Recovery Connect/RCM User Manual

Napier Bailiffs

92 Commerce Park Dr, Unit 11

2023

Recovery Connect/RCM User Manual

Introduction

Welcome to the Recovery Connect Manual, your comprehensive guide to effectively utilizing the features and functionalities of the Recovery Connect software. Whether you are a newcomer looking to get started or an experienced user seeking to enhance your proficiency, this manual is designed to provide you with the knowledge and guidance you need.

About Recovery Connect

Recovery Connect is a powerful subscription-based data management software solution that empowers bailiffs and recovery agencies to streamline their operations, manage cases efficiently, and maintain compliance with industry regulations all for a low monthly fee. With its user-friendly interface and robust set of tools, Recovery Connect is tailored to meet the unique needs of professionals in the bailiff industry.

Purpose of This Manual

This manual serves as your go-to resource for understanding the ins and outs of Recovery Connect. It is structured to provide step-by-step instructions, tips, and insights to help you navigate the software seamlessly. Whether you are looking to sign up, perform specific tasks, or troubleshoot issues, you will find relevant information within these pages.

Who Should Read This Manual

This manual is intended for a diverse audience, including:

Napier Bailiff Staff: For current and future Napier bailiff staff ranging from the management and administration team to the field bailiffs who wish to better understand and utilize the software.

New Users: If you are new to Recovery Connect, this manual will serve as your onboarding guide. You will learn how to sign up, set up your account, and perform essential tasks to maximize the software's benefits.

Experienced Users: Even if you are already familiar with Recovery Connect, this manual can help you discover advanced features and best practices to further optimize your workflow.

What You Will Find in This Manual

This manual is organized into sections that cover various aspects of Recovery Connect. Here is a brief overview of what you can expect to find:

Getting Started: Learn how to sign up for Recovery Connect, set up your account, and navigate the user interface.

Key Features: Explore the software's core features, including case management, reporting, and compliance tools.

Advanced Usage: Discover advanced tips, tricks, and strategies to make the most out of Recovery Connect.

Troubleshooting: Find solutions to common issues and challenges you may encounter while using the software.

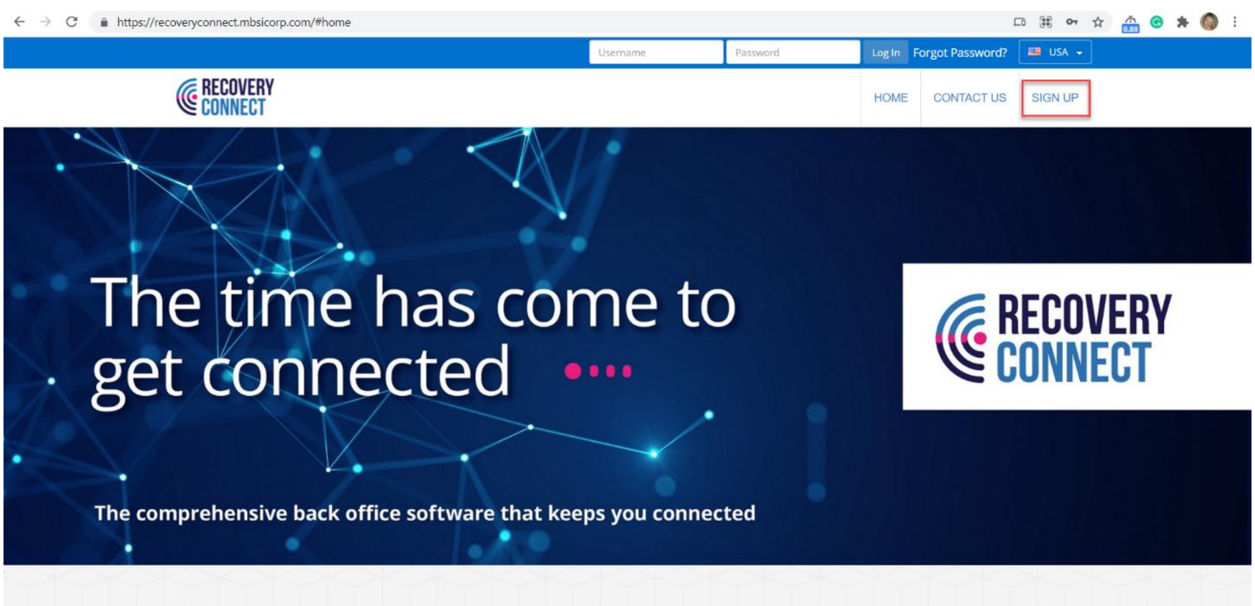
Additional Resources: Access links to supplementary materials, support channels, and updates related to Recovery Connect.

Getting Started in Recovery Connect

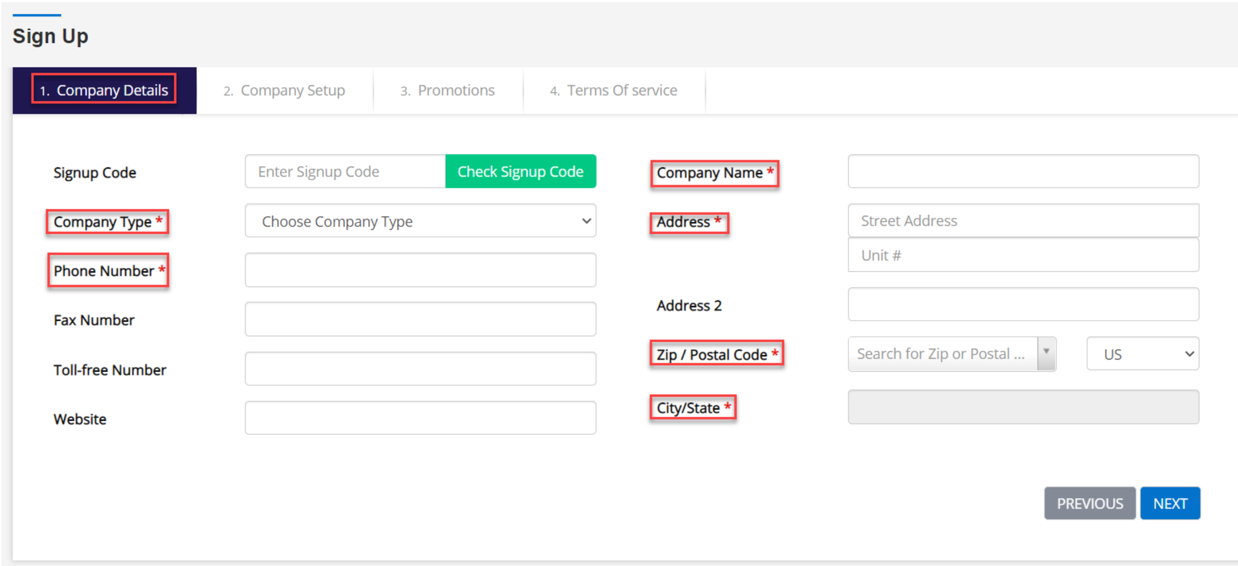
The first step to utilizing Recovery Connect is to create an account, which can be done as follows:

