

# Licensing, VLM / vPortal & Collection-Master

Presented by Luis Gomez



# Resources

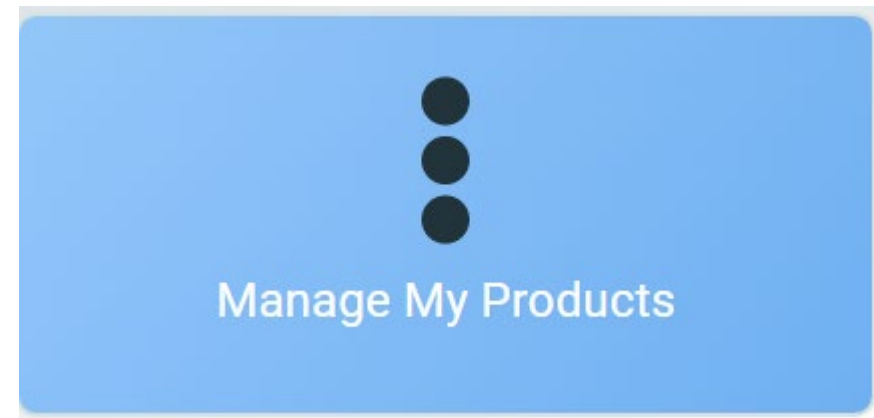
-  **Mastermind** Sessions:
  - Multi-State – [Presentation](#) – [Video](#)
  - Vertican Support Access (VSA): – [Presentation](#) – [Video](#)
- Current  Articles:
  - <https://www.vertican.com/vconnect/#tips>

# Vertican Licenses, VLM & Collection-Master

- vPortal – manages licenses for Vertican products
- VLM – Vertican License Manager
- Collection-Master interfaces with vPortal & VLM
  - Named Users managed by VLM
  - EDI/DTP managed by vPortal
  - Modules managed by vPortal
- vPortal Databases
  - Screen Infinity INF.\* fields
  - vExchange \*vX: Codes

<https://vPortal.Vertican.com>

- Manage My Products
  - Collection-Master Subscription
    - System Info
    - Software Download & Release Notes
    - Subscription Agreement
    - DTPs
    - Modules
    - MultiState
    - vExchange Business Adapters
    - VLM Software



# vPortal – System Info

Product:	Server Name:	Server Path:	Version:	Date Installed:
No products found				
<b>Live Server Information</b>				
Live Server Name and Path:		Please Choose Your Live Server and Path		
<b>Claims</b>				
Number of Claims: 0				

- Product
  - Server Name, Server Path, Version Installed, Date Installed
- Live Server Name & Path
  - Primary System
- Test System
  - CM subscription includes 1 test system
- Users
  - WB\_Users = # of concurrent users
    - Note: CM subscription is now Named Users, you are entitled to 999
- Claims
  - Number of claims
  - Note: CM subscription includes unlimited claims

# vPortal – Software Download & Release Notes

- Download Software
  - Software Version, Size, Date
- Software Installation Instructions
- View Release Notes

## [Software Download & Release Notes](#)

[Download Software](#)

Software Version: 9.1H.018    Size: 5.4 MB    Date: November 10, 2022

[Software Installation Instructions](#)

[View Release Notes](#)

# vPortal – Subscription Agreement

- Plan Type (SLA)
- Incidents
- License Term
- Users

Plan Type & Incidents	License Term	Users	vExchange	Status	Autorenew
Plan Type: Gold - Incidents: 8	10/5/2021 12:00:01 AM - 10/31/2199 11:59:59 PM	99	✓	Active	✗

# vPortal – DTPs

- In-App DTP's
- Many are Included Price 0.00
  - Filter by Price 119 to see the DTP's with a Charge
  - Filter by Expiration to find the current / active DTP's
  - Pro TIP, review your subscription, don't pay for what you don't need!

[DTPs](#)

Group	Name	Number	Start	Expiration	Price	Status	Autorenew

No DTPs found.



# vPortal – Modules

- Modules (Total Plan included Most Modules for no additional charge)
  - Perpetual
  - Monthly (\$0.00)

Description	Duration	Expiration	Price	Autorenew
Companionated Claims - Included with vExchange All Claims Total Plan	Perpetual			<input type="checkbox"/>

# vPortal – MultiState

- In most cases, your “Home State” has been registered
- Unlocks CM capabilities
- Click to Buy – Multistate for each state
  - Included with TotalPlan Subscription

Multistate				
State	Duration	Expiration	Price	Autorenew
No states found.				

# vPortal – vExchange Business Adapters

- vExchange Hosted DTP's
  - Convoke
  - Synchrony
  - Truist
  - Target

vExchange Business Adapters				
Name	Product	Start	Expiration	Autorenew

No Business Adapters found.

