9 – Enter Zoom Level
10 – Page Up
11 – Page Down
12 – Enter Specific Page Number
13 – Move Back
14 – Move Forward
15 – Add Annotations
- Click on the icon to display the Annotation options
- Select the option and drag it onto the report
- Right-click in the Annotation and select Properties to add Text and change the Appearance
- Right-click in the Annotation and select Delete to remove it from the report

❖ **Custom Reports – This requires familiarity with SQL Query**

OUTSIDE COLLECTION AGENCIES

❖ **Setup your OCA**
Navigate to *Administration→Forwarding→Define Outside Collection Agencies*

- **Click the "+" to add a new one**
- **Enter demographic information for the agency**
- **Enter the Forwarding Rate for this agency**
- **Choose the appropriate method – Paper or Electronic for both Forward and Recall – they do not need to be the same method**
- **If you choose Electronic, the "Export Format" box will activate so you may choose the appropriate format**
  - **Navigate to *Administration→Forwarding→Define OCA Export Templates***
  - **Click the "New" button.**
  - **Enter a name for this export.**
  - **Choose the Format of the file.**
  - **Click on the "…" to navigate to the folder you would like the file created in.**
  - **Change the "Text qualifier" if necessary.**
  - **Choose the appropriate "Row delimiter".**
  - **Choose the appropriate "Column delimiter".**
  - **To include the column headings in the first data row, check that box otherwise leave it empty for no column headings.**

- **Enter the name of the OCA forward and recall letters – if applicable**
- **Enter the name of the Debtor forward and recall letters – if applicable**
- **Determine whether to print the letters at process time or send the letters to the queue at process time. Select appropriate option.**
- **Check the "This OCA is active" box when it is completely set up and ready to be used.**
- **If this Agency is California's Franchise Tax Board – Court Ordered Debt check the *FTB/COD* box.**
- **Use the "-" button to remove an old one**

- **Auto Forwarding**
  Navigate to ***Administration→Forwarding→Define Auto Forwarding***
  - **Choose the appropriate OCA to set it up for Auto Forwarding.**
  - **Click the "Auto forward rule is active" box to activate.**
  - **Fill in the appropriate criteria.**
  - **You may add Rules at the bottom of this screen to further control which Accounts are sent to this OCA.**
  - **You may use a saved query if you have one which meets your needs here. To do this click on the folder button.**
  - **You may also save this query if you would like by using the "*save as*" button.**

- **Forwarding Accounts**
  Navigate to ***Operations→Forwarding→Forward Account(s) to an OCA*** OR ***Mass Forward to OCA***
  - ***Forward Account(s)* works for one debtor's Account(s) at a time.**
    - **Open the debtor you wish to forward.**
    - **Navigate to *Operations→Forwarding→Forward Account(s)* and this debtor's Accounts will be displayed.**
    - **Select the Account or Accounts you wish to forward.**
    - **Click the "Include in next batch sent to OCA" to include them in your next batch.**

      ***NOTE:* If you do not check this box the Account will be marked as forwarded but will never be sent to the Forward Agency.**
    - **Click the "Forward" button.**
    - **You will see a "Yes" in the Forwarded column in the *Accounts List* on the Debtor Folder.**
    - **You will also see a forwarding note in the Notes tab.**
  - ***Mass Forward to OCA* allows you to forward many debtors' Accounts all at once.**
    - **Enter your parameters to isolate only those Accounts that you wish to forward.**
    - **Run the query and review your results.**
    - **Remove any Accounts you wish to exclude.**
    - **Make sure that the "Include in next batch sent to OCA" is checked so that these Accounts are sent next time you process the Forwarding queue.**

      ***NOTE:* If you do not check this box the Account will be marked as forwarded but will never be sent to the Forward Agency.**
    - **Click the "Forward Accounts" button.**
  - **Process Queued Accounts**

Navigate to ***Operations→Forwarding→Processed Queued Forwarded Accounts***

- **If you use the paper method a report with all Accounts being forwarded will be generated.**
- **If you use the electronic method a file with all Accounts being forwarded will be created.**

