



RDN Enhancements

NEW Bulk Hold Management





NEW Bulk Hold Management

Dear Customers,

RDN has added a new feature called Bulk Hold. This feature provides Lenders with the ability to place holds on a large number of cases. This new feature will be useful when managing recovery assignments in areas of the country that have been hit with a natural disaster or other event. It can also be used in any short-term situation where the Lender may want to place a large number of cases On-Hold, such as for a holiday.

This feature does not require the Recovery Agencies to acknowledge each Hold request. With a Bulk Hold, each case is placed directly in an On-Hold status. A banner will also be placed on each case alerting the user of the Bulk Hold. Each case is flagged with a permanent update that notifies users that the case is part of a Bulk Hold. Lenders can remove a case from a Bulk Hold if needed. Lenders can also disable the Bulk Hold. ***Once a Bulk Hold is removed or expires, the case will return to New From Client status and the banner will be removed.** *An alternative Bulk Hold Workflow can be selected depending on your needs.

Lenders will have a report to access that lists all the cases that are in a Bulk Hold. Agents will be able to pull a bulk hold report as well.



NEW Alternative Bulk Hold Workflow

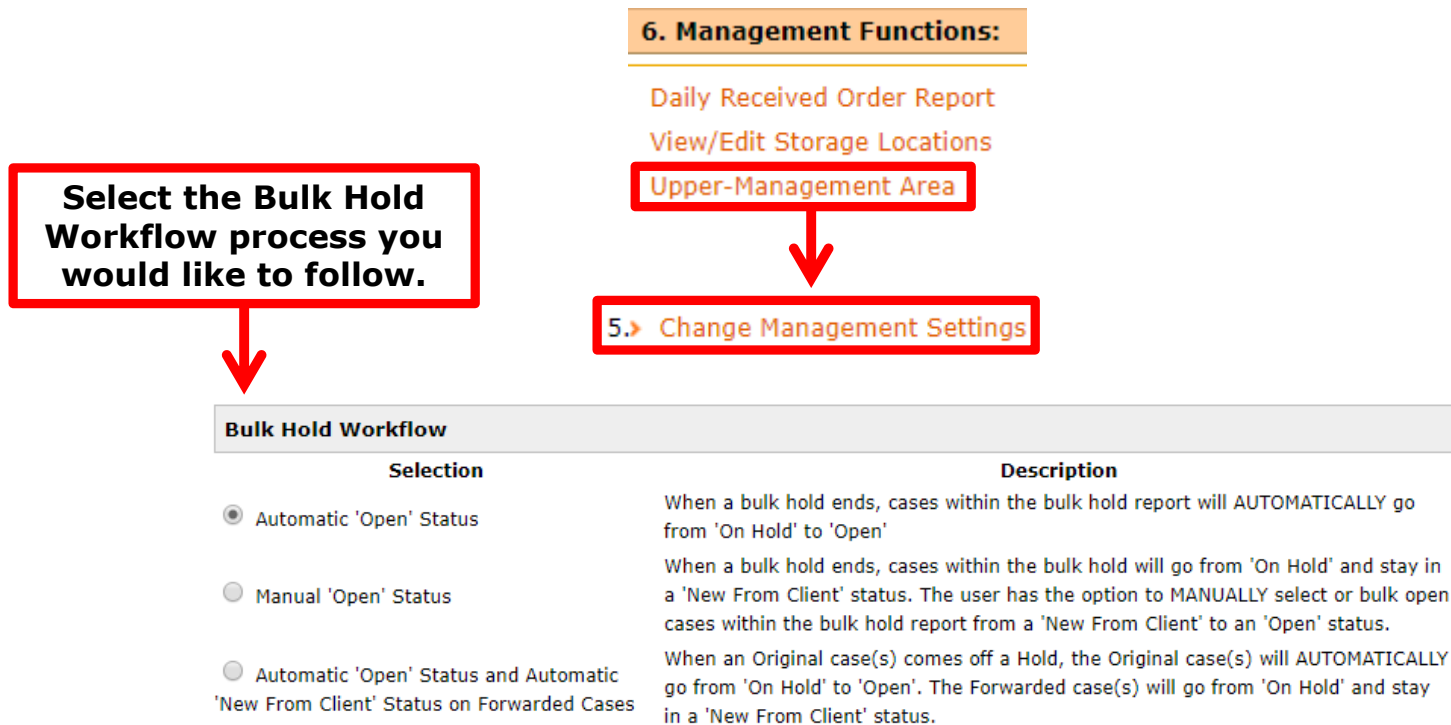
Bulk Hold Workflow Options

Selection	Description
Automatic 'Open' Status	When a bulk hold ends, cases within the bulk hold report will AUTOMATICALLY go from 'On Hold' to 'Open'
Manual 'Open' Status (Default)	When a bulk hold ends, cases within the bulk hold will go from 'On Hold' and stay in a 'New From Client' status. The user has the option to MANUALLY select or bulk open cases within the bulk hold report from a 'New From Client' to an 'Open' status.
Automatic 'Open' Status and Automatic 'New From Client' Status on Forwarded Cases	When an Original case(s) comes off a Hold, the Original case(s) will AUTOMATICALLY go from 'On Hold' to 'Open'. The Forwarded case(s) will go from 'On Hold' and stay in a 'New From Client' status.



NEW Alternative Bulk Hold Workflow

The default Bulk Hold Workflow can be changed via Upper Management Area>Change Management Settings.





NEW Bulk Hold Management

A NEW Bulk Hold Management report has been added to RDN.
You can generate a Bulk Hold report by one or more Clients.

5. Search and Other Database Resources:

Complaint Tracking

RDN Vehicle Search: Network Wide

