



Loan Information Management System

OCM PowerCall Option

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BANK INFORMATION.....ERROR! BOOKMARK NOT DEFINED.

Overview

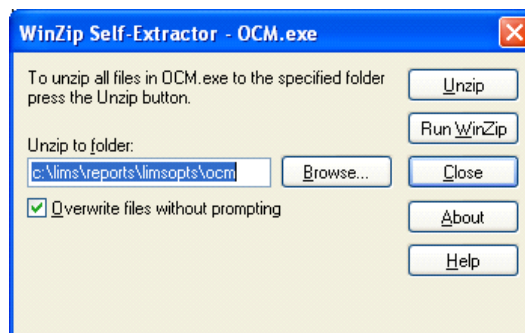
The OCM PowerCall Interface (OCM) Option of LIMS provides a link between between LIMS and the third party collection call service OCM PowerCall.

PowerCall is an automated message delivery system proven to deliver simple but effective collection messages to collection accounts such as 1-10 day past due customers and payment reminders to Reduce Collections cost. In most operations, one full time staff member calls 75-120 of these accounts daily but with PowerCall the messages can be delivered in minutes at a cost of pennies on the dollar compared to staff. PowerCall is Internet based and requires no hardware or software installation and easily imports data from SeaTips Loan Information Management System.

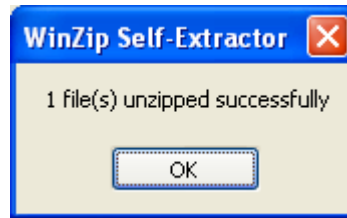
Installation

You are provided with a self executing installation file. The file name may be shown as OCM.ex. The “e” from the extension .exe has been dropped to trick virus protection systems. Rename the file to include an E on the end of the file so that it appears as .exe.

To install, double click file and extract its contents into the folder where you have installed LIMS Reports. (C:\LIMS\REPORTSLIMSOPTS)



This will extract this word document file and a file named OCMRpts97.mde in the chosen location.

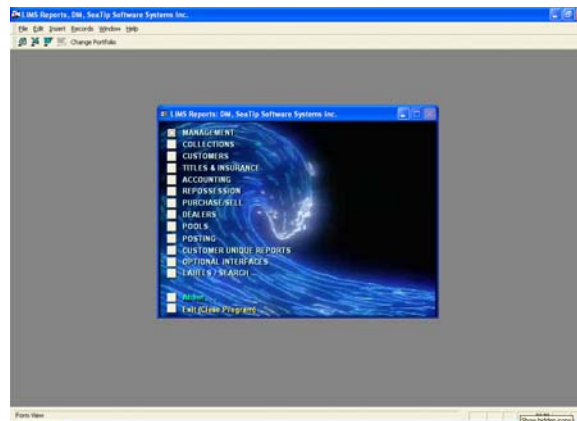


Selecting OK will close extraction window. Select OK to close the Unzip utility window.

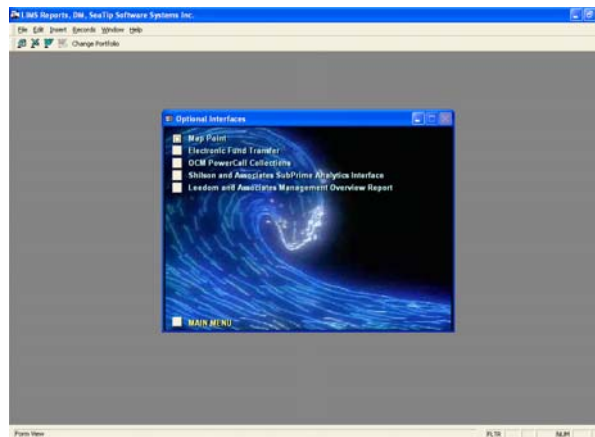
NOTE: This Module should be installed on the workstation of all persons in your organization with responsibility to perform PowerCall function for LIMS accounts.

Access

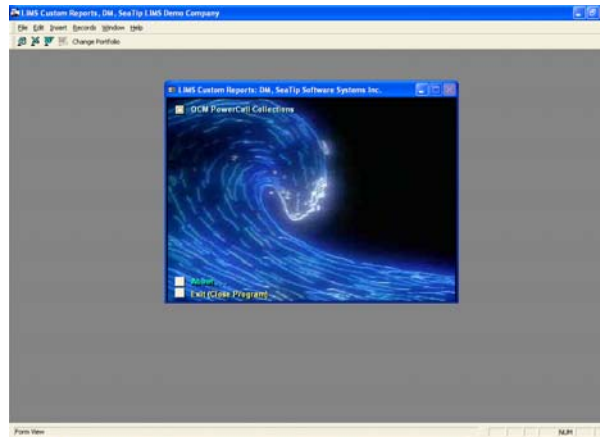
The PowerCall Interface Option is available through LIMS standard reports MENU, under OPTIONAL INTERFACES.



