RDN Training: Adding a Client

CONFIDENTIAL

Adding a Client

The following steps will guide you through adding a Client to RDN.

Main Menu | Add Order | Open Orders [2237] | My Orders [162] | MultiSearch | Clients/Assignees

Select Clients/Assignees.

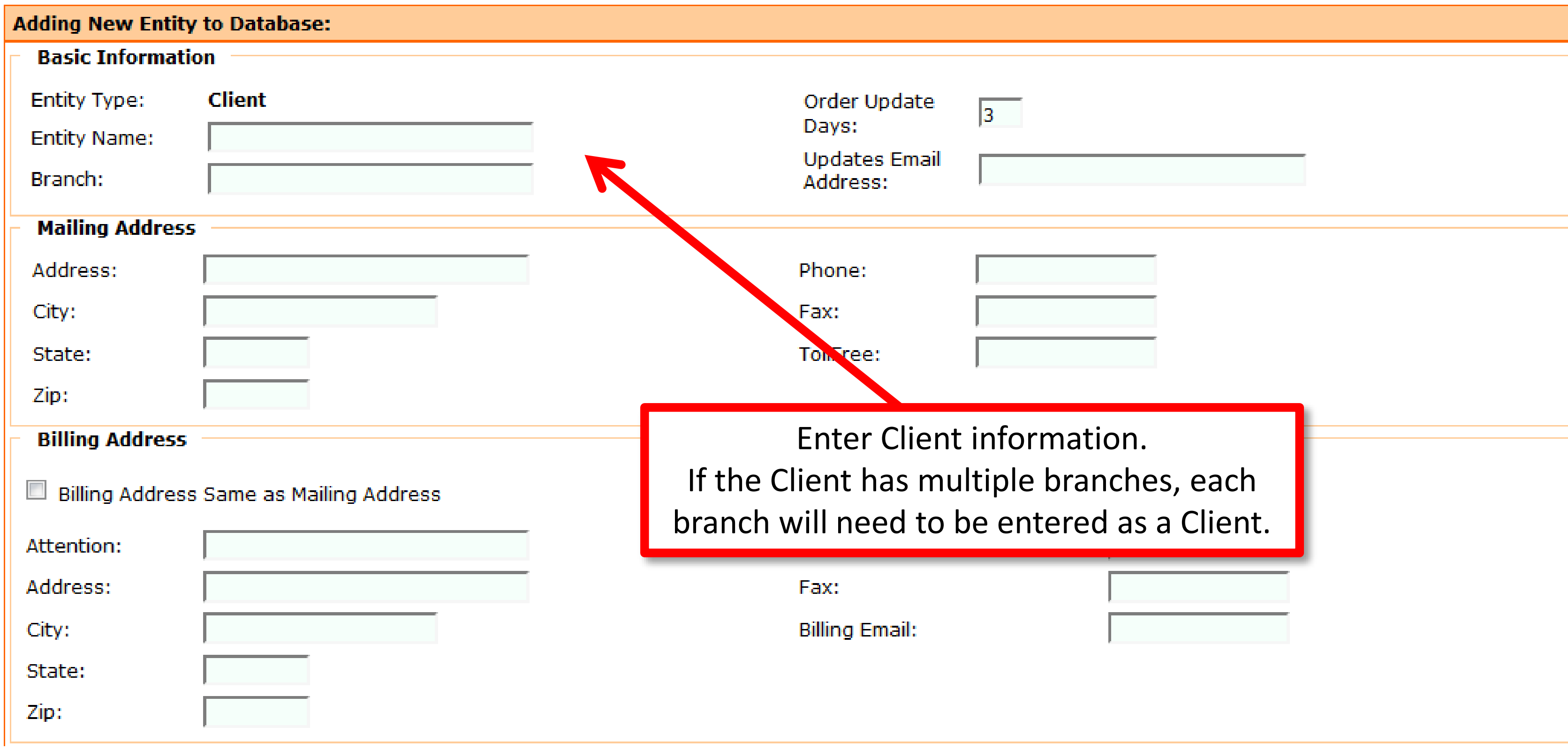
Add New Entity | Clients | Lienholders | Police Dept's | Auctions | Transport Co | DMV

Select Clients.

Add New Entity | Clients | Lienholders | Police Dept's | Auctions | Transport Co | DMV