❖ **Recalling Accounts**
Navigate to *Operations→Forwarding→Recall Account(s) from an OCA* OR *Mass Recall from OCA*

- **Recall Account(s) from an OCA works for *one debtor's Account(s)* at a time.**
  - **Open the debtor you wish to recall.**
  - **Navigate to *Operations→Forwarding→Recall Account*(s) and this debtor's Accounts will be displayed.**
  - **Select the Account or Accounts you wish to recall.**
  - **Click the "Include in next batch sent to OCA" to include them in your next batch.**

    ***NOTE:* If you do not check this box the Account will be marked as recalled but will never be sent to the Forward Agency.**
  - **Click the "Recall" button.**
  - **You will now see a "No" in the Forwarded column in the Accounts view on the Debtor Folder.**
  - **You will also see a recall note in the *Notes* tab.**
- ***Mass Recall from OCA* allows you to recall many debtors' Accounts all at once.**
  - **Enter your parameters to isolate only those Accounts that you wish to recall.**
  - **Run the query and review your results.**
  - **Remove any Accounts you wish to exclude.**
  - **Make sure that the "Include in next batch sent to OCA" is checked so that these Accounts are sent next time you process the Recall queue.**

    ***NOTE:* If you do not check this box the Account will be marked as recalled but will never be sent to the Forward Agency.**
  - **Click the "Recall Accounts" button.**
- **Process Queued Accounts**
  Navigate to ***Operations→Forwarding→Processed Queued Recalled Accounts***
  - **If you use the paper method a report with all Accounts being recalled will be generated.**
  - **If you use the electronic method a file with all Accounts being recalled will be created.**

SYSTEM NAVIGATION

- **Snapshot View**
- **Worklist View**
- **Search Panel**
- **Search Results**
- **Debtor History**
- **Actions Panel – *Changes depending on which Folder is active***
- **Debtor Folder – *Always opens on the Tab you were last on***
- **Account Folder – *Always opens on the Tab you were last on***
- **Pin/Unpin Panels**
- **All Views/Panels may be accessed or retrieved in the *View Menu***

SEARCHING

- **Type**
  - **Debtor**
  - **Account**
  - **Victim**

- **Fields**
  - **Select appropriate field to search**
  - **Select necessary comparison from available options**
  - **Enter value to compare**

- **Add other search fields - Administrators may add additional fields if necessary**
- ***Clear button* – clears search criteria**
- **Saved Search Results Panel**

DEBTOR FOLDER

- **Debtor fields**
  - **Standard**
  - **Custom – Administrators may add new custom fields**
  - **Rearrange View and Edit order as desired**
- **Debtor Summary**
  - **Displays Debtor's total balance**
  - **May match the Account Summary if the Debtor only has one Account**
- **Account Summary**
  - **Displays the 'highlighted' Account's balance. This changes when new Account is highlighted in the Accounts list**
- **Accounts List**
  - **Displays at the bottom of the Debtor Folder**
- **Tabs**
  - **Main Information**
  - **Contacts/Employment**
  - **Notes**
    - ***Predefined views* – isolate certain types of notes**
    - **Your administrator can create your own Predefined views – *Administrator→Other→Define Note Views***
  - **Financial Transactions**
    - ***Expand All/Collapse All***
    - **Filter Transactions**
  - **Debtor Information**
    - **Last payment**
    - **Last action**
    - **Last letter**
    - **Last workflow event**

ACCOUNT FOLDER

- **Account fields**
  - **Standard**
  - **Custom – Administrator may add new custom fields**
  - **Rearrange View and Edit order as desired**
- **Line Items**
  - **Appear at the bottom of the Account Folder**
  - **Detailed breakout of the Account**
- **Tabs**
  - **Main Information**
  - **Debtors**
  - **Notes**
  - **Financial Transactions**
  - **Others – Administrator may add additional Tabs for specific business needs**

ACTION ITEMS

General:

