Using the Queue System in Collection-Master

Presented by Luis Gomez

The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

Resources

- vConnect Article on Queues:
  - https://vertican.tech/using-the-queue-system-in-collection-master/

- Current vConnect Articles:
  - https://www.vertican.com/vconnect/#tips

Using the Queue System in Collection-Master

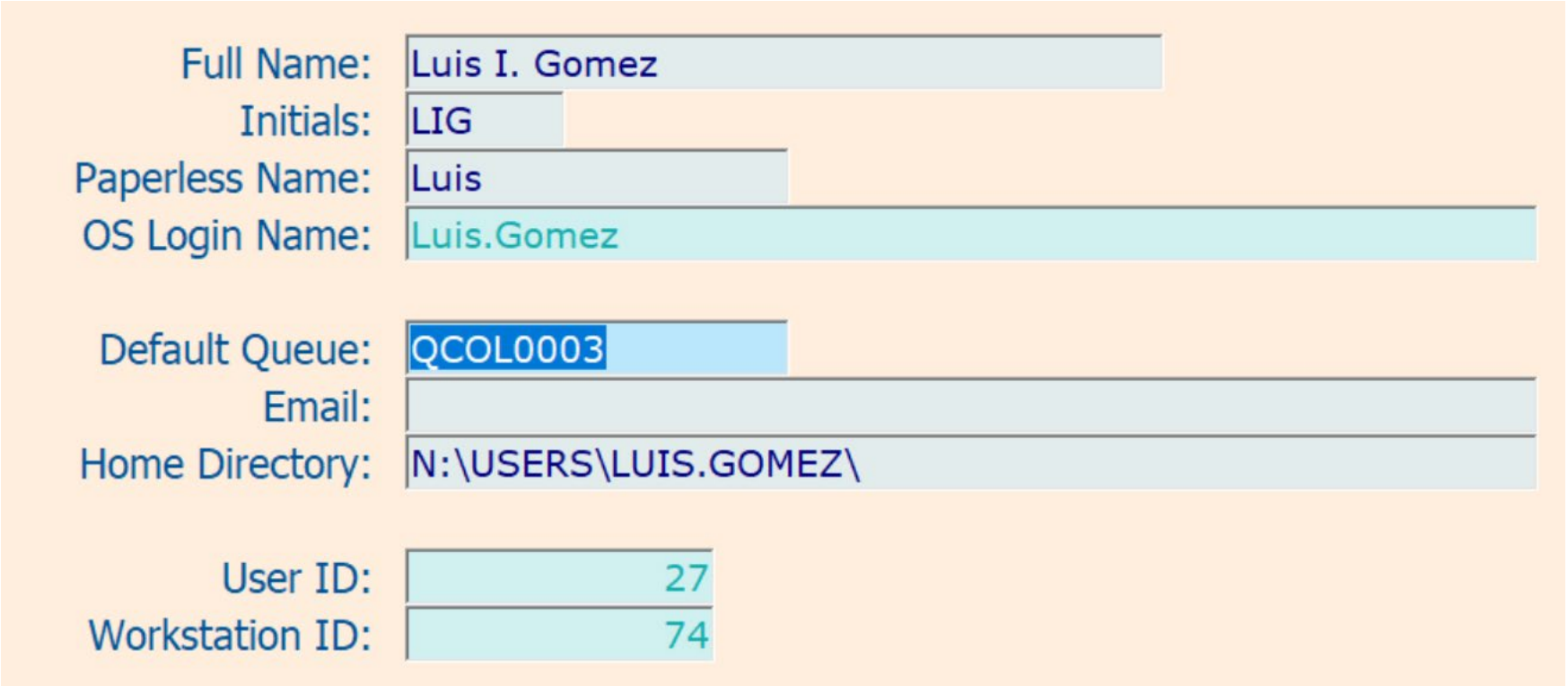
- Queue system – Manage each users' responsibilities
- It is the WHO on Collection-Master
  - Who is assigned to each claim
  - Who is responsible for each task today and beyond
- Every user should be assigned a Queue
- Works in tandem with the Diary System

