

On Line Group Instructions

To set up a group for internet access (this will link the information keyed in house with the information on line):

From CFMAIN, take #7, CGMENU

FROM CGMENU, take #9, Update Organization file

```
Organization Update                               Mode . . . . : CHANGE
Format . . . . : ORGFILER                       File . . . . : ORGFILE

GROUP ID:           AA                          TYPE SERVICE/DELETE: G
GROUP NAME:         TEST GROUP (AA)
BILLABLE (Y/N):    GROUP FEE:                   80000
LUNCH FEE:         N=NO DEFER:
P=BOOK PRINTED:   P                            P=LIST PRINTED:   P
P=DISCUSSION PRINTED: P                       X=INTERACTIVE GRP: X
GROUP CODE:       ZZ                          P=PRIVATE GROUP:
S=SORT DATA:    LIST CODE:
FORMAT CODE:
NAME LINE 2:     NAME LINE 2
G/L #:          TRUST G/L:
LETTER # - FORM: LETTER # - REPLY:
# OF COPIES:    LETTER # - NOTICE:
A/R CODE:      TAX (Y/N):
TAX PERCENT:   FIRST HEADING LINE 1: ACCT
FIRST HEAD LINE 2: BAL                      SEC HEAD LINE 1: 30
SEC HEAD LINE 2: DAYS                      3RD HEAD LINE 1: 60
```

Then put X in interactive group, enter until the screen returns to group ID, and then take CMD 3.

To set up the group calendar

```
Select one of the following:

-- File Maintenance --
1. CG200 - Group Services
2. CG205 - Group Activities
3. CG210 - Orgfile 2

-- Updates --
10. CG250 - Calculate Dates

-- Reports --
20. CG220 - Group Data
21. CG260 - Group Calendar Info
```

CGCALN #3 - Set up the group meeting date, time and place.

```
Group: AA TEST GROUP (AA)

Meeting Place: DEW DROP INN MY FAVORITE PLACE
Meeting Time: 900 A A=AM,P-PM,N=Noon
      Freq: B Bi-Monthly
      Default Month: 1 January
      Week of Month: 3 Third
      Day of Week: 4 Thursday
      Related Groups: AS AM
      Special Instructions:

Group Comprised of: PRODUCE WHOLESALE DISTRIBUTORS SELLING TO
                   SMALLER DISTRIBUTORS

Cmd 1 - End      CMD 2 - Continue to Services Screen
```

On the services screen, you can set the due back dates using codes:

- ✓ FD for flash data due
- ✓ ID for trade information due
- ✓ ND for names due
- ✓ PD for past due information due.

```
Date: 3/19/08      Auxillary ORGFILE Data      CG210-1
Group: AA TEST GROUP (AA)
Services:          Dated Materials/Activities
Code Description   Code Days What? Description      Disposition
AW ANNUAL WRITE-OFF LIST      FD 5 99 FLASH INFORMATION DUE
FL WEEKLY FLASH REPORT        ID 5 99 INQUIRY INFORMATION DUE      FAXED
                               ND 10 99 NAMES DUE
                               RP 5 98 REPORT                      FED-EX
                               RS 15 99 RESERVATIONS & SLIPS      UPS

Days = Days prior to WHAT? Activity
What?=- Blank=Meeting          98=After Previous Meeting
      Code=Other Activity      99=Before Previous Meeting
      Cmd 1 - End              Cmd 7 - Possible Services
      Cmd 12 -First Screen     Cmd 8 - Possible Dated Materials
```

These are keyed under the column for 'Dated materials/activities'.

Under the 1st column you put the activity code, the second column the # of days before the meeting, and the third column put 99 for 'before'.

Under the column 'Services' you enter the services that the group offers.

