

# How to Use the How-Tos in the Vertican Help Center to Solve your Business Problems

Presented by Luis Gomez



# Resources

- Vertican Help Center:
  - <https://vportal.vertican.com/Help-Center.aspx>
    - Self-Help Resources → Collection-Master
      - How to & Videos



**DID YOU  
KNOW?**

# Vertican Help Center – Collection-Master

- How To Documents (PDR)
  - Newly updated layout
  - Referenced by:
    - vConnect Articles
    - MMS presentations
    - Other “How To” documents
- Mastermind Videos (MMS)
  - 34 Videos since March of 2021!

## Collection-Master Help



Documentation



How To



Videos



Knowledge Base



Release Notes



Software Tips



Supported Environments

# How to Documents

- Categories:

Accounting
CM EDI / SQL
CM Features
CM Features / Compliance
CM Features / Setup
CMvX / Troubleshooting
Compliance / CM EDI
Configuration / Setup
Security
System / Client Server
System / Cloud
System / Migration
Troubleshooting
VLM

- Course Level:

101

201

301

401

# Accounting

## • How to Implement Pending Costs

- Special category of cost disbursements
- Particularly useful when you don't want to increase the consumer balance
  - When the costs are disbursed
  - Expect to charge the consumer for these costs at a future date.

## • Recoverable Costs – Paradox!

Recoverable Costs - Paradox								
	Transaction	Forwarder Balance	Forwarder-Costs	Firm Balance	Firm - Costs	Court Balance	Court - Costs	Comments
Placement	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	Everyone Agrees on placement Amount
Non-Recoverable Costs	\$50.00	\$1,050.00	\$50.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	Only Forwarder Believes this is part of the balance & recoverable
Recoverable Costs (Pre-J)	\$100.00	\$1,150.00	\$150.00	\$1,100.00	\$100.00	\$1,000.00	\$0.00	The Client & The Firm believe this is recoverable, the court does not
Pending Costs (Pre-J)	\$125.00	\$1,275.00	\$275.00	\$1,100.00	\$100.00	\$1,000.00	\$0.00	Only the Client believes this is recoverable, and part of the balance.
Collection (Recoverable)	(\$100.00)	\$1,175.00	\$175.00	\$1,000.00	\$0.00	\$900.00	\$0.00	Forwarder & Firm recovered Costs, Court applied to principal
Collection (Partial Pending)	(\$50.00)	\$1,125.00	\$125.00	\$950.00	\$0.00	\$850.00	\$0.00	Forwarder recovered Costs, Firm & Court applied to principal
Additional Pending Costs (Pre-J)	\$75.00	\$1,200.00	\$200.00	\$950.00	\$0.00	\$850.00	\$0.00	Only the Client believes this is recoverable, and part of the balance.
Court Awards Judgment	\$300.00	\$1,200.00	\$200.00	\$950.00	\$0.00	\$1,150.00	\$300.00	The court is now aware of \$300.00 in Costs (That it previously applied to Principal)
Judgment Awarded Pending 2 Recoverable	\$200.00	\$1,200.00	\$200.00	\$1,150.00	\$200.00	\$1,150.00	\$300.00	The Firm & Court now believe that there are Recoverable Costs & Agree on balance

# CM EDI / SQL

## • How to Create a CM EDI RT171 Using SQL Sync

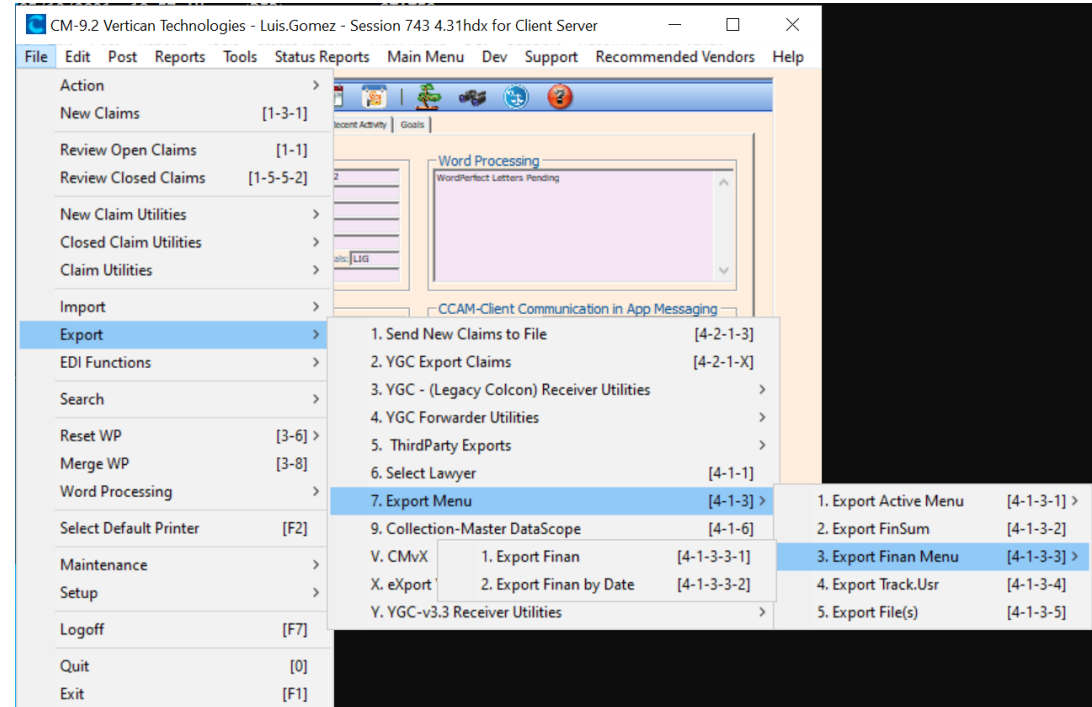
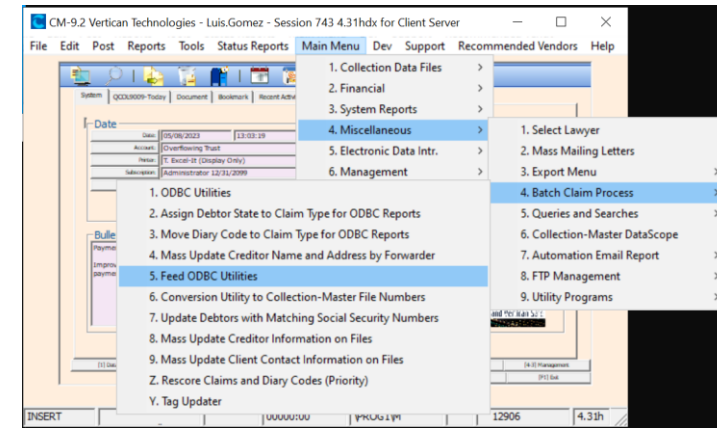
- How to create a query to be used with SQL Server Management Studio
- Find "Swap Interest Stamp 90.0900" on a specific date
- Use the information stored in FInan to create a CM EDI Record 171