Automatic Queues

- QID##### - User ID
- QF##### - Forwarder
- QV##### - Venue
- QSH#### - Sheriff
- QCO#### - Co-Counsel
- QCOL#### - Collector
- QPARA### - Paralegal
- QATTY### - Attorney
- QSALE### - Sales Person

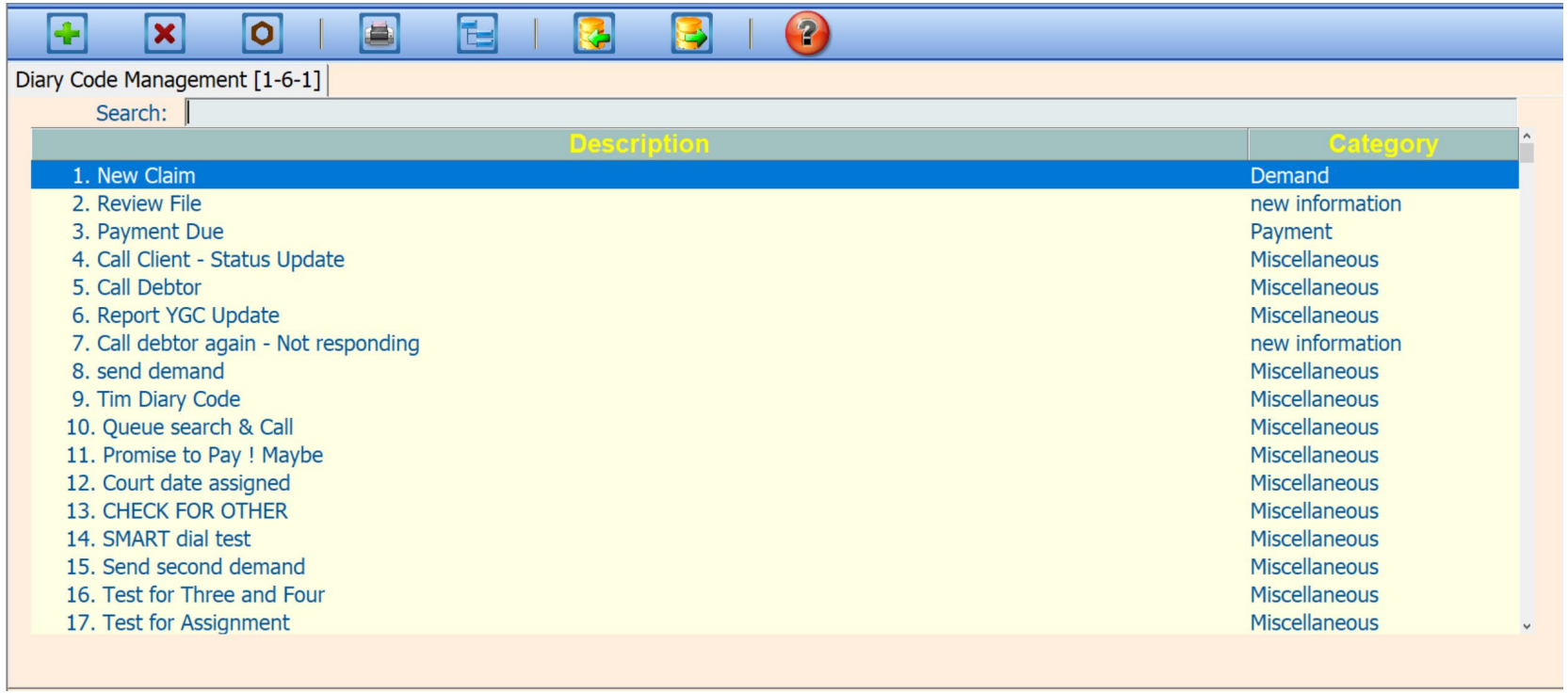
Assign a Queue to an Individual

- [4-1-S-2-2] – Personal Information



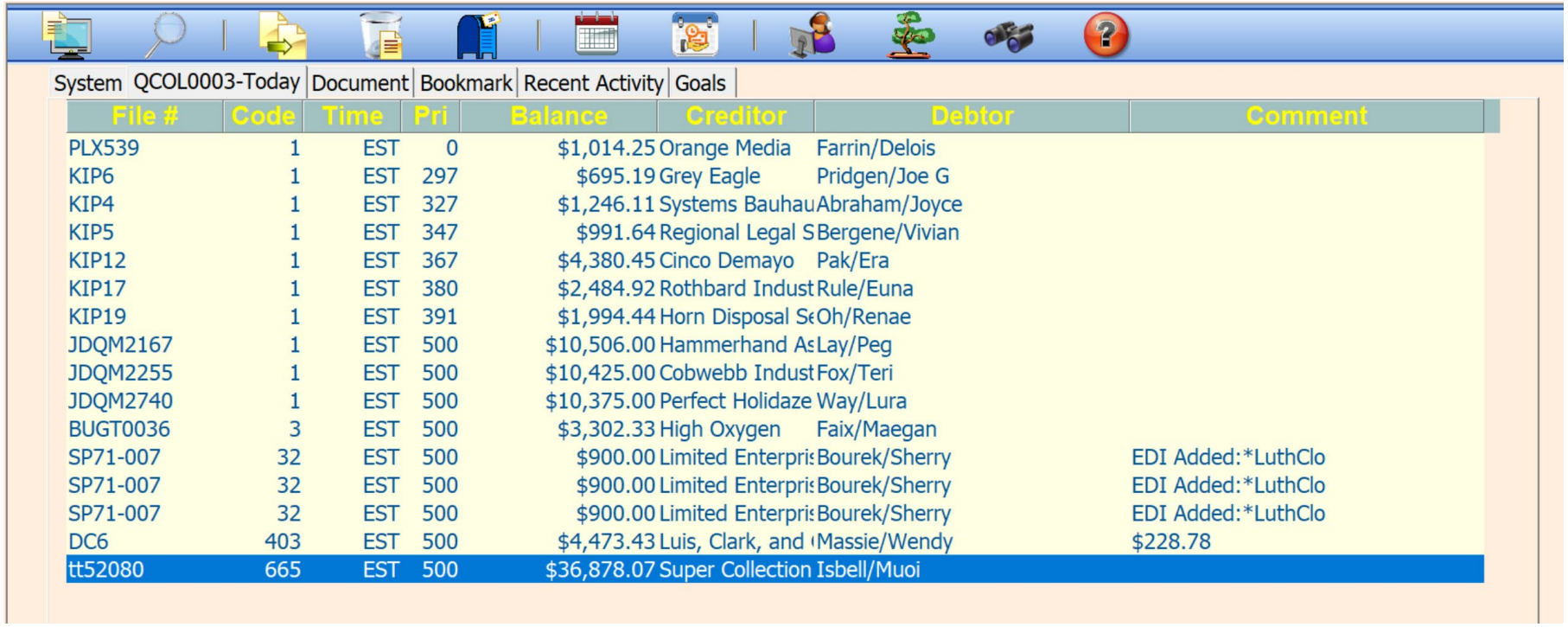
Diary Code Management

- Diary Code Management [1-6-1]