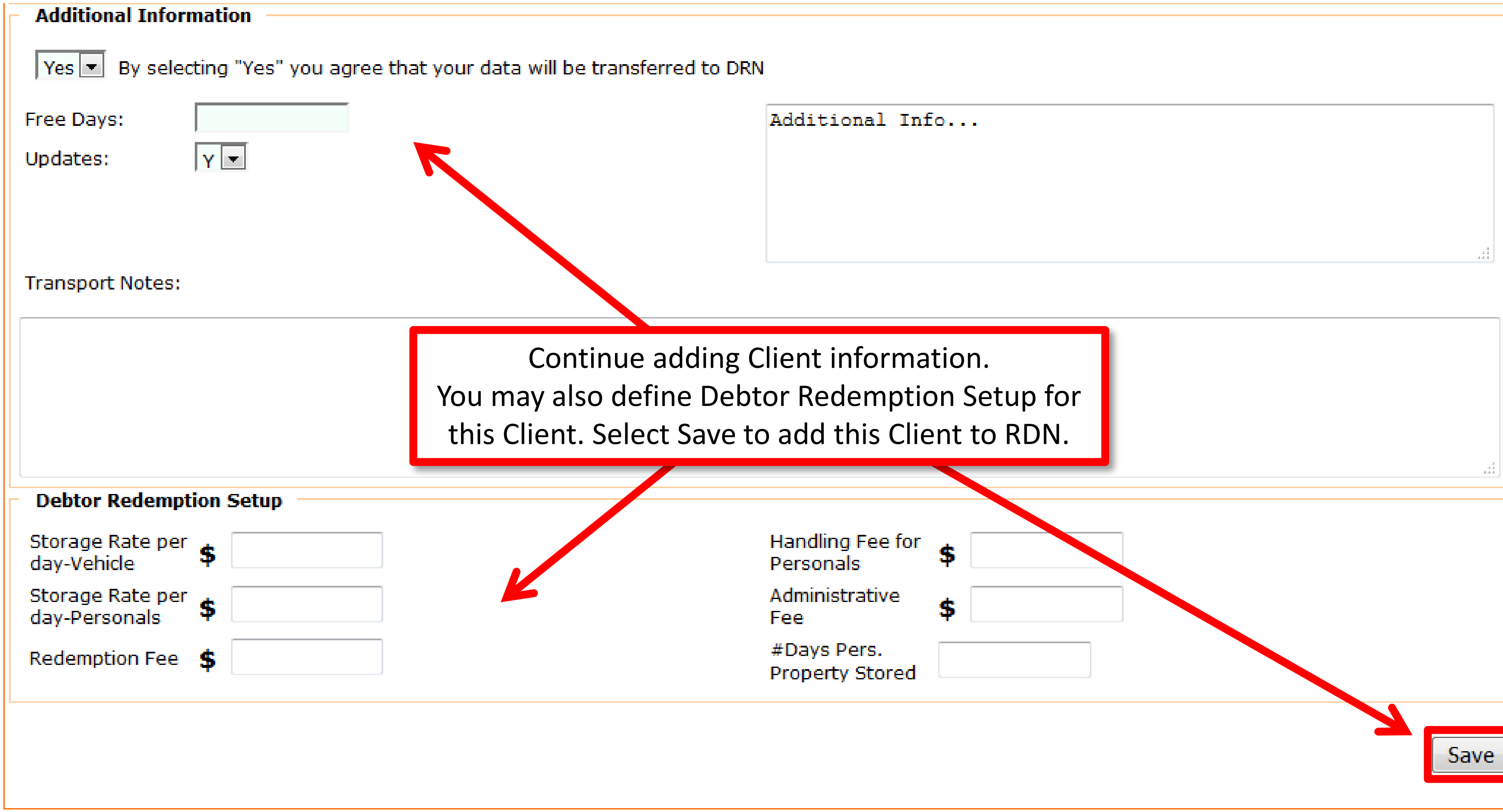
Select Add New Entity.

Adding a Client



Enter Client information.
If the Client has multiple branches, each branch will need to be entered as a Client.

Adding a Client



Continue adding Client information.
You may also define Debtor Redemption Setup for this Client. Select Save to add this Client to RDN.

Adding a Client – Edit Client Information

= Client OPEN Orders = Client Details; = Client ASSIGNEES Details

Local Clients

Showing 1 to 175 of 175 Records.

Currently on page 1 of 1 pages.

Orders	Name	Address	City	State	Zip	Phone	
View Cases	1 AAAAA Test Bank						

Client has now been added. Select the icon to edit this Client.

Adding a Client – Edit Client Information

Modifying Entity:

