

# Using the Queue System in Collection-Master

Presented by Luis Gomez



# 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

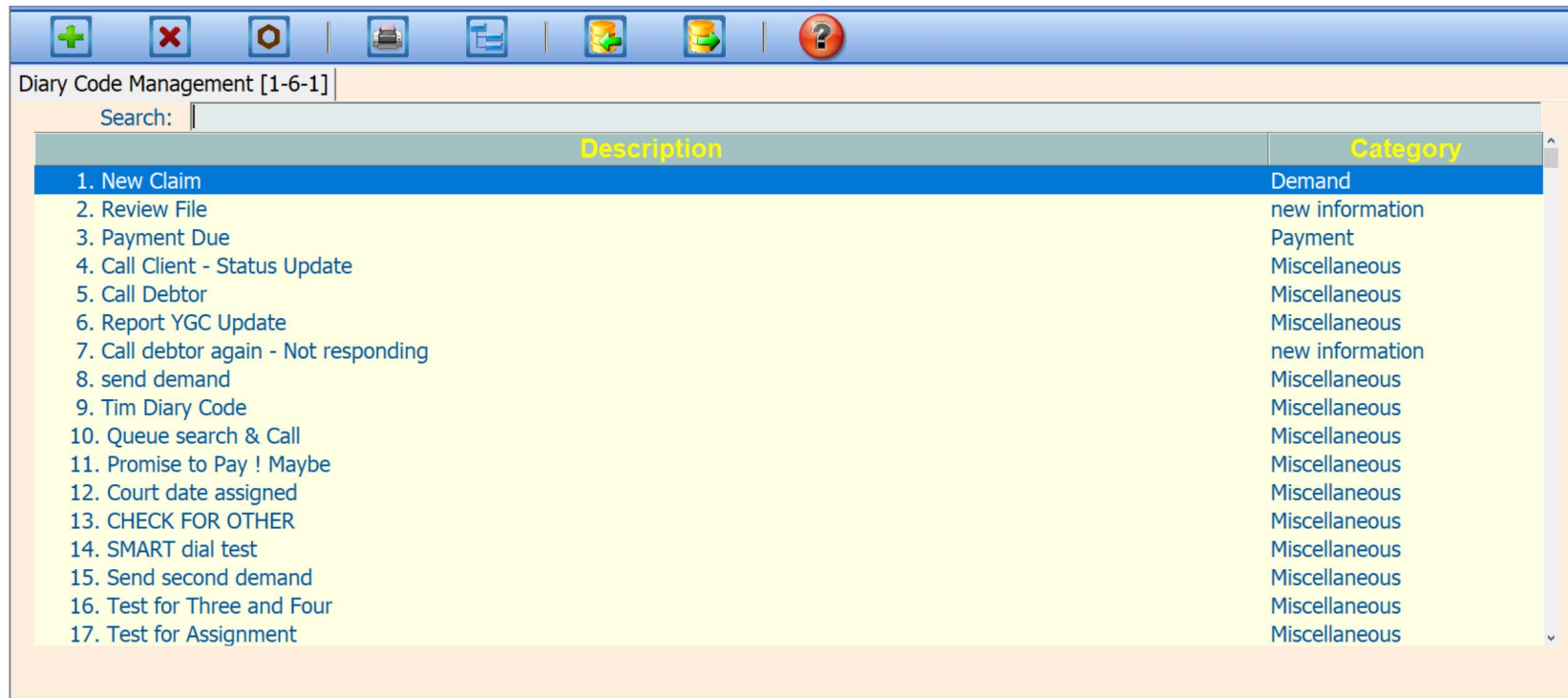
# Assign a Queue to an Individual

- [4-1-S-2-2] – Personal Information

Full Name:	Luis I. Gomez
Initials:	LIG
Paperless Name:	Luis
OS Login Name:	Luis.Gomez
Default Queue:	QCOL0003
Email:	
Home Directory:	N:\USERS\LUIS.GOMEZ\
User ID:	27
Workstation ID:	74

# Diary Code Management

- Diary Code Management [1-6-1]



Description	Category
1. New Claim	Demand
2. Review File	new information
3. Payment Due	Payment
4. Call Client - Status Update	Miscellaneous
5. Call Debtor	Miscellaneous
6. Report YGC Update	Miscellaneous
7. Call debtor again - Not responding	new information
8. send demand	Miscellaneous
9. Tim Diary Code	Miscellaneous
10. Queue search & Call	Miscellaneous
11. Promise to Pay ! Maybe	Miscellaneous
12. Court date assigned	Miscellaneous
13. CHECK FOR OTHER	Miscellaneous
14. SMART dial test	Miscellaneous
15. Send second demand	Miscellaneous
16. Test for Three and Four	Miscellaneous
17. Test for Assignment	Miscellaneous