TODAY’s QUEUE

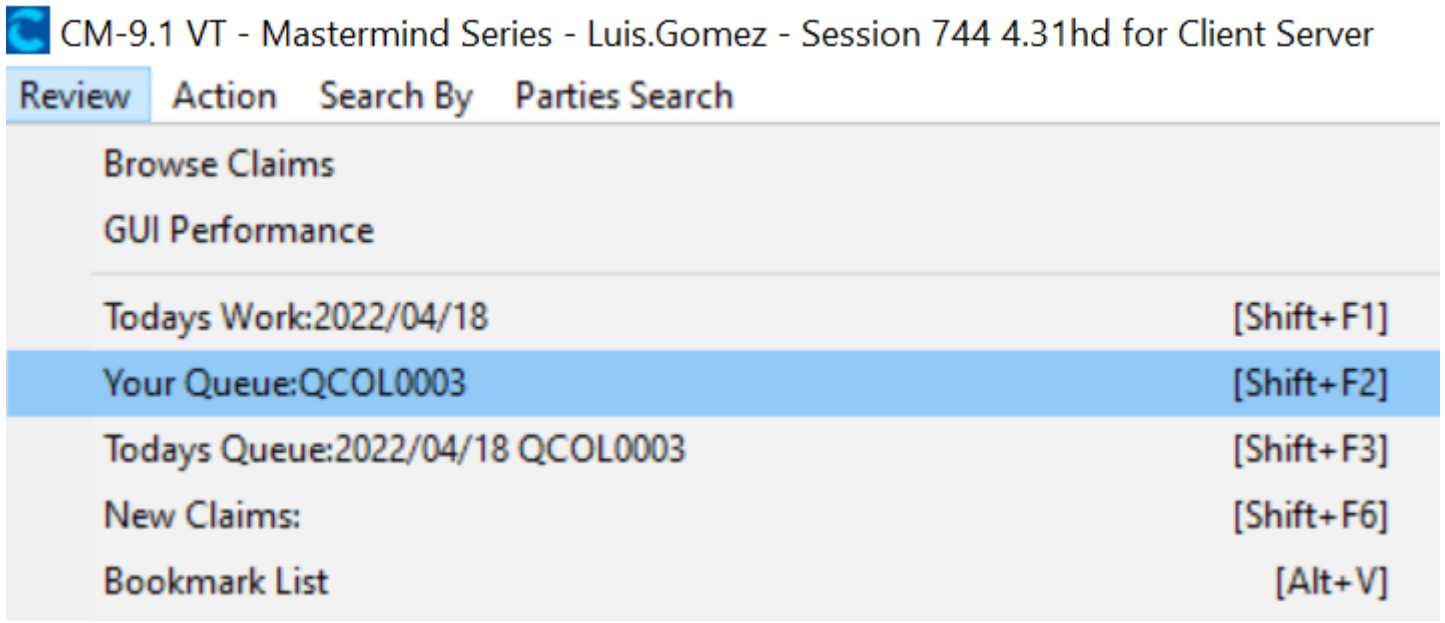
- TODAY’s QUEUE – (Shift F3) - Diary entries in your queue for today



File #	Code	Time	Pri	Balance	Creditor	Debtor	Comment
PLX539	1	EST	0	$1,014.25	Orange Media	Farrin/Delois	
KIP6	1	EST	297	$695.19	Grey Eagle	Pridgen/Joe G	
KIP4	1	EST	327	$1,246.11	Systems Bauhau	Abraham/Joyce	
KIP5	1	EST	347	$991.64	Regional Legal S	Bergene/Vivian	
KIP12	1	EST	367	$4,380.45	Cinco Demayo	Pak/Era	
KIP17	1	EST	380	$2,484.92	Rothbard Indust	Rule/Euna	
KIP19	1	EST	391	$1,994.44	Horn Disposal Se	Oh/Renae	
JDQM2167	1	EST	500	$10,506.00	Hammerhand As	Lay/Peg	
JDQM2255	1	EST	500	$10,425.00	Cobwebb Indust	Fox/Teri	
JDQM2740	1	EST	500	$10,375.00	Perfect Holidaze	Way/Lura	
BUGT0036	3	EST	500	$3,302.33	High Oxygen	Faix/Maegan	
SP71-007	32	EST	500	$900.00	Limited Enterpris	Bourek/Sherry	EDI Added:*LuthClo
SP71-007	32	EST	500	$900.00	Limited Enterpris	Bourek/Sherry	EDI Added:*LuthClo
SP71-007	32	EST	500	$900.00	Limited Enterpris	Bourek/Sherry	EDI Added:*LuthClo
DC6	403	EST	500	$4,473.43	Luis, Clark, and	Massie/Wendy	$228.78
tt52080	665	EST	500	$36,878.07	Super Collection	Isbell/Muoi	