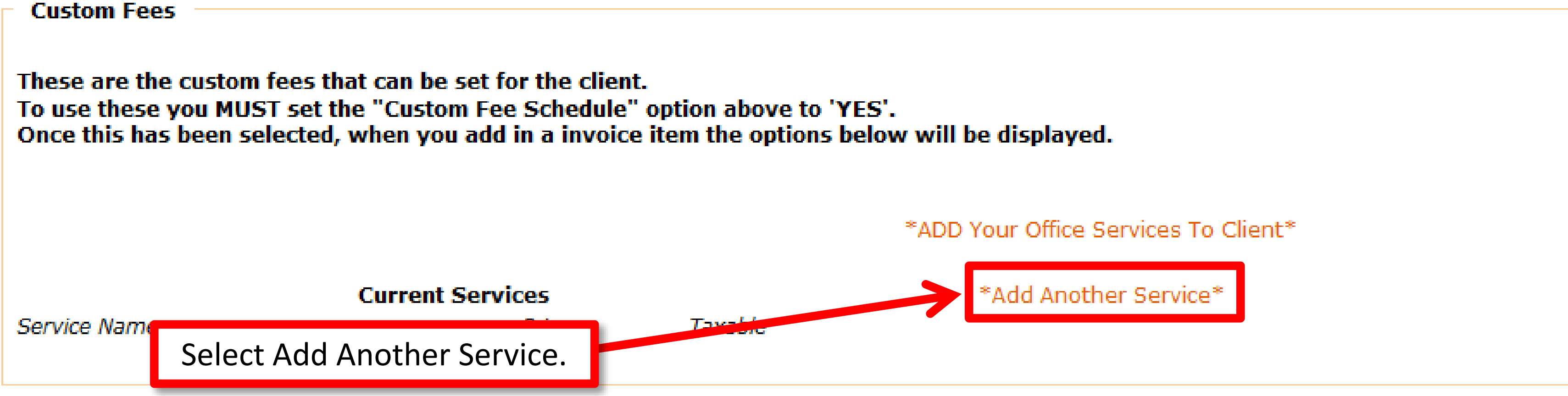
RDN Internal Code:	90DEMO
Client ID Code:	1187431
Entity Name:	1 AAAAA Test Bank
Branch:	Austin
Select RDN Company If Same As Client:	NONE
Assigned Case Worker For Client:	None
Case Worker's Manager for this Client:	
Updates Email Address for Client:	
Update Subject Format (See Format Below):	STATE = Add State to Subject Line. ACCTNUM = Add Client Account Number DEBTORST= Add Debtor's State
Vendor Number:	
By selecting "Yes" you agree that your data will be transferred to DRN:	Yes

You may now edit the Client and select additional options.

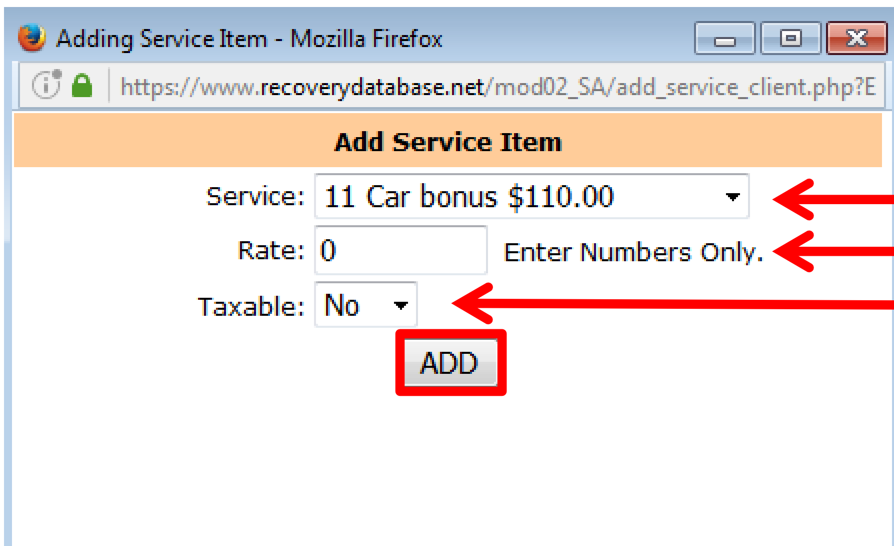
Adding a Client – Edit Client Information

Number of Free Storage Days:		Free Storage Days per Client.
View Accounts in Needed Updates List:	Y	Select Yes/No to view accounts in Needed Updates List.
Need Updates Every This many Days:	3	How often the Client requires an update.
TURN ON/OFF **Custom Fee Schedule**	NO	Select Yes/No for Client Custom Fee Schedule.
Include Receivables on Invoice:	☑	Remove checkmark to not include receivables.
Minimum Password Length	6	Enter minimum password length for an Assignee.
Password Expiration Days	90	Number of days until password expiration.
Number of Passwords to Remember	0	Number of passwords to remember.
Active:	YES	Select Yes/No for active.

Adding a Client – Custom Fee Schedule



Select Add Another Service.



Select your Service Item from the drop down menu. Enter the rate specific to your Client. Select Yes/No for taxable. Select Add to add this custom service item to your Client. Each time you invoice this Client, their custom service items and amounts will populate on your invoice.

Adding a Client – Custom Fee Schedule

Custom Fees

These are the custom fees that can be set for the client.
To use these you MUST set the "Custom Fee Schedule" option above to 'YES'.
Once this has been selected, when you add in a invoice item the options below will be displayed.

You may Edit or Delete the service item.

Add Another Service

Current Services

Service Name	*Price*	*Taxable*		
Repo Fee	$300.00	NO	Edit Service	Delete Service

Select Save Changes.

Save Changes | Save + View

Questions??

If you have any questions, please contact RDN Support at 817-204-0298, option 1, or via email: support@recoverydatabase.net.