

# vExchange Analytics Updates and News

Presented by Joe Cross



vExchange®

 **The Mastermind Series**

Presented by



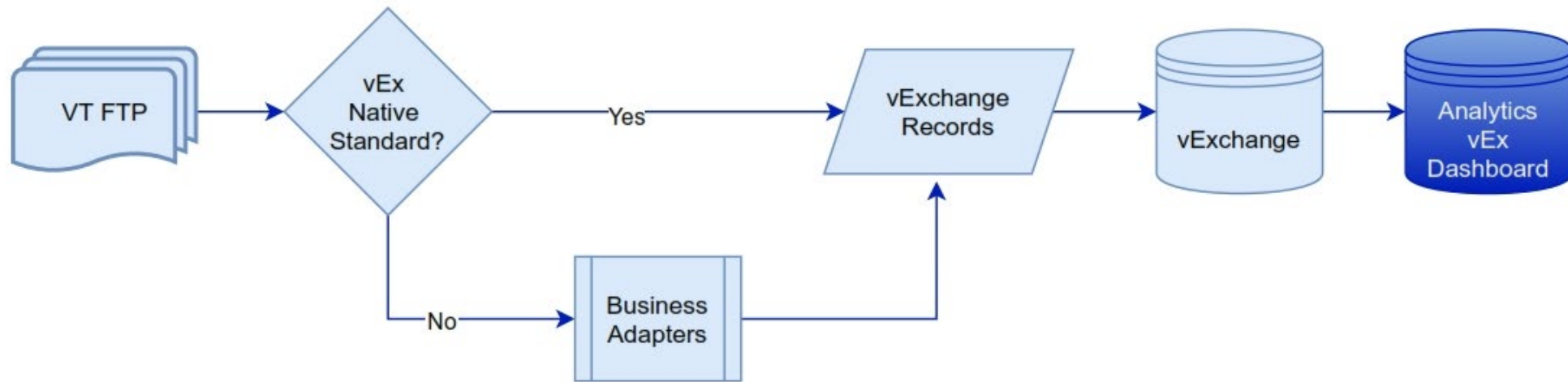
# Today's Agenda

- vExchange Analytics Overview
- What's new in the Orion release?
- Export Updates
- Roadmap Review
- Q&A

# Dashboard Overview

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

# Data Flow



# Account Search

The screenshot displays the vExchange Analytics interface. On the left, a blue sidebar contains navigation options: 'Dashboard' (1), 'Placements' (2), and 'General Reports' (3). The main content area features a blue header with a menu icon and 'My Account'. Below the header, the 'Dashboard' section includes a welcome message and a 'View Account Details' section. This section contains a search field (4) with a dropdown menu showing 'Sender Internal File Number' and a text input field with the placeholder 'Enter an account number to view claim details'. A yellow 'Search' button is positioned to the right of the input field.

# 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

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### 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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# vExchange Rejection Types