- **Manually adding Debtors**
  - ***New Debtor* Action**

- **Debtor Type**
- **Account Type**
- **Enter Main Information**
- **Notice that possible matches appear at the bottom of the screen – Score goes up as more data matches**
- **Enter Zip Code and hit <Tab> to fill in City/State**
- **Fill in additional data as prompted**
- **Enter Line Items to setup Account**
- **Once at least one Line Item amount the Finish button will active, click it when you are done**

- **Manually adding Accounts**
  - ***New Account* Action**
  - **Account Type**
  - **Enter Account Information**
  - **Enter at least one Line Item with an owing amount and click the Finish button when done**

- **Attachments**
  - ***File Attachment Action***
  - **Click the "+" to add**
  - **Enter a description if desired**
  - **Choose either Store file in database or Store only the path**
    - **We generally recommend Store file in database so that everyone can access the attachment**
    - **If you use Store only path be sure to save documents to a *shared drive* that all users have access to**
  - **Highlight and click *Preview* to view**

- **Add Note**
  - **Enter notes in the *Note Text* box**
  - **Select a Pre-defined Note from the drop-down list, if setup**
  - **Set it as an "*Important Note*" by checking the *Add as an important note* box**
  - **Edit or Delete today's notes entered by you (*must be turned on by the Administrator*)**

Debtor:

- **Letter request**
  - ***Letter Request* Action**
  - **Select letter from the Letters list at the top-left**
  - **If there is additional text included, add that in the Additional Text box**
  - **Choose printer if you would like to print to something other than the default printer**
  - **Choose appropriate address to send the letter to if there is more than one**
  - **Select Accounts to include in this letter**

- **Note the *SELECT ALL* and *CLEAR ALL* buttons**
- **Choose *Preview* or *Print***
- **Select *Create PDF and attach to Debtor* if desired**

- **Edit Debtor**
  - ***Edit Debtor* Action**
  - **Update information as needed**
  - **All changed data appears in the notes**

- **Print Debtor Information**
  - ***Print Debtor* Information Action**
  - **Select Accounts to include**
  - **Note *Select/Clear All* toggle**
  - **Note *Expand/Collapse All* toggle**
  - **Choose options for what to include on the report**
  - **Click the "Refresh" button after making changes**
  - **Choose *Transaction History* options**
  - **Use a *Date Range* if desired**

- **Print Debtor Ledger**
  - ***Print Debtor Ledger* Action**
  - **Select report type – *Comprehensive or Line Item***
  - **Select Accounts to include**
  - **Note *Select/Clear All* toggle**
  - **Note *Expand/Collapse All* toggle**
  - **Use "Refresh" button after making selections to update report**

Account:

- **Edit Account**
  - ***Edit Account* Action**
  - **Update information as needed**
  - **All changed data appears in the notes**

FINANCIAL TRANSACTIONS – PAYMENTS

- **Posting Payments**
  - **Must be in DEBTOR Folder to post payments**
  - ***Enter Payments* Action**
    - **Post date**
    - **Type**
    - **Doc # – *This field may be used for check number or last 4 of credit card number***
    - **Comment – *This field is optional***
- **Allocating money to Accounts**
  - **Auto Allocate**
    - **Turn On or Off entirely with a system setting**
    - **May turn off for one transaction by unchecking the *Auto Allocation* box**

        - **Use the *Clear All Allocations* option to clear them for the current transaction**
    - **Use *All* or *None* buttons as needed**
    - **Use the *Items on a payment plan* option to isolate and allocate money only to Accounts on a payment plan**
- **Reversals**
    - **Must be in DEBTOR Folder to post reversals**
    - ***Enter Reversals* Action**
    - **Select the payment to be reversed**
    - **Choose a reversal reason**
- **View Financial Transaction History**
    - **DEBTOR Financial Transactions Tab**
    - **ACCOUNT Financial Transactions Tab**
    - **Financial Transactions Report – *Reports→Financial Transactions Report***
- **View Payment History Action**
    - **Choose which Accounts to include**
    - **Note *Clear All* and *Select All* options**
    - **To include Debtor Reference 1 check the box**
    - **Preview or Print**
    - **If changes are made, click the Refresh button**
- **Print Debtor Ledger Action**
    - **Choose Report type – Comprehensive or Line Item**
    - **Note *Clear All* and *Select All* options**
    - **Note *Expand All* and *Collapse All* options**
    - **Preview or Print**
    - **If changes are made, click the "Refresh" button**

