vExchange Dashboard 101

Presented by Brandon Tor and Joe Cross

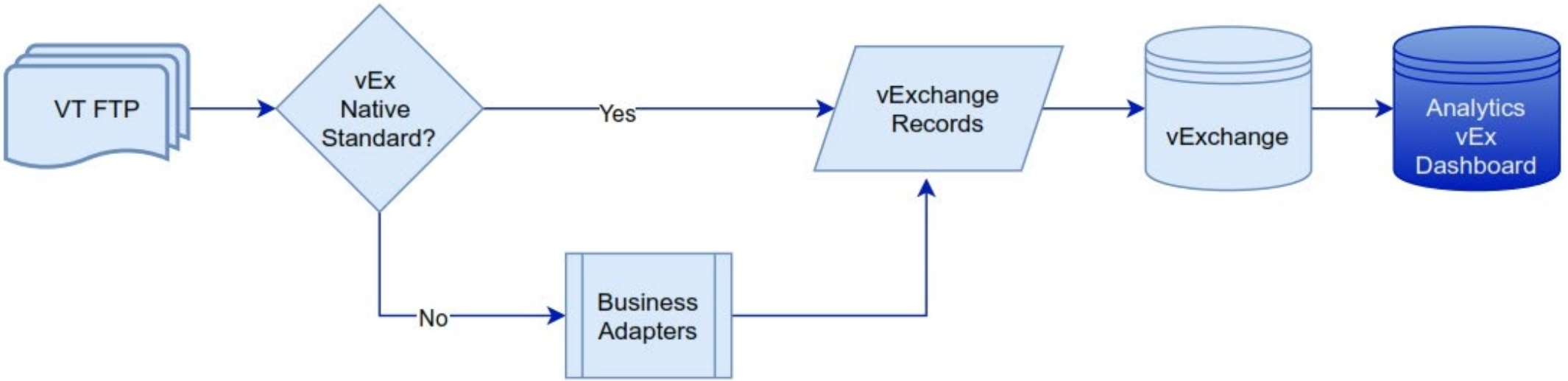
The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

