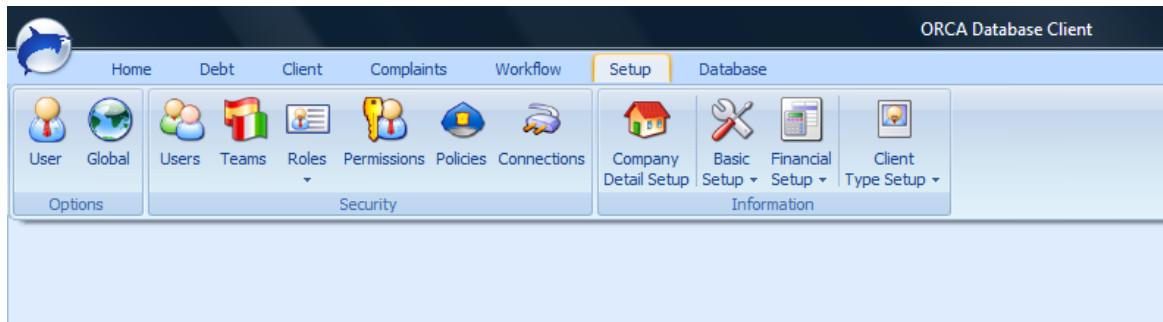




System Setup

The ORCA system is designed to be a flexible and user friendly environment, users with a higher level of access can change the behaviour of the systems functionality by using the options shown on the Setup toolbar.



Before the system can be used it is vital that all of the setup tables are properly configured to ensure that the correct actions occur depending on the type of client you are collecting accounts for.

A list of client types must be created and then within each client type we can stipulate what actions can take place on **accounts** that belong to a **client** within that **client type**.

For example,

You would not want a user to be able to send a **confirmation of loan letter** when you are chasing the amount due on outstanding telephone accounts.

Within each **Client Type** you can specify the default settings to be used for client within this type:-

- Which letters can be sent
- What status codes can be used
- The commission rates available
- What types of transaction can be posted
- What payment types can be applied
- The method of allocation when payments are posted
- Whether card payments can be taken
- If card processing fees can be applied
- What types of dispute can be raised
- What team/collectors work accounts for this client type
- What screens should appear when an account is accessed
e.g. Show the loan Agreement page for Car Loan accounts and the Homeowner page for Mortgage Debts.
- What scripts should appear for the user to read out to the debtor when an account is accessed.

There are some additional items to configure which are global and do not relate to any specific client type.

- What **types of note** can be recorded against an account.
e.g. Inbound Call, Outbound Call, Incoming Mail etc
- What **result types** can be selected for each note.
e.g. The result of an Outbound Call may be “Answer phone detected”, you would not want this result type available for selection if the note type was Incoming Mail.
- Whether a certain type of result forces the raising of a **dispute** transaction
- What types of dispute can be raised.