Three Great RLSS Features

Quick Date Listings, Conversations, and Activity Alert are three handy items within the RLSS software that you may not be taking advantage of. All three can be accessed from the Features menu, with Conversations and Activity Alert also accessible from Loan Master and Loan Activity.

Quick Date Listings is designed to provide "tickler" files. The four date fields found in the Loan Master files (approval date, closing date, first payment due date, and maturity date) are always available as search criteria in Quick Date Listings. Additionally, any optional field established as type "date" is also available. A date range is selected and the field to be searched is identified. Search criteria may be further refined by Status, Loan Officer and Funds. The resulting report identifies the borrower and the contact person and phone number along with the criteria specified in the search process.

Quick Date Listings can save a lot of staff time. If, for example, your borrowers are required to provide you with proof of insurance on a regular basis, an optional field may be established as a date field. Data within that field is entered and updated through Loan Master files. Quick Date Listings could then be used to pull a report reflecting which loans are to provide insurance verification within a specified time, ex: 07/01/14- 07/31/14. The report automatically includes contact information for the identified loans, allowing staff to start making follow-up calls, etc.

Quick Date Listings may also be used to pull a report such as all birthdays within a specified month. Assuming an Optional Field for birthdays has been established, select it as the field selection. Enter a broad date range for the Beginning and Ending Dates such as 01/01/30 – 07/31/14. Under Month From and To, enter the month you wish to search such as July. All birthdays for the month of July will appear on your listing regardless of day and year.

Conversations were originally designed to document phone conversations between the lender and the borrower. Entry may be done from either the Features menu or within the Loan Master file and includes an automatic date (which you can override, if desired) and entry of pertinent data. Any information that is entered is then easily accessible on all workstations running GMS-RLSS software. Additionally, Conversations may be viewed from the Loan Activity screen allowing you to enter recurring account numbers or special fees that may need to be withheld from the loan's repayments.

If you enter a number of months, such as 24, on the Screen Alert Setup tab, when accessing a loan through the Loan Master or Loan Activity screen that has had a conversation entered within that timeframe, the most current conversation will appear at the bottom of the screen. This is great if you need to be alerted to withhold an additional amount or advance the Next Payment Due date. Conversations are also an excellent way to save staff time. It offers a speedy way to share information among staff without making phone calls, sending emails, or putting "little yellow stickies" in the loan folder. If desired, conversations may be printed in total or by date range.

<u>Activity Alert</u> was added to the Conversations feature in April, 2014. Activity Alert allows you to select one conversation per loan that will always appear at the bottom of the Loan Master file and Loan Activity screens whenever that loan is accessed. Simply enter or select an existing conversation, put a checkmark in the Activity Alert box and it will now be seen at the bottom of these screens in addition to any Conversation that also appears. Activity Alert is great to use if you always need to have access to certain information such as account numbers.