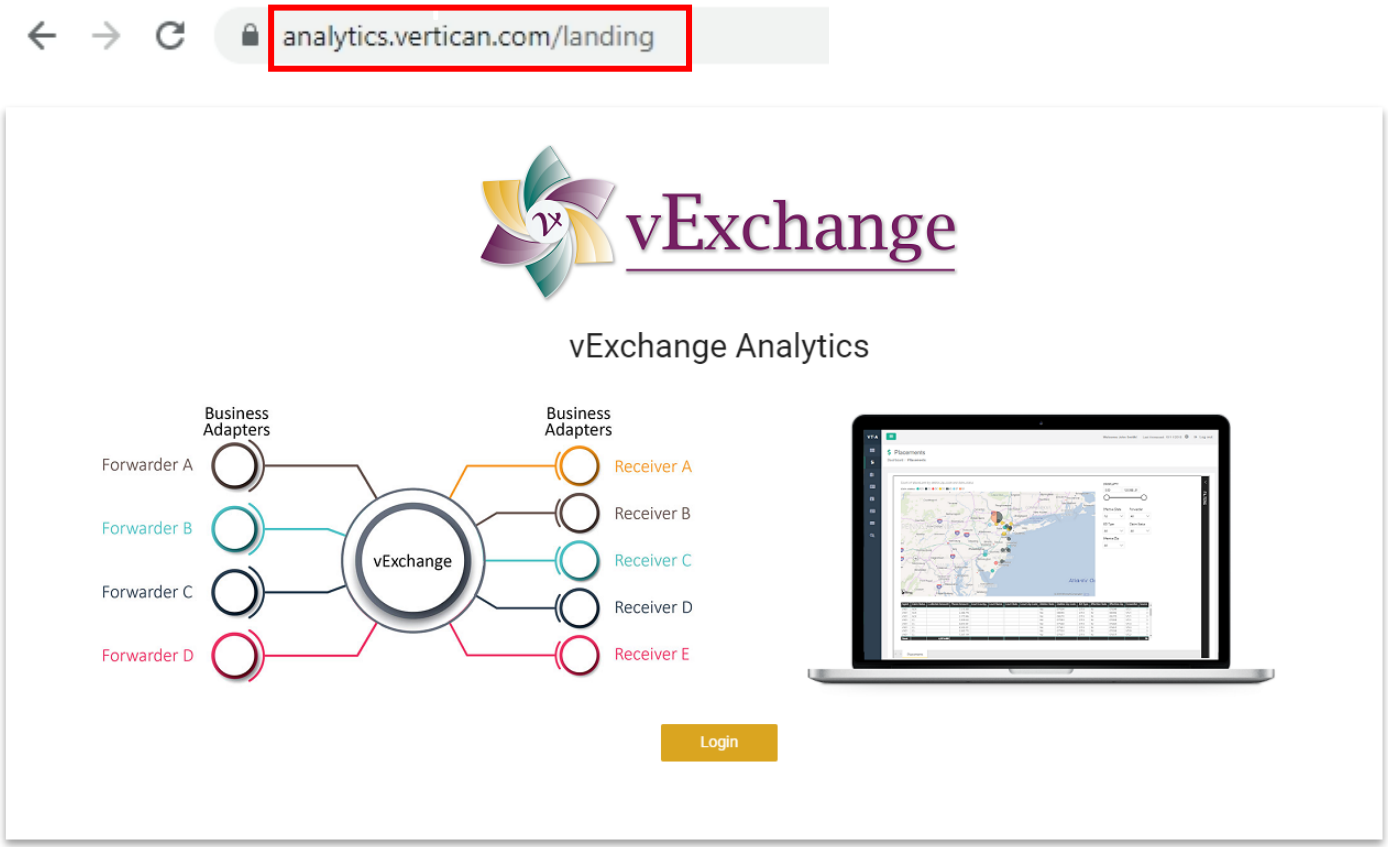
Dashboard Overview

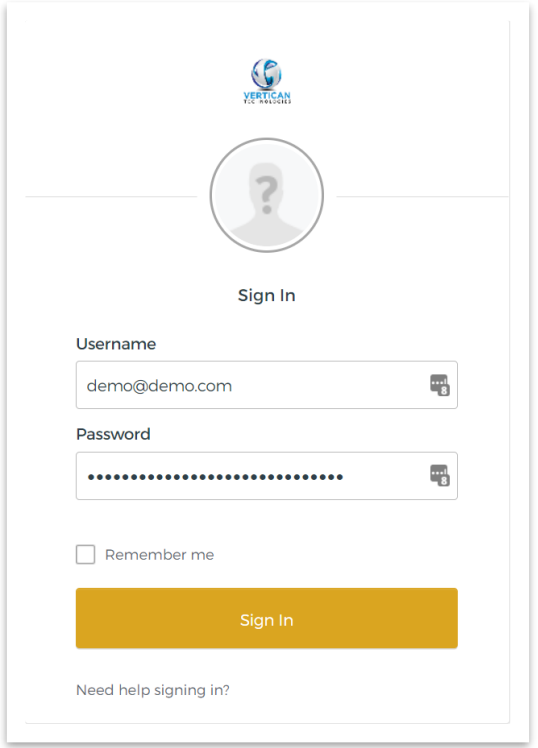
- What is Dashboard?
- Why would I use Dashboard?
  - Reconciling transactions between forwarders and receivers
  - Reviewing account-level details
  - Fixing rejections
- Where does the data come from?
- How fresh is the data?

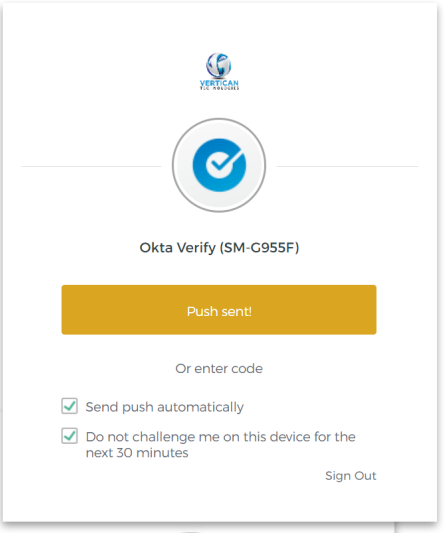
Data Flow

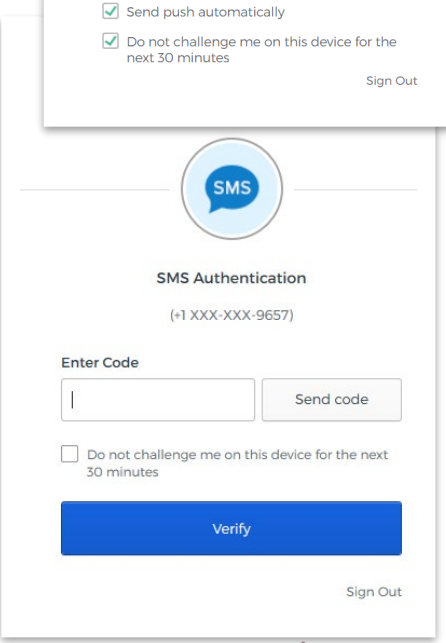

VT FTP
vEx
Native
Standard?
Yes
No
Business
Adapters
vExchange
Records
vExchange
Analytics
vEx
Dashboard