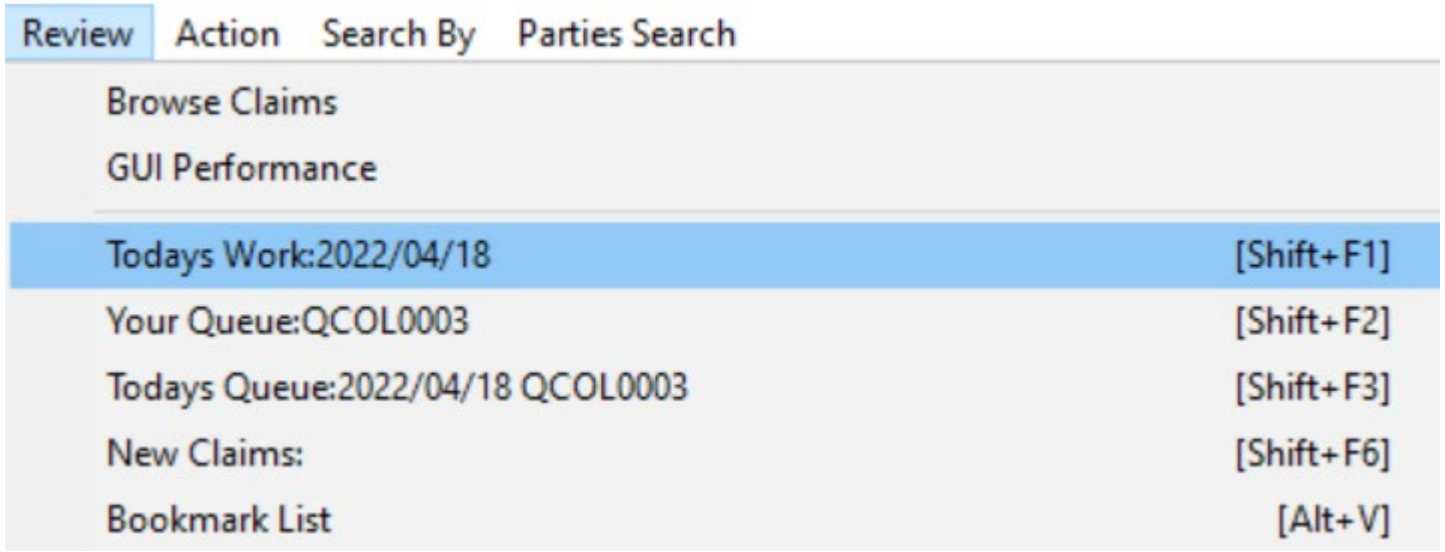
My Queue

- MY QUEUE – (Shift F2) All Claims for your individual queue

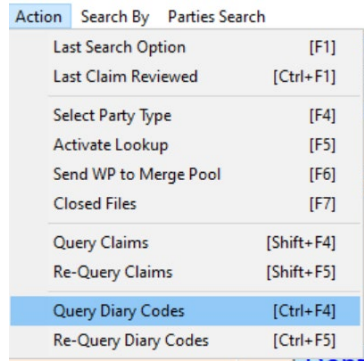


TODAYS’s WORK

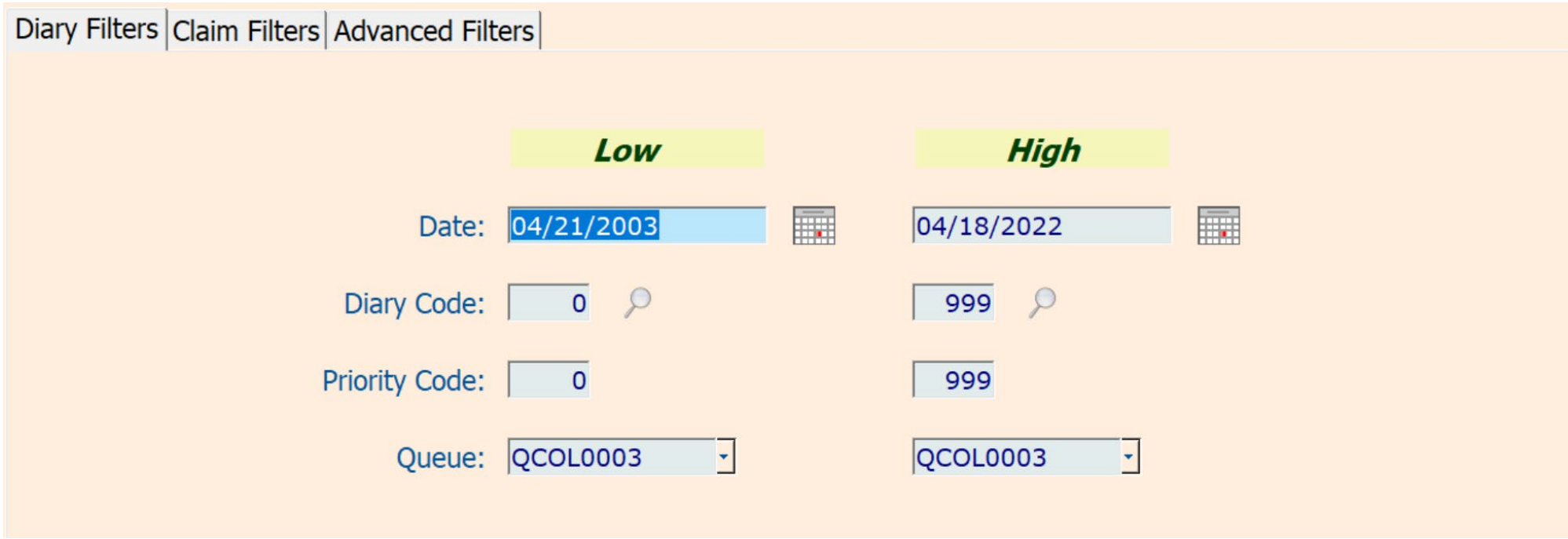
- TODAYS’s WORK (Company Wide) – Shift-F1 – All Claims for today



Query Diary Codes



- Query Diary Codes – [Ctrl+F4]
  - Find Claims using Advanced Diary Filters



Using the QUEUE System in Collection-Master

- When filtering by Diary, include Queue Range to improve performance
- Diary Report – [3-3-2]
- FNSelect (Paperless, 3-2 Report & Others)
  - Include Diary Filters to additionally filter search

Group/Security – Policies

- MAST:ACCESS BY DIARY
- MAST:DEL OTHER’s DIA
- DIARY:RPT MY QUEUE [3-3-2]
- MAST:DIA DEL OVERRID
- MAST:DIARYLOG NOTES
- MAST:DIA_DISPLAY_TZ
- MAST:NODIARY & / WP
- MAST:REV DIARY TODAY
- MAST:REV OWN QUEUE
- MAST:Review by Diary

- MAST:ACCESS BY DIARY
  - Queue must be assigned using Naming Scheme (QCOLL#01)
  - Claim Ownership dictates results
  - [Collector/Paralegal/Sales Person/Attorney] or [Queue]
    - Set to “N” to prevent diary codes belonging to other users from being viewed from claim review screen.

