

vExchange Dashboard 101

Presented by Brandon Tor and
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vExchange®

 **The Mastermind Series**

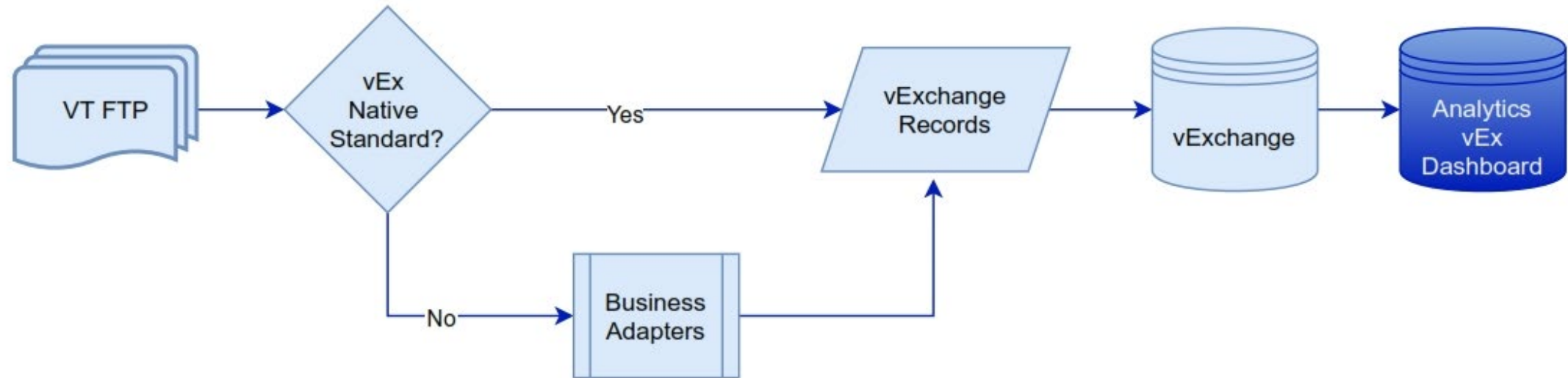
Presented by



Dashboard Overview

- What is Dashboard?
- Why would I use Dashboard?
 - Reconciling transactions between forwarders and receivers
 - Reviewing account-level details
 - Fixing rejections
- Where does the data come from?
- How fresh is the data?

Data Flow

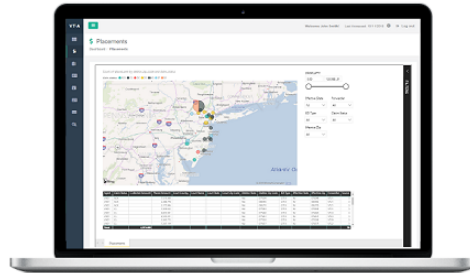
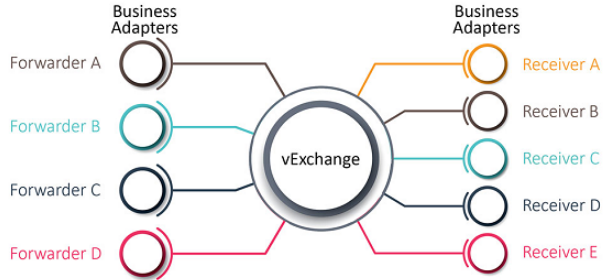


Two-step Authentication

analytics.vertican.com/landing



vExchange Analytics



Login



Sign In

Username

demo@demo.com

Password

.....

Remember me

Sign In

Need help signing in?



Okta Verify (SM-G955F)

Push sent!

Or enter code

- Send push automatically
- Do not challenge me on this device for the next 30 minutes

Sign Out



SMS Authentication

(+1 XXX-XXX-9657)

Enter Code

|


Send code


- Do not challenge me on this device for the next 30 minutes

Verify

Sign Out

Password Reset





Sign In

Username

demo@demo.com

Password

.....

Remember me

Sign In

Need help signing in?

Account Search

The screenshot displays the vExchange Analytics dashboard. The top navigation bar includes a hamburger menu icon and a 'My Account' link. The left sidebar contains three menu items: 'Dashboard' (1), 'Placements' (2), and 'General Reports' (3). The main content area features a 'Dashboard' heading, a welcome message, and a 'View Account Details' section. This section includes a 'Search Field:' dropdown menu (4) with 'Sender Internal File Number' selected, and a search input field with a 'Search' button.

vExchange Analytics

My Account

Dashboard

Dashboard

Welcome to vExchange Analytics

Please choose from the options on the left.

View Account Details

Search Field:

Sender Internal File Number

Enter an account number to view claim details

Search

Online Help

The screenshot shows a web interface for online help. At the top right, there is a blue header with a hamburger menu icon and a "My Account" link. Below the header, the page title "Online help" is displayed with a question mark icon. The main content area contains the instruction "Please choose from the options below." and four buttons: "Release Notes", "User Guide", "vExchange Documentation", and "Contact Support". On the right side, a user account dropdown menu is open, showing the email "joetest@nothing.com" and two options: "Help" (highlighted with a red box) and "Log out".

My Account

joetest@nothing.com

Help

Log out

Online help

Please choose from the options below.