Two-step Authentication

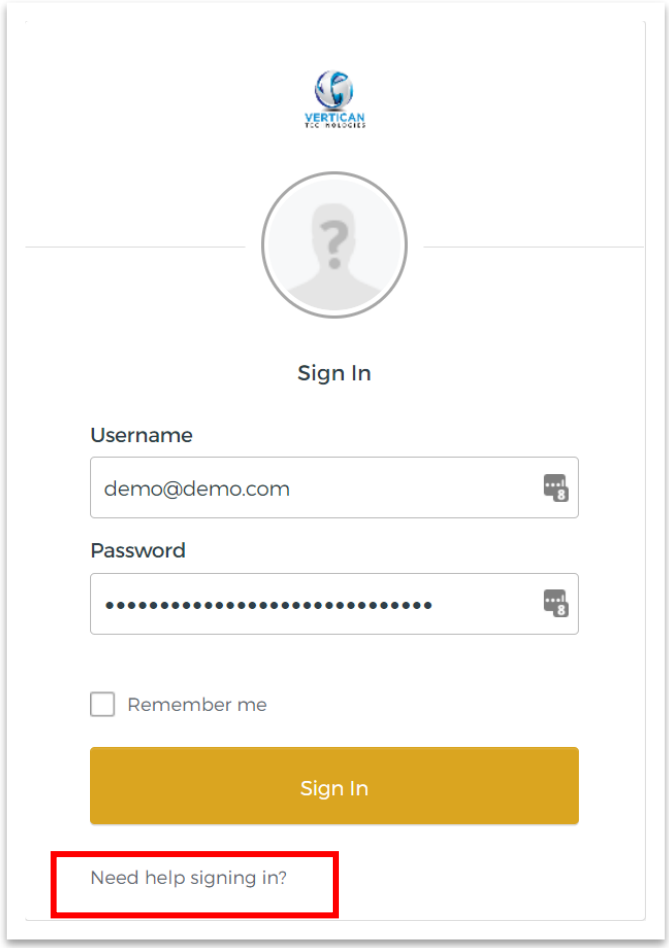




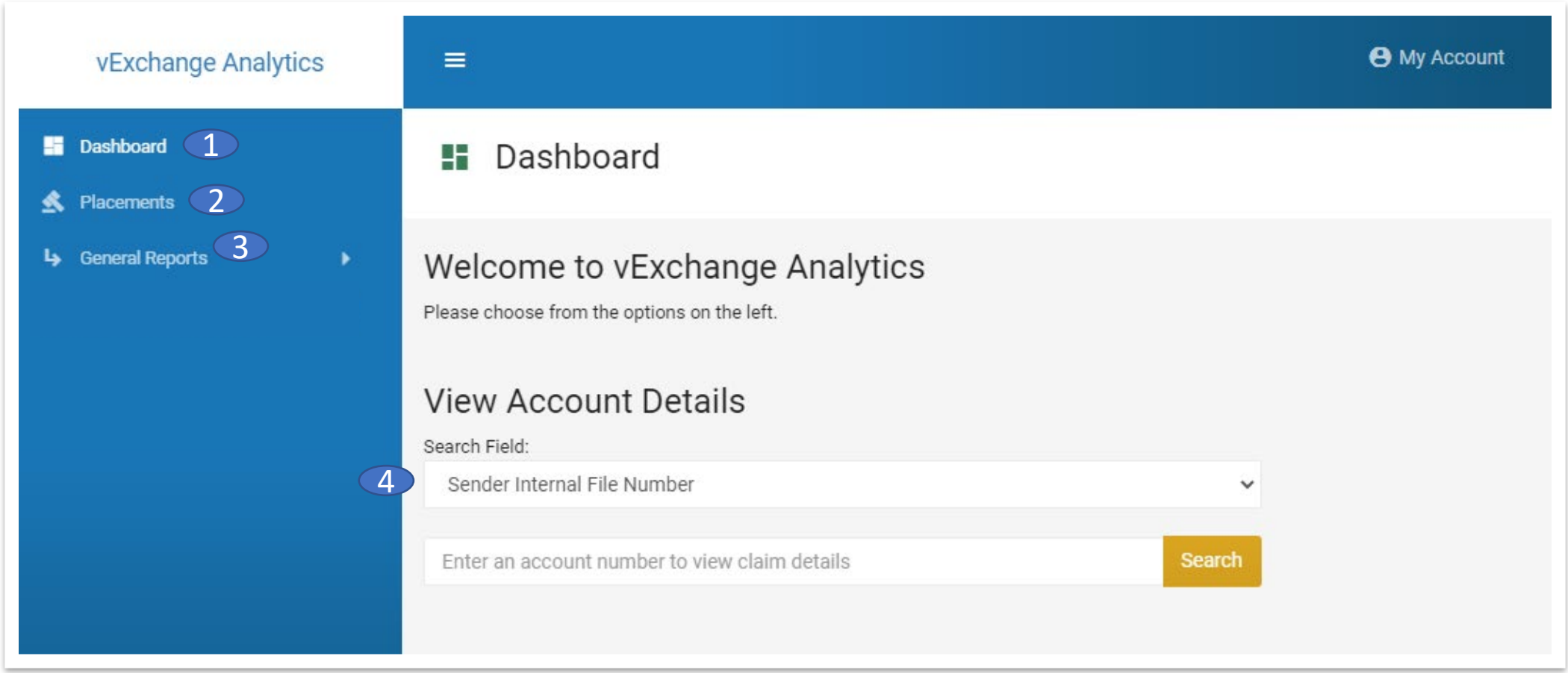




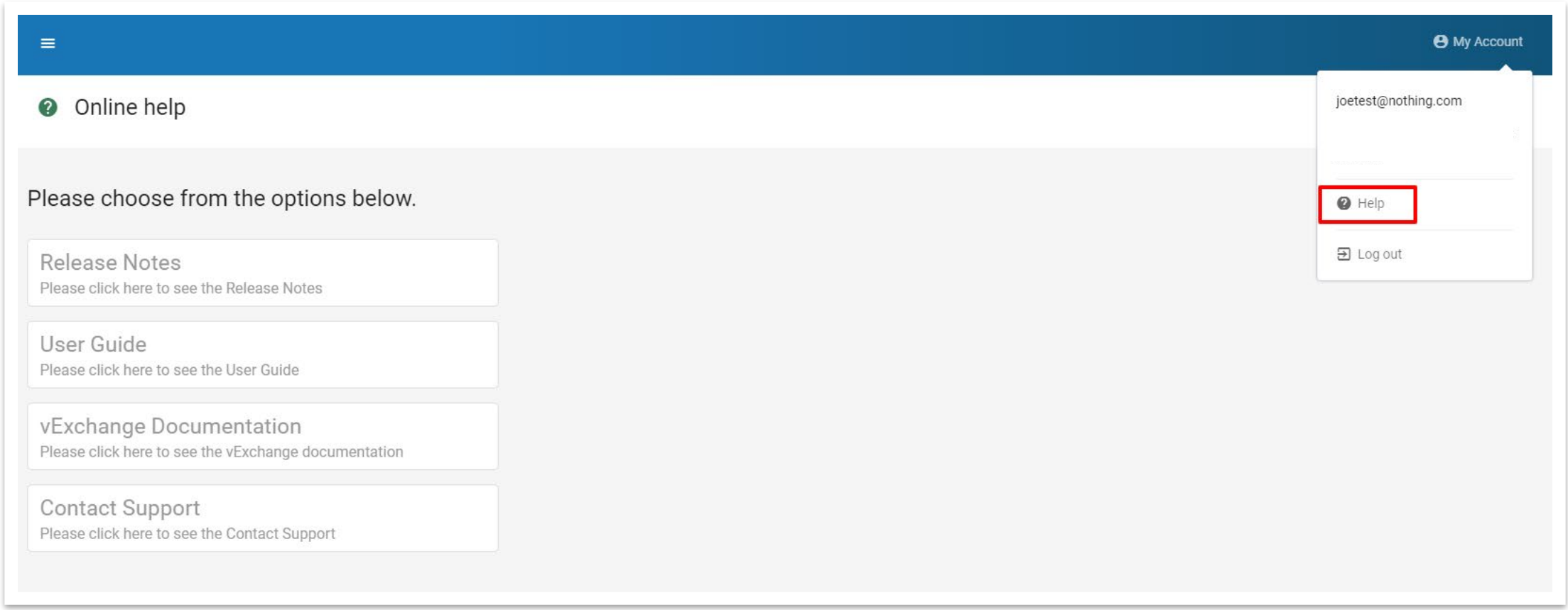
Password Reset



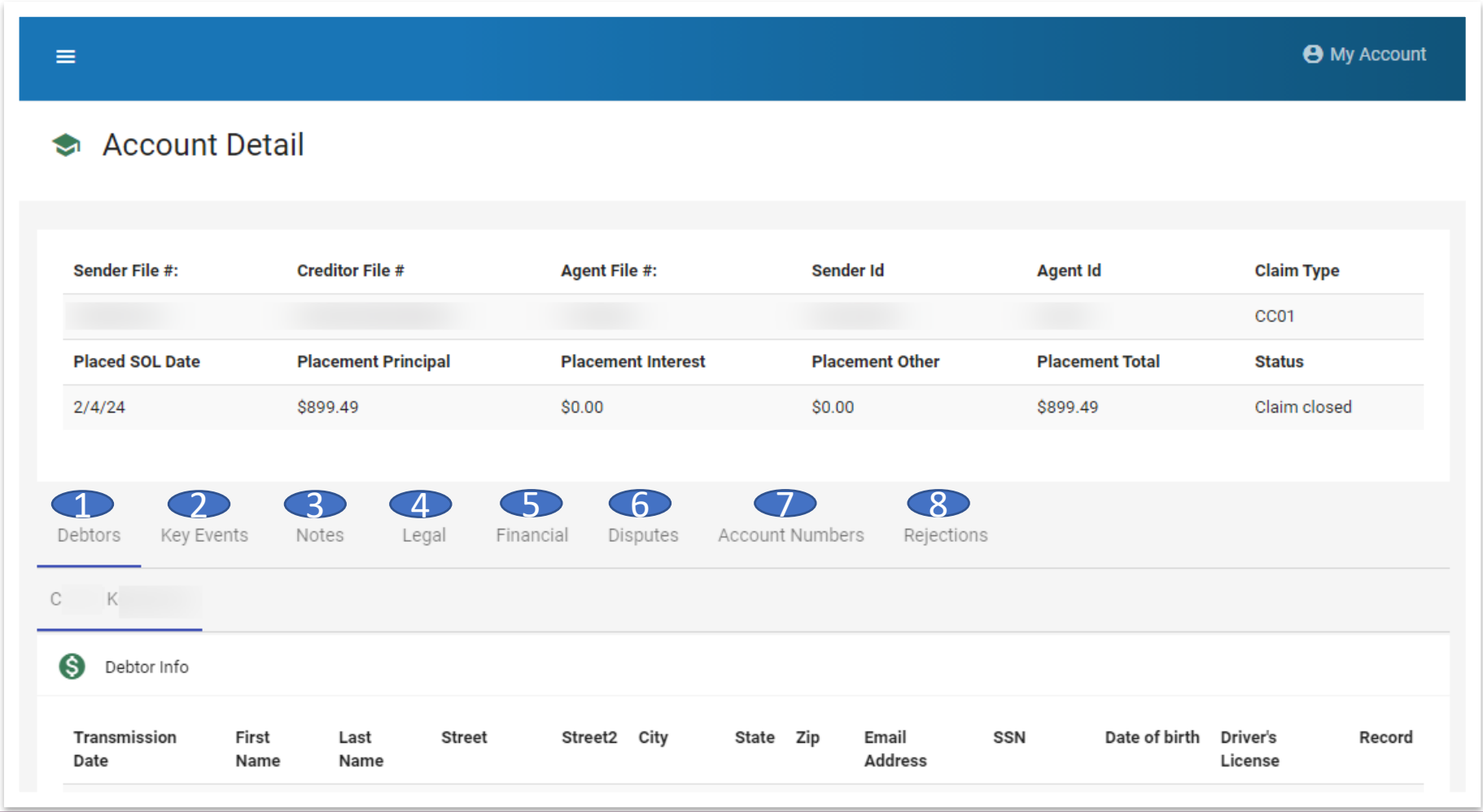