171	H	FIRM_FILENO	INT_DATE	PRE_J_RATE	POST_J_RATE	Stored_INT	#
171	D	D24600	2017-04-26	15.0000		0.00	#
171	D	D24601	2017-04-26	15.0000		0.00	#
171	D	D60005	2017-04-26	15.0000		0.00	#
171	D	D60006	2017-04-26	15.0000		0.00	#
171	D	D24602	2017-12-11	15.0000		17.22	#
171	D	RCS00029	2020-04-15	15.0000		130.40	#

# CM Features

## • How to Leverage the Collection-Master Dashboard

- Designed to provide an intuitive interface to the main menu
- Retains the advantages of using the keyboard
- Along with a modern mouse-driven interface



## CM Features / Compliance

- **How to Manage Consent in Collection-Master**
  - Track and manage consent in Collection-Master

The screenshot shows the Collection-Master software interface. At the top, there are navigation tabs: Start Call, Call Result, Paperless, Call Log, Infinity, and Inconvenient. Below these are search fields and time zone settings (CST, Early: 01:00:00, Late: 23:00:00, Call Start: 15:33:18). A table lists contact information with columns: Name, Phone, Type, Consent, Resp Party, and Relation. The selected contact is Quick/Nida P, 682/413-1559, Sjiug, MAIN.

Below the table, there are several sections:

- Contact Information:** Contact: Quick/Nida P, Spoke With: [blank], Telephone: 682/413-1559, Type: Sjiug, Consent: [dropdown], Consent Type: [dropdown], Pref Contact: [dropdown], Between: [dropdown] and [dropdown], Language: English.
- Claim Information:** Creditor: Black Florence Security, Orig Creditor: [blank], Last Paid Date: 09/22/2015, Last Paid Amount: 1.00, Next Pay Date: [blank], Next Pay Amount: 0.00.
- Contact Result:** Radio buttons for Right Party Contact, Spouse, Authorized Third party, Unauthorized Third party, No Contact.
- Call Disclosures:** Checkboxes for Inform call recorded, Call not recorded, Not Attorney, mini-Miranda read, 3rd party liability, Debt Collector, Non-Liable, OK to Speak With, Credit Bureau.
- Verified By:** Checkboxes for Address, Social Security #, Date Of Birth, Full Name, Phone Number, Other.
- Call Type:** Radio buttons for Inbound, Outbound, Dialer, Other, 7-in-7 Count Call, 7-in-7 Do Not Count.
- Balance Information:** Thru: 12/20/2021, Placed: 606.31, Charges: 0.00, Int: 0.00 %, Credits: 2.00, Total Due: 604.31.

At the bottom, there are keyboard shortcuts: [F1] Restart Call Time, [F2] End Call, [Alt+P] Pause Call, Manager Override, [Esc] Cancel.

### Dialer Export Consent Setup

'Enable' turns this feature on for ALL Dialers. Consent for each Phone must match below setup EXACTLY in order to be exported through any Dialer. If consent rule is 'Default', standard rules will be followed. If consent is 'N' or 'W', do not send phone.

Enable

Phone: Must Equal:

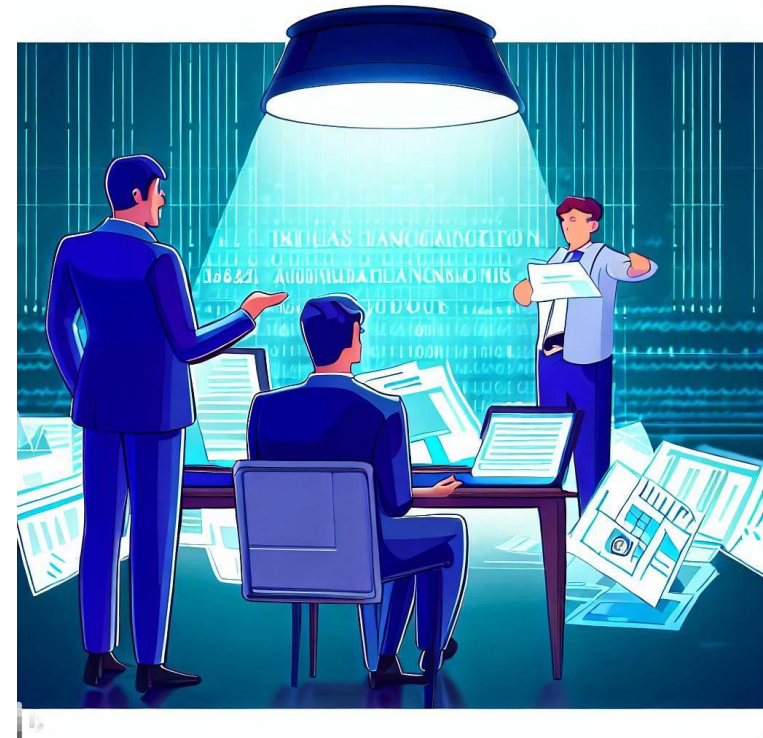
Phone 1 (Home):	Blank	▼
Phone 2 (Work):	Y	▼
Mobile Phone:	Y or Blank	▼



