# RDN Training Guide Change Client – Case Page

When one of your local clients decides to become a Global Client user of RDN, if they have cases open with you, you will need to switch the classification of those existing cases from a "Local Client" to a "Global Client". By doing this, the lender will be able to access the cases that they had with you prior to their switch to a Global RDN license. Any orders that they send to you after their switch to Global Client will be automatically established as Global Client cases.

You may find it easier to accomplish this process by first creating a list in MultiSearch of all the open cases you have with your client.
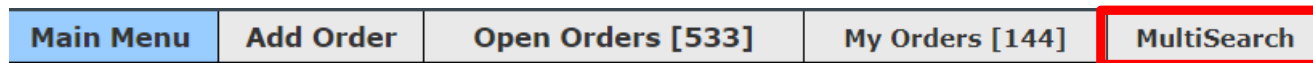
The following slides will guide you through changing the Client on a case page.

By performing a MultiSearch for cases with the current Client, you will be able to work from a list of cases.

- Click MultiSearch to perform a search by Client.

| Main Menu | Add Order | Open Orders [533] | My Orders [144] | MultiSearch |
|-----------|-----------|-------------------|-----------------|-------------|

- Select the Client via the drop down menu.

**Client Criteria**

| Client | Any |
|--------|-----|

- Select the Status of Open, On Hold, Need Info.

**Status Criteria**

| Order To | Any |
|----------|-----|
| Status | Open, On Hold, Need Info |

- Scroll down and click Search.

Search!    Clear Selections

- Click the Case Number to access each case.

| Row | ☐ | Home Zip | Case Number |
|-----|---|----------|-------------|
| 1   | ☐ | 78746    | ⊙ 2050902315 |
| 2   | ☐ | 78746    | ⊙ 2038127267 |

- From the case page, click the Client tab.

| MY SUMMARY | CLIENT |

- Click Edit.

**Client Information**  ✏ Edit

- Select the Client from the drop down menu.

**Client Information**

Client name: - Global Clients - ▼

- Click Update.

Update     Cancel

- Client is now updated on the case page.

Client Information saved.

# Questions?

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

Phone: 817-204-0298
Email: support@recoverydatabase.net