Step 1: Go to https://recoveryconnect.mbsicorp.com

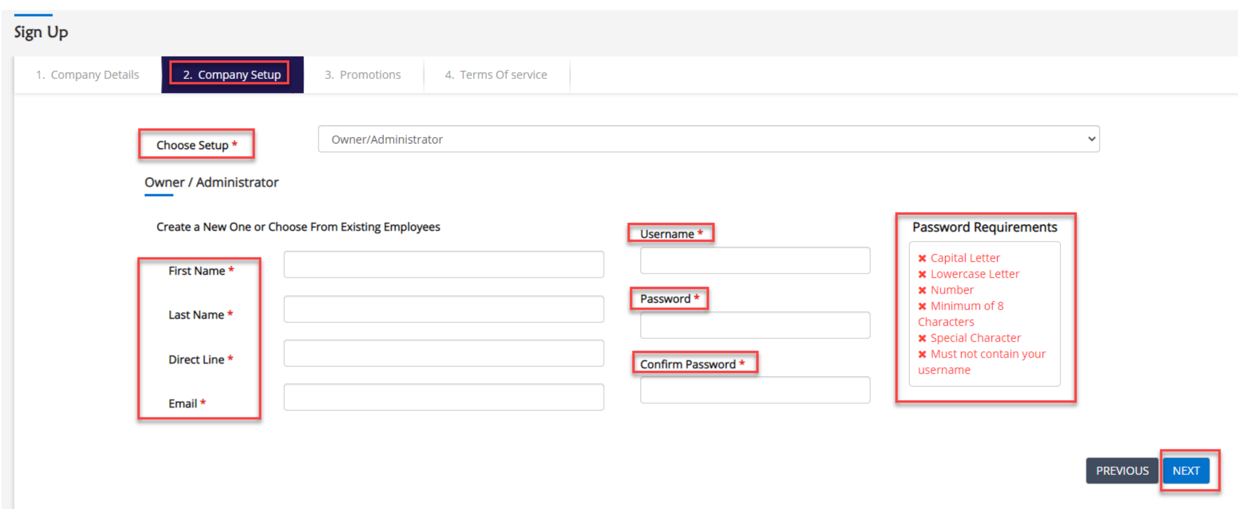
Step 2: Click on Sign Up



Step 3: Fill out the required field on the form under the Company Details tab and click Next.

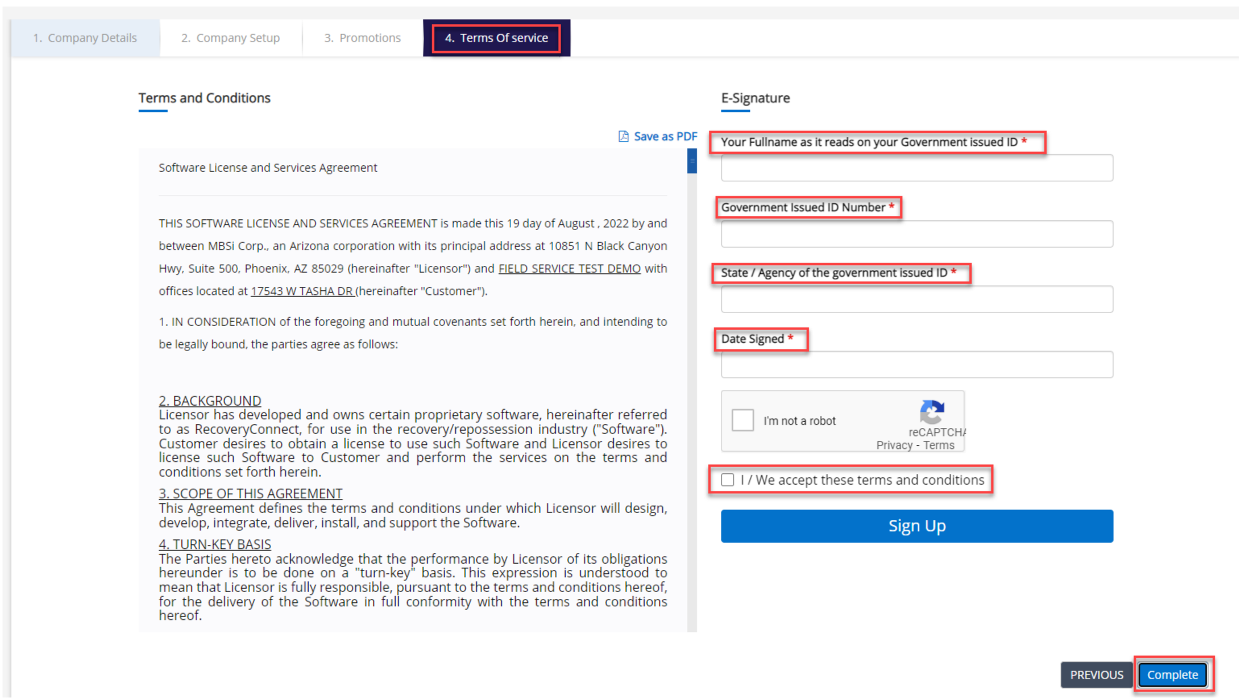


Step 4: Fill out the required fields on the Company Setup tab and click Next

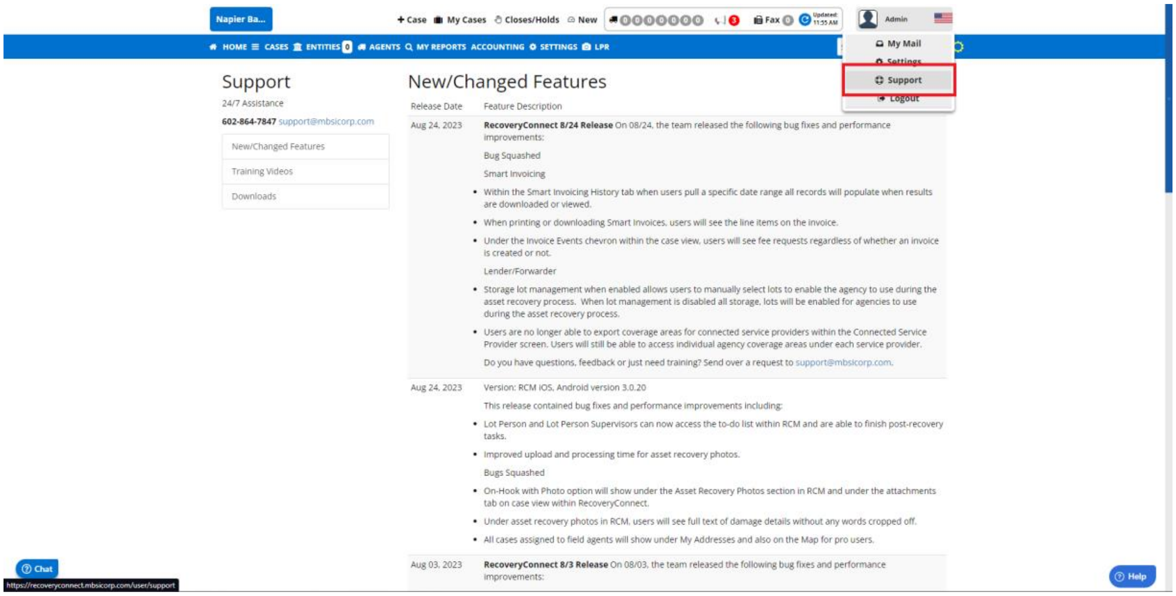


Note: There are three different company setup types to choose from, Owner/ Administrator, Manager on Behalf of Company Owner and Lending Institutions, Clients, Police, Attorneys, and Insurance Companies.

Step 6: Complete the Terms of Service tab and click Complete.



Once an initial account is Setup, you can use this account as the administrator account to add employees, clients, and cases to the software.