FINANCIAL TRANSACTIONS – ADJUSTMENTS

- **Account Adjustments**
    - ***Enter Adjustments* Action**
    - **Enter either a positive or negative amount**
    - **Choose Adjustment Reason**
    - **Enter a comment if desired**
    - **Allocate adjustment amount accordingly**
    - **You may also add a new Line Item for the adjustment**
        - **Click on *Add new line item***
    - **Apply the new charge to the original charge amount if desired**
        - **Click *Apply new line items to charged amount* box to implement this option**
    - **System tracks if there is a remaining amount to allocate**
    - **"Post and Do Another" button is available to allow you to post multiple transactions in a row**
    - **"Search Debtors" button allows you to search for a new Debtor**
- **Adjustment Reasons**
    - **Balance Decrease**
    - **Balance Increase**

- **Posting Error**
- **Waived**
- **Write-off**
- **Definable – you administrator may add new Reasons**
  Admin→Other→Define Code Types→Adjustment Reason

- **Cancel/Reactivate Accounts**
  Operations→Account→Cancel Account or Reactivate Account

  - **CANCEL ACCOUNTS**
    - **Must be on the *Debtor Folder* when Cancelling Accounts**
    - **Choose which Account to cancel from the list**
    - **Select one of the pre-defined cancellation reasons**
    - **Click the *Cancel Account(s)* button**
    - **Set up Cancellation Reasons in *Administration→Other→Define Code Types – Cancellation Reason***
    - **Activity is tracked in the Notes on both the Debtor and the Account**

  - **REACTIVATE ACCOUNTS**
    - **Must be on the Debtor Folder when Reactivating Accounts**
    - **Choose which Account to reactivate from the list of cancelled Accounts**
    - **Select a new status for the Account**
    - **Click *Reactivate Account(s)* button**
    - **Activity is tracked in the Notes on both the Debtor and the Account**

PAYMENT PLANS

- **Creating Plans**
  - ***Payment Plan* Action**
  - **Click "+" to add a new plan**
  - **Choose Accounts to include**
  - **Note *All* and *None* options**
  - **Choose either *Payment Amount* or *Number of Payments***
  - **System auto calculates based on your entries**
  - **Choose *Payment Type* if necessary**
  - **Choose *Term***
  - **Enter *First Payment Due Date***
  - **If applicable, enter *Alternate First Payment Due Date***
  - **If applicable, enter *Alternate First Payment Amount***
  - **When done click on the appropriate button:**
    - ***Save and Print Agreement Letter***
    - ***Save***
    - ***Discard Changes***

- **Ways to Edit the Plan**
  - **Click the "*Pencil*" icon to edit**
  - **Make necessary changes, such as a new payment amount**
  - **The system automatically adjusts the payment plan to accommodate your changes**

- **Pay Plan Agreements and Delinquent Notices**
  - **Setup reminders to go out "*X*" number of days before the payment due date**
  - **Set up delinquent letter to be sent "*X*" number of days after the payment is missed**
  - **This is done by your administrator in *Administration→Payment→Define Payment Plan Rules***
- **Action Icons**
  - ***Pencil* = Edit Payment Plan**
  - ***Minus* = Delete Payment Plan**
  - ***Plus/Minus* = Add/Remove Accounts**
  - ***Circle with Line* = Cancel Payment Plan**
  - ***Envelope with Magnifying Glass* = Preview Payment Plan Letter**
  - ***Printer* = Print Payment Plan**