Apt Complex/Community Access Codes: Network Wide

Current Case Reminders that are set

Zip Code / Area Code / County Search

Key Code Report

Key Code / Key Service Request Report

Recovery Time Summary

Fee Approval Search

Recovery Time Summary [detailed]

Company Assignment Count

Agent Assignment Count

Client Count

Client Assignments

Agent Count

View Recent Updates

Monthly Repossession Report

NEW Bulk Hold Report.

Bulk Hold Report



NEW Bulk Hold Management

The Bulk Hold report will allow you to select one or more Clients.

Bulk Hold Report

Please select client(s) for the report

-- SHOW ALL CLIENTS --
Bank and Trust of California

Select Client(s) and select Generate Report.

Generate Report Export Report

A screenshot of a web application interface for generating a Bulk Hold Report. The interface has a blue header bar with the text 'Bulk Hold Report'. Below the header is a white area containing a dropdown menu. The dropdown menu is currently open, showing the text '-- SHOW ALL CLIENTS --' and 'Bank and Trust of California'. A red box highlights the dropdown menu area, and a red arrow points from this box to a 'Generate Report' button located below the dropdown. Another red box highlights the text 'Select Client(s) and select Generate Report.' to the right of the dropdown. At the bottom of the interface, there are two buttons: 'Generate Report' and 'Export Report'. The 'Generate Report' button is highlighted with a red box.



NEW Bulk Hold Management

The Bulk Hold report will allow you to select one or more Clients.
An Export option has also been provided.

Bulk Hold Report

Please select client(s) for the report

-- SHOW ALL CLIENTS --
Bank and Trust of California

Select Client(s) and select Export Report.

Generate Report **Export Report**

A screenshot of a web application interface for generating a Bulk Hold Report. The interface has a blue header bar with the text 'Bulk Hold Report'. Below the header is a white area containing a dropdown menu. The dropdown menu is open, showing the text '-- SHOW ALL CLIENTS --' and 'Bank and Trust of California'. A red rectangular box highlights the dropdown menu area, and a red arrow points from the bottom of this box to the 'Export Report' button. To the right of the dropdown menu, there is another red rectangular box containing the text 'Select Client(s) and select Export Report.' Below the dropdown menu are two buttons: 'Generate Report' and 'Export Report'. The 'Export Report' button is highlighted with a red rectangular box.



