

# **COLLECTIONS MAX**

**DEBT COLLECTION SOFTWARE**

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## Scheduler

Collections MAX Scheduler is a Windows based desktop program that gets invoked once a night to automate the Collections MAX debt collection system. You need to be a subscriber to the Collections MAX core system for this software to function properly.

## Requirements

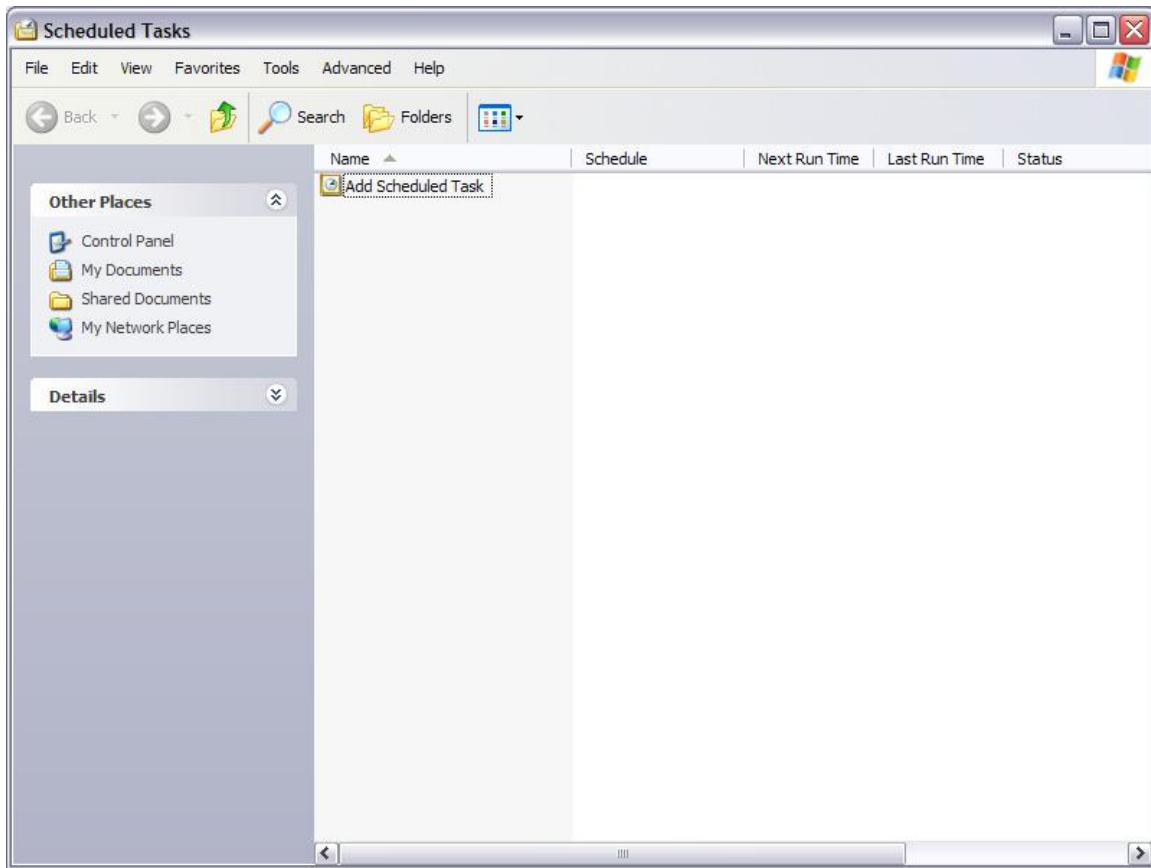
You need a computer in your network that is running Windows XP or Server 2003 with the Microsoft .Net Framework 1.1 and 2.0 installed. If your server has a Windows XP or Server 2003 operating system, it is recommended to install this program on the server to reduce latency in the network and speed up execution times.

## Installation

Unzip the zip folder “collectionsmax-scheduler.zip” and double click on the setup executable. Follow the on screen instructions to install the program in your desired directory.