# 201

## CM Features / Compliance

- **How to Prepare for an Audit with your Client**
  - Leverage technology
  - Make preparing for an audit with your client easier!



# CM Features / Setup

- **How to Set Up and Edit Report Templates in Collection-Master**
  - Set up report templates in Collection-Master
  - A few reports explaining the mechanics of editing a report and modifying it

```
177CRLE
Expanded·Collection·LedgerCRLE
||COLLECTIONS·ONLY:CRLE
||TOP·OF·PAGE:CRLE
[Column14CPI(Arial)][Column-Row_Label]Current·Trust·Account:[Column-MidRow_String]\ACCOUNT\[Column-MidRow_Label]
CRLE
CRLE
[Column8CPI(Georgia)][BoxBottom][Column-Header_Caption][Bold].....Expanded·Collection·Ledger.....
||TITLE:CRLE
||HEADING:CRLE
[Box\MAXCPI(180)\CPI(Verdana)][BoxSides]CRLE
```

# CMvX / Troubleshooting

- **How to Troubleshoot vExchange / CMvX**
  - Available tools
  - Better understand how CMvX & vExchange work together

CMvX Matrix for SAMPLE1 Re:ABC CORPORATION Vs. ALLEN/JOHN Ö \$8,209.44/ \$11,403.42

Sort: Status Filter: [All]

Status	Date	Age	*vX Code:	Code	Description
JG	07/24/14	5624	*vX:L501	*Extra	Extra:1 Fields Modified
JG	07/28/14	5628	*vX:A107	DEMAND	Document Name
JG	07/28/14	5628	*vX:A107	"	:J
JG	07/28/14	5628	*vX:A107	"	F401: \$4,152.00-
JG	08/12/14	5643	*vX:A107	*D1_CSZ	Sparta NJ 07871
JG	08/12/14	5643	*vX:S122	*D1_M/R	Y
JG	08/12/14	5643	*vX:A107	*D1_CSZ	Sparta NJ 07903
JG	10/09/14	5701	*vX:J100	92	Judgment Entered
JG	03/03/15	5846	*vX:A020	20	Collection
JG	07/23/15	5988	*vX:S100	XTEST	xtest

# Compliance / CM EDI

\*ItmBal – Balance as of Itemization Date  
 \*ItmCrts – Sum of all payments/credits  
 \*ItmDate – Itemization date  
 \*ItmDbts – Sum of all charges/debits  
 \*ItmDtDs – Itemization date description  
 \*ItmFees – Itemization Fees  
 \*ItmInt – Itemization Interest

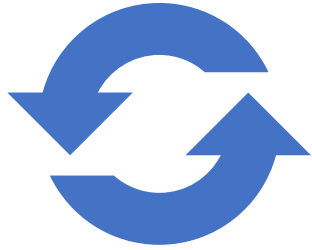
- **CM-EDI Record 830 to import a WPScript for debt itemization**
  - Text file contains **CM-EDI Record Type 830**
  - Import and create a WPScrip
  - Debt itemization Infinity Codes
  - Mastermind presentation – Handling Regulation F Functionalities in Collection-Master

WPScript - Debt Itemization Script

Seq	Label	Field	Req
1	Balance as of Itemization Date:		
2	Sum of all payments/credits:		
3	Itemization date:		
4	Sum of all charges/debits:		
5	Itemization date description:		
6	Itemization Fees:		
7	Itemization Interest:		