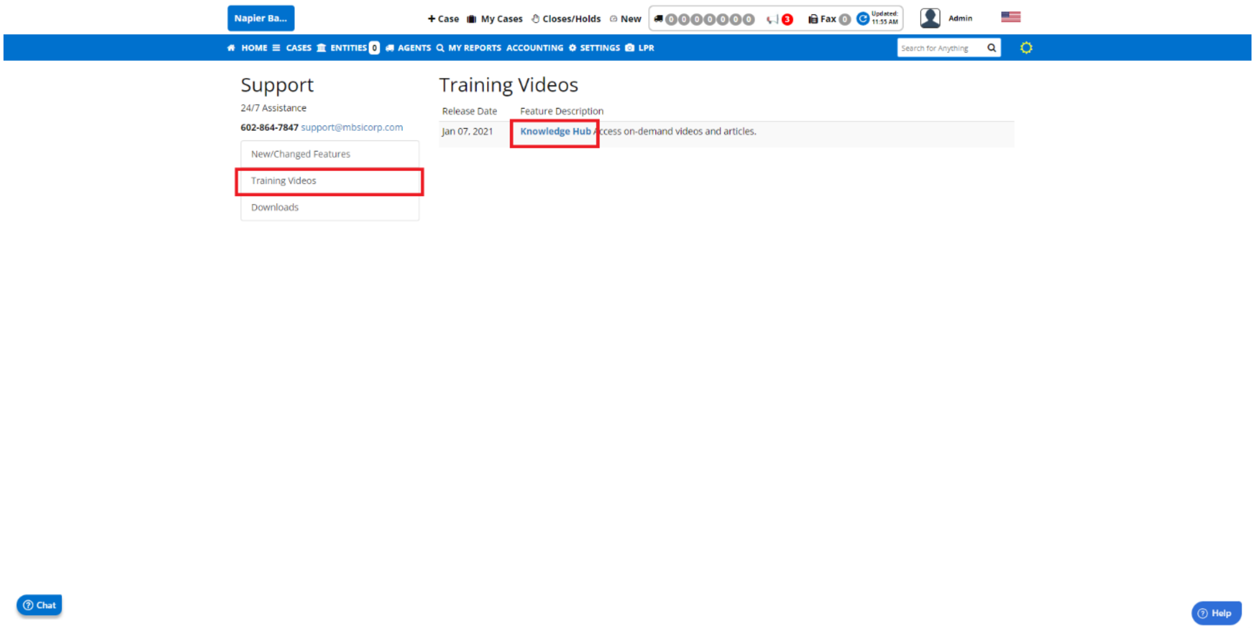
Accessing Support and Documentation

When using Recovery Connect or RCM, if you ever find your self requiring support or wanting to learn more about a given feature, you can access support through 3 different ways:

Official Documentation

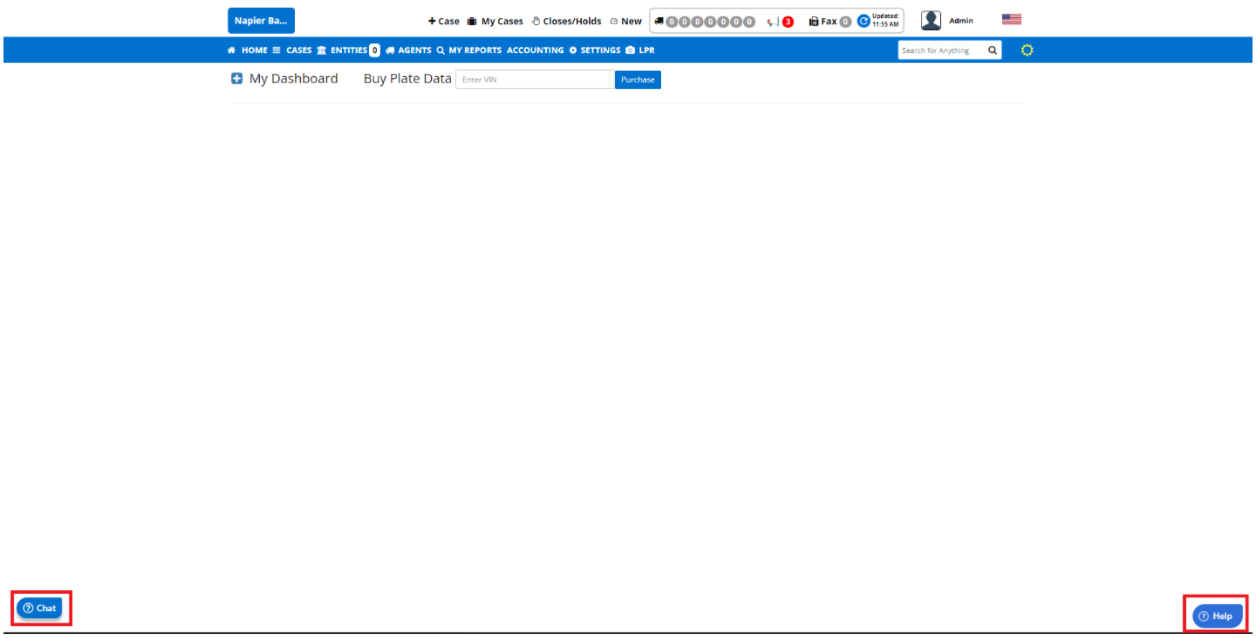
1. The first option is to access the official documentation. In the top right corner of Recovery Connect, hover over the username, and click on the support drop down menu item.

Once there, you’ll see an overview of the newly added features to the program. Next click on the training videos section on the left side of the screen. Under training videos, you will see a link to the knowledge hub, click on that to be taken to the official Recovery Connect documentation. Alternatively, here is the link https://mbsicorp.freshdesk.com/support/home



Live Support

The second method of accessing support is the live support chat and quick lookup functions. The live chat allows you to chat with an MBSI Corp representative, while the quick lookup allows you to quickly search the documentation for guidance. The live chat is in the bottom left of the screen while the quick lookup is in the bottom right of the interface:



Emailing the support team

The last method of reaching support is by email to the support team.