## Setting up the Task Scheduler

Windows comes with a built in Task Scheduler that you will use to automate the start up of the Scheduler. To use, go to START/ACCESSORIES/SYSTEM TOOLS/SCHEDULED TASKS (If you don't have this installed, you may need to enable it in your Windows installation CD or Add/Remove programs in the control panel)



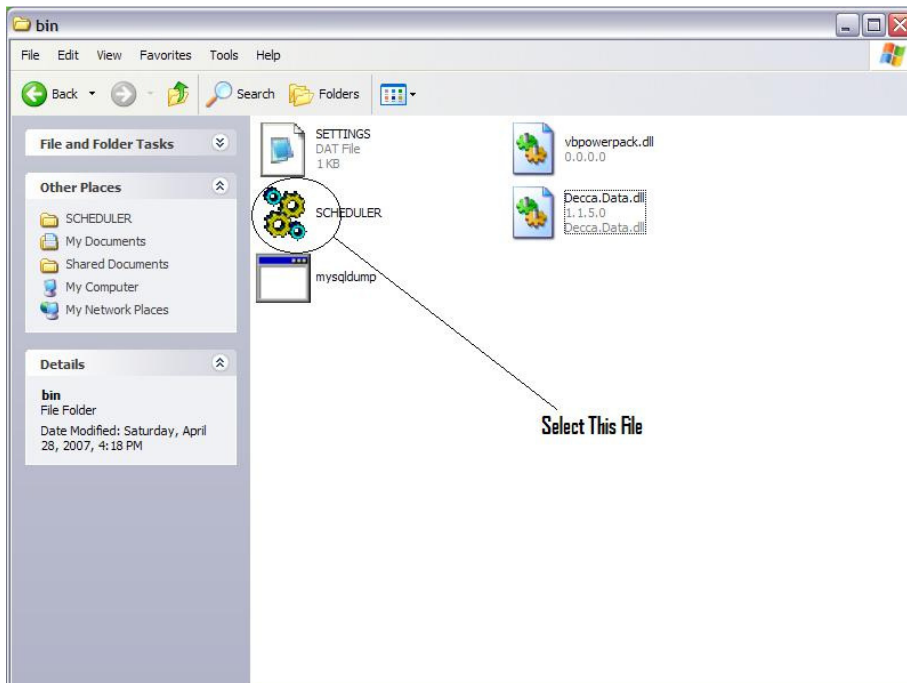
You should now see a window like the one above.  
Double click on the “Add Scheduled Task” in the name column.



You should now see a window like this. Click the Next > button.



You should now see a window like this. Click the Browse.. button and navigate to your installation directory folder where you installed the Scheduler – default is C:\Program Files\Collections MAX Scheduler



Select the SCHEDULER.exe file and click the Open button.

**Scheduled Task Wizard**

Type a name for this task. The task name can be the same name as the program name.

Perform this task:

☐ Daily  
☐ Weekly  
☐ Monthly  
☐ One time only  
☐ When my computer starts  
☐ When I log on

< Back   Next >   Cancel

Select the Daily radio button, then click the Next > button.

**Scheduled Task Wizard**

Select the time and day you want this task to start.

Start time:

Perform this task:

☒ Every Day  
☐ Weekdays  
☐ Every  days

Start date:

< Back   Next >   Cancel

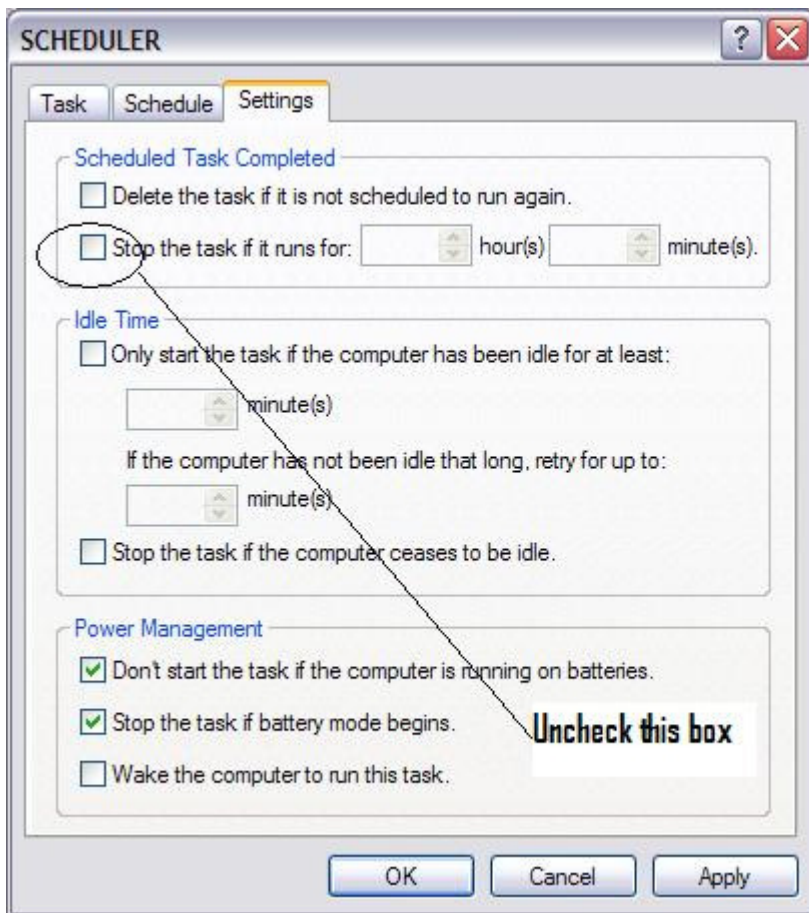
Set the time that you want the scheduler to run. Then click Next>