## Formatting rejections (aka pre-processor)

TXT file in FTP Rejections folder

Fix formatting errors

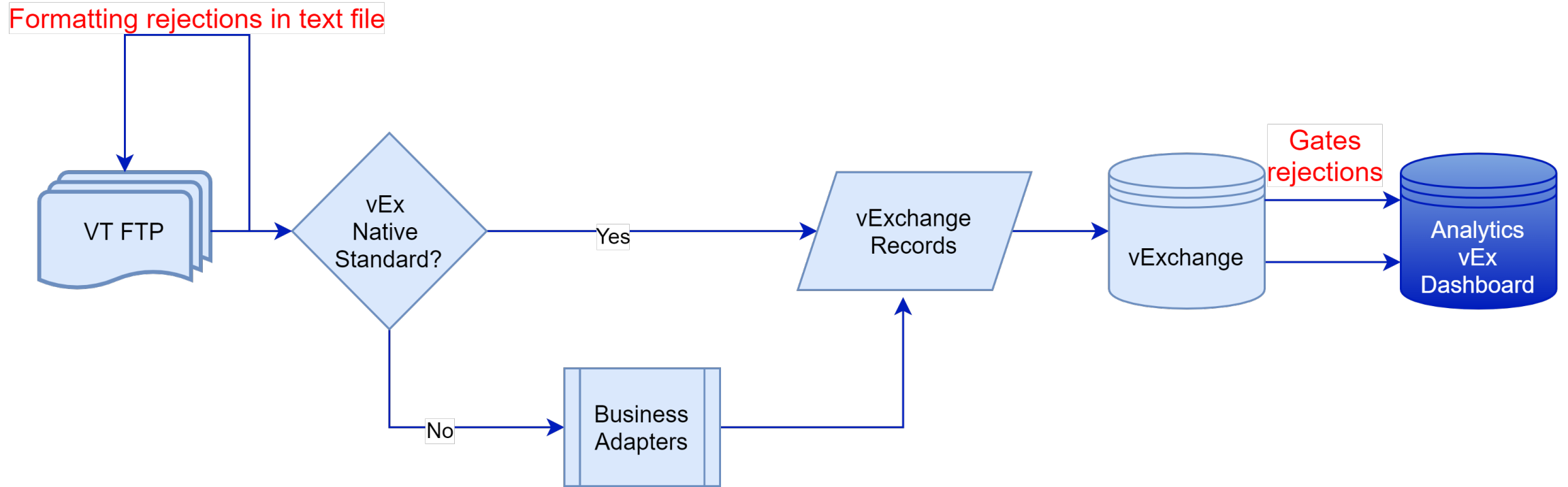
## Sender Gate rejections

Available in Dashboard

New/different data uploaded will automatically remediate

Certain gate rejections only remediated manually by sender

# Rejection Flow





# 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

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

3

Category	Rule	Forwarder	Receiver	Record	Description	First Rejection Date	Remediation Date	Report Name
Operational	<a href="#">80</a>			2405	Active Temp Hardship aging- Firm sent Temporary Hardship with no Temporary Hardship ended code received	07-06-2021		<a href="#">Compliance - Supplemental - Hardship - Exceptions</a>
Operational	<a href="#">79</a>			2402	Firm sent Temporary Hardship status code with no Temporary Hardship ended status code and Firm sent Collection Letter and/or Settlement Letter code and/or Right Party Contact code with Payment Plan code and/or Promise Settle in Full and/or Promise Pay in Full and/or Promise to Pay and/or payment with a positive gross payment amount	05-20-2021		<a href="#">Compliance - Supplemental - Hardship - Exceptions</a>
Financial	<a href="#">14</a>			2303	Cost information sent with File Suit code is missing suit information or Suit Filed or Suit Pending code	11-25-2020	11-25-2020	<a href="#">Financials - Cost - Exceptions</a>
Affidavit	<a href="#">81</a>			1410	Client sent Affidavit request received by client, Affidavit sent to Firm, or Affidavit Error Description code to Firm	10-22-2020		<a href="#">Affidavit - Monitoring</a>
Inventory	<a href="#">27</a>			RM_MCM	Firm did not send Placement Acknowledged code within 5 days of placement	10-08-2020	10-09-2020	<a href="#">Inventory - Placement Not Acknowledged</a>