Account Search



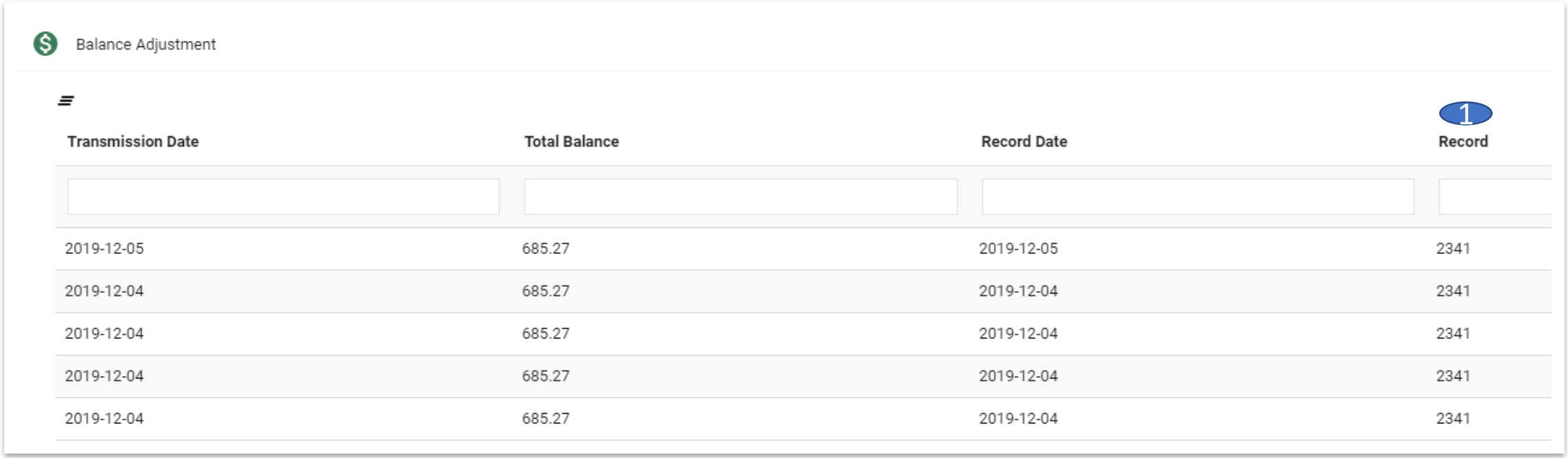
Online Help


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

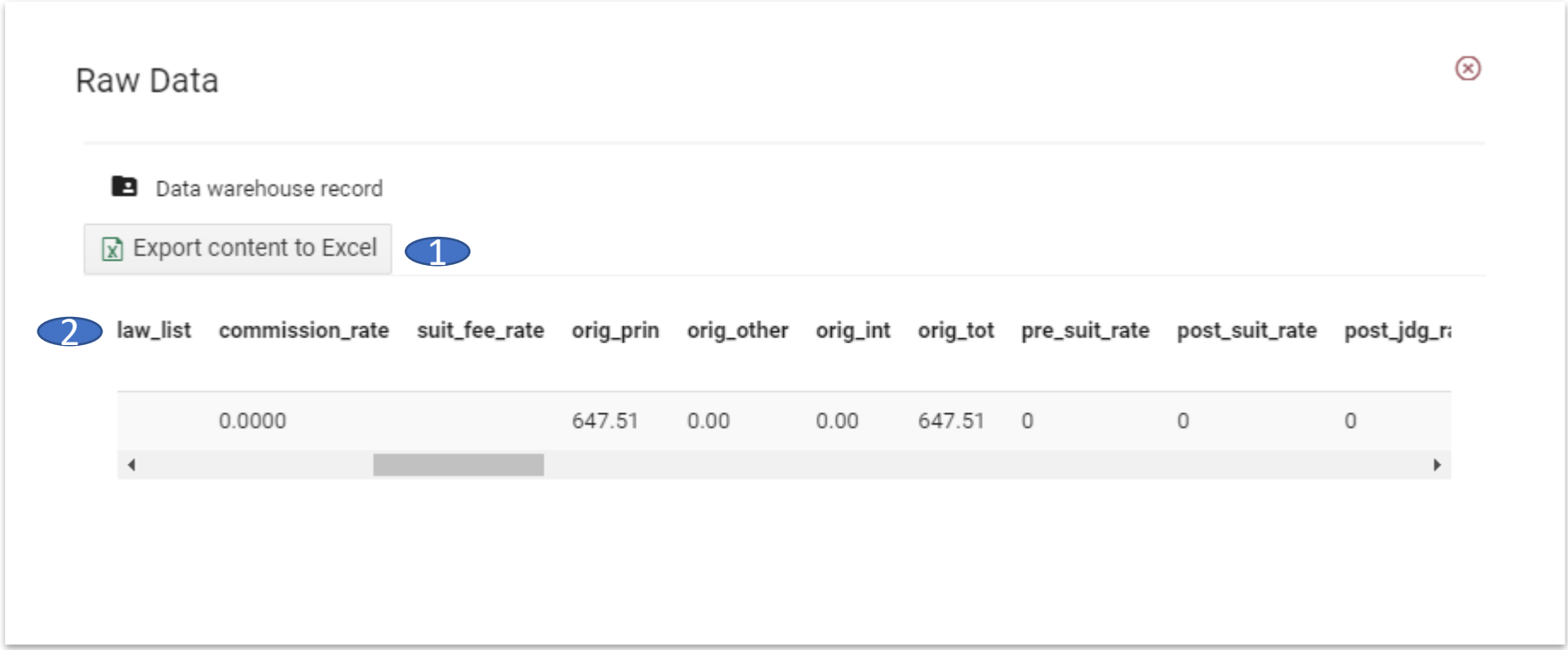
Account Details



