

DTP Preserve

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- How to prevent inbound client data maintenance from clobbering existing data
 - What options are available?
- Other tricks to use when dealing with with client inbound data

Goal for this Mastermind Session



- ✓ Learn how stop client inbound data at the field level
- ✓ Learn how to redirect client inbound data to the notes
- ✓ Learn how trigger various things from client inbound data (not including EFLEs)

Where Does Preserving Apply

Maintenance
Data is the
source:

- And the destination field is blank, maintenance data goes in get's entered
- And the destination field is populated, maintenance data is blocked or rerouted

Placements
are
Unaffected

- No Preserving of Data

What Can Be Preserved

- When Maintenance Data is the source:
 - Data in the MASTER table
 - Primary Claim Data
 - Data in the EXTRA table
 - Additional claim data
 - Data in the DEBTOR table
 - Consumer data
 - Data in the INFINITY table
 - Supplemental Claim Data

Preserve Configuration

- Vertican-provided Preserve files
 - Saved in F:\CLSINC\PRESERVE
- Naming convention
 - Saved in F:\CLSINC\CUSTOM
- Preserve_EDI_TYPE.txt
 - e.g. Preserve_TRAK.tst,
 - Preserve_CIT13.txt

CODE	STANDARD	CODE2	STANDARD2
AACA	AACA- New Claims (RMS)	LATITUDE	Latitude AIM Import
ACCURINT	Accurint Tentative EDI	LEXNEXA	LexisNexis- Address Import
AIFB	Citibank AIF-B	LEXNEXB	LexisNexis- Bankruptcy Import
CIT13	Citibank (V3)	LEXNEXC	LexisNexis- CSV Import
CM EDI	Collection-Master EDI Standard	NCO	eRecoverEase Legal Interface (NCO)
CMvX	Collection-Master vExchange Standard	NCODE	NCO Data Exchange (NCode)
DCSC	RMS- Daimler/Chrysler USA	OMGA	Capital One Omega
DISCOVER2	Discover- CR-Titanium Placement	RMS	RMS - Receive New Claims [Format A]
EXPERIAN	Experian Claim Type Import	SFGAG	Resurgent Capital Services (Old)
FORDB	Ford RMS Format B	TFS-RMS	Target Financial Services
GENERAL	General EDI - User defined	TOYOTA	Toyota - RMS
GE-RMS	RMS - GE	TRAK	TRAKAmerica
HRSC	RMS-Household Finance	YGC	YGCv3.3

Special CMvX Considerations

- Set EDI Type to “CMvX”
 - F:\CLSINC\CUSTOM\PRESERVE_CMvX.txt
 - Sort Code may be set for the client
 - e.g., TRAK, YGC, AIFB



How to Preserve

- In the Preserve_EDI_TYPE.txt
 - Comments supported
 - Anything after an exclamation point is considered a comment
 - Section Headings
 - [MASTER]
 - [EXTRA]
 - [DEBTOR]
 - [INFINITY]

How to Preserve

- Preserve all fields in all tables

```
Preserve_Discover2.txt
1 ! Table is identified by bracketed section
2 ! list fields to preserved - one per line after the table identifier
3 ! tables and fields are case insensitive
4 ! using an * (asterisk) in a particular section identifies that ALL
5 ! lines starting with an exclamation mark are comments
6 [Debtor]
7 *
8 [Master]
9 *
10 [Infinity]
11 *
12
```

Preserve Specific Fields

```
Preserve_Discover2.txt
1 ! Table is identified by bracketed section
2 ! List fields to preserved - one per line
3 ! after the table identifier. The field
4 ! names are case insensitive.
5 ! Asterisks indicates preserving
6 ! all fields in that table.
7 ! Exclamation marks indicate comments.
8 !
9 [Debtor]
10 Street..
11 Street2..
12 City..
13 State..
14 Zip.
15 !
16 [Master]
17 JMT_DATE
18 !
19 [Infinity]
20 *Intrest..
21 *IntREfD..
22 *InRteCd.
```

Preserve and Redirect Data to Notes

- Use “Notes_Only.*field name*” to direct data to Paperless Notes

```
PRESERVE_OMEGA.TXT
1 [MASTER]
2 Notes_Only.comm
3 Notes_Only.sfee
4 [DEBTOR]
5 Notes_Only.NAME
6 Notes_Only.ALIAS
7 Notes_Only.STREET2
8 Notes_Only.CITY
9 Notes_Only.ST
10 Notes_Only.ZIP
11 Notes_Only.EMAIL
12 Notes_Only.HOME
13 Notes_Only.SAL
14 [INFINITY]
15 Notes_Only.*001AAAd
16 Notes_Only.*001AACS
17 Notes_Only.*001AAEm
18 Notes_Only.*001AAF#
19 Notes_Only.*001AAF2
20 Notes_Only.*001AAFN
21 Notes_Only.*001AAHp
22 Notes_Only.*001AAK#
23 Notes_Only.*001AANm
```

Configuration That Does Cool Stuff

- Use Document Management [1-7] for:
 - Add a Diary Code
 - Special Diary Comment available
 - Update Status Code 1
 - Update Status Date 1
 - Update Status Code 2
 - Update Status Date 2
 - Remove Diary Codes
 - [F7] Advanced



Other Resources For the DTP Crowd

- DTP-Related Masterminds
 - CM-EDI
 - CMvX
 - Preserve
- Future DTP-Related Masterminds
 - DTP Automation
 - DTP Field Level Events (eFLEs)

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