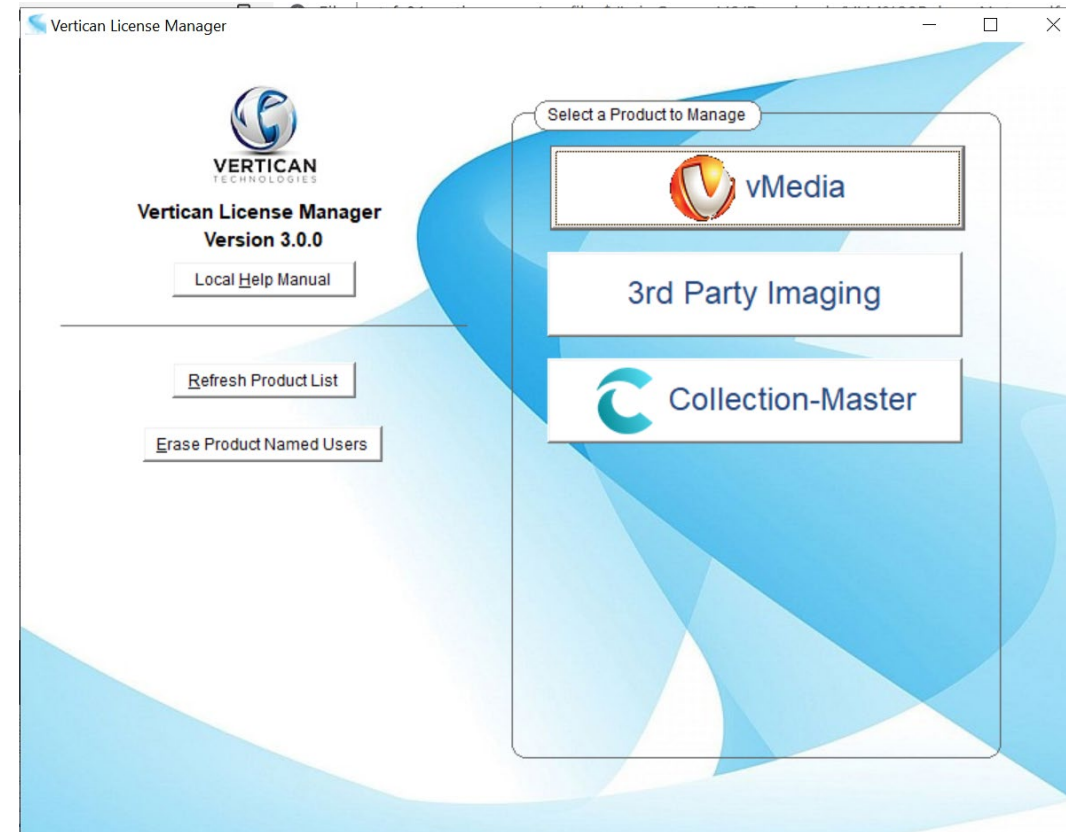
# vPortal – VLM Software

- Newest Release 3.1.0.0
  - VLM included with vMedia, may be downloaded separately
  - VLM is found under CM subscription under “VLM Software”
- Newest VLM Benefits
  - Refresh Product List
  - Option to Erase Named Users (Start Over)
  - 30-day grace period allowing for a *lack of a connection* to the licensing server
  - Free Administrator User for Collection-Master and LicenseManager
- Coming Soon:
  - Automatic Backups of VLM\_Master.dbf

[VLM Software](#)  
[Download Vertican Licensing Manager Version 3.0.0.0](#)  
[Download VLM Release Notes](#)