Record Column



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

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

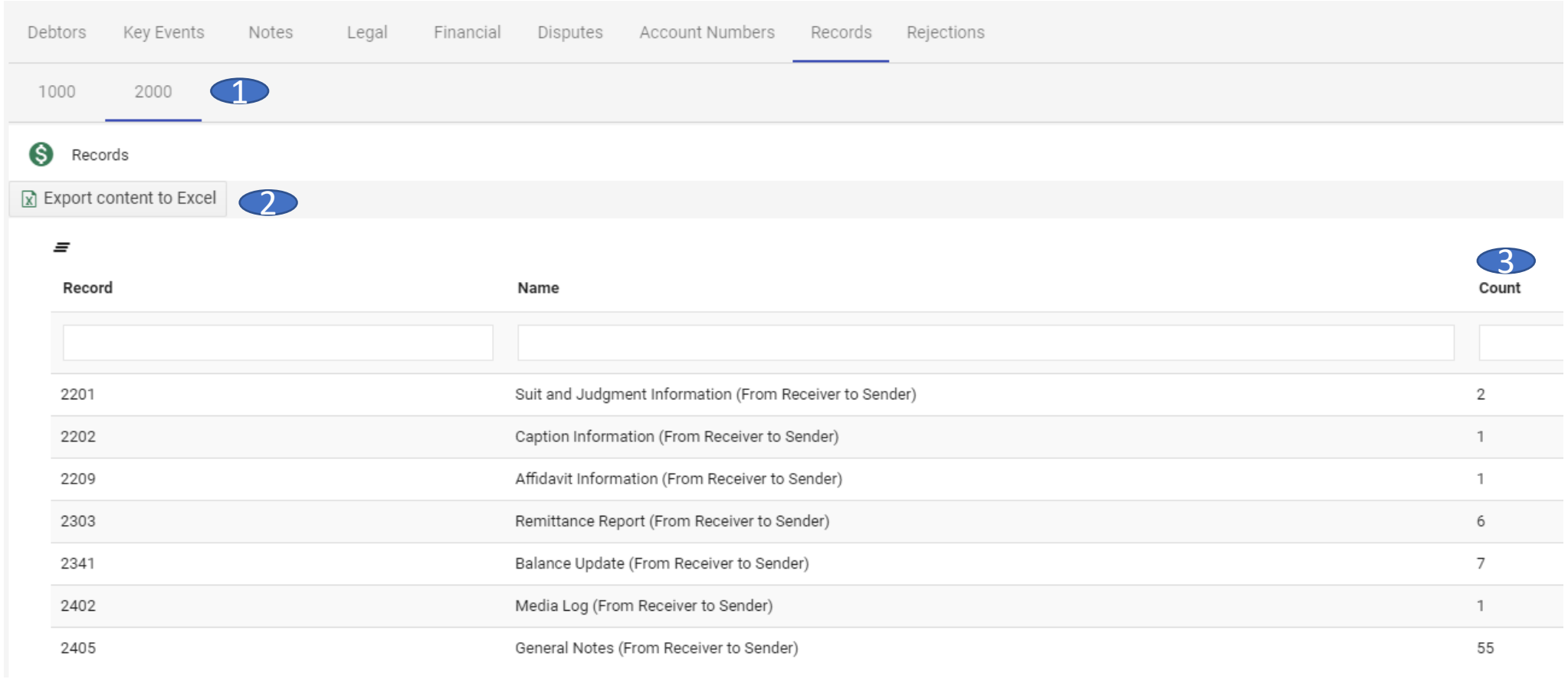
Historical Remittance

2