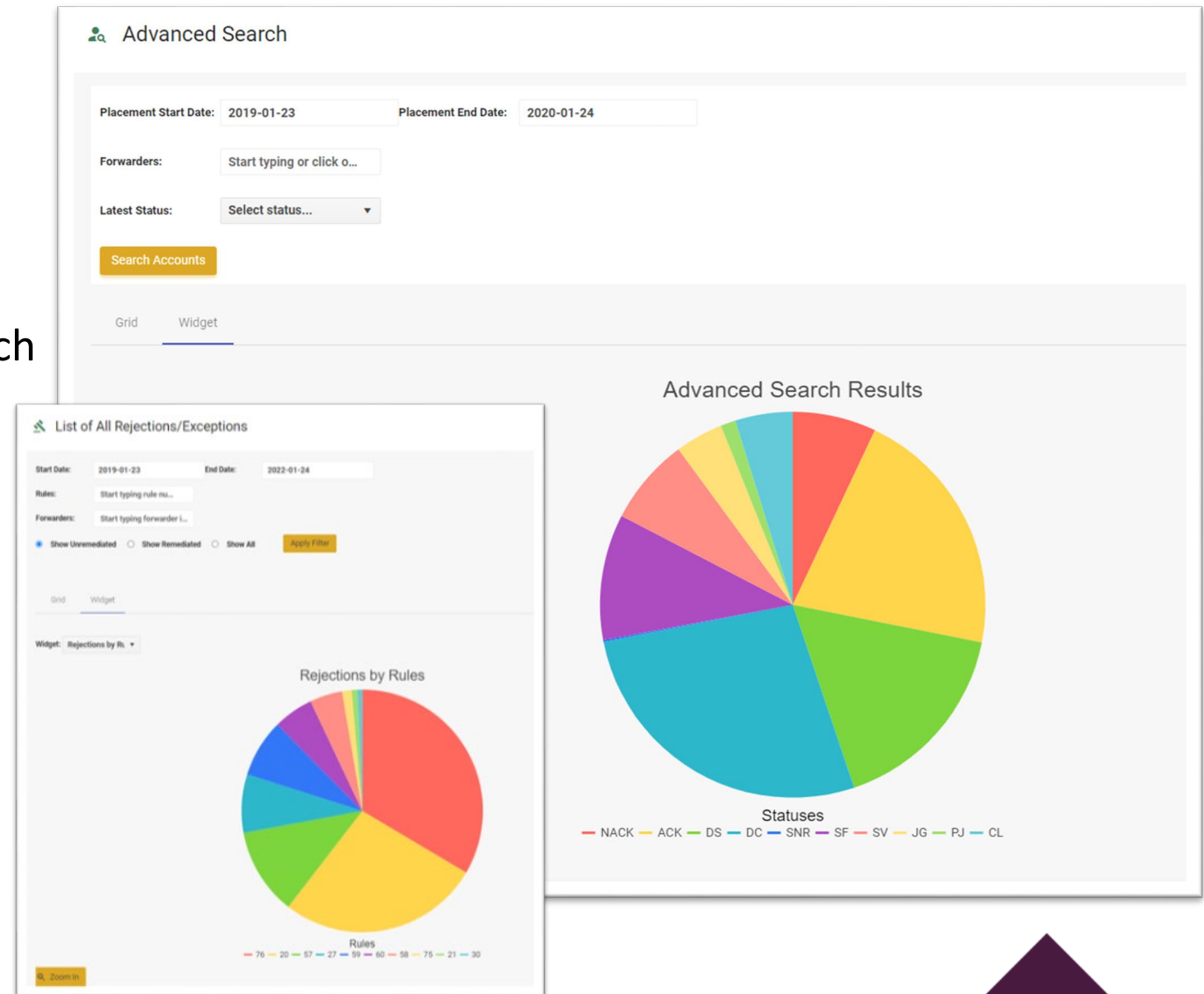
⏪ ⏩ 1 ⏪ ⏩ 10 items per page 1 - 5 of 5 items

# What's New?

- You can now visualize your "Advanced Search" and All Rejections results
- We are adding enhancements to the Zoom view
- We completely overhauled the Export All feature