If your computer is password protected (which it should be), you will see a window like this. You need to enter your password of the current user (Administrator) that will invoke the program. Enter the required information and hit the Next > button.



Make sure to put a check in the Open advance properties for this task when I click Finish box.



Navigate to the Settings tab and uncheck the box that says “Stop the task if it runs for “  
Click Apply then click OK. You have set up the scheduler successfully.

### Configuring the Scheduler

The first time that you run the scheduler, you will be prompted to configure it. Find the Scheduler shortcut icon on your desktop or start menu and launch it.



**Collections MAX Scheduler Configuration**

Main | Backup

**Access**

Server:  Test

Username:

Password:

**Interest**

If calculateinterest = YES

☒ Calculate Interest on all accounts DAILY

☐ Calculate Interest on all accounts MONTHLY.

Calculate on the  day of the Month

☐ Calculate Interest on all accounts WEEKLY.

Calculate on  of each week.

**Callbacks**

☒ Delete callbacks greater than  days old.

**Promises**

☒ Mark broken promises

☒ Generate broken promises letters automatically

Broken promise letter  Select

**Statute Of Limitations Date**

☒ Mark accounts that have expired statute of limitation dates

**Email Notification**

☐ Enable email notification

SMTP Server:  Port:

Username:  Test

Password:

Email Address From:

Email Address To:

☒ Close program when finished

OK EXIT

This is the configuration screen for the Scheduler.

**Access:** This section sets the connection information so the scheduler knows how to connect to the Collections MAX database. If you are using the scheduler on the same machine that that database is located then use local host as your Server

Enter a Username and Password that has Select, Insert, Update, and Delete permissions set. Do not use a root username for this as it is insecure.

Click the Test button to make sure you set the access information correctly.

**Callbacks:** Check this box to delete old callbacks. This keeps the callback log fresh and speeds up the callback system considerably.

**Promises:** The promise system takes care of tracking unsecured payments. If a payment is not received by the promise date, the scheduler will mark the accounts status as a Broken Promise for easy identification for later follow up. Click the Mark broken promises check box to enable this feature.

Optionally, you can schedule a follow up letter when a promise has been broken. To do this, click the Generate broken promise letters automatically check box, then click the

Select button and select the letter that you would like to schedule when a broken promise is found. Click OK to finish.

Statute of Limitations Date: Put a check in the Mark accounts that have expired statute of limitations dates to enable this feature. This allows you to scrub for accounts that have reached their statute of limitations. It will change the status to SOL DATE EXPIRED on the account when it finds one with an expired SOL date.

**It is recommended that you set a checkmark in the Close program when finished box so you don't create extra instances of the Scheduler. Keeping it open should be used in debugging purposes only.**

Interest: You can calculate interest on accounts that need them by checking off one of the Calculate Interest checkboxes.

\*Calculate Interest on all accounts DAILY – will calculate interest everyday on all accounts that is in the collectionsmax database, table dbase, column calculateinterest and has a YES in the column.

\*Calculate Interest on all accounts MONTHLY – will calculate interest only on the specified day of the month on all accounts that is in the collectionsmax database, table dbase, column calculateinterest and has a YES in the column.

\*Calculate Interest on all accounts WEEKLY – will calculate interest weekly only on the specified day of the week on all accounts that is in the collectionsmax database, table dbase, column calculateinterest and has a YES in the column.

The options to calculate interest can be modified in the Collections MAX Administrator.

Email Notification: You can enable this by putting a checkmark in the Enable Email notification box. This will send you a simple message informing you that the scheduler ran.

Setting:

SMTP Server: Your SMTP server name.