When Selected, a separate OPTIONS Menu will appear.



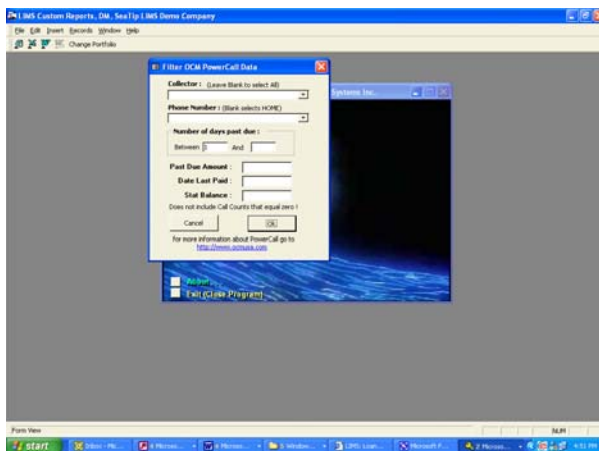
which then presents you with the OCM Option.



Use the Change Portfolio function in the text menu area (found in all LIMS modules) to the appropriate portfolio you wish to use.

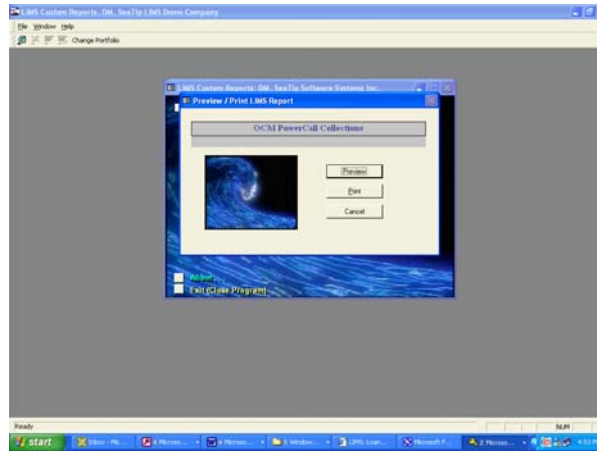
Select the Option.

The user will be presented with the following filter screen.



There are numerous filters available to help the user to drill down to exactly the subset of laons with in the portfolio the users wishes to use.

Enter your filter sets and selecting OK will present the user with the following decision window.



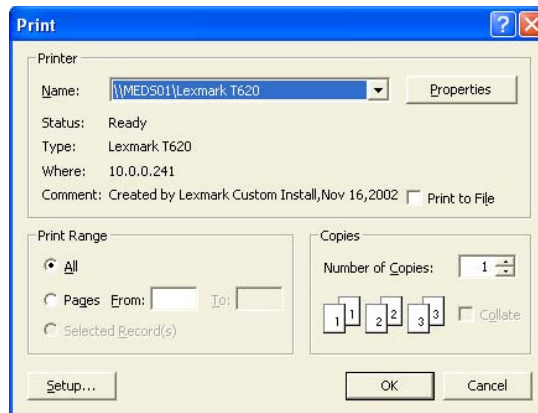
Always select PREVIEW unless you are absolutely sure you will receive the correct results. Review the data to insure you have the correct targeted results.

