

NEW FEATURES UPGRADE 5.0.5

Numerous changes and fixes have been included in this upgrade. The major changes are listed below:

- 1) There is now a miscellaneous field below the client address on the client master main screen.
- 2) Now have the ability to disallow forwarding of debts listed with specific clients. From the Client's Main screen choose **F** for *Flags* and then **D** for *Defaults*. You will see the new question "*DISALLOW Forwarding of Debts listed for this Client (Y/N):*" If this option is activated then the ability to forward debts can be disallowed in the Debt Action Menu, in the Globally Transfer Debt routine of the Inter Office Data Transfer Menu, and through the majority of office specific transfers.
- 3) The Bank Info Screen now has places to enter the *Owner of Account* and the *Bank Phone Number*.
- 4) An additional Miscellaneous field is available in the Debt Supplementary Info Screen (Screen # 2).
- 5) The Deposit Summary Reprint (option 20 in Financial Management) now has the ability to do a reprint over a range of dates.
- 6) The Payment Listings report (option 23 in Financial Management) now has the ability to use both client and date ranges and the ability to limit the report to include only Merchandise Returned transactions.
- 7) The spouse's SIN will now appear on the debtor data listings.
- 8) There is now a B – Other Information screen attached to the debt's file. This screen will hold Drivers License Information and 3 additional miscellaneous field entries.
- 9) The client inventory report now stores the information entered by the user to allow for The reprinting of reports based on this previously entered information.
- 10) Debtor Notices now have the ability to print either of 2 versions of the debtor info screen. Version 1 contains the standard information of displaying Principal, Interest, Legal and Costs. Version 2 designed for Parking tickets debts displays Ticket # and License Plate #.
- 11) Notice editing now uses a full screen editor (Iyrix), instead of a line editor.
- 12) The ability to record the method of payment is now an option when entering transactions. This option can be turned on by choosing **F** for *Flags* while in the Branch master and answering **Y** to the *question "Ask for Payment Method (Y/N):"*
- 13) If a 0.00 % commission rate is entered the flat rate question previously limited to Merchandise returned types of payments will now be asked. This can effectively allow the acceptance of payments at 100.00% commission.
- 14) When deleting a comment you will now be asked to confirm the deletion.
- 15) There is now an **O** for *Other* option on the client master's main screen which will allow the entry of up to 3 additional contact names, phone numbers, extensions and miscellaneous info on the contacts.
- 16) A comment is now written when the debt's commission rate is edited.
- 17) Global Re-Scheduling of debts available by autouser, client or both. Choose 03 Collection Management/ 06 Global Routines / 02 Global Scheduling Routine.

- 18) Protection when entering dates in the interest calculator to ensure that the dates entered are reasonable. This will prevent the numeric overflow error when too many days of interest are calculated during the midnight run.
- 19) New security feature which can allow specified users the ability to delete system generated client comments. When comments are deleted they will now be automatically renumbered so the ascending sequential order remains intact.
- 20) Service Address Screen is now available in the Debtor Screen Selection Menu.
- 21) A new Audit Function routine (choose 01 Management Menu, choose 20 Audit Function, choose 02 Audit Queues) produces a printed report of all debts for a collector/autouser primarily based by client and list amount. This is a good tool when determining reassignment criteria.
- 22) In the Branch statement flags you can enter a variable client (also know as a mirror client) default alpha code.
- 23) Although the client account inquiry (option 13 in the Accounting Menu) is not intended to be an exact replacement for statement generation it's ability to reproduce statement type information to screen has been expanded.
- 24) Commission Reduction Scale setup found in Client's Default Settings screen (access a client, choose Flags, choose Defaults) used in conjunction with the Commission Reduction Scale Table Entry menu allows for automatic commission reduction of debts after specified periods with no payment activity.
- 25) The payment listing report can now be limited to Merchandise Return payments.
- 26) Global unforwarding routine is now available in the Global routines (option #6) in the Collection Management Menu.
- 27) New statement printing option available (L=Laser) has the correct spacing requirements for printing statement to standard laser or inkjet printers.
- 28) The Collector Inventory Report (option #13) in Collection Management has a new option to limit the report to only active accounts.
- 29) Statistical History Report can now be reprinted without recalculating. Several new options have also been added.
- 30) In the Debtmaster there is a new Other option that will let you input and view co-borrower information. Clerical Menu 31) Coborrower Search allows you to search by coborrower name or number. Notices can also be sent to Coborrowers.
- 31) The client commission range flags, Flag, C=Commission, are now specified by a Commission Range Code, rather than having to set up every client individually. The Commission Range Codes can be modified or added in Client Management 20) Commission Ranges.
- 32) Mirror clients can now be set up. Mirror clients are used to track AR's and NSF's for clients who do not want to see AR's and NSF's on their statements.
- 33) The client master now has a *Date Entered Field* so that you know when the client was created.
- 34) There is now a Legal Number search 02) Clerical Menu 29) Legal Number Search.
- 35) In the User Master Collection Management, 01) User Master Menu the User Phone # can now be anything you wish. Such as an email address, or a standard phone number with extension. Past versions did not allow you to enter the phone number extension for example.

- 36)** You can now set up a Commission Reduction Scale on a client basis. This scale will allow you to automatically reduce the commission percentage of a debt based on its current age. See TA0149 for details on setting up a Commission Reduction Scale.
- 37)** In certain circumstances a damaged index can be recreated on the fly. The Historical Statistic report was most notorious for damaged indexes, usually because the login was killed while the report was running. When possible these damaged indexes are recreated on the fly, behind the scenes, so you will never know that a damaged index was found and fixed. Do not confuse a damaged index with an index that is corrupt. A damaged index cannot be opened; the file itself is damaged. A corrupt index can be opened, it's just that the sort order is wrong (stuck in a loop or skips over several records in the sort order).