Choosing new software requires significant time and money. Ideally, the selection process results in a few options that your business can easily decide between.

Overview

Today's presentation is designed for Collection-Master end-users, attorneys, collectors, IT folks, paralegals, bookkeepers, EDI people... basically the people who are in the trenches using Collection-Master everyday to get their jobs done.

I designed the content of this MMS based on 30+ years working and supporting Collection-Master for hundreds of law firms around the country.

I have been asked to present today because I truly know the major differences between CM and Q-LawE.

The differences that will impact your business and lower your costs to collect...

Nick's Hand-Picked Features

- Contact Management (Para/Atty)

- Document Management (Para/Atty/Collectors/Support)

- Custom Screens (Para/Atty/Support)

- AMR (Attorney Meaningful Review)

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Nick's Hand-Picked Features

- Backend SQL Database (IT)

- PowerBI Reporting (Management)

- Reporting and Query (Support/IT)

- Job Scheduler (Support)

- Workflow Builder (IT)

- DDAS (Data-Driven Automation System) (IT)

- Vendor Import (IT)

Additional factors to consider

- Vertican Technologies' intellectual property for precise data conversion

- Expedited application implementation and reduced project timelines

- Peace of mind through the product transition

10	Introduction to the Project Plan	Review of the project plan and overall process. Define client and VT expectations and requirements.	Vertican PM	04/01/22	1	04/02/22
11	Client Review	Client to provide the rules for what active and closed claims to be converted/ migrated	Client	04/01/22	1	04/02/22
12	Workflow review	Client will provide any diagrams, SOPs or material that explains their current workflow so Vertican can be best prepared for the consultations.	Client	04/01/22	1	04/02/22
13	SQL-SYNC Review	Vertican will confirm if SQL-SYNC is installed in client's system; if it is not an installation will be performed.	Vertican Implementation	04/04/22	1	04/05/22
14	CM Version Review	Vertican will confirm that client is on the most current CM release version. Most current version is required.	Vertican Implementation	04/04/22	1	04/05/22
15	Set up Remote Access to Client's system	Client will create a remote access solution for Vertican staff to work on client's system during conversion process. - Remote Desktop is a solution	Client	04/04/22	1	04/05/22
16	Validate the environment	Vertican will have a meeting with client to confirm the following components: Fileserver SQL Server CM SQL-SYNC Admin Username and Password for SQL-SYNC Admin Username and Password for vMedia	Vertican Implementation	04/05/22	1	04/06/22
17	Client Begins QLawE Subscription	Client purchases a minimum of 5 QLawE users using click to buy on vPortal.	Client	05/01/22	1	05/02/22
18	Installation and setup	Customized to allow as much data from CM to be converted automatically. Some custom tables only used in Q-Law requires setup and config. In addition to a Q-LawE Production, we will also help setup a Test System.	Vertican Implementation	05/02/22	5	05/07/22
19	Consult on SQL server configuration	Client will provide DBA and Vertican will provide consulting to optimize SQL. Client will provide DBA and resources to setup and fine tune the SQL server.	Client	05/02/22	30	06/01/22
20	⊟ Review special data conversion issues with client		Vertican Implementation	05/02/22	30	06/01/22
21	Client code review	Vertican will export all pertinent client code, client name, address, fees information to an XLS file. Vertican will then consult with client on how to fill in all the special settings that QLaw allows.	Vertican Implementation	05/02/22	30	06/01/22
22	Infinity field review	Vertican to run a custom query listing all infinity fields and count for client from client's system.	Vertican Implementation	05/04/22	5	05/09/22
23	Infinity field review	Vertican will provide a list of commonly used infinity fields that will be converted. If client has any non standard use of infinity fields client must provide guidance as to how to map.	Vertican Implementation	05/04/22	5	05/09/22
24	Status code review	Vertican will provide a list of YGC pcodes (*CC: codes) that are used for status codes in QLaw. Client will be required to map their CM status codes to the pcodes (*CC: codes). A spreadsheet will be provided for this mapping. Vertican will review what data sources may be used for this (EDI Matrix Setup)	Vertican Implementation	05/04/22	3	05/07/22
25	Court code review	Vertican will export all pertinent court code, court name, address information to an XLS file. Vertican will then consult with client on how to fill in all the special settings that QLaw allows.	Vertican Implementation	05/04/22	3	05/07/22
26	Cost code review	Vertican will export the cost code settings by court into the QLaw cost code system. Vertican will provide an XLS file for client approval.	Vertican Implementation	05/04/22	3	05/07/22
27	Fee rate review	Vertican will review all the CM commission rates to the equivalent QLaw commission rates, and a conversion matrix will be created.	Vertican Implementation	05/04/22	3	05/07/22
28	Diary code review	Vertican will export the diary codes to QLaw task codes. Vertican will provide an XLS spreadsheet for client approval.	Vertican Implementation	05/04/22	3	05/07/22
29	Document code review	Vertican will run a custom query on the client's system to extract all the vMedia document descriptions. Vertican will provide a QLaw DocID list, the client will be required to map the vMedia document description to the QLaw DocIDs - this is required for future automation.	Vertican Implementation	05/04/22	3	05/07/22
30	User setup review	Vertican will consult with client to review how claims are currently placed with users. The review will include attorney assignment of claims for filing and docket calendar. Paralegals and collectors will be reviewed to be assigned to the QLaw desk. (Debt.att, debt.collect) Client will fill in a QLaw user list that includes all users who will login, their security level and attorney setup.	Vertican Implementation	05/04/22	3	05/07/22
31	Report review	Vertican will consult with client to review commonly used reports and provide equivalent QLaw Reports and Query.	Vertican Implementation	05/10/22	3	05/13/22
32	Custom Directory Requirement review	Vertican will consult with client to review their use of custom remittances, templates. Vertican will demonstrate how standardized remittances are used in QLaw and how check layouts are customized in QLaw.	Vertican Implementation	05/10/22	3	05/13/22