Support: support@mbsicorp.com

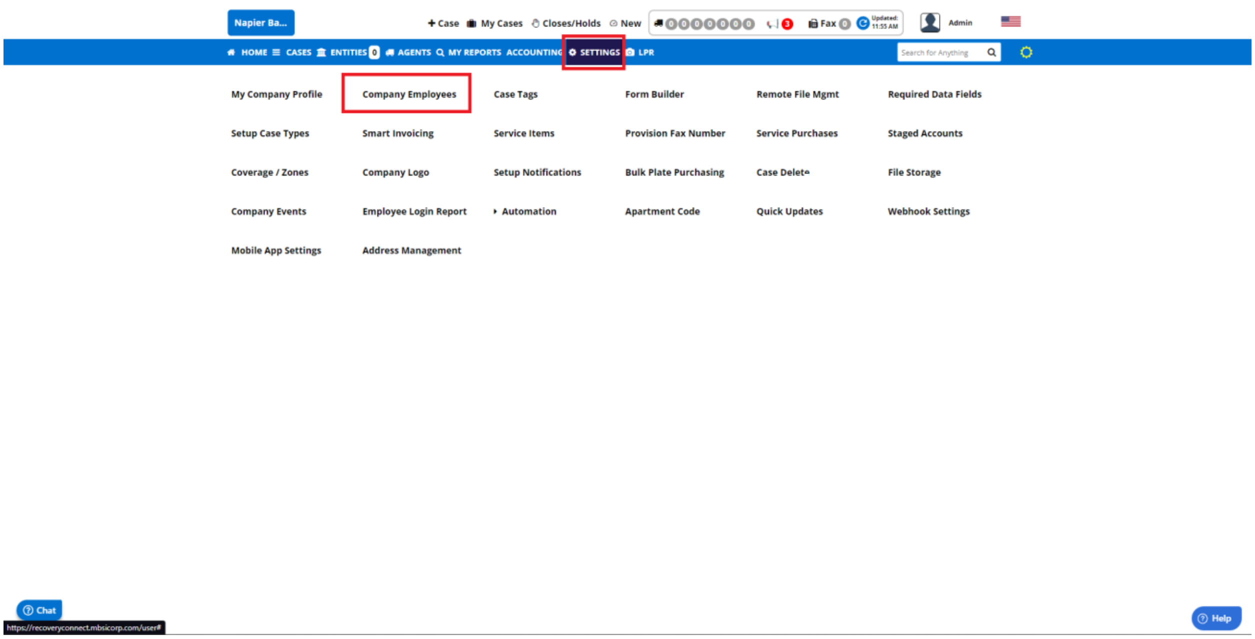
Sales: sales@mbsicorp.com

Managing Profiles and Settings

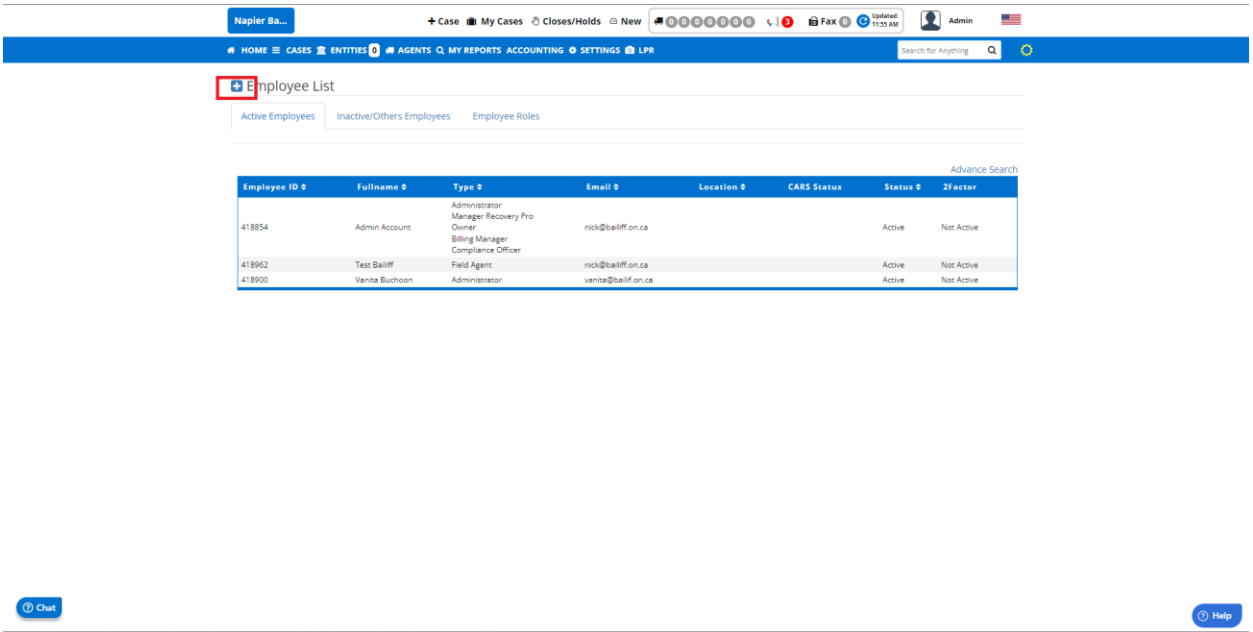
Creating Employees

In Recovery Connect, setting up employees is essential to scaling business operations. The software offers a vast array of possible employee types, hover the two main types you most want to focus on are Administrator and Field Agent. The administrator employee type is for the office and allows for creation of cases and files while the field agent employee type is designed for the bailiffs.

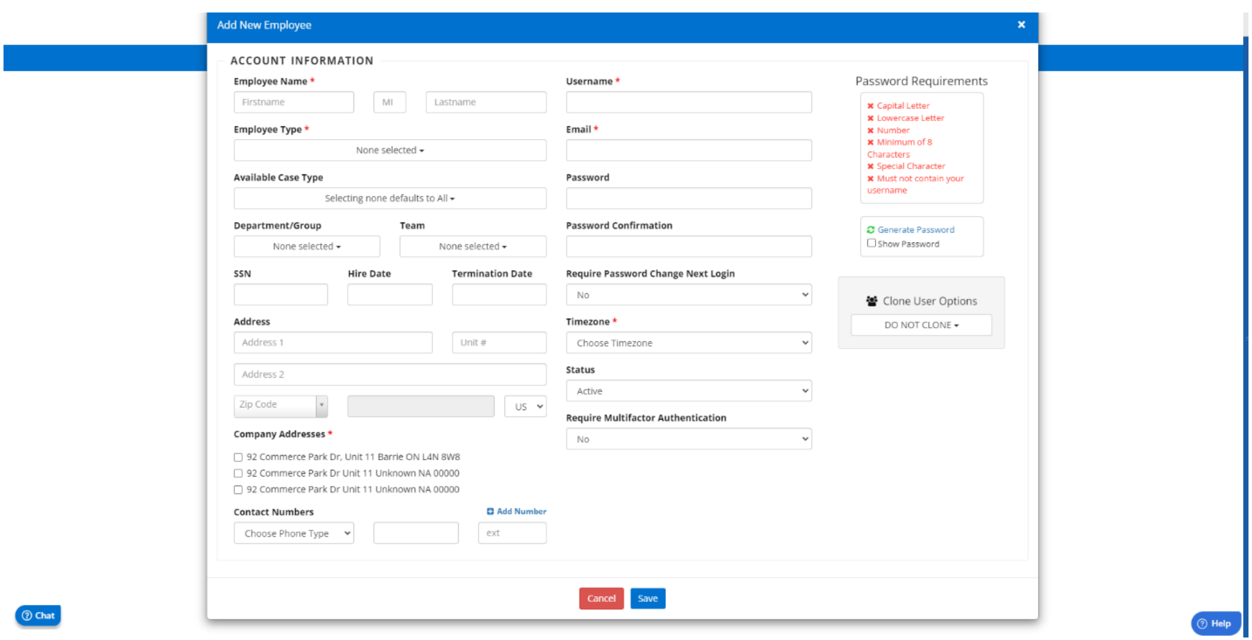
You can access the employee setup as follows on the top navigation section of the interface, hover over the settings tab. When the drop down pop up, look for the company employees dropdown item and click on it:



This section allows you to view all company employees and their current roles along with make modifications to them. Any time you wish to add a new employee or bailiff, you will need to migrate to the is section and create them here. To create a new employee, click on the plus symbol next to the “Employee List” title at the top left of the interface (many of the create functionalities will be found in the plus symbol next to their given title).



Once their, you will be presented with a drop-down modal allowing you to create a new employee. Fill in the form with your desired functionality and information for a new employee, including what you wish their username and password will be and click save to add the new employee.

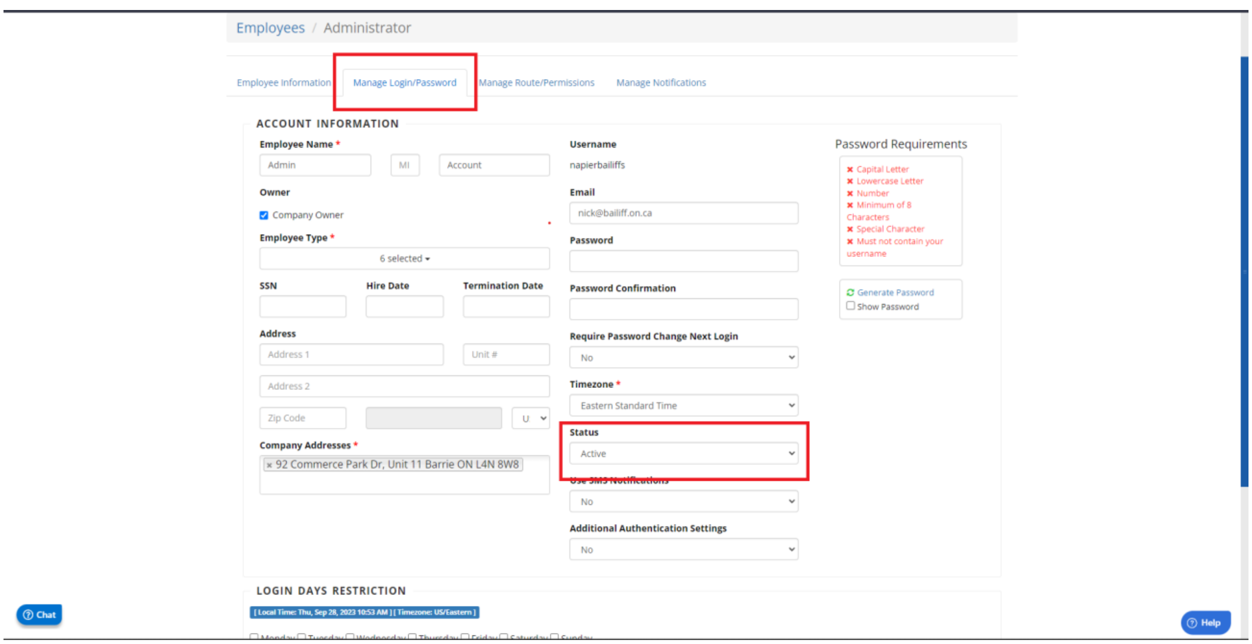


Editing Employees

Within the company employee section, you can also view and edit all current employees as well as set them to inactive or delete them. This section serves as you employee management system and associates each employee with a given username and password. Within this section, you can also reset the employee's username or password.