WORK LISTS

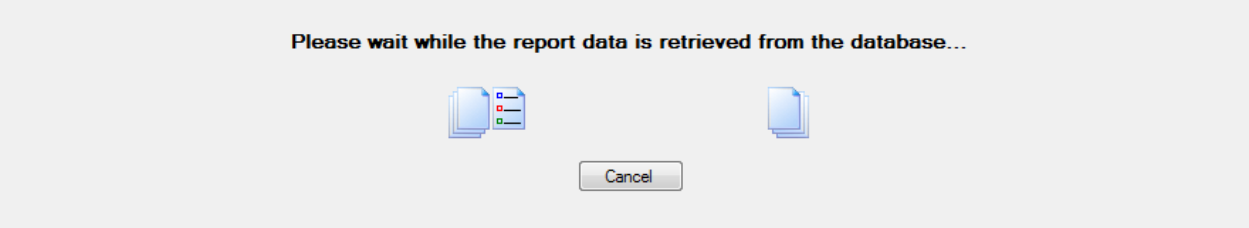
- **Working Work Lists**
  - **To open Work List View click on *View→Work List View***
  - **Click on the Work List you would like to work**
  - **All Debtors in Work List appear below**
  - **Double-Click on the Debtor you would like to work to open the folder**
  - **Note that the Active Debtor has a flag next to it and the Next Debtor has an arrow next to it**
  - **When you are done working the Debtor select the Next Work Step Action and enter the appropriate Next Step and Next Work Date OR use the Done Working Debtor Action with no Next Step or Next Work Date**
  - **After this use the *Next Debtor on List* Action to move to the next Debtor**
  - **Note that on the Work List Folder it displays a check mark next to the Debtors that have already been worked**
  - **To close out of the Debtor Folder and return to the Work Lists folder without taking any further action use the *Done Working Debtor* Action**
- **Next Step/Next Work Date**
  - ***Edit Next Step* Action**
    - **Next Step selected often works with your Work Flow to cause a new Work Flow Action to take place**
    - **An unlimited number of Next Steps may be added by your Administrator**
  - **Next Work Date controls when the Debtor will be placed back on a Work List**
- **Send to Supervisor Work list**
  - ***Refer to Supervisor* Action**
  - **Sends the Debtor to a special Work List for your Supervisor to review**
  - **Your supervisor will then see a Supervisor Work List with all referred Debtors in it**
  - **Supervisors can then send the Debtor back to the collector when they are done reviewing the Debtor and the collector will see a special Work List with their Back from Supervisor Debtors**
- **Work Lists Actions**
  - ***Stop Working List* Action takes you out of the current Work List**
  - ***Next Debtor on List* takes you to the next Debtor in line**
  - ***Print Work List* allows you to print out the active Work List**

REPORTS

- **Standard Reports – There are many standard Revenue Results reports available**
  - ***Accessing Reports***
    - **All Revenue Results Reports may be accessed from the Reports menu with the exception of the Snapshot.**
    - **Many users are setup with the Snapshot Screen as their default view, but if not the *Snapshot Screen* can be accessed from *View→Snapshot View*.**
    - **The Administrator of the RR application is able to control which reports are available to which Roles via *Administration→Collector→Setup→Define Roles*.**
  - ***Standard Report Options***
    - **Report Buttons:**
      - **Use this button**

to run the report once your report preferences have been set.
      - **Use this button**

to print your report when you are ready to produce a hard copy.
    - **Select Multiple Options:**
      - **Use *Ctrl-click* to select or deselect more than one individual option**
      - **Use *Shift-click* to select a group of options at once (from starting *Shift-click* through ending *Shift-click*)**
  - ***Cancel Report Button:***
    - **Click the *Cancel* button to quit out of the report.**



  - ***Export Options:***
    - ***Right click* anywhere on the report to bring up these Export options:**

- **If there are arrows to the right of each Export Option, you may also choose to email reports. This feature requires both setup and permissions in order to be made available. It will open up the choices *To Disk* and *To Email* when you highlight the option.**
    - ***To Disk* allows you to save the report in a particular location.**
    - ***To Email* opens up a new email and attaches the report so that you may send it.**