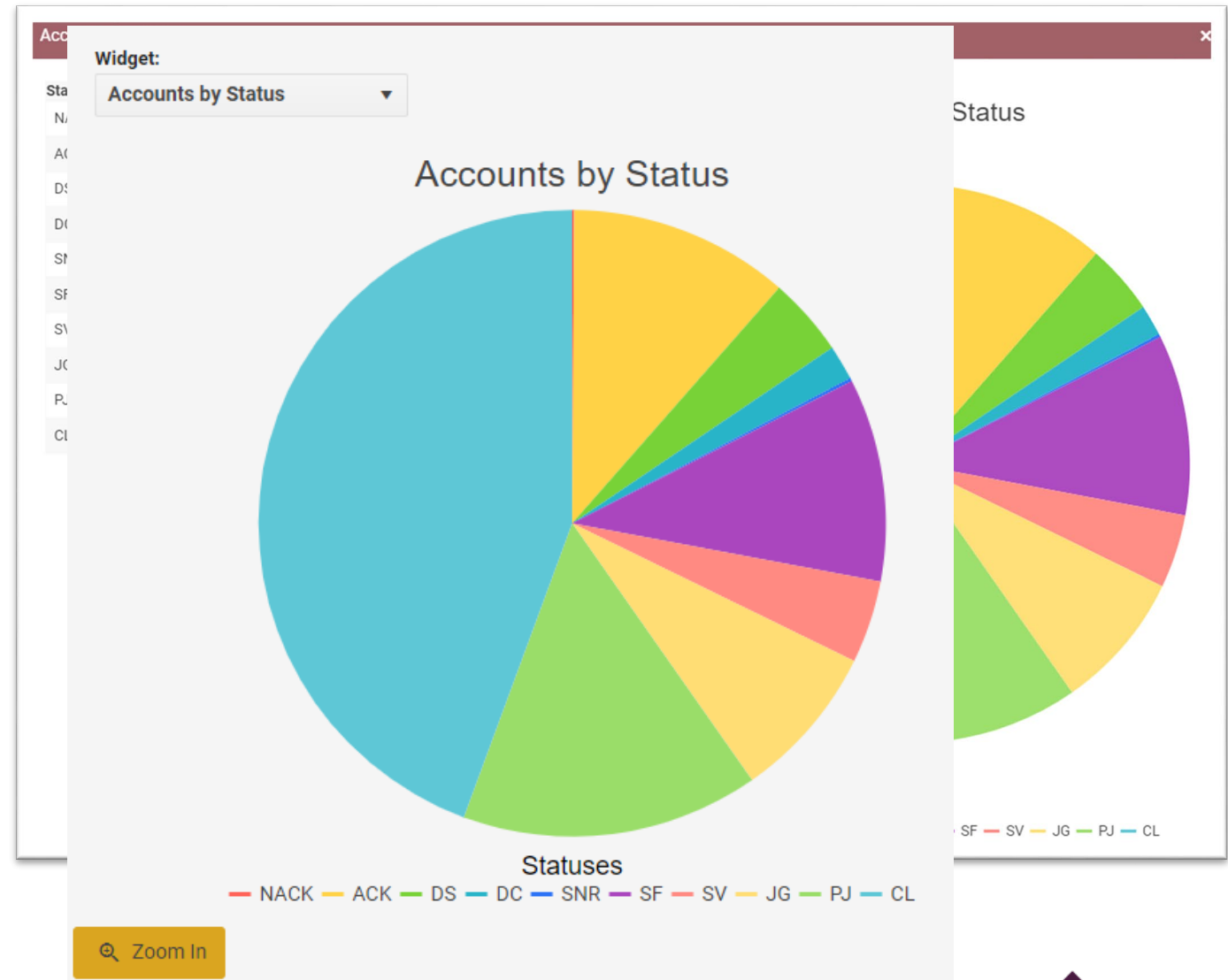
# New Visualizations

- Added to Advanced Search and All Rejections
- Dynamically updates based on your search
- Hovertext shows another level of detail



# Data Tables

- Click "Zoom In" to see all of the underlying data without hovering
- Also shows relative percentages
- Easy to copy/paste into other reports



# Export Changes

- Reasons behind decision, constraints
- Export Visible is for small exports to Excel
- CSV is for large data sets that may not work in Excel
- Walkthrough of opening a CSV file

<https://vertican.tech/vexchange/dashboard-help/release-notes/how-to-open-exported-csv-files-in-excel/>