[Enter] OK [Esc] Exit

# Configuration / Setup



## How to Update Legacy Copies of Collection-Master

Updating older versions of Collection-Master

Best practice for updates to be installed in a timely fashion

Updating from a very old version to a current version may hold some surprises



## Highlights

**VERTICAN ASSISTANCE IS REQUIRED**

**BACKUP BACKUP BACKUP**

**TEST SYSTEM**

**VERTICAN LICENSE MANAGER (VLM)**

# Configuration / Setup

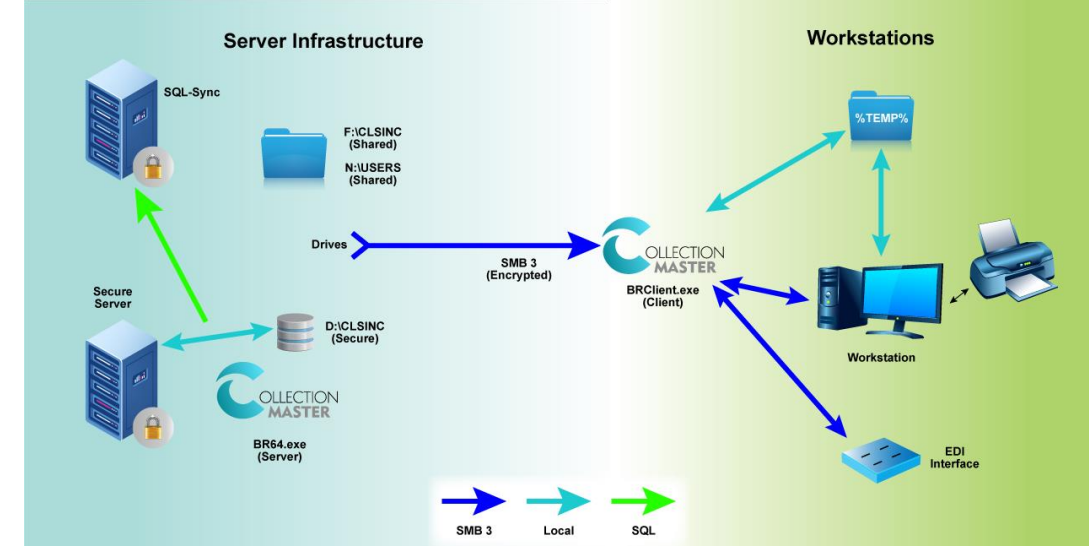
- How to Configure Mapdrive.\_CS
  - Understand and configure Collection-Master
  - F:\CLSINC\WBWIN\Mapdrive.\_CS.
- Highlights:
  - **Client-Server**
  - **@Login\_Name**
  - **SETENV**
  - **SQL-SYNC Setup**
  - **Excel-It**
  - **Drive Statements**
  - **Substitute Commands**
  - **Defining the Application to be used for Zip/Unzip**
  - **Logging**
  - **SpoolCMD**

```
1 Drive F,F:,F:,CLSINC
2 Drive H,F:,F:,CLSINC\HISTORY
3 Drive I,F:,F:,CLSINC\DATA
4 Drive K,F:,F:,CLSINC\PERM
5 Drive L,F:,F:,CLSINC\COMMON
6 Drive M,F:,F:,CLSINC\SHARE
7 Drive N,N:,N:,USERS\[LOGIN_NAME$]
```

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## Security

- How to Secure Data in Collection-Master
  - Best practices for securing your data



```
C:\Windows\system32\cmd.exe

This script will aid in moving Collection-Master data in order to utilize
Secure Data. Before continuing, it is imperative that the instructions
on configuring Secure Data be read.

Please ensure that you have a verified, accurate and reliable BACKUP prior
proceeding.

If you wish to continue please type CONFIRM
If you wish to cancel please type CANCEL or close the window.
>CONFIRM
```



# 301

## Security

- How to Set Up Security in Collection-Master
- Various areas of security
  - Windows Active Director
  - Vertican License Manager (VLM)
  - Policies within Collection-Master

Group/Security Maintenance

Unselected

Search: MENU:

Name	Description
MENU:0	Access: Exit Main Menu
MENU:1	Access: Collection Data Files
MENU:1-1	Access: Paperless File
MENU:1-1-8-F1	Access: Add Infinity records
MENU:1-1-8-F8	Access: Delete Infinity records
MENU:1-1-8-F9	Access: Modify Infinity records
MENU:1-1-F1	Access: 1-1 Action>Account Card