- MAST:DEL OTHER'S DIARY
  - Queue must be assigned using Naming Scheme (QCOLL#01)
  - Diary Code Ownership dictates results
  - Set to “N” to prevent user from deleting other people’s diary codes

- DIARY:RPT MY QUEUE [3-3-2]
  - Allow: Access to all queues in addition to my queue
  - Set to “N” to Restrict Access
- FNSelect Diary Filter:
  Your Queue will be the default, and make the field Read Only.

- MAST:DIA DEL OVERRID
  - **‘Y’** = By default, the user is restricted from deleting matching or overdue Diary Codes based on the security defined in the diary code.
  - ‘**N**’ = Removes the restriction of deleting matching or overdue Diary Codes based on the security defined in the diary code.

- MAST:DIARYLOG NOTES
  - '**Y**' = Logging into the Paperless occurs with a 20-character diary description and Diary add/delete dates will not be included
  - '**N**' = Logging into the Paperless occurs with a 9-character diary description and the appropriate Diary add/delete dates will be included.

MAST:DIA_DISPLAY_TZ

- MAST:DIA_DISPLAY_TZ
  - '**Y**' = Display all claims in the diary list regardless of time zone [DEFAULT]
  - '**N**' = Hide any claim which falls outside time zone

- MAST:NODIARY & / WP
  - '**Y**' = Allows user to exit claim without ordering a document or modifying/adding a Diary Code
  - '**N**' = Prevents user from leaving a claim without ordering a document or modifying/adding a Diary Code
  - **Exceptions**: This security policy only affects existing claims. It has no effect on new claims. For example, this policy will not let you exit an existing claim that does not have a Diary Code, but if you just entered the claim via [1-3-1], it doesn't matter how the policy is set, you can still exit the claim.

- MAST:REV DIARY TODAY
  - **Y**’ = Allow user to review today's work by Diary Code
  - ‘**N**’ = Set policy to N to prevent users from reviewing today's work by Diary Code