# Export Survey

## Goals:

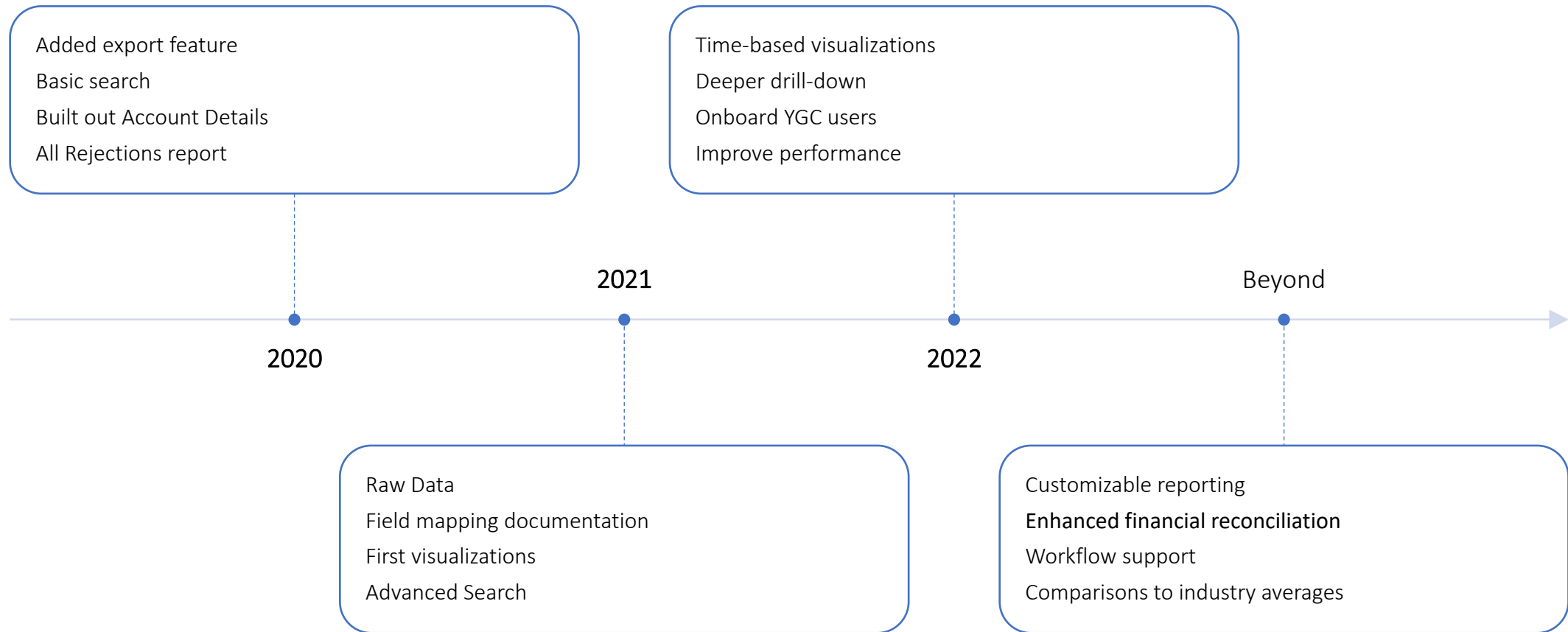
- Better tailor our export features to meet your workflows.
- Provide tools and data, within vExchange Analytics, to minimize the need for other tools.

Please provide your feedback here: <https://www.surveymonkey.com/r/GFFDBD6>

## Ideas for enhancements:

- Increase page size to allow larger "Export Visible"
- Schedule recurring exports/reports available for download via web
- Support more formats (JSON, XML, Word, PDF)

# Roadmap



# Questions



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

[IMPLEMENTATIONS@VERTICAN.COM](mailto:IMPLEMENTATIONS@VERTICAN.COM)



# More Resources

- Recent PDRs
  - [How to Open Exported CSV Files in Excel](#)
  - Dashboard Search Problems Caused by Blocked Pop-ups
  - [Refresh Your Browser Cache](#)
- Online Help - <https://vertican.tech/vexchange/dashboard-help/>