

*Pre Sales Questions: Are there any monthly or maintenance fees associated with Collections MAX?*

NO. There are no monthly or maintenance fees required.

*Installation: Can I host the MySQL database on a remote hosting company like GoDaddy?*

No. Most hosting companies enforce remote connection limits and configure the MySQL server to be run in strict mode which isn't compatible with Collections MAX. We DO have a hosting option called [WEBCONNECT](#) that will allow you to host the database remotely.

## *Installation: Can you tell me in plain english what I need to do to get Collections MAX working?*

These are the things  
that you need to do to install Collections  
MAX.

- Download and install MySQL from <http://dev.mysql.com/downloads/mysql/5.1.html#downloads>
- When installing MySQL make sure to uncheck the box that says enable strict mode. You MUST also supply a root password and REMEMBER it exactly when configuring MySQL. Reboot the computer after you finish installing.
- Make sure that each computer that is going to run Collections MAX has the .net framework 1.1 AND 2.0 installed. You can find the links for both here.

<http://www.microsoft.com/downloads/details.aspx?FamilyId=262D25E3-F589-4842-8157-034D1E7CF3A3&displaylang=en>

<http://www.microsoft.com/downloads/details.aspx?FamilyID=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en>

## *Installation: Can you tell me in plain english what I need to do to get Collections MAX working?*

- After you have installed these frameworks (if you needed to) you can install the Database Installation Wizard. This program is located in the database folder in the collectionsmax.zip file that you downloaded from the Collections MAX site.
- Run this program. It will prompt you for the root password that you needed to remember in step 2. You can then create your usernames and passwords for your collectors and managers. The program will install the database to the mysql server. Make sure to UNINSTALL the Database Installation Wizard AFTER you complete this step. If you run it a second time you will erase your database.
- Install Collections MAX Collector, Administrator, and Scheduler. You can log in using the usernames and passwords you just set up. If you are connecting to the computer that has MySQL on it the SERVER will be localhost. If it is on another computer it will be the IP address of that computer. If you are connecting to another computer on the network you will need to open port 3306 on BOTH Windows Firewalls.

*Installation: do i have to have a server if i only want to use my (1) computer. If not, how do i configure*

You can install Collections MAX on a single computer if you like. Remember that in the server box you will be connecting to localhost.

*General Questions: Do you have a version of software that uses Microsoft Sequel Server?*

No. We currently do not have any future plans to incorporate MS SQL into our product.

*General Questions: Do you have any existing relationships with letter vendors to export files to?*

Not currently. We will be in the very near future but I don't think they should have a problem with mapping to our export format.

I will try to contact a few to see their requirements but if the community has any recommendations we would like to hear them.

*How Do I?: Does Collection Max allow you to attach documents to specific debtor accounts...and how?*

Yes,

However you will need to scan them first using your existing scanning software. Save them as a pdf or jpg and place them on a network drive where all collectors have access. Map the network drive to each collectors computer. Then in the Correspondence or Skip Info section of Collector you can attach the files.



## *Troubleshooting: ERROR "Configuration system failed to initialize"*

On Windows XP You need to UNINSTALL the .NET 3.5 SP1 framework to correct this problem.

## *Troubleshooting: ERROR: "System.Runtime.InteropServices.COM Exception"*

You need to have Microsoft Office 2003 and above installed on any machine that is using Collections MAX Administrator.

## *Troubleshooting: ERROR: "The application failed to initialize properly"*

This most likely means that the .NET Framework has not been installed or is corrupt.

To fix this you will need to download and install the 1.1 framework at

<http://www.microsoft.com/downloads/details.aspx?FamilyId=262D25E3-F589-4842-8157-034D1E7CF3A3&displaylang=en>

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And download and install the 2.0 framework at

<http://www.microsoft.com/downloads/details.aspx?FamilyID=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en>

If these frameworks are already present and you are still having problems you can try to uninstall and then re-install them.

## *Troubleshooting: ERROR: HRESULT 0x800A03EC When EXPORTING TO EXCEL*

On the excel spread sheet or csv import file if ANY field value began with an equal sign (=), it would cause the exception. Removing the equal sign from the start of the field, removed the exception error. This is due to an error in excel that expects a formula instead of a field when the field begins with an equal sign (=).

