

Red Planet News: January 2013

Happy New
Year!



What's Coming?

Enhancements are currently in place to make changes to Odyssey so it is fully supported on platforms such as iPads and iPhones. Functionality will be similar – the main difference will be in the navigation via mega menus rather than the standard dropdown menus currently in place. This will improve navigation and usability.

Enhancements should be in production by March 2013.



Knowledge Base – Mantis

We have recently created a new project in Mantis named 'Knowledge Base'. All Mantis Users have access to this project. Essentially it contains tickets for FAQ's and User Guides that you can use as a tool for information/training material. It is a relatively new project and we anticipate it will be continually updated.

Payout Figure -this is the figure that the client would have to pay, based on the current loan balance less any unearned interest, to completely Payout the loan by the next instalment date.

Payout Valid To - this is date that the current Payout Figure is valid to (generally the loan next instalment due date).

Processing an Early Payout from the client

1. Cancel the Loan via Loans/Cancellation/Legal/**Cancel Loan**. This will stop the direct debits on the loan.
2. When the payout is received from the client – you would receipt the payment towards the loan in Loans/Transactions/**Receipts**.
3. If there is an outstanding balance, you will need to add a loan journal (write off/interest income) – credit or debit depending on the loan balance to obtain a zero balance on the loan – the loan will then finalise/close off when you process your Loan EOM.

Updated	Summary
05/12/12	Processing an Early Payout of a Loan (by client)
05/12/12	Edit Loan Billings via Loan Update
05/12/12	Guide to endorsements
05/12/12	Client Matching
05/12/12	Loan Termination Process
05/12/12	Loan Cancellation Process
29/11/12	Manually selecting a creditor payment (settlement) via Loan Enquiry
28/11/12	User guide to interfacing between WinBEAT or a similar broking system
28/11/12	How to overcome popup blocker issues
28/11/12	Mantis client user guide
28/11/12	Training Guide and FAQs
23/11/12	Rules for reversal of an endorsement

If you don't have a user login for Mantis or have forgotten your login/password – please email sharonw@redplanetsoftware.com to setup/reset this detail for you.

If you can't find the answer, please email us your query.

Online Acceptance

Many of our clients are looking at using online Acceptance as an option for the handling and approval process of loan contracts.

Basic process is that when customers are presented with a loan contract, they are given the option to go online and accept the contract electronically – they are provided with a unique password and can enter personal details/billing details and agree to the terms and conditions. The contract is then submitted for approval or automatic acceptance using auto decisioning for conditional loan approval (processes would be tailored to your specifications).

If you would like to obtain more information on online acceptance, please email Peter Williams.

We appreciate hearing from our clients so if you have any feedback or ideas to build on these enhancements, please email peterw@redplanetsoftware.com