❖ **Report Menu Options *(displayed at the top of the report results)*:**

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

1 – Table of Contents or Thumbnail View
2 – Print Report
3 – Find/Search Option
4 – Single Page View
5 – Multi-Page View
6 – Continuous Scroll On/Off
7 – Zoom Out
8 – Zoom In
9 – Enter Zoom Level
10 – Page Up
11 – Page Down
12 – Enter Specific Page Number
13 – Move Back
14 – Move Forward
15 – Add Annotations

- **Click on the icon to display the Annotation options**
- **Select the option and drag it onto the report**
- **Right-click in the Annotation and select Properties to add Text and change the Appearance**
- **Right-click in the Annotation and select Delete to remove it from the report**

❖ **Custom Reports – This requires familiarity with SQL Query**

OTHER OPTIONS

❖ **Merge Debtors (duplicate Debtors)**
- **Locate "Target Debtor" – Debtor to be kept on the system**
- **Use *Operations→Debtor→Merge Debtors* to locate the "Source Debtor"**
- **System keeps the Debtor that you open, not the one you select from the "Merge Debtors" option**

- **Merge all Accounts, Employment information, notes etc. from "Source Debtor" to "Target Debtor"**
- **Check notes to see additional notes**

- **Help Menu**
  - **Found off the *Help* menu at the top of the screen**
  - **You may navigate to the area of your choice**
  - **There is also a "Help" button on many of the screens which will take you to the specific Help topic pertaining to that screen**

- **Keyboard Shortcuts**
  - ***Right click* on any of the folders to see the available Actions, including the keyboard shortcuts if one is available**
  - **To *customize* your own keyboard shortcuts right click next to the toolbar at the top of the screen and chose Customize**
  - **Click on the Keyboard tab and choose one of the commands in the drop down list**
  - **If a shortcut already exists it will appear in the *Shortcut(s) for selected command* box and if one does not exist this box will be blank**
  - **Add your own shortcut by clicking in the Press shortcut key(s) box then click on the "Assign" button to assign it**

VICTIM RESTITUTION TRAINING OUTLINE

VICTIM SETUP

Administration\Victim\Victim Restitution Setup

- **Options Tab**
  - **Enter Minimum Dollar Amount**
  - **Enter Victim Types, Disbursement Type, Subtype and Priority**

- **Line Items Tab**
  - **Check the Line Item Types to include in Victim Restitution**
  - **Use *Select All* or *Unselect All* buttons as needed**

- **Payment Types Tab**
  - **Setup Payment Types that need to be held for a number of days**
  - **Select Payment Types that are not to be disbursed to Victims**

- **Files Tab**
  - **Enter the directory for the electronic disbursement file**
  - **Enter the disbursement file name**

VICTIM RESTITUTION CUSTOM FIELDS

Administration\Victim\Define Victim Custom Fields

- **Enter the *Display Name***

- **Choose the appropriate *Data Type***

- **If you used the CODE type, select the appropriate *Code***

- **Add a *Description* if desired**

- **Other fields are usually left with the default answers**

VICTIM TEMPLATES

Administration\Victim\Define Victim Templates

- **Customize fields displayed on the following screens:**
  - **Victim Summary (*Account Folder - Victims tab*)**
  - **View Victim**
  - **Edit Victim**
- **Choose the Default Template or create a New one**
- **Select Template Section to modify**
- **Add or Delete fields**
- **Rearrange the order of fields displayed**

VICTIM MATCHING

Administration\Victim\Define Matching Rules

- **Adjust Threshold Points as desired**
- **Add a custom field to the Matching Rules if needed**

VICTIM LETTERS

Administration\Correspondence\Define Letters

- **On Settings Tab click the "*This is a victim letter*" box**
- **Otherwise set Victim Letters up the same as other correspondence**
- **Send letters using the "*Letter Request*" Action off the Victim Folder**
- **May also automate Victim letters using Workflow**

USING VICTIM RESTITUTION

Viewing Victim Information

Victims Tab

- **From the Account folder, click on the *Victims* Tab**
- **Displays Victim *demographic information* as well as *Owing*, *Adjusted*, *Paid* and *Balance* amounts**
- ***Disbursed* and *Undisbursed* amounts are also available**