## *How Do I?: How do I disable automatic updates in Collections MAX Administrator?*

When you log into Collections MAX Administrator use the word SETTINGS as both the username and the password. Follow the on screen prompt to disable automatic updates.

## *Installation: How do i download the administrator on my computer?*

Download the collectionsmax.zip file from <http://www.collectionsmax.com>

## *How Do I?: How do I enable multiple instances in Collections MAX Professional?*

In Collections MAX Professional enter the word SETTINGS in both the username and password box when you log in and press the login button. A screen will pop up. Put a checkmark in the box and click OK. Restart Collections MAX Pro and you will be able to use multiple instances of the application.

*How Do I?: How do I extract First, Middle, and Last names if my debtor names look like lastname, firstname middlename?*

See this website: <http://www.cpearson.com/excel/FirstLast.htm>



*Installation: How do I finish the MySQL installation if it cannot start the service?*

You need to restart your computer and then click Start / All Programs/ MySQL / MySQL Server Version / Instance Configuration Wizard.

You will then need to run the wizard and choose a new root password. At the completion of the wizard your server should be able to start.

## *How Do I?: How do I format currency in letters in Microsoft Word?*

In your letter hit ALT and F9 at the same time. Then change your field to {MERGEFIELD "currentbalance" \#\$#,###.00}

## *How Do I?: How do I format my current balance field in Microsoft Word for a 50% off settlement letter?*

Insert your current balance field in your mail merge letter inside Microsoft Word

It should look like >

Now press ALT and F9 together.

It should now look like {MERGEFIELD "currentbalance"}

Now make sure this field is selected and press CTRL and F9 together

*How Do I?: How do I format my current balance field in Microsoft Word for a 50% off settlement letter?*

It should now look like { {MERGEFIELD "currentbalance"}} }

Change it so it looks like { = {MERGEFIELD "currentbalance"} / 2 \#\$#,###.00 }

## *How Do I?: How do I remove the test accounts entered while I was learning the program?*

In the Export Screen inside Collections MAX Administrator, select the portfolio and then click the Delete All button.

## *How Do I?: How do I set headers on my client reports?*

Report headers are available for the reports listed in the client tab only in the reports screen in Collections MAX Administrator.

You can create your header in the utilities / settings section of Collections MAX Administrator. Click on the Edit button.

Click on the OK button to save when finished.

Make sure that you check off the Make heading visible in reports check box.

## *Payment Processing: How do I set up payment processing for Net Deposit?*

To set up payment processing for Net Deposit you will need to:

1. In Collections MAX Administrator click Utilities then click Settings.
2. In the payment processing tab click on the Edit Net Deposit Settings button.
3. Put a checkmark in both checkboxes that say Enable real time credit card processing and enable real time ACH processing.
4. Enter your Client ID and Client Code from Net Deposit.
5. Click OK to save. When your collectors go into Collections MAX Professional you will see a process credit card button in the credit card payment screen.

## *Payment Processing: How do I setup payment processing for Billing Tree?*

To setup payment processing for Billing Tree you will need to.

1. In Collections MAX Administrator click Utilities then Click Settings.
2. In the Payment Processing tab click the Edit Settings button for Billing Tree.
3. You will need to enter your source key and PIN from Billing Tree.
4. Select the destination folder for where the encrypted text file is to be saved on your computer.
5. Click the generate configuration file button to generate the text file. Put the file in the Collections MAX Professional root folder (Program Files / Collections MAX Professional)
6. Billing Tree will be enabled when a collector needs to process a credit card transaction in real time.



*General Questions: How does your system handle the calculation of attorney fees and costs? Can you generate a report for each client outlining the total received and how the money is allocated (i.e.-atty. fees, costs, money due client)? Can you tell the program which order the monies received are to be applied (i.e.-first to costs, then to fees, then disbursement, etc.)? Can you generate trust reports showing all transactions for a particular debotor and/or creditor (so that I can prepare a report of all debtors for a particular creditor)?*

*Thank You*

How does your system handle the calculation of attorney fees and costs?

A: Collections MAX has many different fields that let you allocate fees and costs.

Can you generate a report for each client outlining the total received and how the money is allocated (i.e.-atty. fees, costs, money due client)?

A: While we can generate a report outlining the total received for each client, currently the transactional report is only available on a debtor detail and not on a client detail to outline how the money was allocated.