Username: Your SMTP username

Password: Your SMTP Password

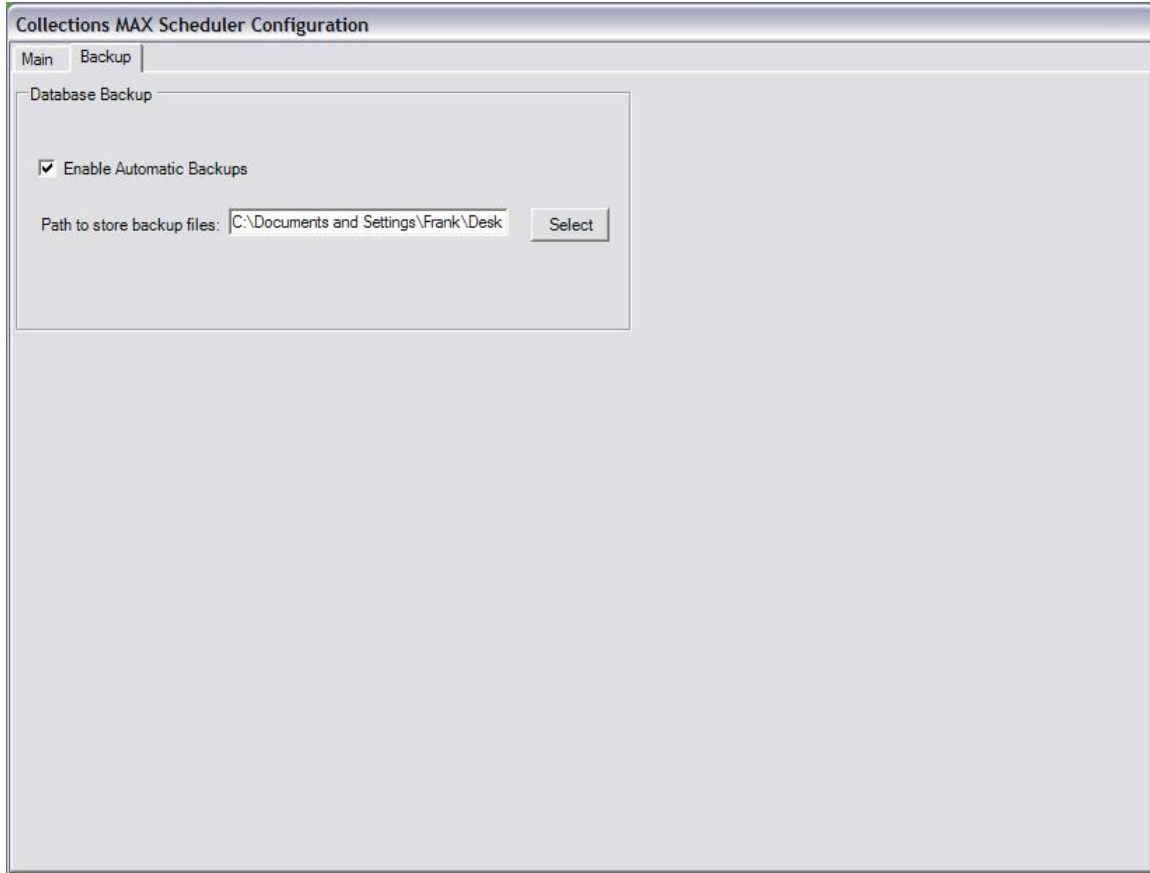
Port: Your SMTP Port - default is 25

Email Address From: Notification from

Email Address To: Destination email address you would like the notification sent to.



Click the Test button to send a test email.



Click on the Backup tab to view the database backup options.

Add a checkmark to the Enable Automatic Backups checkbox to run a backup of your database every night. You can select the destination folder that you want your backups stored in by clicking the select button. After you have finished this, click on the Main tab and select the big green OK button.

**Collections MAX Scheduler Configuration**

Main | Backup

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Password:

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Broken promise letter

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☒ Mark accounts that have expired statute of limitation dates

Interest

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Calculate on the  day of the Month

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Calculate on  of each week.

Email Notification

☐ Enable email notification

SMTP Server:  Port:

Username:

Password:

Email Address From:

Email Address To:

☒ Close program when finished

You will see a green “SETTINGS SAVED” dialog. Congratulations, you have set up the scheduler. Now click the EXIT button to finish.

The next time you start up the scheduler, you will be presented the following screen

One Moment.....Starting Scheduler

☒ Abort Startup and Open Configuration Screen

Make sure to check the box that says Abort Startup and Open Configuration Screen within 30 seconds to edit the configuration file or the scheduler will run.