Release Notes
Please click here to see the Release Notes


User Guide
Please click here to see the User Guide

vExchange Documentation
Please click here to see the vExchange documentation

Contact Support
Please click here to see the Contact Support

Account Details

 My Account


 **Account Detail**

Sender File #:	Creditor File #	Agent File #:	Sender Id	Agent Id	Claim Type
					CC01

Placed SOL Date	Placement Principal	Placement Interest	Placement Other	Placement Total	Status
2/4/24	\$899.49	\$0.00	\$0.00	\$899.49	Claim closed


1 Debtors **2** Key Events **3** Notes **4** Legal **5** Financial **6** Disputes **7** Account Numbers **8** Rejections


C K


 **Debtor Info**

Transmission Date	First Name	Last Name	Street	Street2	City	State	Zip	Email Address	SSN	Date of birth	Driver's License	Record
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Record Column


 Balance Adjustment

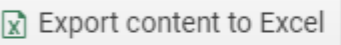


Transmission Date	Total Balance	Record Date	 Record
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2019-12-05	685.27	2019-12-05	2341
2019-12-04	685.27	2019-12-04	2341
2019-12-04	685.27	2019-12-04	2341
2019-12-04	685.27	2019-12-04	2341
2019-12-04	685.27	2019-12-04	2341

Raw Data

Raw Data ⓧ

 Data warehouse record

 Export content to Excel 1

2 law_list commission_rate suit_fee_rate orig_prin orig_other orig_int orig_tot pre_suit_rate post_suit_rate post_jdg_r

	0.0000		647.51	0.00	0.00	647.51	0	0	0
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Financials Panel

Debtors Key Events Notes Legal **Financial** Disputes Account Numbers Records Rejections

All Promise to Pay Stipulation Direct payments Posted **Historical Remittance** Live Remittance Balance Adjustment

1

\$ Historical Remittance



2


Transmission Date	Remit #	Trans #	DP Reference #	Ret Code	Pay Date	Post Date	Remit Date	Gross Pay	Fees	Cost Ret.	Cost Exp.	Balance Adjustment	Description	Rejection Status
2020-10-15				68	2020-06-27	2020-06-27	2020-10-09	0.00	0.00	0.00	-23.00		PROCESS SERVER FEE	Rejected
2020-09-11				68	2020-06-02	2020-06-02	2020-09-02	0.00	0.00	0.00	-23.00		PROCESS SERVER FEE	Passed
Sum:								\$0.00	\$0.00	\$0.00	-\$46.00			


3


Records Panel

Debtors Key Events Notes Legal Financial Disputes Account Numbers Records Rejections

1000 2000 **1**

 Records


 Export content to Excel **2**





Record	Name	3 Count
<input type="text"/>	<input type="text"/>	<input type="text"/>
2201	Suit and Judgment Information (From Receiver to Sender)	2
2202	Caption Information (From Receiver to Sender)	1
2209	Affidavit Information (From Receiver to Sender)	1
2303	Remittance Report (From Receiver to Sender)	6
2341	Balance Update (From Receiver to Sender)	7
2402	Media Log (From Receiver to Sender)	1
2405	General Notes (From Receiver to Sender)	55

Rejections Panel

Debtors Key Events Notes Legal Financial Disputes Account Numbers Records **Rejections**

 List of All Rejections/Exceptions

Show Unremediated Show Remediated Show All **Apply Filter** **1**

 Export visible  Export all *Maximum 500k **2**

3 Drag a column header and drop it here to group by that column **4**

Category	Rule	Forwarder	Receiver	Record	Description	First Rejection Date ↓	Remediation Date	Report Name

Using Logs

≡ Logs

Start Date: End Date: Apply Filter 1

Export visible Export all *Maximum 500k 2

Drag a column header and drop it here to group by that column

3

Source	Agent ID	Agent Name	File Name	Path	Start	End	Forwarded	Report	Row Count	Client No.
b3pLogs			b3pmntr_CACsvExFinacialToCAC S_Prod_Secondrun		2021-06-29 11:30:50	2021-06-29 11:30:50		Generate b3pmntr_BLGACL_20210629113050_001.txt	31	-1
b3pLogs			b3pinput_CACsvExUpdateToCAC _Prod_SecondRun		2021-06-29 11:30:36	2021-06-29 11:30:36		Generate b3pinput_BLGACL_20210629113037_001.txt	46	-1
b3pLogs			b3pinput_CACsvExUpdateToCAC _SecondRun		2021-06-29 11:30:12	2021-06-29 11:30:12		0 row file b3pinput_BLGACL_20210629113013_001.txt	2	-1
CMvX RT0			EDICMVX_006292021.UPD.upd		2021-06-29 07:07:55	2021-06-29 07:07:55		CMvX 9.1F.026 Import:06/29/2021 01:00:07	869607	-1
CMvX RT0			EDICMVX_C06292021.UPD.upd		2021-06-29 07:06:52	2021-06-29 07:06:52		CMvX 9.1F.026 Import:06/29/2021 01:56:09	9068	-1
b3pLogs			b3pmntr_CACsvExFinacialToCAC S_Prod_Secondrun		2021-06-28 11:31:16	2021-06-28 11:31:16		Generate b3pmntr_BLGACL_20210628113116_001.txt	12	-1
b3pLogs			b3pinput_CACsvExUpdateToCAC _Prod_SecondRun		2021-06-28 11:31:00	2021-06-28 11:31:00		Generate b3pinput_BLGACL_20210628113100_001.txt	36	-1
b3pLogs			b3pinput_CACsvExUpdateToCAC _SecondRun		2021-06-28 11:30:22	2021-06-28 11:30:22		0 row file b3pinput_BLGACL_20210628113023_001.txt	2	-1
CMvX RT0			EDICMVX_006282021.UPD.upd		2021-06-28 06:06:35	2021-06-28 06:06:35		CMvX 9.1F.026 Import:06/28/2021 01:00:26	947281	-1

The Future

- Summary and aggregate reports – e.g. Key Events
- File status reporting
- Managing key changes

What would you like to see?

vExchange and the Dashboard continue to evolve based on client feedback and business need. Over time, some of the underlying technologies may change.

Questions



If you have any questions or if your firm requires any additional users created, you may address these requests to:

IMPLEMENTATIONS@VERTICAN.COM