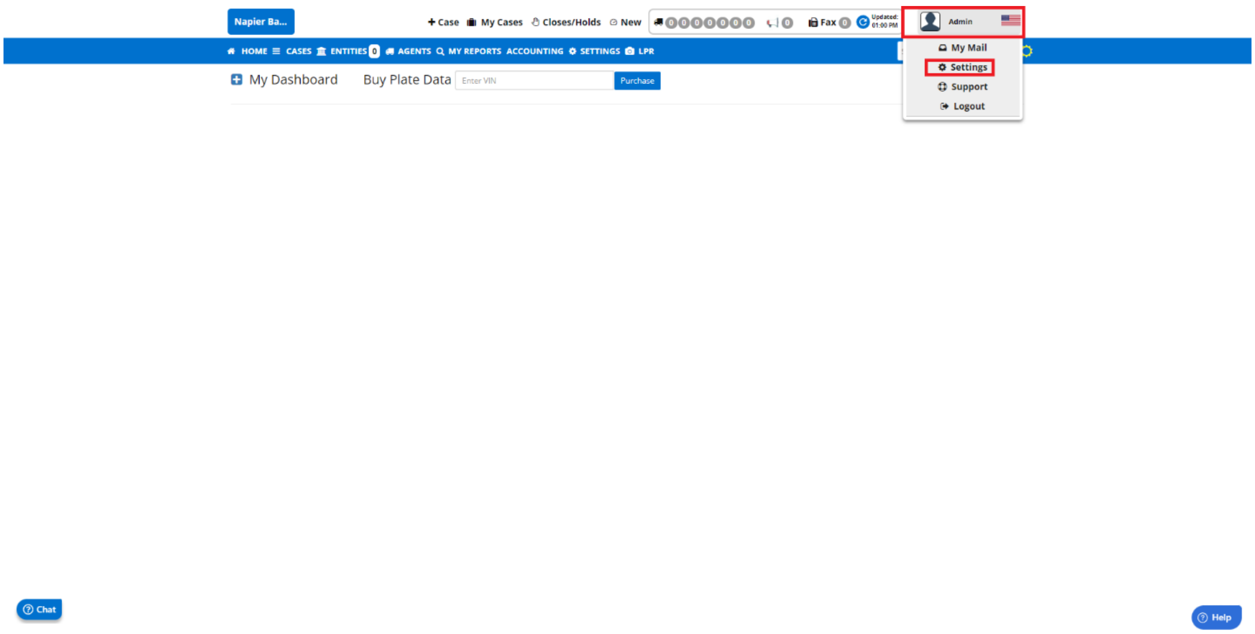
Deleting an Employee

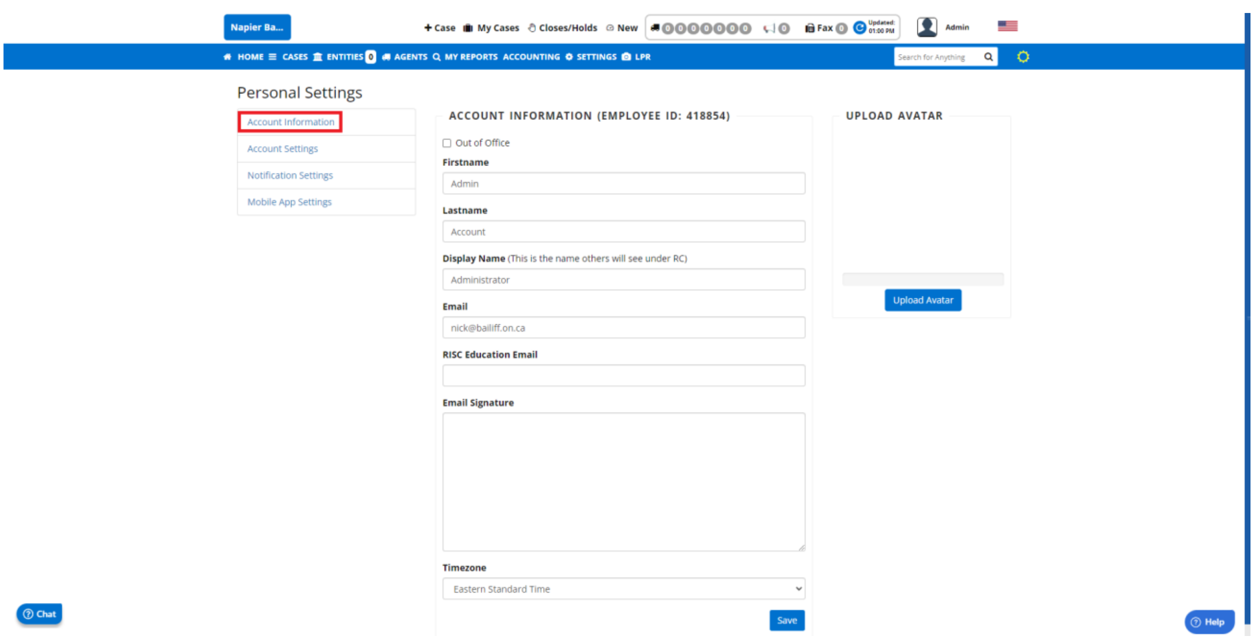
To delete/deactivate an employee, you must navigate to the company employee section in the settings tab as previously discussed. When there click on the employee as if you were going to edit them. Navigate to the tab that says "Manage Login/Password" and scroll down to the middle of the page were looking for an input box labelled "Status". Click on the status box and from the drop-down menu select the option "Inactive". This will deactivate their account and move them into the inactive employee list. If you wish to reactivate their account, you can navigate to them in the inactive employee list and set their status to active.