Name	Account No.	Reference	Days Late	Current Due	Past Due	Stat	Phone Number
Aging 61-90							
Jalan, Bob	DM00-0718-003C-096C		97	664.98	704.98	2,494.85	(123) 955-4992
Quint, Alan	DM00-020C-003A-0843		88	0.00	350.16	350.16	(123) 955-4760
Maweth, Eben	DM00-020B-0073-0A13		90	124.39	909.18	2,302.28	(123) 955-9721
Sum	Summary for Aging = 61-90 (3 delin/records)		Avg (80)	889.37	1,973.32	5,186.29	
Recent							
Aging 91-120							
Reust, Rick	DM00-0174-005E-0651		95	0.00	163.97	163.97	(123) 955-4822
Reust, Rick	DM00-0174-005E-0651		95	0.00	163.97	163.97	(123) 955-4823
Maria, Corina	DM00-022A-0014-0A19		96	160.00	1,172.00	3,206.91	(123) 955-4743
Rahab, George	DM00-01E-5-0062-08C3		96	150.00	1,267.50	4,863.85	(123) 955-4377
Sanjay, Laxette	DM00-019A-0096-0740		96	0.00	500.09	500.09	(123) 955-4879
Baith, Larry	DM00-010D-0002-0089		97	280.00	1,470.00	2,713.31	(123) 955-4441
Dalshaha, Sorja	DM00-0212-0014-08D0		97	160.00	1,146.43	1,403.49	(123) 955-9436
Bowles, Joe	DM00-018B-006B-0742		97	0.00	468.39	468.39	(123) 955-4935
Harmon, Ali	DM00-018E-006A-0704		97	0.00	46.95	46.95	(123) 955-4306
Sarath, Billy	DM00-0221-0067-09FD		97	152.16	1,118.32	3,242.70	(123) 955-9663
Ekner, Michael	DM00-014G-005F-0770		100	551.90	617.25	617.25	(123) 955-4986
Luiza, Raymond	DM00-0214-0094-09C7		100	130.00	1,046.25	2,572.60	(123) 955-9497
Sanjay, Arnie	DM00-022A-0014-0A19		100	160.00	1,252.00	2,899.38	(123) 955-4750
Eglin, Edie	DM00-016F-0058-0779		104	0.00	814.81	814.81	(123) 955-4233
Magnumisabell, Laura	DM00-020B-0090-095A		104	700.00	745.00	2,194.00	(123) 955-4222
Magnumisabell, Laura	DM00-020B-0090-095A		104	700.00	745.00	2,194.00	(123) 955-4530
Rahab, George	DM00-01A-0054-0774		104	0.00	524.16	524.16	(123) 955-4239
Sarah, C O	DM00-01FD-0055-0569		104	0.00	60.32	60.32	(123) 955-9028
Tamra, Donna	DM00-01D3-0064-0889		104	0.00	17.58	17.58	(123) 955-4201
Tom, Jason	DM00-016F-0058-0779		108	0.00	374.95	719.95	(123) 955-4315

If not, close and start the filter process again.

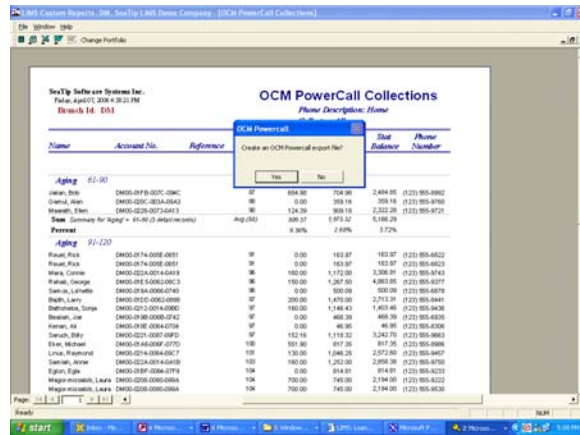
If correct, select the PRINT function

If you want a hard copy of the loans selected, select OK, which will return your windows print menu.



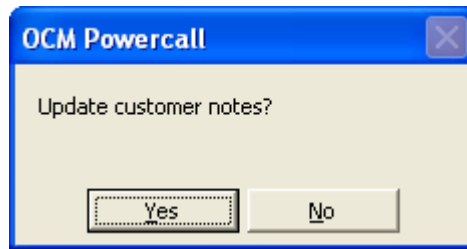
Select OK and a report will be printed.

Closing report window or selecting CANCEL will present the user with the following.



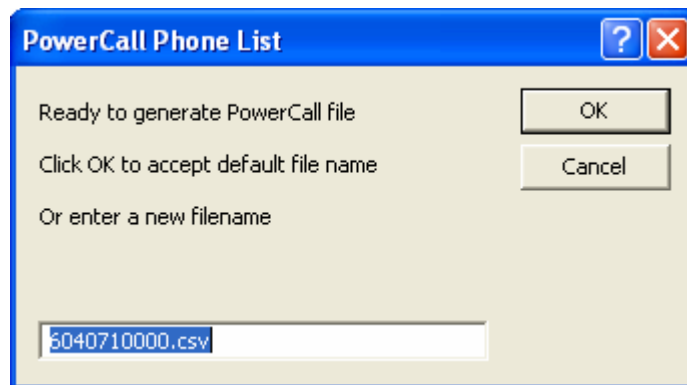
Select YES to create the telephone number file.

The system now presents the user with another window.



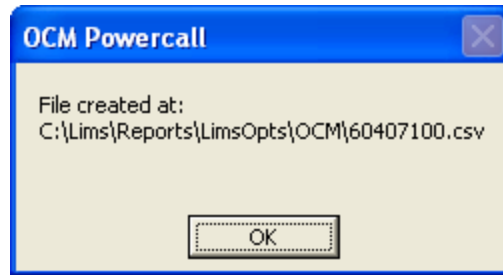
Select YES and each customers notes record will be updated with a transaction indicating this effort.

The system now presents the user with another window.



This is the file that will be created indicating the date of the creation in the file name.

The system now presents the user with another window.



This is the files location.

Upload the file and leave the voice message to be delivered per OCM instructions.