



RDN Enhancements Case Page – Modules Previous Cases





Modify UI Template

An RDN case page can be customized and displayed to your preferences.

To modify the case page, you must have the permission of: Can modify UI Template.

Please see your Manager for this permission if applicable.

The following slides will guide you through how to customize an RDN case page.

If you have any questions, please contact RDN Support.

Phone: 817-204-0298

Email: support@recoverydatabase.net



Modify UI Template

Assignee Information

Name: **Admin Admin**

ID: **1164003**

E-mail: *<empty>*

Phone: *<empty>*

Fax: *<empty>*

Extension: *<empty>*

Team Information

Name: *<empty>*

Phone: *<empty>*

Add

Fax: *<empty>*

E-

Open a case page and scroll to the bottom of the page. Select My Setup.

Payment History

Monthly payment:

Days/date past due:

Amount past due:

Account balance:

Chargeoff date: *<empty>*



Modify UI Template

User Interface Template Builder will display your current case page. You may click and drag any Tab, Field, or Module to the desired location on the case page. You may also remove any Tab, Field, or Module from the case page.



User Interface Template Builder 2.0 RDN Recovery Database Network

Order Date	Case #	Ref Number	Screen Resolution: 1024 x 1024 ▼
Client	Collector	Lien Holder	Client Acct No

User Interface Template Builder
Drag any Tab, Field or Module to desired locations.
Click **Save Changes** to save and return to the Case Viewer.

Module Options
Uncheck options to prevent users from making changes.

Enable Orderto Changes Enable Status Changes Enable Substatus Changes

TABS	Client Add Adjuster Adjusters Updates Recovery Forms	FIELDS	MODULES																		
<ul style="list-style-type: none">Print OrderPhotos / DocsReleaseInvoicesOPENLANEPay AdjusterRemindersOffice Notes	<table border="1" style="width: 100%;"><tr><td>Client ID</td><td>Debtor</td><td>Year</td></tr><tr><td>Client Address</td><td>Cosigner</td><td>Make</td></tr><tr><td></td><td>Coll Ext</td><td>Model</td></tr><tr><td></td><td>Coll Phone</td><td>V.I.N.</td></tr><tr><td></td><td>Client Fax</td><td></td></tr><tr><td></td><td>Client Phone</td><td></td></tr></table>	Client ID	Debtor	Year	Client Address	Cosigner	Make		Coll Ext	Model		Coll Phone	V.I.N.		Client Fax			Client Phone		<ul style="list-style-type: none">AdjustersBalanceCase InvCase StatusCase WorkerClaim NumberClose DateColl EmailColl FaxColorCompany AddressCompany CityCompany FaxCompany Name	<ul style="list-style-type: none">Addresses - MiniAddresses - View OnlyAdjuster SearchAdjusters - AddAdjusters - PayAdjusters - ViewAdjusters - View OnlyAgent EmailAuction and Bid InformationCase History InformationCase Worker InformationClient Emailclient informationClient Specific Forms
Client ID	Debtor	Year																			
Client Address	Cosigner	Make																			
	Coll Ext	Model																			
	Coll Phone	V.I.N.																			
	Client Fax																				
	Client Phone																				



Modify UI Template

Modules are snippets of information and are identified in green. Modules will display on the My Summary tab of the case page. Modules may be added or removed to the case page via the drag and drop method. To add a Module, click and drag the available Module to the appropriate section on the case page. To remove the Module, drag and drop the Module from the case page to the available Modules section. NOTE: Adding of multiple modules may result in a slower load time of the case page.

The screenshot displays a user interface for modifying a UI template. It is divided into three main sections:

