CollectMax™
Advanced Collections Software

CollectMax™ Version 9 Features

Trends
Want to compare this year's collections results to last year's? Want to know how many judgments were entered last month? Want to view goals? With Trends you can track Basic Inventory, Legal Activity, Payments, and Productivity information for your firm.

Right Click Advance on DU Actions
Advance Payment Due Actions quickly and easily right from the Consumer Summary screen with a right click of the mouse. No need to dive into the action details to move this date forward.

New Hotkey for Activity Form
A new hotkey has been created to start a Call Activity without using the mouse. Simply press Ctrl-Alt-C while on any Consumer screen to start the Call Activity Form or to bring an existing Call Activity to the front. For mouse clickers out there, the Activity Entry button will still work too.

New Document Property – Update User Defined Variable
A new document property has been added which will allow you to update a user defined variable (Account, Debtor, or Claim level) with a value or formula when a document has been generated.

Letters by Action Automation
Processing letters in Batch Processes is now more powerful. In one sweep, you can process different letters based off of action codes. Using a grid display, for each action code you can define the document you wish to generate, the completion code to be used to complete the action as well as a new action code and delay. Select the action date range and status codes to base the selection off of and you are done. No more running the process multiple times for different documents. This stands to be a great time saver!

Quick Envelope Printing
From a consumer account, you can select to print an envelope via MS-Word for most any entity associated with the account. Version 9 includes the ability to print differing envelope sizes along with the return mailing address, if needed. Mailing labels are also still available for printing.

Mask Consumer Phone Number According to Member Type Selection
Mask the consumer's phone numbers according to account member type selection which is determined at the client level. For example, to mask the consumer's phone number if a defending attorney or credit counseling service has been added to an account, you can select this check box under client settings and pick the member types. If one of the selected member types exists on a consumer account, then the phone numbers will be masked.

Quick Access to Include Last Review
Quick Access has been expanded on the Account Find screen to include Last Review. With Version 8 we added quick transaction access and Call Activity to the Account Find screen. Quick Access has been expanded to now include easy access to the Last Review used in the current log in session. As with the Quick Access for transactions, the next time you log in it will be set to normal mode.

CollectMax™ from JST.

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SimpleDex Template Creation Disabled
If you have to ask, "What is SimpleDex?", you are more than likely using MaxExtract for data extractions. SimpleDex, short for Simple Data Extraction, was the precursor to MaxExtract. Longtime customers may know it as MaxExtract's slower, less capable, older cousin. MaxExtract was released in CollectMax™ version 6 as a replacement for SimpleDex and has been expanded over time to its current form.

The time has come to put a lid on SimpleDex for good. With the release of version 9, you will still be able to access existing SimpleDex templates but you will no longer be able to create new ones.

We encourage you to give MaxExtract a try as it will save processing time and provide you with more available data extraction options. Please reach out to the JST Support team should you have any questions or need assistance.

Features Requiring Document Management:

Drafts
Drafts offer a power packed feature which can solve document preparation issues while you are waiting for the final output to be approved. With this new feature, you can save merged documents as a 'Draft' in the Imaging list, personal data can be masked as needed and then the document can be stored as a watermarked image while awaiting final review and approval.

Document automation properties can be addressed when document is generated or finalized. Different automation is available for both Pass and Fail finalizations. E-signing capabilities are available via Adobe (e-signing requires Adobe software license) as well.

Document Management is required to use Drafts. Please contact JST Sales if you would like to learn more about the Document Management module.

Convert Document Images to PDF Format
This feature has been expanded to allow you to convert documents in the Imaging list to a PDF format. This includes documents without an extension (otherwise known as compact documents, which were added to the Imaging List as part of a batch merge process), MS-Word Documents, and files such as TIF, JPG, BMP, etc.

Document Management is required to use this feature. Please contact JST Sales if you would like to learn more about the Document Management module.

Auto Image Export by Type
A new property of an image type code is that it can automatically export an image to a defined network path along with the option to create a custom naming method. This automation will occur when a non-compact image is added to the Imaging list or a compact document (see above description) is converted to a Normal document or to PDF format.

This feature is extremely helpful if you are creating documents for e-filing as it will save you the step of exporting these files for transmission to the court.

Document Management is required to use this feature. Please contact JST Sales if you would like to learn more about the Document Management module.

Features Requiring Worklists:
Quick Access Added to Worklist Navigation
A new check box has been added under System Options to allow you to auto start the Find form designation (Quick Access) when navigating in Worklist mode. Once selected, the system will respect the selection mode on the Find form (Normal, Trx-Cost, Trx-Payment, Trx-NRC, Activity/CALL, or Last Review) when you are working accounts via a worklist. For instance, if you want to go straight to the Activity/Call form or a particular Review this will streamline your workflow.

Operator Worklists are required in order to use this new feature. Please contact JST Sales if you would like to learn more about Operator Worklists.

Features Requiring Both Worklists and MaxConditions:

Account Find – Review Worklist Only
When selecting a worklist, you can now click on the new Review button and select a review. A grid will be displayed showing the accounts in your worklist along with the review steps. If an item has a condition with a 'false' return the grid will display a red dot, notifying you the step should be reviewed. This provides a clean visual display of items that need further evaluation before finalizing a review.

Operator Worklists and MaxConditions are required in order to use this new feature. Please contact JST Sales if you would like to learn more about these modules.

Features Requiring MaxPlans:

New MaxPlan Feature – SubPlans
Do you find yourself repeating the same evaluation criteria between steps within a MaxPlan? Do you start your MaxPlans off with the same steps each time? Then SubPlans are the answer.

A SubPlan is like a MaxPlan in itself. Think of it as a mini MaxPlan that can be run prior to the start of a MaxPlan or in between steps. SubPlans are saved separately from MaxPlans and can be dropped into different plans as needed. They will be easy to implement into your current MaxPlan design.

MaxPlans are required in order to use this new feature. Please contact JST Sales if you would like to learn more about MaxPlans.

Features Requiring Both Document Management and MaxPlans:

New MaxPlan Step – Create an Instant PDF Document
A new MaxPlan step has been created in version 9 that will generate a document and save it to the Imaging list as a PDF. When adding the step to the plan you will select the document to be generated, the description as well as the image type. This document will only be added to the Imaging list and will not be sent to a print list.

New MaxPlan Step – Add a Draft
A new MaxPlan step has been added to enable you to create a Draft as part of a MaxPlan. Drafts are a new Version 9 feature found on page 2 of this document.

Document Management and MaxPlans are required in order to use this new feature. Please contact JST Sales if you would like to learn more about these modules.

JST has been providing collections software solutions since 1987.