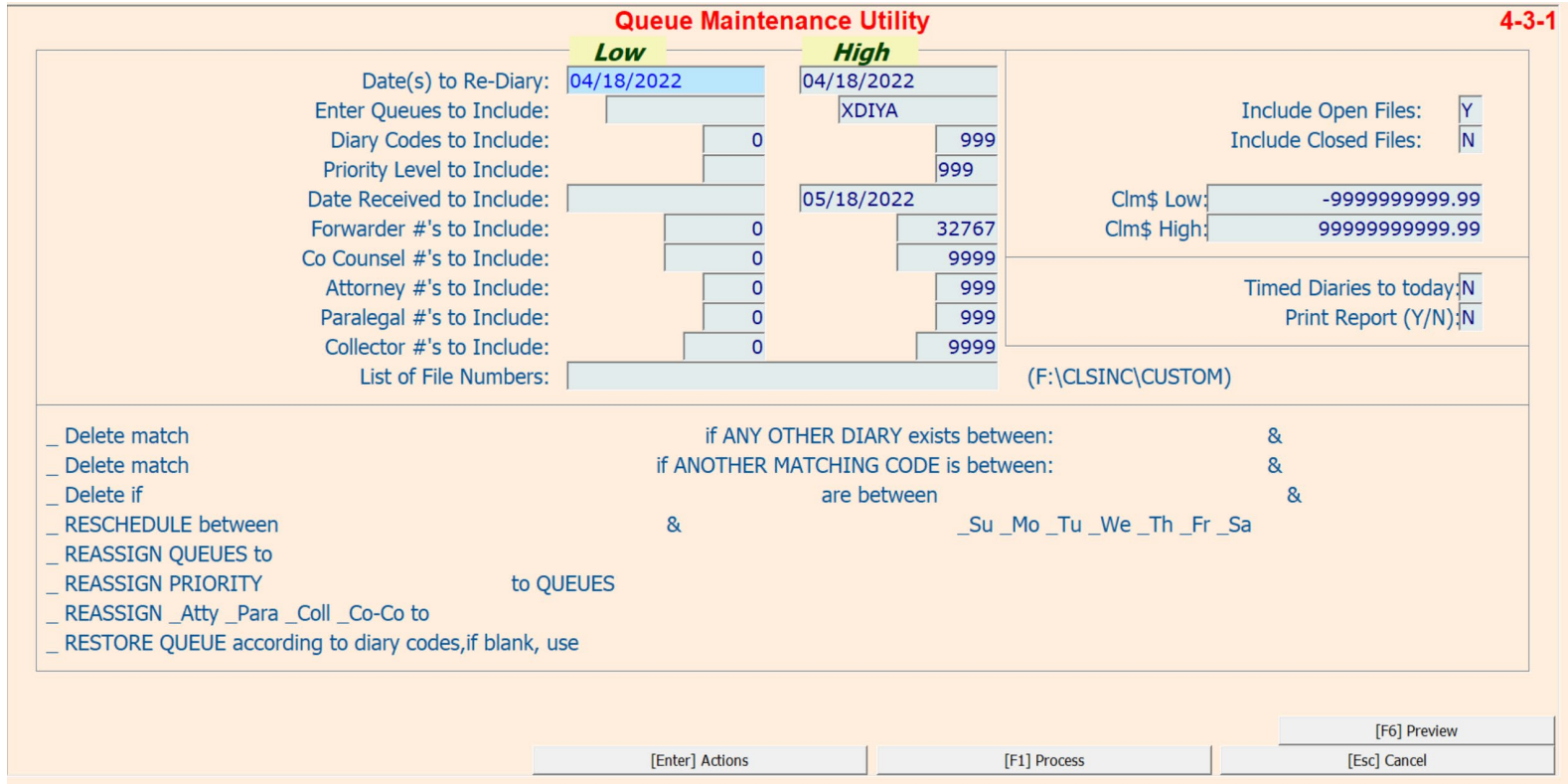
MAST:REV OWN QUEUE

- MAST:REV OWN QUEUE
  - '**Y**' = Allow users to review claims by way of their own diary queue
  - '**N**' = Set policy to N to prevent users from reviewing claims by using their own diary queue

- MAST:Review by Diary
  - '**Y**' = Does not inhibit Diary search by diary functionality from the Claim Review screen
  - '**N**' = Set policy to N to prevent users from searching by Diary from the Claim Review screen

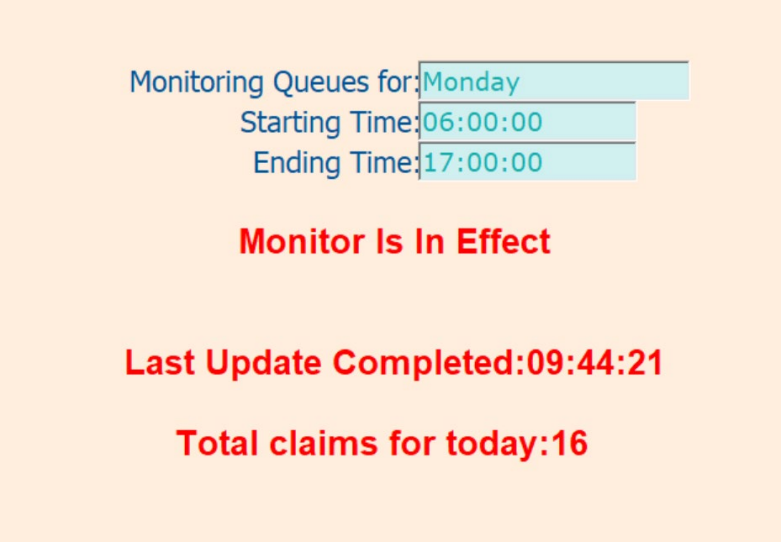
Queue Maintenance

- Queue Maintenance – 4-3-1



Queue Monitor

- Queue Monitor [4-3-S-1]
  - Fun all the time in addition to performing EDI Automation, it builds a snapshot by Queue
  - Use Queue Watch [4-3-2] – Review # of entries per queue over time.



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