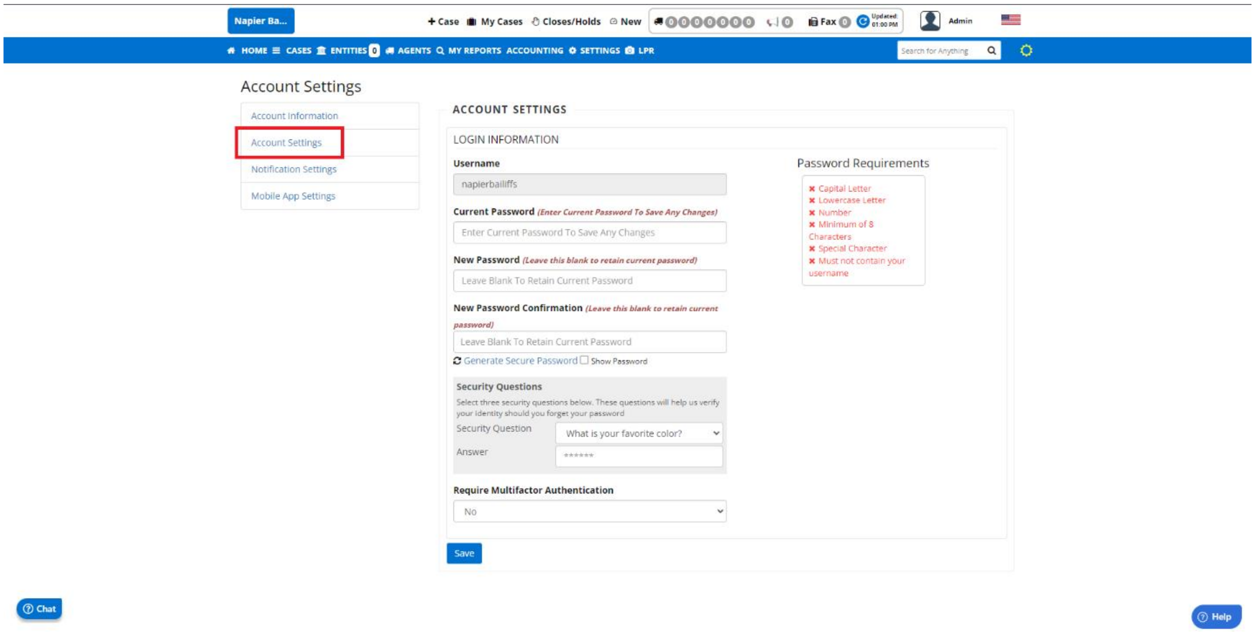


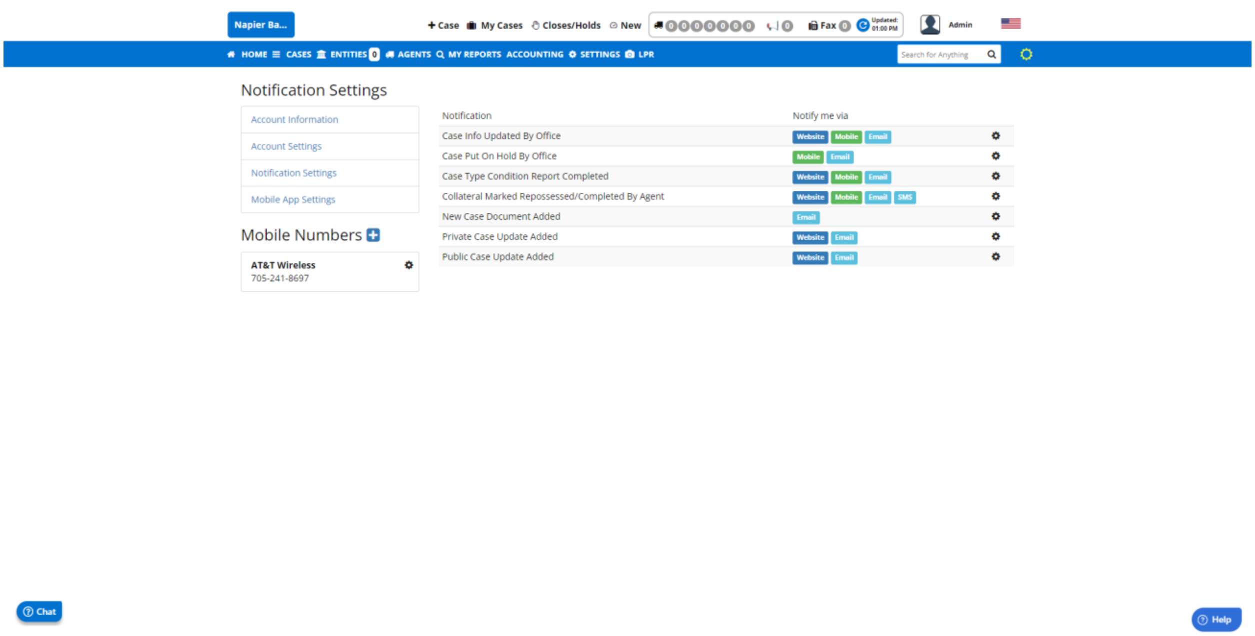
Editing your Account

On top of editing employee's accounts, you and your employee's can also edit your own account including changing and resetting your password and notifications. You can access these options in the top right corner by hovering over your name and clicking on the settings drop-down menu item.