Victim Folder

- **Double-click on the victim listed on the Victims Tab**
- **There are three tabs of information available: *Main Information, Notes, Victim Info***
- **You may also have custom Victim tabs**

Victim Actions

- **New Victim – Add new victims**
- **Edit Victim – Update an existing victim**
- **Delete Victim – Remove an existing victim (no undo!)**
- **Add Note – Add a victim note**
- **Spread Payments – Apply payments to victims that were received prior to their entry into Revenue Results**
- **Victim Financial History – Displays a report of the victims financial history**
- **Letter Request – Request a letter to be sent to the victim**
- **Payment Transfer – Transfer payments from one victim to another**
- **Victim Adjustments – Make an adjustment to victims without affecting the Account**

Searching for a Victim

Search Panel

- **Select Victim from the Search Type box drop-down menu**
- **Choose the appropriate Search Field, such as Last Name or Victim Number**

- **Enter *Search Criteria* and click the Search button or hit <*Enter*>**
- **Search Results will display the *Victim* on the left and the associated *Debtor* on the right**
- ***Double-click* on the Victim you would like to view. The associated Debtor and Account folders will also open**

Define Victim Searches

Administration→Other→Define Searches

- **Select Victim from the *Searches* box**
- **Use the arrows to rearrange the order of the Search Fields or Search Results fields**
- **Add additional fields by clicking in the first empty row of the Field column and change the display name if desired**
- **Remove fields by selecting the row to remove and clicking on the "-" button**
- **Click Save Changes button to save your modifications**

Victim Operations

Victim Disbursements

Operations→Victim→Victim Disbursements

- **Those that are available for disbursement are available to be selected**
- **Click the Override balance restrictions button to activate others**
- **Use All/None buttons to help with your selection**
- **Click the Disburse button to complete the disbursement process and create the file**

Disbursement Reversals

Operations→Victim→Disbursement Reversal

- **Select the disbursement(s) to reverse from the list**
- **Click the Reverse Disbursements button**

Merge Victims

- **Open the Victim Folder for the Victim record you would like to keep (merge the other record into)**
- **Navigate to *Operations→Victim→Merge Victims***
- **Search for the duplicate and select it from the results list**
- **Click the Merge button**
- **Say Yes to the *"Are you sure you want to continue?"* prompt.**

9.0 Release

Email Setup

Sending Letters Via Email

- Add the email fields to the debtor edit and display templates.
  - ***Administration→Debtor→Define Debtor Templates→View Debtor and Edit Debtor***
  - Add the following fields:

    Email
    Email Consent
    Email Consent Date
    Email Consent Type

- In ***Administration→Organization Setup→Settings→Correspondence*** you may setup a default email account
  - Click the ***Use the below email account for all email correspondence*** box
  - You may also choose to click the ***Allow user to override*** box
  - Enter the following information:

    Mail server: *such as* exchg1.cunet.local
    Port: 25 (should be default)
    Enable SSL: *usually left* unchecked
    Username: a network username with access to your email server, such as '*email-user'*
    Password: a network password for the username above
    Domain: Optional

Security

- ***Administration→Collector→ Setup→Define Users→*****Collector Setup Tab**
- Select these options as appropriate for each user:
  - "Allow to email reports"
  - "Allow to email letters"

- In ***Administration→Collector→Setup→Define Users→*****Email Setup Tab** you may setup an individual email account.
  - Users who have an email account setup may use their own email account to send letters or report as long as the "***Allow user to override"*** box is checked
  - They must also be setup to ***Allow to email reports*** and/or ***Allow to email letters*** as indicated in the Security section
  - If the user does not have their own email account setup they may still email letters or reports using the default account
  - Enter the following information on the Email Setup Tab:

    Mail server: *such as* exchg1.cunet.local
    Port: 25 *(should be the default)* Enable SSL - leave unchecked

    Username: the user's network password, such as '*kmendenhall'*
    Password: enter the user's network password
    Domain: Optional – *if you do not use a Domain, leave it blank*
    Display email: Kellie.Mendenhall@RevQ.com

Display name: Kellie Mendenhall