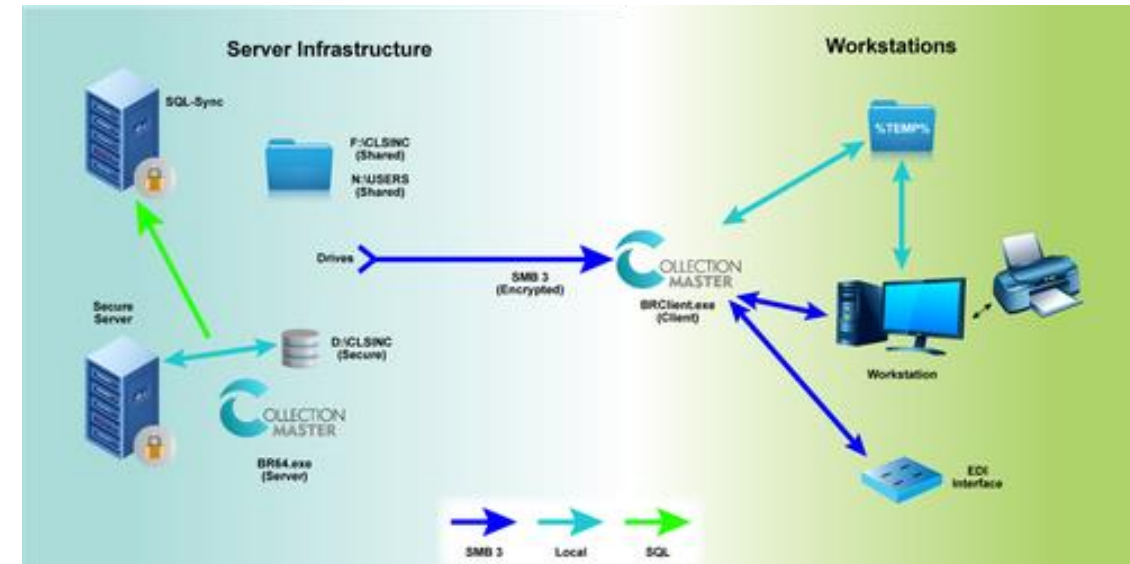




# 301

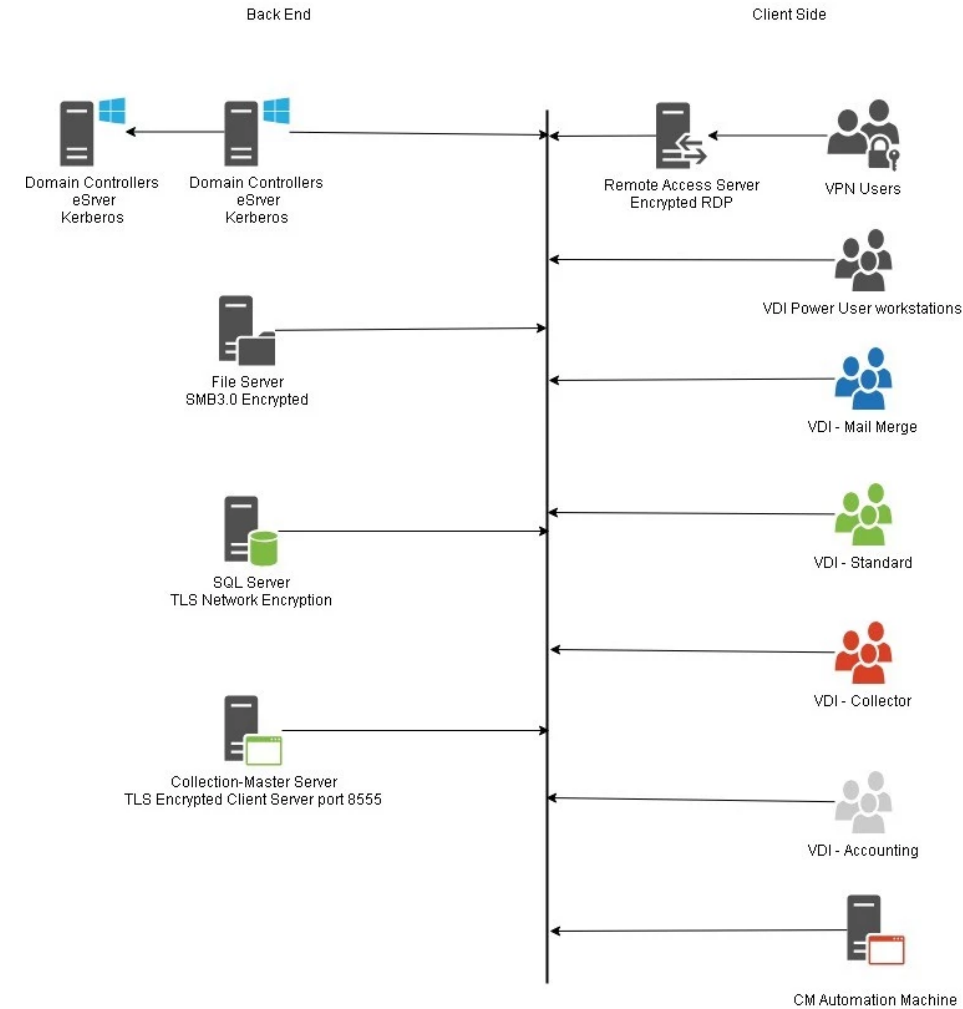
## System / Client Server

- How to Optimize Client Server
  - Client Server -- one of the most significant advances:
    - Performance
    - Data integrity
    - Reliability
  - Client-Server will leverage almost any hardware:
    - Make it "better than distributed mode"
  - Highlights
    - **CPU / Threads**
    - **Memory**
    - **Resource Monitor**
    - **Data Storage Media Strategy**



# System / Cloud

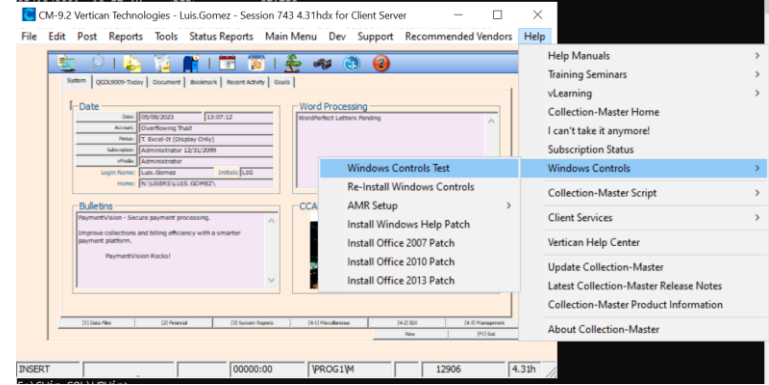
- How to Run Collection-Master in the Cloud
  - Also see VT in a Box
  - How to Optimize Client Server
- Highlights
  - **Virtual Machines (VM)**
    - **Virtual Desktop Infrastructure (VDI)**
      - VMware Horizon Client
      - Remote Desktop Connection
  - **Cloud Hosting**
  - **Wide Area Network (WAN)**
  - **Value-Added Resellers (VAR)**