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*Thank You*

Can you tell the program which order the monies received are to be applied (i.e.-first to costs, then to fees, then disbursement, etc.)?

A: Yes

Can you generate trust reports showing all transactions for a particular debotor and/or creditor (so that I can prepare a report of all debtors for a particular creditor)?

*General Questions: How does your system handle the calculation of attorney fees and costs? Can you generate a report for each client outlining the total received and how the money is allocated (i.e.-atty. fees, costs, money due client)? Can you tell the program which order the monies received are to be applied (i.e.-first to costs, then to fees, then disbursement, etc.)? Can you generate trust reports showing all transactions for a particular debotor and/or creditor (so that I can prepare a report of all debtors for a particular creditor)?*

*Thank You*

A: For a particular debtor yes. Creditor No.

*How Do I?: I am trying to determine what fee my collectors are at based on multiple clients placements and all I see on their reports are the cash collected. What report do I pull to see how much they collected in fee instead of the cash ammount?*

The Collector Totals (between Dates) report (Collections MAX Administrator / Reports) in the Employess tab will show both fee and gross dollars collected.

*General Questions: I don't see a way to connect a printer to the system. Do the letters default to the default printer specified on the server?*

The letters are generated using Mail Merge in Microsoft Word. After it generates the letters you can specify which printer it goes to.

*Installation: I installed Collections MAX and it is asking me for a server, username and password. What do I do?*

You will need to download and install MySQL from <http://www.mysql.com>

After you install MySQL and configure the instance you will need to install the Database Installation Wizard that is found in the database folder in the collectionsmax.zip file that you downloaded from the website.

You use the Database Installation Wizard to install the database and configure the usernames and passwords for Collections MAX.

Upon completion of the Wizard, you will either enter localhost (if the database is installed on the same machine) or the IP address of the computer that has the MYSQL database in the SERVER box. You will also enter your USERNAME and PASSWORD to login.

*Installation: I installed the software and now i am being aske for a user name and ip address i didn't set up a user name or password where do i get this from ?*

Please see this post.

[Can you tell me in plain english what I need to do to get Collections MAX working?](#)

*General Questions: I noticed that you if attempt to take a payment in the collector section, it only allows 2 options (credit card or check)? What if the collector takes a cash, money order, or western union payment?*

You would add the payment from Administrator. There you can select the cash, Western Union options.

The collector would still get credit for the payment. For most offices the collector doesn't open the mail or receive cash so we didn't include those options in Collections MAX Collector.



*Troubleshooting: I received an error when trying to use the Import Mapping Utility. How can I correct this?*

To fix problems with the Import Mapping Utility you will need to verify the following.

1. Microsoft Office 2003 or greater is installed on the machine.
2. You have downloaded and installed the .net framework 1.1 and 2.0
3. Your csv file has a header row and the header row does not have any spaces, underscores, dashes, or ampersand characters ( \_ - &)
4. You do not have excel open when trying to load a csv file into the Import Mapping Utility.
5. If you are running Windows Vista you need to make sure that the User Access control is turned off and that you are running inside an Administrator account.
6. You do not have any equal signs (=) that start your data fields, ie: = 123 Main St.

*Troubleshooting: I tried doing the mail merge for letters, and it came up that Microsoft Word was already running and needs to be closed. Problem was that Microsoft Word was not running, I checked with task manager, and also looked at Applications, Processes and Services for WINWORD.EXE and was not found. I tried resetting the computer and made the same check again, but Collections Max comes up with the same error. I need help urgently here.*

*Regards,*

*Brett Grentell (Hazda Solutions)*

It looks like your Microsoft Office software is not able to use COM correctly to communicate with Collections MAX. I would either call Microsoft for support (as there are many reasons why COM is not working) or move the installation to another computer.

*How Do I?: If I change computers (buy a new one), can I transfer the database to my new computer, so that I will work on the localhost? And how?*  
*Thank you!*

You will need to backup the current database on your old computer using MySQL Administrator ([www.mysql.com](http://www.mysql.com)) and then restore the database to your new mysql installation using the software.

*How Do I?: Is it possible to allow a user to access the database from another computer, which is connected via a home network? If so, can you explain how to do this and does the computer that holds the database need to have a static IP address?*

Yes. This is what the software was designed to do.

You will need to set the computer that has the MySQL database to a static ip address. Then open up port 3306 TCP on the Windows Firewall on all computers in the network. Then in the server box type the static ip address of the computer that has the MySQL database.