# 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 S	Oh/Renae	
JDQM2167	1	EST	500	\$10,506.00	Hammerhand A	Lay/Peg	
JDQM2255	1	EST	500	\$10,425.00	Cobwebb Indust	Fox/Teri	
JDQM2740	1	EST	500	\$10,375.00	Perfect Holiday	Way/Lura	
BUGT0036	3	EST	500	\$3,302.33	High Oxygen	Faix/Maegan	
SP71-007	32	EST	500	\$900.00	Limited Enterpri	Bourek/Sherry	EDI Added:*LuthClo
SP71-007	32	EST	500	\$900.00	Limited Enterpri	Bourek/Sherry	EDI Added:*LuthClo
SP71-007	32	EST	500	\$900.00	Limited Enterpri	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

CM-9.1 VT - Mastermind Series - Luis.Gomez - Session 744 4.31hd for Client Server

Review	Action	Search By	Parties Search
Browse Claims			
GUI Performance			
<hr/>			
Todays Work:2022/04/18			[Shift+F1]
Your Queue:QCOL0003			[Shift+F2]
Todays Queue:2022/04/18 QCOL0003			[Shift+F3]
New Claims:			[Shift+F6]
Bookmark List			[Alt+V]



# TODAYS'S WORK

- TODAY'S WORK (Company Wide) – Shift-F1 – All Claims for today

Review	Action	Search By	Parties Search
	Browse Claims		
	GUI Performance		
	Todays Work:2022/04/18		[Shift+F1]
	Your Queue:QCOL0003		[Shift+F2]
	Todays Queue:2022/04/18 QCOL0003		[Shift+F3]
	New Claims:		[Shift+F6]
	Bookmark List		[Alt+V]

Action	Search By	Parties Search
Last Search Option		[F1]
Last Claim Reviewed		[Ctrl+F1]
Select Party Type		[F4]
Activate Lookup		[F5]
Send WP to Merge Pool		[F6]
Closed Files		[F7]
Query Claims		[Shift+F4]
Re-Query Claims		[Shift+F5]
Query Diary Codes		[Ctrl+F4]
Re-Query Diary Codes		[Ctrl+F5]

# Query Diary Codes

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

Diary Filters
Claim Filters
Advanced Filters

**Low**

Date:

Diary Code:

Priority Code:

Queue:

**High**

Date:

Diary Code:

Priority Code:

Queue:

# 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

- 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

- 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]

- 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

- 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

- 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

- 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

- 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

- 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 Maintenance Utility** 4-3-1

	Low	High	
Date(s) to Re-Diary:	04/18/2022	04/18/2022	
Enter Queues to Include:		XDIYA	Include Open Files: <input type="checkbox"/> Y
Diary Codes to Include:	0	999	Include Closed Files: <input type="checkbox"/> N
Priority Level to Include:		999	
Date Received to Include:		05/18/2022	Clm\$ Low: -9999999999.99
Forwarder #'s to Include:	0	32767	Clm\$ High: 9999999999.99
Co Counsel #'s to Include:	0	9999	
Attorney #'s to Include:	0	999	Timed Diaries to today: <input type="checkbox"/> N
Paralegal #'s to Include:	0	999	Print Report (Y/N): <input type="checkbox"/> N
Collector #'s to Include:	0	9999	
List of File Numbers:			(F:\CLSINC\CUSTOM)

_ Delete match _ Delete match _ Delete if _ RESCHEDULE between _ REASSIGN QUEUES to _ REASSIGN PRIORITY to QUEUES _ REASSIGN _Atty _Para _Coll _Co-Co to _ RESTORE QUEUE according to diary codes,if blank, use	if ANY OTHER DIARY exists between: & if ANOTHER MATCHING CODE is between: & are between & & _Su _Mo _Tu _We _Th _Fr _Sa	
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[F6] Preview  
[Enter] Actions    [F1] Process    [Esc] Cancel

# 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.

Monitoring Queues for: Monday  
Starting Time: 06:00:00  
Ending Time: 17:00:00

**Monitor Is In Effect**

**Last Update Completed: 09:44:21**

**Total claims for today: 16**





# The Mastermind Series



To learn about upcoming trainings:

<https://vertican.tech/mastermind/>

To view past trainings:

<https://vimeo.com/vertican/>