

Subject: Processing Amendments in the Calculator	Product: Customer Loyalty Group	Approved on:
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Purpose:

Adjusting months or draft amounts from a client's program after adding or removing an account.

Policy:

- Client removes an account without lowering their draft amount, which lessens the months in program.
- Client adds an account without increasing their draft amount, which increase months in program.

Procedure:

1. After completing the Program Change to add/remove an account open click on the *Draft Change* tab in the Calculator.
2. Match the draft amount in the table to the monthly draft amount on the Amendment
 - a. If they don't match, do the following:
 - i. Click *Select All* from the *Draft Changes* section
 - ii. Scroll to the bottom of the section
 - iii. Using the *Debit Amount* field, type in the draft amount from the Amendment
 - iv. From the *Change Reason* dropdown, select *Change*
 - v. Click *Update*
 - vi. Click *Select all*
 - vii. Click *Finalize*
3. To remove months from program, do the following:
 - a. Scroll to the bottom of *Draft Changes* section
 - b. Select drafts starting from the bottom going up the number of months needed to be subtracted from program
 - c. In the right-hand bottom corner, select *Skip*
 - d. Click *Update*
 - e. Click "*Select all*"
 - f. Click *Finalize*
4. To add months to program, do the following:
 - a. Click the *Schedule Draft* bar under the *Draft Changes* table
 - b. Select *Program Draft*
 - c. Set *Draft Date/Start Date* to the next month from the final draft month in the *Draft Changes* section
 - d. Set the *Number of Occurrences* field to the number of months being added to the program
 - e. Add amount of drafts to the *Draft Amount* field which is shown on Amendment
 - f. Click *Build Draft Schedule*
 - g. Click *Select All*
 - h. Click *Finalize*
5. Scroll down to *Client Balance Schedule*

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6. Click *DL Global Data & Recalculate* to view changes made to drafts
7. Scroll up to *Historical Balance Saved*
8. Click *Save Balance*
9. Go back to QuickBase and add notes explaining the change in detail
 - a. Include the creditor you added and what amendments were made to the calculator.
10. Click *Save & Close*

Exceptions:

- Settlements will be affected from Program Change
 - EMT request haven't been submitted
 - Notes haven't been included in Comment section regarding affecting settlements
- Draft amount is lower than \$250
- Potential Cancel Request has been submitted

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