The computer that has the static ip address can still connect using localhost in the server box.

*General Questions: Is it possible to have a user access the system from a remote location?*

Yes. You will need to have your database hosted online with our WEBCONNECT hosting option.

<http://www.collectionsmax.com/webconnect.html>

*General Questions: Is there a minimum limit on the number of accounts required to run the NCOA process?*

Yes. The minimum is 100 accounts.

## *General Questions: What database does Collections MAX use?*

Collections MAX uses MySQL 4.1 and higher. It requires strict mode to be disabled.

## *Installation: What do I need to have installed on my computer to run Collections MAX?*

You need to have the following installed:

.net framework 1.1 and 2.0

Windows XP or Vista

Microsoft Office 2003 or higher for Collections MAX Administrator.

MySQL version 4.1 or higher installed with a root password and strict mode disabled.



## *Pre Sales Questions: What is Collections MAX Professional?*

Collections MAX Professional is the unrestricted version of Collections MAX Collector. With Collections MAX Professional you remove the 1,000 account limitation, the session limitation, and the 5 collector limit.

Collections MAX Professional is licensed on a per computer basis. Currently at \$179 per computer and we include the administration tools (Collections MAX Administrator) free of charge to use on as many computers as needed.

## *How Do I?: What is the best way to check my EXCEL import file for invalid dates before converting it to CSV?*

You will need to install this macro in Excel

```
Dim c As Range
For Each c In Selection
    If Not IsDate(c.Value) And c.Value <> vbNullString Then
        c.Font.ColorIndex = 3
        c.Borders.ColorIndex = 3
    End If
Next c
```

Then click on a column that has dates so the entire column is highlighted and run the macro. Any invalid dates will be marked in red so you can correct them before converting to csv.

## *Payment Processing: What payment processors are integrated with Collections MAX?*

There are currently two payment processors integrated with Collections MAX. Net Deposit and Billing Tree.

Collections MAX has the ability to process credit cards in real time and batch export ACH and credit card payments using these gateways.

You can find more about Net Deposit at <http://www.netdeposit.com>

and Billing Tree at <http://www.mybillingtree.com>

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## *Installation: What port do I open in my Windows firewall for MySQL?*

You need to open port 3306 as a TCP port in your Windows firewall especially if you are trying to network more than one computer.

*Pre Sales Questions: What's the maximum number of accounts the system can handle from multiple sources without media?*

Installations with millions of accounts on a single server exist. It depends on your disk space but as a benchmark you can expect around 3 Mega Bytes per thousand accounts.

*Troubleshooting: When batch importing accounts I receive this error: Index was out of range must be non-negative and less than the size of the collection.*

You have a corrupted record or the row has invalid characters in your CSV data file.

Collections MAX is VERY PICKY when it comes to dates because certain system processes depend on those dates. If a record in a date column has invalid characters then it may give you this error and abruptly stop importing.

What you need to do is

1. Look in MySQL Administrator for the very last account in the dbase table. Find the filenumber.
2. Open your CSV data file in notepad and search for the file number. Delete the next account AFTER the file number as this account was responsible for giving the error. Make sure to delete the entire record.
3. In Collections MAX Administrator delete ALL the accounts for the portfolio in the export screen.
4. Re-import your accounts.

*Troubleshooting: When batch importing accounts I receive this error: Index was out of range must be non-negative and less than the size of the collection.*

If you keep getting this error then you should re-build your data file. Edit your excel file for invalid data before converting to CSV.

*General Questions: When entering newbiz how may i set up to ensure accounts do not get worked for 15 days so to stay in accordance with the law for our state or to create a daily call list to ensure all accounts are getting thoroughly worked?*

Simply do not assign the account to collectors until the 15 days is up. The accounts will not show up in their queue. If you have already assigned the accounts you can create a "dead collector" and assign all the accounts from your portfolio to him to hold for the 15 days.

Collections MAX also automatically shuffles accounts from last worked (oldest accounts are first and the account is considered worked when the account is notated) so there is no need for a call list.



*General Questions: Which check printing software is Collections MAX compatible with?*

Versa Check 2007 and higher.

*Installation: Will the software connect to a computer that is hosting the MySQL server running Linux?*

Yes. It does not matter which operating system is running the MySQL server.