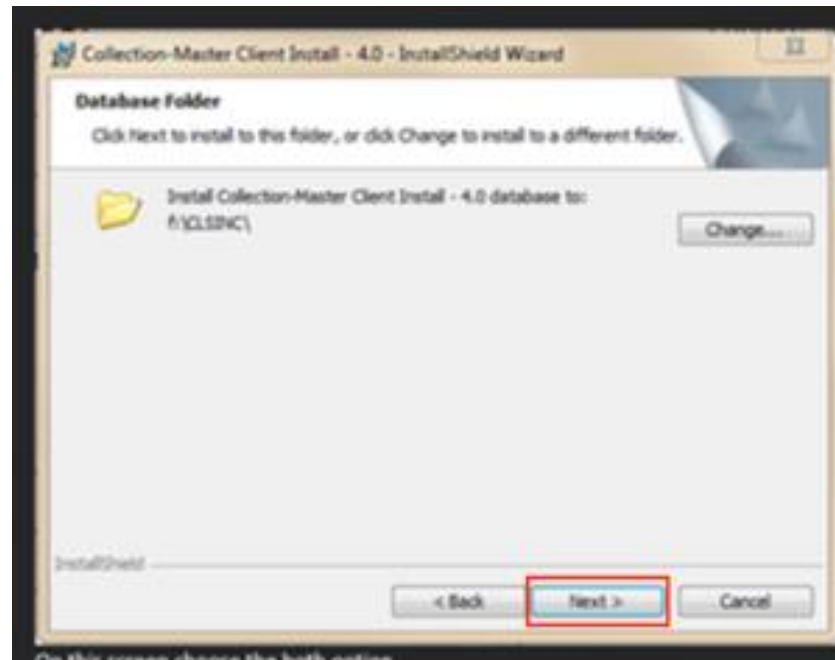
# System / Migration

- How to Migrate Collection-Master Across Servers
  - Migrating between servers when running Collection-Master
- Highlights
  - **Transferring the Data**
  - **Using a Physical Storage Device**
  - **Copy Multiple Times**
  - **Final Copy**
  - **Windows SMB 3**

# Troubleshooting



- How to Resolve .OCX Errors / Reinstall Windows Controls
  - Resolve .OCX errors encountered



# Troubleshooting

- How to Troubleshoot Errors Using PROC ER
  - Gather information: VT\_ERROR\_LOG.TXT
    - STAT LOCKS
    - STAT STACKS
    - STAT FILES,
  - Run this command from the actual session in Collection-Master
    - Not from another session
- Highlights
  - What is PROC ER?
  - Additional Troubleshooting

# 201

## Troubleshooting

- How to Troubleshoot CCAM in Collection-Master
  - Mechanism to communicate with end-users
  - Messages will include:
    - links to articles
    - MMS (Master Mind Series)
    - vConnect
    - Employee Spotlights
    - and many more.
  - Click on the image, → current CCAM message

CCAM-Client Communication in App Messaging

**RESERVE YOUR SPOT TODAY!**

 **How to Use the How-Tos in the Vertican Help Center to Solve your Business Problems**

 Wednesday, May 10, at 2:00 pm (ET)

**The Mastermind Series**



**Presented by:**  
Luis Gomez

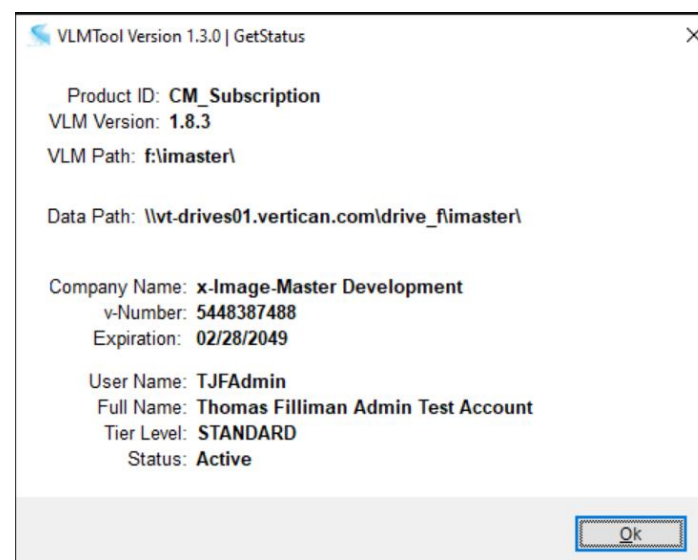
# Troubleshooting

- How to Troubleshoot New York Interest Swap [2-S-5-F4]
  - New York Interest SWAP program
  - Recalculates interest:
    - From the existing rate (typically 9%)
    - To 2%
    - On New York post-judgment cases

FILENO	ORIG_INTEREST	INT AT JUDGMENT	NEW INTEREST	INTEREST COLLECTED	INTEREST DUE	JDG DATE	ORIG PJ RATE	ORIG PER DIEM AMT	ORIG PER DIEM BASE	CALC_DAYS	NEW_PER_DIEM	NEW_BASE_INT
CONVOKE4	229.86	0	91.95	0	91.95	9/28/2017	5	0.1369863	1000	0	0.0547945	1000
NYINT1	120.08	0	26.68	0	26.68	1/1/2021	9	0.2465753	1000	0	0.0547945	1000
NYINT2	115.75	0	13.9	0	13.9	1/1/2021	9	0.1455386	590.24	0	0.0323419	590.24
NYINT3	130.92	0	29.1	20	9.1	1/1/2021	9	0.2688263	1090.24	0	0.0597392	1090.24
NYINT4	118.72	0	99.32	97.85	1.47	1/1/2021	9	0.169666	688.09	0	0.0377036	688.09
OLDNY1	26.68	0	26.68	0	26.68	1/1/2021	2	0.0547945	1000	0	0.0547945	1000
OLDNY2	26.41	0	96.43	89.75	6.68	1/1/2021	2	0.0542329	989.75	0	0.0542329	989.75
OLDNY3	24.02	0	24.02	0	24.02	1/1/2021	2	0.0493151	900	0	0.0493151	900
OLDNY4	77.92	0	148.87	142.52	6.35	1/1/2021	2	0.0516449	942.52	0	0.0516449	942.52
OLDNY5	74.12	0	21.36	0	21.36	1/1/2021	2	0.0438356	800	0	0.0438356	800
ISS11129	66.55	0	31.05	0	31.05	5/7/2011	4	0.016057	146.52	0	0.0080285	146.52
ISS11131	446.83	0	223.41	0	223.41	5/17/2011	4	0.1115956	1018.31	0	0.0557978	1018.31
ATES0004	3747.12	0	674.12	0	674.12	12/28/2013	10	1.1058356	4036.3	0	0.2211671	4036.3
BUCKET03	17065.41	0	1954.84	0	1954.84	5/18/2009	12	3.6056219	10967.1	0	0.600937	10967.1
DISCIJUG	267.76	0	108.18	1.79	106.39	7/26/2014	5	0.0941164	687.05	0	0.0376466	687.05
N0000025	5641.84	0	963.94	0	963.94	12/13/2013	10	1.5438658	5635.11	0	0.3087732	5635.11
NAN-100	2854.42	0	285.44	0	285.44	11/10/2012	20	0.8247397	1505.15	0	0.082474	1505.15
O0004	100.12	0	0	0	0	5/1/2003	8.57	0	0	0	0	0
TR-100	869.61	0	108.09	0	108.09	9/7/2001	8.57	0.0798184	339.95	0	0.0186274	339.95