To view and select services, key CMD 7

Date: 3/19/08 Group Services

Group: AA TEST GROUP (AA)

AW ANNUAL WRITE-OFF LIST

CB CIB REPORTS

CD COD REPORTS

DL DISCUSSION LETTER

FL WEEKLY FLASH REPORT

GR GROUP REPORTS

LS LOCATION/SEARCH

PD PAST DUE LIST

RT RTM CHECKS

SL SEARCH LETTER

Flag with an 'X' all Desired Dates Services

To view and select dated materials/activities key CMD 8

Date: 3/19/08 Group Services - Dated

Group: AA TEST GROUP (AA)

CB CIB REPORT

DL DISCUSSION LETTER

EX EXPERIENCE FORM & LETTER

FD FLASH INFORMATION DUE

ID INQUIRY INFORMATION DUE

IQ INQUIRY

LT LETTER

ND NAMES DUE

PD PAST DUE LISTING DUE

PL PAST DUE LETTER

PM PAST DUE REMINDER

PS PAST DUE LIST, LISTINGS

RP REPORT

RS RESERVATIONS & SLIPS

WO WRITE OFF LIST

XR EXTRA PAST DUE LSIT

Flag with an 'X' all Desired Services

To set up services, use CGCALN #1

```
Date: 3/19/08          Group Services

Enter/Update Group:

D=Delete                D=Delete
AW ANNUAL WRITE-OFF LIST
CB CIB REPORTS
CD COD REPORTS
DL DISCUSSION LETTER
FL WEEKLY FLASH REPORT
GR GROUP REPORTS
LS LOCATION/SEARCH
PD PAST DUE LIST
RT RTM CHECKS

SL SEARCH LETTER
```

To set up activities, use CGCALN #2

```
Date: 3/19/08          Group Services - Mailings

Enter/Update Mailing:

D=Delete                D=Delete
CB CIB REPORT
DL DISCUSSION LETTER
EX EXPERIENCE FORM & LETTER
FD FLASH INFORMATION DUE
ID INQUIRY INFORMATION DUE
IQ INQUIRY
LT LETTER
ND NAMES DUE
PD PAST DUE LISTING DUE
PL PAST DUE LETTER
PM PAST DUE REMINDER
PS PAST DUE LIST, LISTINGS
RP REPORT
RS RESERVATIONS & SLIPS
WO WRITE OFF LIST
```

CGCALN #3 - To automatically calculate the meeting and due back dates.

CGCALN #21 - Print a schedule of the group activities and/or a group meeting calendar.

Dates to Include: 030108 thru 033108

X = Reports to Print: X Calendar of Group Meetings
 X Activity Schedule

3/22/08 DUE BACK SCHEDULE FOR: 3/01/08 THRU 3/31/08 CG260-2

(AC) Test group (AC).	MAR 03	PAST DUE LETTER
(AP) ASSOCIATED PRODUCE DEALERS	MAR 04	RESERVATIONS & SLIPS
(AA) TEST GROUP (AA) NAME LINE 2	MAR 06	NAMES DUE
(AP) ASSOCIATED PRODUCE DEALERS	MAR 06	PAST DUE LETTER
(AM) ADVERTISING MEDIA GROUP	MAR 07	PAST DUE LISTING DUE
(AC) Test group (AC).	MAR 10	PAST DUE LISTING DUE
(AM) ADVERTISING MEDIA GROUP	MAR 11	DISCUSSION LETTER
(AC) Test group (AC).	MAR 12	DISCUSSION LETTER
(AA) TEST GROUP (AA) NAME LINE 2	MAR 13	FLASH INFORMATION DUE
(AA) TEST GROUP (AA) NAME LINE 2	MAR 13	INQUIRY INFORMATION DUE
(AA) TEST GROUP (AA) NAME LINE 2	MAR 13	REPORT
(AC) Test group (AC).	MAR 13	PAST DUE LIST, LISTINGS
(AM) ADVERTISING MEDIA GROUP	MAR 13	PAST DUE LIST, LISTINGS
(AP) ASSOCIATED PRODUCE DEALERS	MAR 13	PAST DUE LISTING DUE
(AP) ASSOCIATED PRODUCE DEALERS	MAR 17	DISCUSSION LETTER
(AP) ASSOCIATED PRODUCE DEALERS	MAR 19	PAST DUE LIST, LISTINGS
(AM) ADVERTISING MEDIA GROUP	MAR 25	RESERVATIONS & SLIPS

