

# PaymentVision Integration In COLLECTION-MASTER

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# PaymentVision: Goals For Today

- Review the Paperless File Enhancements
- Review Security and Compliance
  - No credit card information is stored in Collection-Master
  - Tokens used to communicate between CM and PV
- Review Automation for Processing Scheduled Payments on their Due Date
- Q&A

# PaymentVision: Paperless File

## Call Screen Enhancements – Card Payments

The screenshot displays the 'Call Screen: HL18' window. A red arrow points to a card payment icon in the top toolbar. A 'Card Details' dialog box is open, showing the following information:

**Card Details**

Fileno: HL18

Select Debtor: 1 - MORROW/ALVIN S

Card Number: 5555555555554444 Type: MasterCard

Expiration: Month 05 Year 2023 CVV Code: 123

[Enter] OK [Esc] Cancel [F1] Bank Account Payment

Buttons: [F1] Restart Call Time [F2] End Call [Alt+P] Pause Call Manager Override [Esc] Cancel

Background window details:

- Search: MORROW/ALVIN S
- Family Management Co
- The 23rd Sixth Bank (LATITUDE )
- 7-In-7 Calls: 1
- Contact Information: MORROW/ALVIN S, Spoke With, Telephone: 636/...
- Claim Information: Creditor: MBNA, Orig Creditor: NA, Last Paid Date, Next Pay Date: 07/11
- Summary: 2022, 17338.95, 0.00, 333.15, Credits: 0.00, Total Due: 17672.10

# PaymentVision: Paperless File

## Call Screen Enhancements – ACH Payments

The screenshot displays the PaymentVision software interface. A red arrow points to the 'ACH Payments' icon in the top toolbar. The main window shows a 'Call Screen: HL18' with various call management icons. A 'Bank Account Details' dialog box is open, displaying the following information:

**Bank Account Details**

Fileno: HL18

Select Debtor: 1 - MORROW/ALVIN S

Bank Name: The 23rd Sixth Bank of New Jersey

Routing #: 122199983

Bank: 3

Account #: 93591988633

Type: Checking

Buttons: [Enter] OK, [Esc] Cancel, [F3] Add Bank, [F1] Card Payment

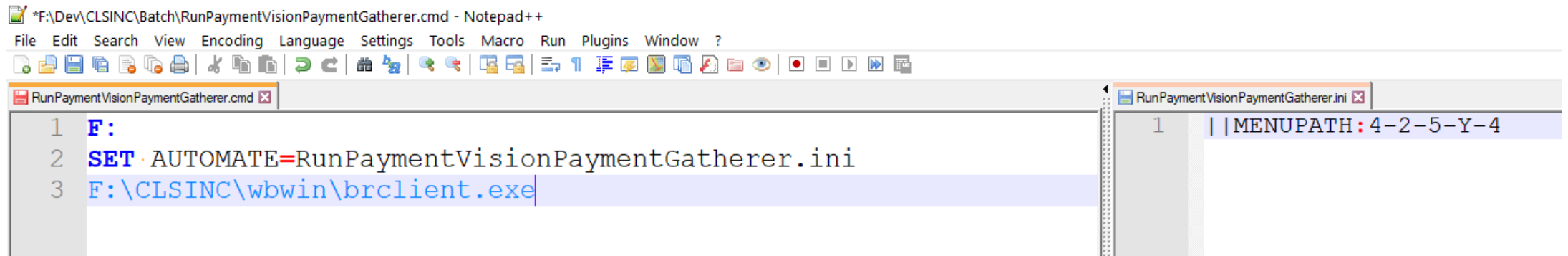
Footer: [F1] Restart Call Time, [F2] End Call, [Alt+P] Pause Call, Manager Override, [Esc] Cancel

Additional information visible in the background includes a search bar, a list of contacts (MORROW/ALVIN S), and a summary table:

| Year             | Balance         |
|------------------|-----------------|
| 2022             | 17338.95        |
|                  | 0.00            |
|                  | 333.15          |
|                  | 0.00            |
| <b>Total Due</b> | <b>17672.10</b> |

# PaymentVision: Automation

- Create two files
  - .CMD – can be saved anywhere (Desktop recommended)
  - .INI – save in F:\CLSINC\CUSTOM



The screenshot shows two Notepad++ windows. The left window, titled 'RunPaymentVisionPaymentGatherer.cmd', contains the following text:

```
1 F:  
2 SET AUTOMATE=RunPaymentVisionPaymentGatherer.ini  
3 F:\CLSINC\wbwin\brclient.exe
```

The right window, titled 'RunPaymentVisionPaymentGatherer.ini', contains the following text:

```
1 ||MENUPATH:4-2-5-Y-4
```

A graphic featuring the text "Q&A" in a large, white, sans-serif font with a slight drop shadow. The text is centered and surrounded by several overlapping, semi-transparent blue squares of various sizes. Many of these squares contain a white question mark, creating a visual theme of questions and answers. The background is plain white.

# Q&A