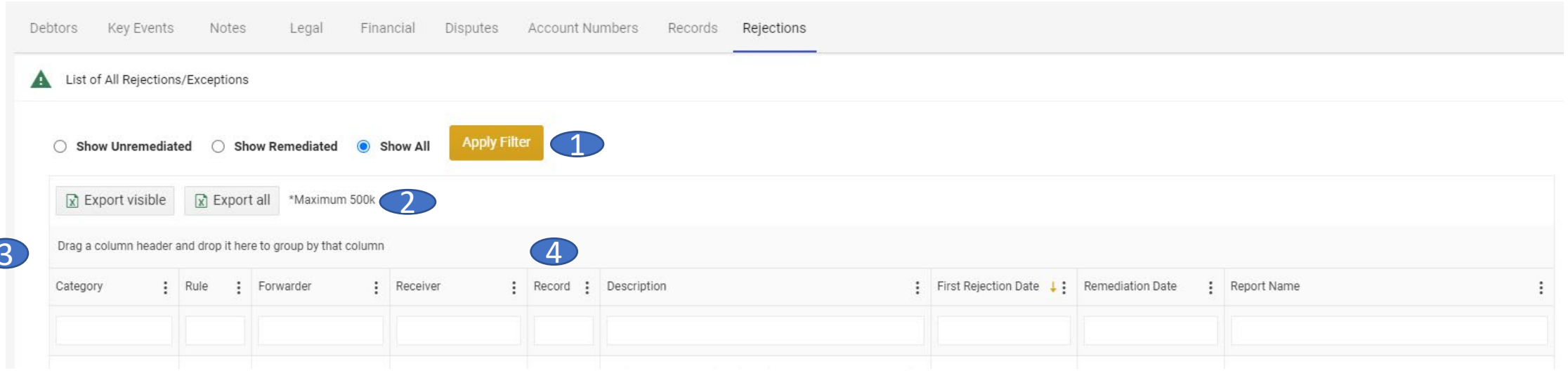
Transmission Date	Remit #	Trans #	DP Reference #	Ret Code	Pay Date	Post Date	Remit Date	Gross Pay	Fees	Cost Ret.	Cost Exp.	Balance Adjustment	Description	Rejection Status
2020-10-15				68	2020-06-27	2020-06-27	2020-10-09	0.00	0.00	0.00	-23.00		PROCESS SERVER FEE	Rejected
2020-09-11				68	2020-06-02	2020-06-02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