3/22/08 NATIONAL ASSOCIATION OF CREDIT MANAGEMENT CG260-1
 INDUSTRY CREDIT GROUPS
 3/01/08 THRU 3/31/08

WED MAR 05 08		
(SG) SPECIALTY INSTITUTIONAL	RICHARD KAUFMAN - CMA	BUENA PARK HOTEL
THU MAR 06 08		
(MI) SPECIALTY INSTITUTIONAL	RICHARD KAUFMAN - CMA	MICHAEL'S RESTAURANT
MON MAR 10 08		
(CC) COMPUTER & COMPUTER PRODUCTS	LAURA ROTHMAN - CMA	?
TUE MAR 11 08		
(WC) WEST COAST MUSICAL INSTRUMENT	LARRY CONVOY - CMA	MICHAEL'S RESTAURANT
WED MAR 12 08		
(AS) ALUMINUM SUPPLIERS & EXTRUDERS	ERNA OHLSSON - CMA	RADISSON HOTEL - L.A.
(CB) ALUMINUM SUPPLIERS & EXTRUDERS	ERNA OHLSSON - CMA	ELKS LODGE #1468
(TS) ALUMINUM SUPPLIERS & EXTRUDERS	ERNA OHLSSON - CMA	LOUS VILLAGE
THU MAR 13 08		
(BC) BAY AREA CREDIT PROFESSIONALS	CHERYL HAMMOND - CMA	RADISSON HOTEL-S J
(FR) FOOD/HOTEL & RESTAURANT GROUP	ERNA OHLSSON - CMA	BICYCLE CLUB - B.G.
(MM) MASS MERCHANDISERS	RAUL MENDOZA - CMA	BUSINESS CRSTEVEN'S STEAK HOUSE

First of the Month Online Group Setup (from CMGMNU):

Select one of the following:

1. CMG500 - Work with subject maintenance changes.
 2. CMG510 - Key in Group notice.
 3. CMG520 - Monitor flash information keyed by group members.
 4. CMG530 - Update existing flash information.
 5. CMG540 - Print/Clear Group Meeting Reservations.
 6. CMG300 - Match/Merge Information from Internet
 7. CMGI01P- Enter Group Master Information
 8. CF0400 - Post trade information.
 9. CMG560 - Print reports requested for group books.
 10. CMG300G- Match/Merge group quick subjects.
 11. CGR30E - Post past due data.
20. CF130G - Daily Usage Report. 21. CMG105 - Daily Group Interactive Log.

CMGMNU #2 - Key the group, then key meeting date, due back dates, any general info, and meeting place and time.

```
AA TEST GROUP (AA) NAME LINE 2
Meeting Date: 032008
Due Back Dates: Names 031008   Trades 031508   P/Due 000000   Flash 031508
Key in message to display:
Bring your cowboy boots and we'll do some two stepping!
Danny and the Dudes will be there!
```

The due back dates are the source of the due back dates for the online group screens. The message will display on the group function selection screen.

If the group schedules are set up in the calendar system, running CGCALN #10 will update the group meeting and due back dates.

```
AA TEST GROUP (AA) NAME LINE 2
Meeting Place: DEW DROP INN MY FAVORITE PLACE
Meeting Time: 0900 A A-AM,P-PM,N-No
Freq: B Bi-Monthly           Default Month: 01 January
Week of Month: 3 Third       Day of Week: 4 Thursday
# Items Limit: 10           Billing Unit Cd: C004
Menu Option #1 Tuna Salad
Menu Option #2 Steak Salad
Menu Option #3 Greasy Fried Chicken
```

The meeting time and location may also be keyed here.

You can set a limit of items per group that can be entered as part of the group fee, and if the member exceeds the limit, the excess items are billed to the billing unit code.

If menu items are entered, they will display on the reservations screen.

CMGMNU #7 - key in any general comments that will display to all groups.

```
21:46:37          ENTER GROUP MASTER INFORMATION

ENTER HEADING LINE
  Annual Membership Dinner

ENTER DETAIL LINES
1. The Annual Membership Dinner will be on October 30.
2. More details will be coming in the monthly newsletter!
3. See you there!
4.
5.
6.
7.
8.
9.
10.
```

The information keyed here is displayed on the group selection screen.