- Fields:** A vertical list of blue boxes representing data fields. A red arrow points to the top of this list. Fields include: Debtor, Cosigner, Coll Ext, Coll Phone, Client Fax, Client Phone, Year, Make, Model, V.I.N., Adjusters, Balance, Case Inv, Case Status, Case Worker, Claim Number, Close Date, Coll Email, Coll Fax, Color, Company Address, Company City, Company Fax, Company Name, Company Phone, Company Skipnumber, Company State, Company Zip, CoSig Phone, CoSig Poe Add, CoSig POE Phone, Cosigner Add, and Cosigner Cell.
- Modules:** A vertical list of green boxes representing information snippets. A red arrow points to the top of this list. Modules include: Fees, Forms Help, GPS Tracking, In Office Updates, Investigator Information, Invoice (View Only), Invoice Module, Lien Holder Information, OPENLANE, Picture Management, Previous Cases, RDN Standard Forms, Recovery (View Only), recovery information, Release - View Only, release information, reminder information, Saved Forms, Skiptracing, and Temporary Service Items.
- Case Page Template:** A central area showing a grid of modules. A red arrow points from the 'Assign To' module in the 'Modules' list to the 'Assign To' module in the case page template. The case page template shows a grid with modules like 'Assign To', 'debtor information', 'Collateral', 'Phone Numbers', 'Additional Information', 'Addresses On Account', 'Assignee information', and 'Payment History'.



Modify UI Template

Case Template Builder
Drag Module to desired locations.
Save and return to the Case Viewer.

Module Options
Prevent users from making changes.

Click Previous Cases and drag the module to the case page.

Forms

Debtor	Year
CoSigner	Make
Coll Ext	Model
Coll Phone	V.I.N.
Client Fax	
Client Phone	

Assign To
debtor information
Collateral
Phone Numbers
Additional Information
Addresses On Account
Assignee information
Payment History

FIELDS
Adjusters
Balance
Case Inv
Case Status
Case Worker
Claim Number
Close Date
Coll Email
Coll Fax
Coll Phone
Company Address
Company City
Company Fax
Company Name
Company Phone
Company Skipnumber
Company State
Company Zip
CoSig Phone
CoSig Poe Add
CoSig POE Phone
CoSigner Add
CoSigner Cell

MODULES
Taxes Module
Fees
Forms Help
GPS Tracking
In Office Updates
Investigator Information
Invoice (View Only)
Invoice Module
Lien Holder Information
OPENLANE
Picture Management
Previous Cases
RDN Standard Forms
Recovery (View Only)
recovery information
Release - View Only
release information
reminder information
Saved Forms
Skiptracing
Temporary Service Items
Updates
Updates - Last 5



Modify UI Template

**The module has
been moved to
the case page.**



- Previous Cases
- Payment History
- Assign To
- debtor information
- Collateral
- Phone Numbers
- Additional Information
- Addresses On Account
- Assignee information



Modify UI Template

To save your changes, scroll down and select Save Changes.

Complaints

Save Changes

To reset the case page to the default, scroll down and select System Defaults.

Additional Information
Addresses On Account
Assignee Information
Payment History

System Defaults

To cancel any changes, scroll down and select Cancel Changes.

Company State
Company Zip
CoSig Phone
CoSig Poe Add
CoSig POE Phone
Cosigner Add
Cosigner Cell
Cosigner DOB

release information
reminder information
Saved Forms
Skiptracing
Temporary Service Items
Updates
Updates - Last 5
Updates - View Only

Cancel Changes

A log out will be required to see the changes.

www.recoverydatabase.net says
To display changes, please log out of your RDN account and log back in.

OK



Modify UI Template

Previous Cases module will display on the My Summary tab.

MY SUMMARY | CLIENT | ADD ADJ | RECOVERY | FORMS

PRINT ORDER

PHOTOS / DOCS

RELEASE

INVOICES (0)

OPENLANE

PAY ADJUSTER

REMINDERS (0)

OFFICE NOTES (0)

BIDS / AUCTION

EMAIL / FAXES

HISTORY

DUPLICATE CASE

SKIPTRACING

COMPLAINTS

Order to: **Involuntary Repo** Status: Open Add Sub-status: Jump to: Enter Case Number Work Order

Client ID: 1943785 Debtor: MICHAEL AARON Year: 2014
Client Address: 1620 S Stapley Mesa, Arizona 85204 Coligner: Make: TOYOTA
Call Ext: Model: PRIUS
Coll phone: V.I.N.: JTDKN3DU7E1810087
Client Fax: Client phone: 000-000-0000

Previous Cases for Debtor

Case #	Order Date	Order Status	Actions
2068821576	02/12/19	Repossessed	view updates view case
2069538354	03/07/19	Reassigned	view updates view case

Payment History

Monthly payment: Days/date past due:
Amount past due: Account balance:
Chargeoff date: <empty>