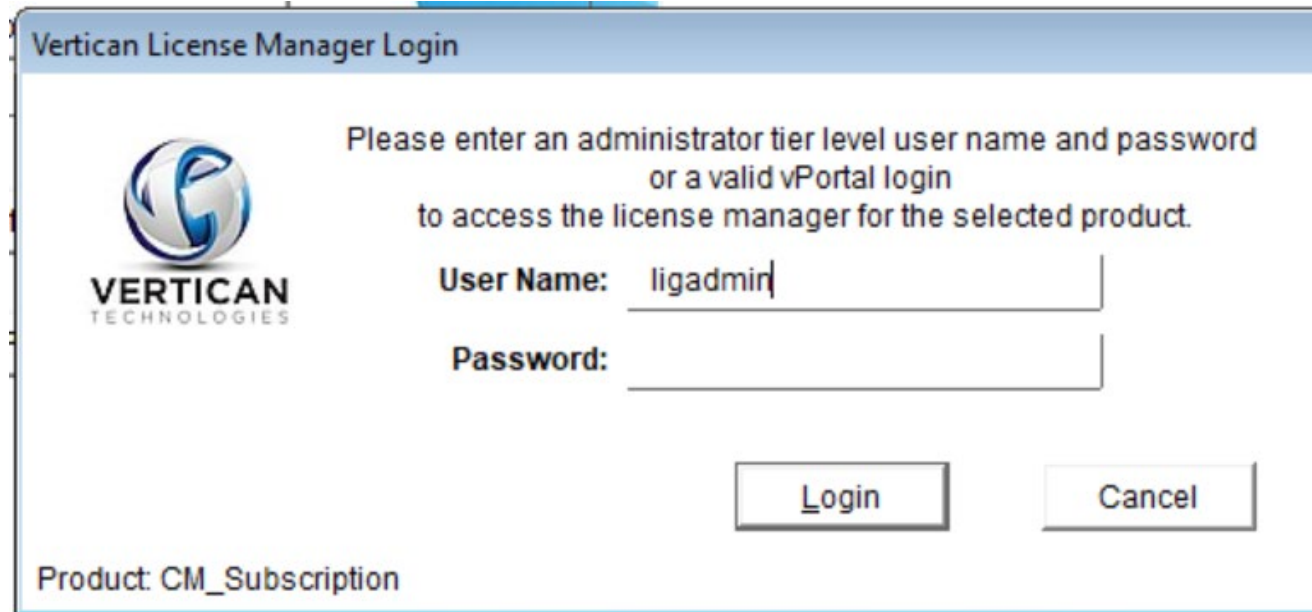
# VLM – Vertican License Manager

- f:\Imaster\LicenseManager.EXE



# VLM – Login

- Use your Free Administrator account:
  - As a CM User
  - To Manage users in LicenseManager



The screenshot shows a dialog box titled "Vertican License Manager Login". On the left is the Vertican Technologies logo. The main text reads: "Please enter an administrator tier level user name and password or a valid vPortal login to access the license manager for the selected product." Below this are two input fields: "User Name:" with the text "ligadmin" and "Password:". At the bottom right are "Login" and "Cancel" buttons. At the bottom left, it says "Product: CM\_Subscription".

# VLM – Q-LawE

- Clients that are upgrading to Q-LawE will license Q-LawE users.
- Q-LawE STANDARD User License
  - May also be used for Collection-Master
  - Feel free to reduce your Collection-Master Licenses accordingly!

# Update Collection-Master from vPortal

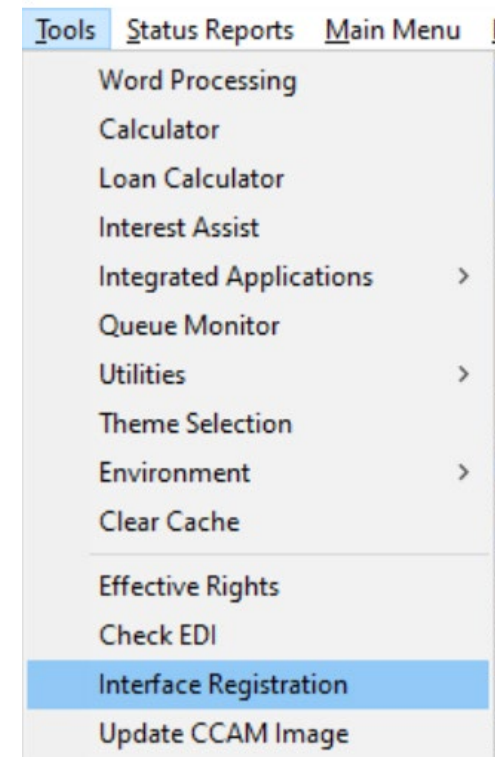
- Tools → Interface Registration

- Screen Infinity Fields
- Users, Modules, Licensing, etc.
- DTP's (Renew only)

- Help → Update Collection-Master

- CM91u.exe
  - \*vX: Codes & Key Events
- Release Notes

- Note: Release Date is the actual date released. Version is the anticipated or actual release.





# Vertican Support Access (VSA)

- Help → Client Services → Vertican Support (Access) (Login Required)
  - Preferred method of opening a service request
  - Provide as many details as possible
    - The Client Success Team will triage the request
    - The more complete details provided the better the experience will be

\* indicates the field is required

\*Username  
admin

\*Password  
|

Log In Cancel

# The Mastermind Series

To learn about upcoming trainings:

<https://vertican.tech/mastermind/>

To view past trainings:

<https://vimeo.com/vertican/>