NEW Bulk Hold Management

Bulk Hold Report is returned based on your Client(s) selection. This report will list the status of the Bulk Hold, and the Start and End date. Once a Bulk Hold event has expired, the Bulk Hold will be removed from the case page.

Bulk Hold Report

Total Cases: 3
Bulk Holds: 1

Total number of cases and Bulk Hold events are displayed.

Show entries

Search:

Lender	Bulk Hold Name	Bulk Hold Status	Start Date	End Date	Action
Travis QA Bank	Forwarder Test	Disabled	2019-06-12	2019-06-13	Bulk Open



NEW Bulk Hold Management

Bulk Hold Report

Total Cases: 3

Bulk Holds: 1

Show entries

Search option has been provided.

Search:

Lender	Bulk Hold Name	Bulk Hold Status	Start Date	End Date	Action
Travis QA Bank	Forwarder Test	Disabled	2019-06-12	2019-06-13	Bulk Open



NEW Bulk Hold Management

A Bulk Open option has been added that will move all cases within the Bulk Hold from a New From Client status to an Open status.

Bulk Hold Report

Total Cases: 3

Bulk Holds: 1

Show entries

Select Bulk Open to move each case in the Bulk Hold event to an Open Status.

Lender	Bulk Hold Name	Bulk Hold Status	Start Date	End Date	Action
Travis QA Bank	Forwarder Test	Disabled	2019-06-12	2019-06-13	Bulk Open



NEW Bulk Hold Management

Bulk Hold Report

Total Cases: 3
Bulk Holds: 1

Show entries

Search:

Click Header Name to sort.



Lender	Bulk Hold Name	Bulk Hold Status	Start Date	End Date	Action
Travis QA Bank	Forwarder Test	Disabled	2019-06-12	2019-06-13	Bulk Open



NEW Bulk Hold Management

Bulk Hold Report is returned based on your Client(s) selection.

Bulk Hold Report

Total Cases: 110
Bulk Holds: 34

Show 25 entries

Search:

Lender	Bulk Hold Name	Bulk Hold Status	Start Date	End Date
Bank and Trust of California	TravisQA Test	Disabled	2019-03-28	2019-03-29
Case #	Status	VIN	Borrower	
2032692632	On Hold	6701E76BC3D8C9243	John Doe	
2032692634	On Hold	6FA65717BCA7F9A81	John Doe	
Bank and Trust of California	Travis Test	Disabled	2019-05-08	2019-05-09
Case #	Status	VIN	Borrower	
2052964939			John Doe	
2053023277			John Doe	
2054491190			John Doe	

Select Bulk Hold row to display cases that are currently in a Bulk Hold.

Select a case number to view the case page.



NEW Bulk Hold Management

A banner and update are placed on the RDN case page to alert the user of a Bulk Hold event.

On Hold on 05/03/2019 (15 days ago) 7 Exp. Date:

Order to: **Involuntary Repo** ▼ Status: **On Hold** ▼ ← **Status is changed to On Hold.**

work Order

ⓘ This case is a part of a bulk hold - Testing Adam 2 ← **Banner is placed on the case page.**

RDN Carrie Barbour Documentation Support Logout

Order Date: 2014-06-02 Case #: 2032692632 Ref. Number: Get new reference number File Folder Labels

Client: Bank and Trust of California Collector: Gene Tharp Lien Holder: Bank and Trust of California Client Acct No:

My Summary CLIENT ADD ADJUSTER ADJUSTERS (2) UPDATES (35) RECOVERY FORMS

Saved to RDN:
05/03/2019 9:36 AM

Last updated by:
1Travis Gross (Lender)

Details
Case being Held as part of a Bulk Hold event.

Update is placed on the case page.

05/03/2019 9:36 AM
Company
Bank and Trust of California

Update type
Bulk Hold



Questions?

We hope you are pleased with this new feature and look forward to bringing you more in the future.

If you have any questions regarding this new feature, please contact RDN Support.

Phone: 817-204-0298

Email: support@recoverydatabase.net