# Troubleshooting

- How to Troubleshoot the Vertican License Manager (VLM)
  - How the Vertican License Manager (VLM) works
  - Products:
    - vMedia, Collection-Master, and 3rd Party Imaging through various available tools
- Related MMS:
  - DIY VLM Install



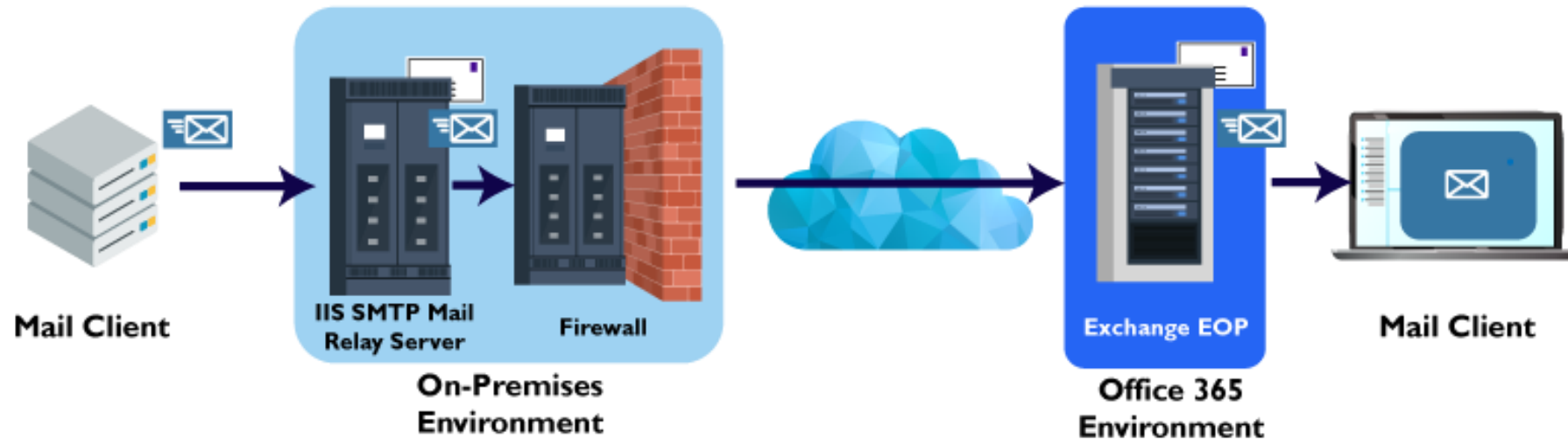


301

# Troubleshooting

Directory for Merge Forms:	F:\CLSINC\WORD		
Word Processor Type:	MIXED		
Default Extension for Forms:			Use DSC in F114-119: <input type="checkbox"/>
Alternate Extension #1 & #2:	WPD	FRM	Utilize Merge Pool: <input checked="" type="checkbox"/>
Alternate Extension #3 & #4:	DOC		Caption Fields: 2
SMTP Server Name:	smtp.Vertican.com		
BCC E-Mail address:	VT-BCC@Vertican.com		
Default Reply E-Mail Addr:	VT-Reply@Vertican.com		

- How to Troubleshoot the SMTP Server
  - How the SMTP e-mail works with Collection-Master



# 401

## Troubleshooting

- How to Troubleshoot the Account Card
  - Calculations in the Collector Account Card.
    - Includes legal calculations, interest, and other components
    - This sample is a fictional case and is intentionally configured to have unusual amounts
    - **WARNING:** This document covers advanced math, and **MATH IS HARD!**

CM 9.1 Meridian Technologies - Lab/Gomez - Session 752.4.3 Trial for Client Server  
Action Claim Information Search Navigate