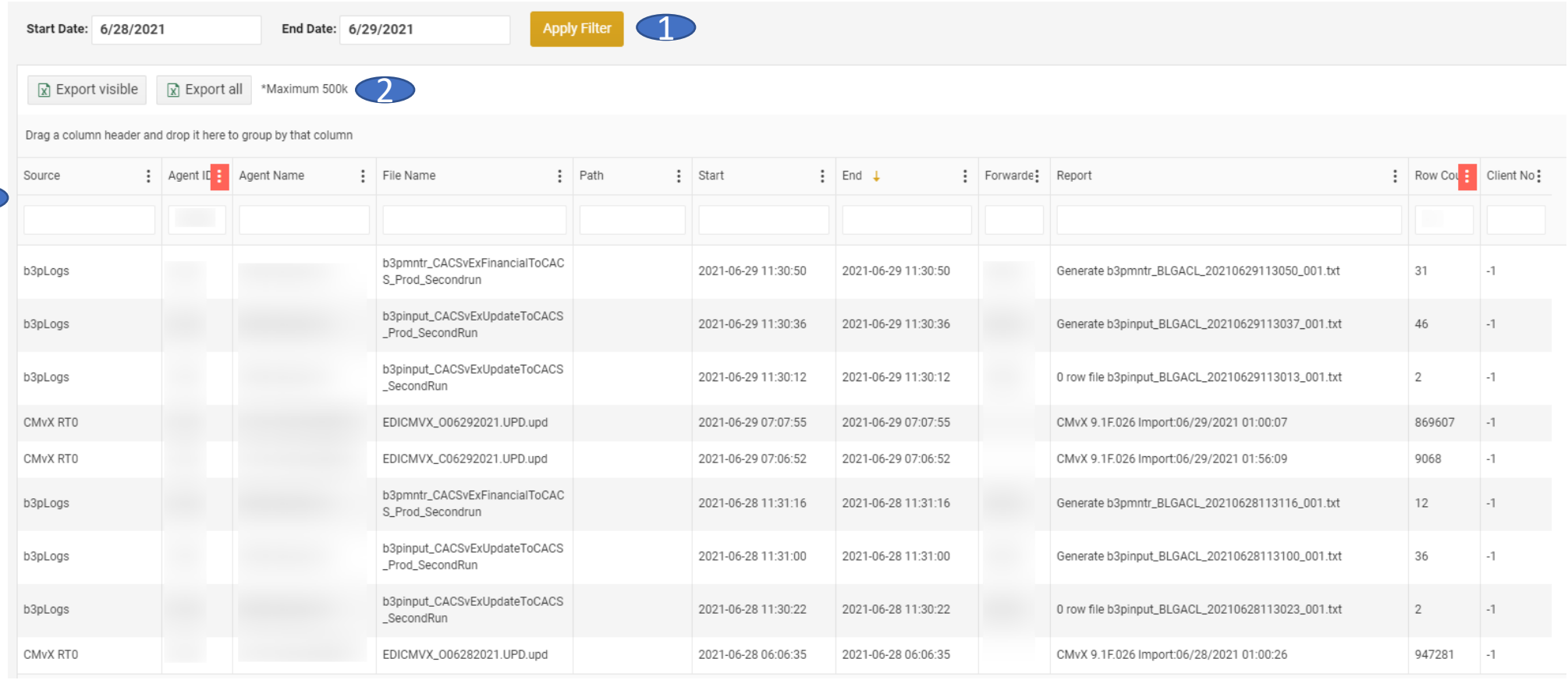


Rejections Panel



Using Logs

Logs



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