What's New, What's Coming with Revenue Results

October 7, 2009 | Chad Broadus

ART OF SUCCESS 2009
SOARING TO NEW HEIGHTS

RevQ
A Columbia Ultimate Company

Revenue Results 6.0

6.0 New Features

- Account type inactive
- Advanced debtor account linking
- Contact manager
- Custom payment fields
- Database maintenance
- Grid sorting by column
- Multiple same type line items
- Paid-in-full report

6.0 New Features

- Predefined notes
- Tax intercept for California
- Victim restitution for Alaska
- ZIP code auto populate

6.0 Updates

- Addresses
  - Ability to enter only the State as an address
  - *Date Updated* added to the address information area
- Accounts
  - Account cancel reason
- Adjustment
  - Ability to post a negative auto adjustment

6.0 Updates

- Collector Bin
  - Bin description now displayed in the Initial Methodology screen
- Collectors
  - Added Apply button to the Define Collectors screen

6.0 New Features

- Correspondence
  - Added merge fields
    - PLNAccts – lists all Accounts on a Payment Plan
    - AcctsRef1Desc – lists Account Ref1, account description, and account balance
  - Expanded letter notes
    - Note now includes debtor balance at time of letter printing

6.0 New Features

- Correspondence
  - *Include All Accounts* option added to mass letter request
    - When selected, data for all qualifying accounts will be returned in the merge field
  - Ability to print a letter for a Contact

6.0 New Features

- Export
  - Ability to schedule an export
  - Ability to save export parameters for reuse
- FTB/COD updates (California clients)
  - Ability to process updated FTB file formats

6.0 New Features

- General usability
  - Keyboard navigation between tabs
    - Ctrl-Tab cycles top level tabs
    - Ctrl-Alt-tab cycles bottom level tabs
    - Ctrl-w closes active top level tab
- New icons
- Color bars to delineate sections

6.0 New Features

- Import
  - Drag and drop field tree for easier import template setup
  - Ability to ignore a field in the incoming file
  - Ability to define a Debtor only import, requiring no Account information
  - Ability to export the failed lines from a failed import into a new file
  - Ability to email notification of failed scheduled import

6.0 New Features

- Line Items
  - Ability to add *Adjusted Owing* column to the Line Items grid of the Account screen
    - Displays charge amount + adjusted amount

6.0 New Features

- Payments
  - Ability to select the Account where the Overpayment Line Items should be created, rather than having the system choose
  - Ability to select a Reversal Reason from a dropdown list of pre-defined reversal reasons
  - Ability to do an Account level search from within the payment screen
  - Ability to set the payment fee to apply per account, or as a whole

6.0 New Features

- Print Debtor Information
  - Added Account Ref1 and Ref2
  - Ability to restrict sensitive information
  - Ability to include transaction history down to the line item level for a given date range

6.0 New Features

- **Reports**
  - Added *Created Date* to the Payment Plans report
  - Username added to bottom of Payment History report
  - Added Debtor Reference 1 to the Payment History report
  - Snapshot
    - Ability to configure the Snapshot report down to the Bin and Account Type level
    - Ability to configure the Snapshot report down to the Bin and Account Type level per Collector
    - Performance increase of Snapshot report
  - SB940
    - Ability to display only delinquent accounts

6.0 New Features

- Reversals
  - Ability to choose reversal date
  - Account Reference 1 and Account Number added to the payment reversal screen
- Search
  - Ability to search by phone number
  - Middle initial included in the search results

6.0 New Features

- Workflow
  - Account
    - Ability to post an adjustment as a percentage of the account balance
    - Added payment plan status as an Account Workflow attribute
    - Added Debtor Next Step and Debtor Next Work Date as Actions
    - Ability to adjust a line item balance to zero
    - Added Account Cancelled event
    - Added Account Reactivated event
    - Added an Account Paid In Full event
    - Added a Payment Plan Created event
    - Added a Bin change action
    - Added a Request Letter Series action
    - Added a Request Letter action

6.0 New Features

- **Workflow**
  - Debtor
    - Added a Debtor Paid In Full event
    - Added a Payment Plan Created event
  - Ability to copy an existing Workflow
  - Unified Debtor/Account Workflow screen
  - Ability to include/exclude Bins
  - Added a date offset function for all dates in Actions

6.0 New Features

- **Work Lists**
  - Added a column that displays the number of Accounts for the selected Debtor
  - Ability to exclude Debtors with closed Accounts

Revenue Results 6.5 Sneak Peek
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Thank You!

Please take a moment to complete your session survey.