Review Open		Post Judgment		File: SAMPLE1	Time: 62:39:12	Collector F1-1	
Collection Order: CPOLVIWE		Default Sub Code: 1		Cash or Cash Equivalent			
<b>Debtor Charges</b>		<b>Credits</b>		<b>Balance</b>		<b>Client Costs</b>	
Post Judgment	3570.56	723.79		2846.77		CST Received	6.00
Contract Fee	10.00			10.00		CST Returned	12462.54
Stat Fee	55.09	55.09				Non-Rec Expd	480.45
Court Costs	6578.41	449.96		6128.45		Costs Due	6128.45
Pending Costs		50.00		-50.00		Cost Balance	
Non-Rcv Costs		50.00		-50.00		<b>Misc Accounting</b>	
Other Amount	6321.64			6321.64		Overpaid	366.68
Subtotals	16535.70	1328.84		15206.86			
Int: 06/28/2021	2629.36	100.00		2529.36		CoCo-Coll	
Firm Charges	100.00	100.00				CoCo-Costs	
Subtotals	19165.06	1528.84		17736.22		Sales Tax	
Claim Adjust		200.00		-200.00		<b>Earnings</b>	
Compromise						Commissions	625.85
Coll & Hold						Suit Fees	250.34
						Stat Fees	90.00
<b>Totals</b>	<b>19165.06</b>	<b>1728.84</b>		<b>17536.22</b>		Comm: 25	Sfee: 10
						Trst: TRST	Cst: COST
							BR:
							PC:

Use buttons or pull-down menu, or Escape to Exit

Collector Debitment Legal Legacy Interest Client Judgment Comp Judgment Escape  
Recent Financial Billing Retail CostBill Commercial

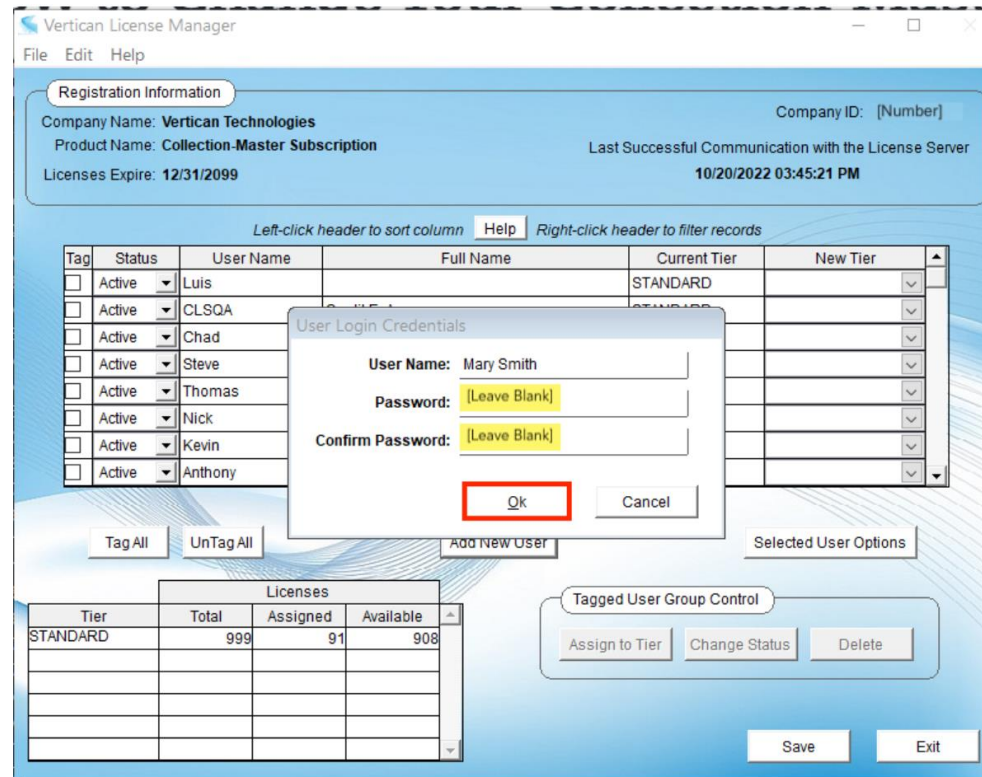
SAMPLE1 | Forwarder One uses v. ALLEN/JOHN | \$15,006.86 | \$17,536.22

```

1 Calculations for SAMPLE1
2 -----
3 Original Claim Amount F(1):1.63
4 Suit Amount F(2):2000
5 Judgment Amount F(4):3627.84
6 Principal Collected F(8):688.88
7 Interest Collected F(9):100
8 Balance F(5):15006.86
9 vPre Suit LO Paid:-34.91
10 vPre JMT LO Paid:-34.91
11 Atty Fees Due:0
12 Costs Due:6128.45
13 Contract Fees Due:10
14 Calculated Principal Collected:723.79
15 Pre Suit Payments:0
16 Post Suit Payments:7.81
17 Post Judgement Payments:2653.33
18 -----
19 Costs at Judgment:6129.45
20 Stat Fees at Judgment:55.09
21 Contract Fees at Judgment:10
22 Prin at Judgment:-2997.25
23 Awarded at Judgment:3197.29
24 -----
25 46345 - Claim is Post Judgment
26 N 1:Include Costs in Judgment
27 Y 0:Include Stat in Judgment
28 Y 0:Include Contract in Judgment
29 Y 0:Include PJI in Judgment
30 Calculated Pre-J Prin Paid:7.81
31 Pre-J Payments:7.81
    
```

## • How to Change Your Collection-Master Subscription User Count

- Subscription:
  - Add Users
  - Remove Users



# The Mastermind Series

To learn about upcoming trainings:  
<https://vertican.tech/mastermind/>

To view past trainings:  
<https://vimeo.com/vertican/>



# Questions Asked in Advance

- For Collection Master, where can I find definitions for each function, videos, training materials, and any other support documentation that can help me leverage your product as a service delivery leader?
  - Is there a way to preload or assign files so work can be done without external Excel sheets? Like assigning queues, login, work your queue. Any tips and tricks are also welcomed.
- Does the CM software work with Windows 11? Where do we receive macros for Windows 11? For example, to merge documents in Microsoft Word.