Before the Meetings:

CMGMNU #5 - This will display and/or print any reservations keyed online

```
Key In Group ID For Which You Wish To Print A Reservation List  AA

Key F if this is the final listing to clear for next meeting
-Or-
Key V to view to the screen                                     V
```

AA	TEST GROUP (AA)	NAME	LINE 2
Member#	Qty	Made by	Attending
860	8	Mr. Simpson	Sam
		Tuna Salad	Ron
		Steak Salad	Will
		Greasy Fried Chicken	Andrew
990	1	nj	
		Tuna Salad	
		Steak Salad	
		Greasy Fried Chicken	
991	45	Ms. Thompson	Terry
		Tuna Salad	Tina
		Steak Salad	Tara
		Greasy Fried Chicken	Tommy

CMGMNU #8 - (for book of report groups) To post and list trade data entered. This also runs at dayend so this is run to catch any that a member may have entered that day.

CMGMNU #11 - (for past due book groups) To post and list past due data entered. This also runs at dayend so this is run to catch any that a member may have entered that day.

Daily:

CMGMNU #3 - To edit and post flash information with comments, and comments keyed from trade data.

```
Date      030108      Reported by      00990
Subject Name      SAMPLE CANDY
Address           NEW SUBJECT ST
City/State       NORMAN OK                      Zip 73071
Comment Amount:
Comment:
  NSF Check $500
Press Enter to Accept and Continue Monitoring Comments on the Screen or
  Press S to Skip the record and Leave it in the file, or
  Press Q to Quit and Return to the Menu
```

Any flash or trade data with comments is held until reviewed by NACM staff.

CMGMNU #6 - Process new subjects keyed for group flashes, books, past due books, and agings.

```
Subject          TEST SUBJECT FOR DBA
                 NORMAN OK
Search Name      TEST SUBJECT FOR DBA
386854          TEST SUBJECT FOR DBA
                 NORMAN OK
```

First you match the data to an existing subject, if there is a match. If not, you can set up a new subject.

TEST SUBJECT FOR DBA

NORMAN OK

Member 00990 Group AA

The above name and address is that of the Subject. Below is the subject
you have chosen to merge it with.

Subject Number 386854

Subject Name TEST SUBJECT FOR DBA
Address Line 1

Address Line 2
Address Line 3 NORMAN OK Zip In File 907 (MMYY)
Phone Number

CMGMNU #10 - Link subjects key for quick group updating.

The linking process is the same as #6, you can match to an existing subject or set up a new one.

If the member has keyed a new subject to be set up, the polling process is not done until this process is completed.

An exception is Oklahoma, when the member sets up a new subject it goes in immediately.

CMGMNU #11 -Post past due data keyed (if running past due book groups)

CPMNUT #2 - Link collection claims placed on line. (If using ddi collections)

Date: 3/22/08	Posting of On-Line Placements	CP319C-1
Submitted By: C 13553		
Override Name:		
Attention:		
Claim Type: C (C=Active Claim, P=Pre/Free Collects F=Free Demands)		
Debtor YVONNE PRUITT		
204 PARK ST.		
ATHOL MA 1331		
Phone: 9782492519		
Contact Person:	Amount: 44898	
AR Number: 4364612	X=Letter Service:	
Instructions: Last payment amt: (\$136.01)		
Date Sign Up: 8/3/00	Disconnected: 11/6/03	
Enter Date: 032208	Follow-Up: 000000	Inv Date: 000000
Collector:	Rate Code: -OR-	PerCent: 000
Taxable:	Int PerCent: 0800	Y=Consumer: Y
X=Do Not Forward:	X=Add Fee:	Gross Claim:

From here you are displayed the information keyed on line by the member, and you can assign it to a collector, set your follow up date, and a rate code.

NOTE: If you receive collection accounts from members in an automated format the linking process is very similar.

Optional - To print during the day, accounts placed for collection:

CPM020 EDIT

Optional - To print during the day, credit reports to set up, references to be workied, and/or D&B Experian requests:

CPM030 EDIT

CMGMNU #4 – Correct or remove a flash entry.

Enter Group ID	AA
Enter Date Entered	030108
Enter Member #	00990