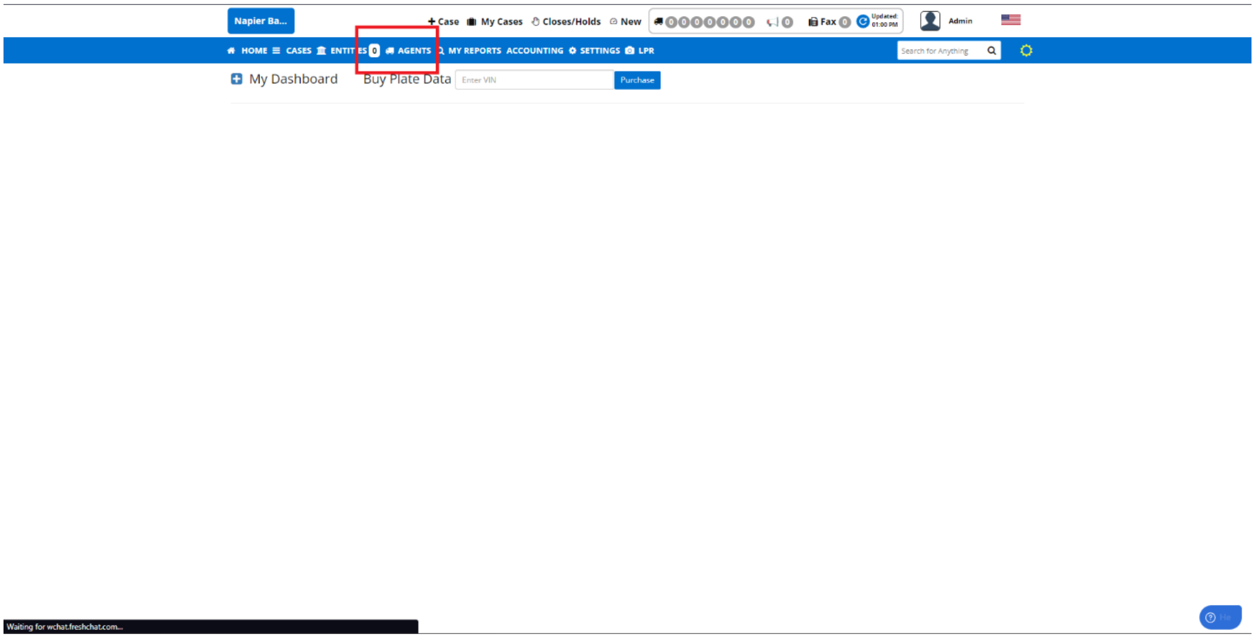






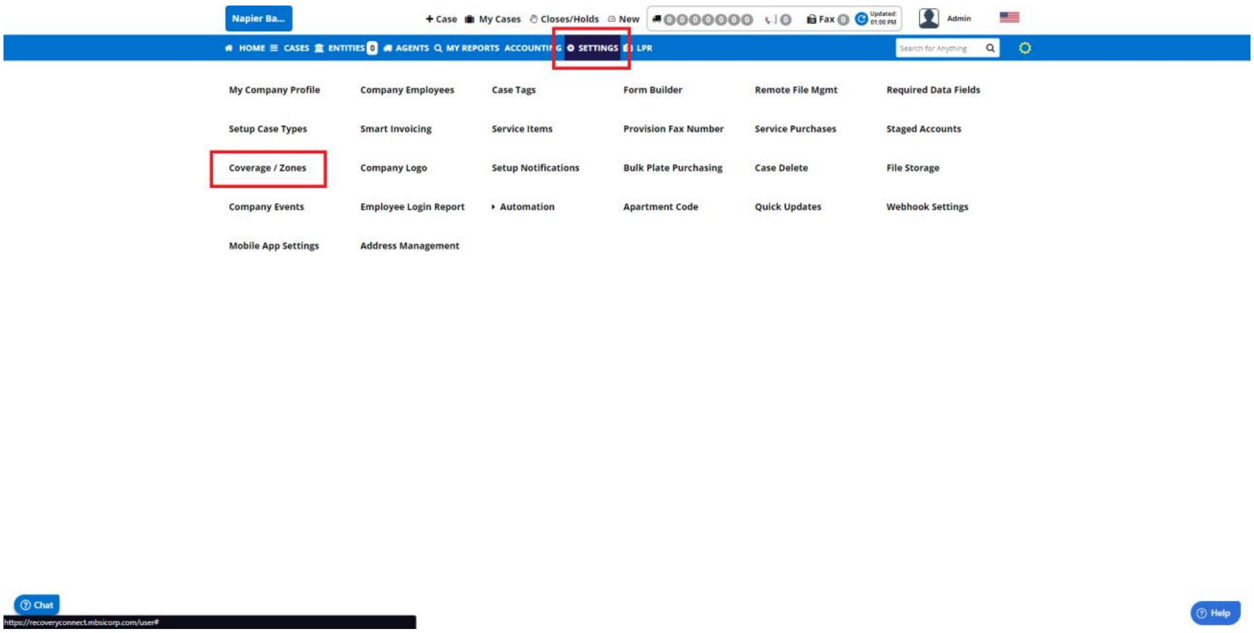
Viewing Bailiffs and Setting Zones for Bailiffs

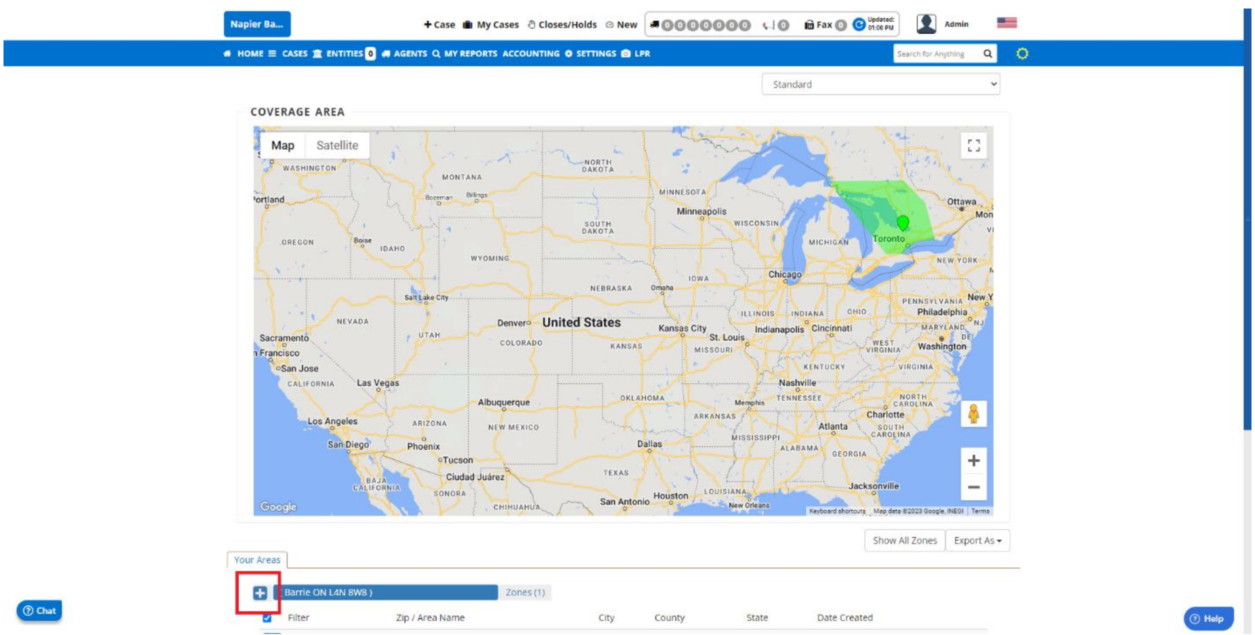
Recovery Connect allows you to also view your bailiffs and their zones by hovering over the agents drop-down menu item in the middle left of the blue navigation banner. Clicking on the agents tab will show you bailiff cards, clicking on them allows you to view details about each bailiff including their coverage zones, account login information, and their notification settings.



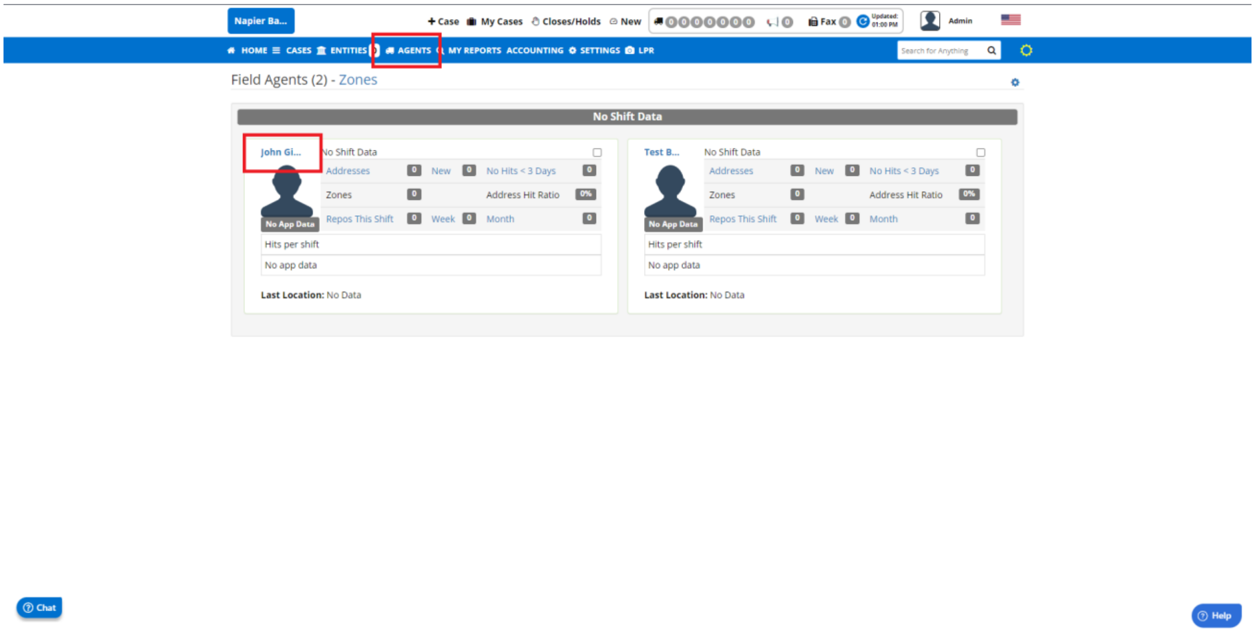
Setting Coverage Zones

Each bailiff can be assigned a coverage zone, allowing them to only accept cases from certain areas. You can physically draw the coverage zone you wish to assign a bailiff on the map. To access this functionality hover over the settings tab in the middle top of the blue navigation banner and in the drop-down items select “Coverage / Zones”. Once there, you can draw coverage zones and then go back to the agent’s tab in the blue navigation section and assign said draw zones to different bailiffs as to the businesses’ requirements:

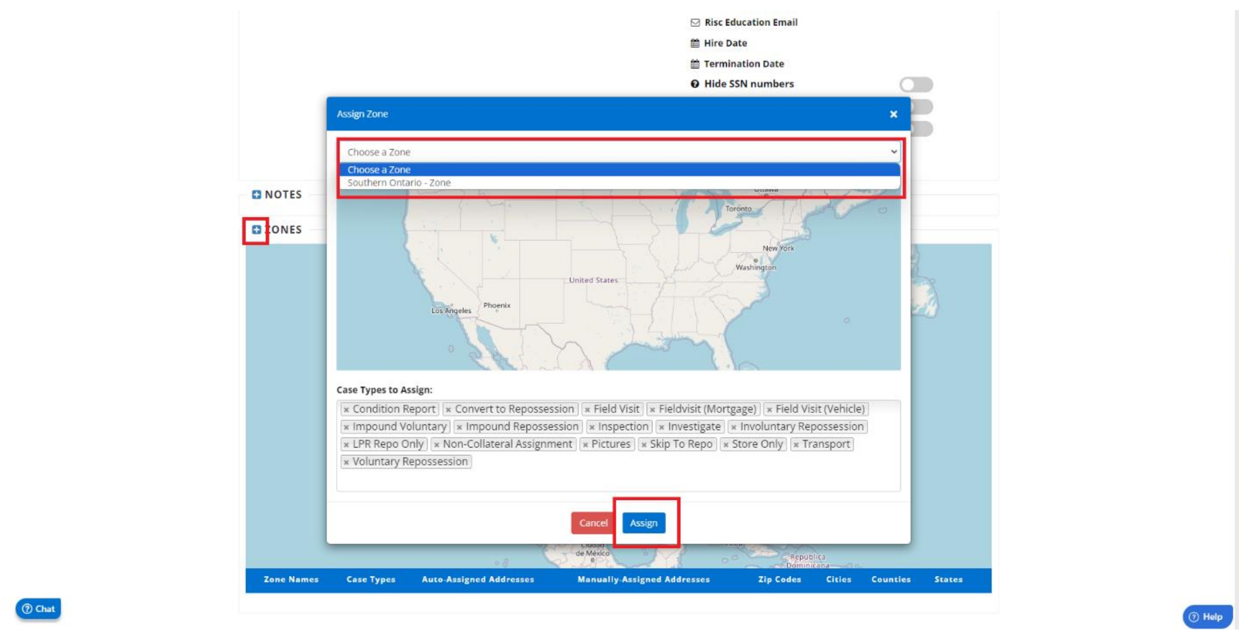




Create a new coverage zone



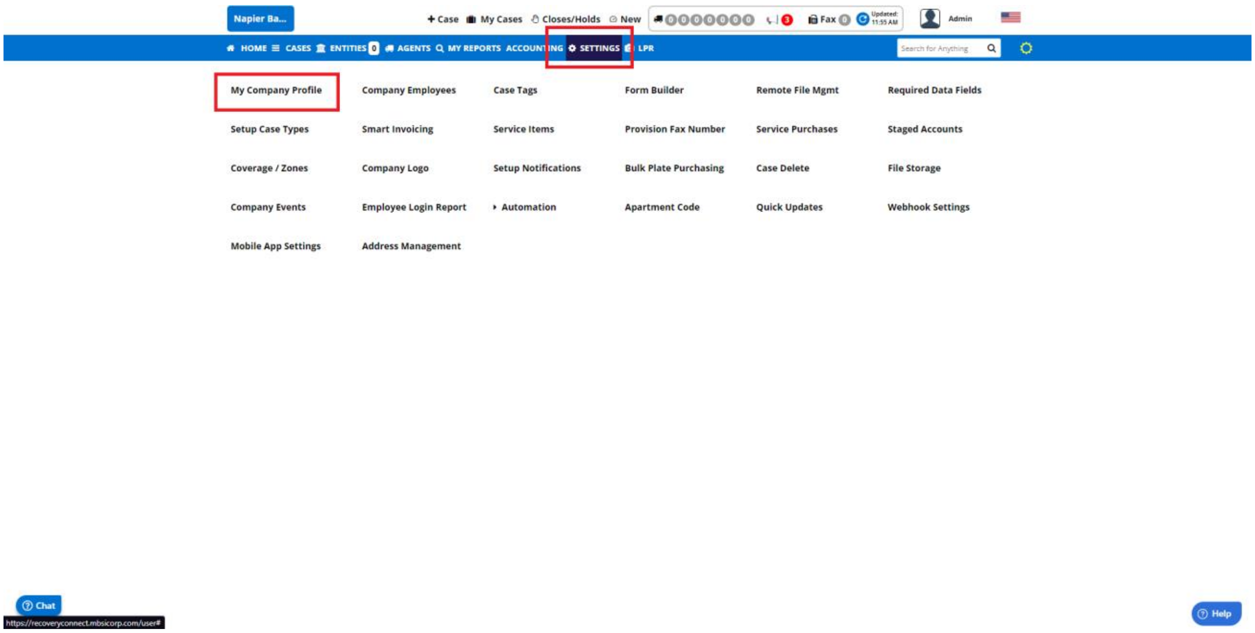
Click on a bailiff to change their coverage zone and other settings



Scroll down and click on the plus to assign a bailiff a coverage zone

Setting up Company Profile

Like employees, Recovery Connect allows you to set up and modify your company profile. Although most of the setup is done when originally signing up for Recovery Connect, you modify the profile at anytime by hovering over the settings tab in the navigation near the top middle of the screen:



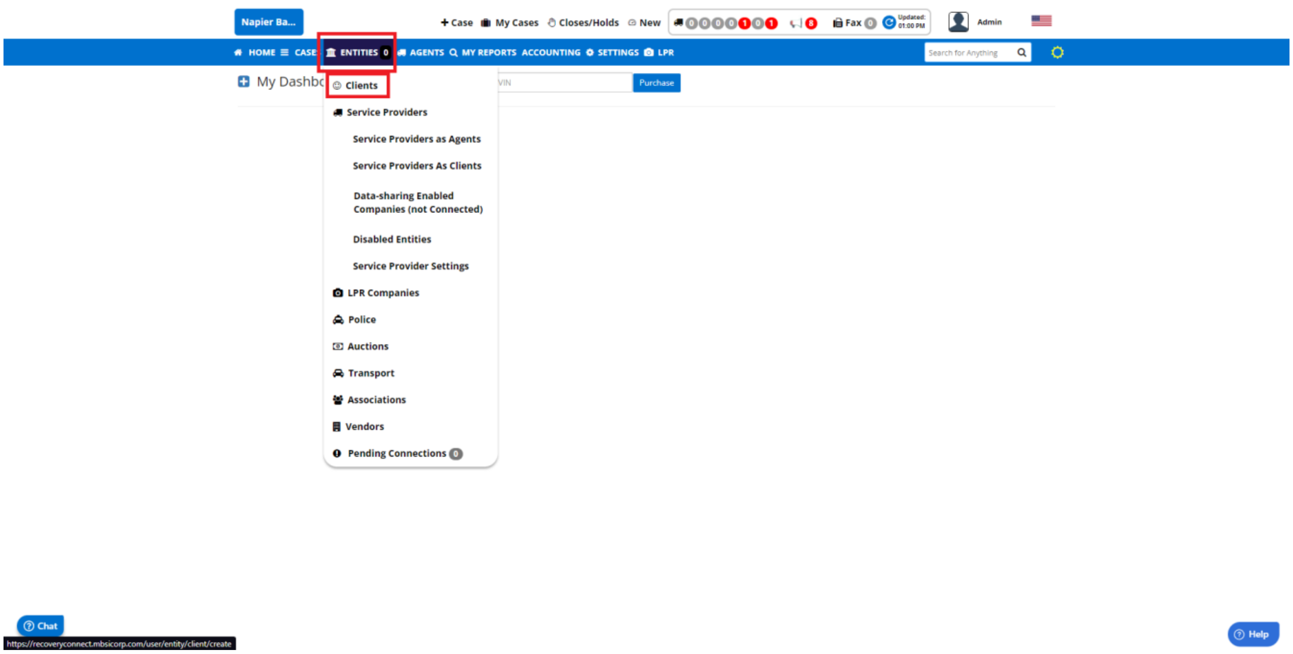
Withing this section, you can modify an array of options for the company profile, if you need help in completing a specific task here, refer to the support or documentation.

Clients

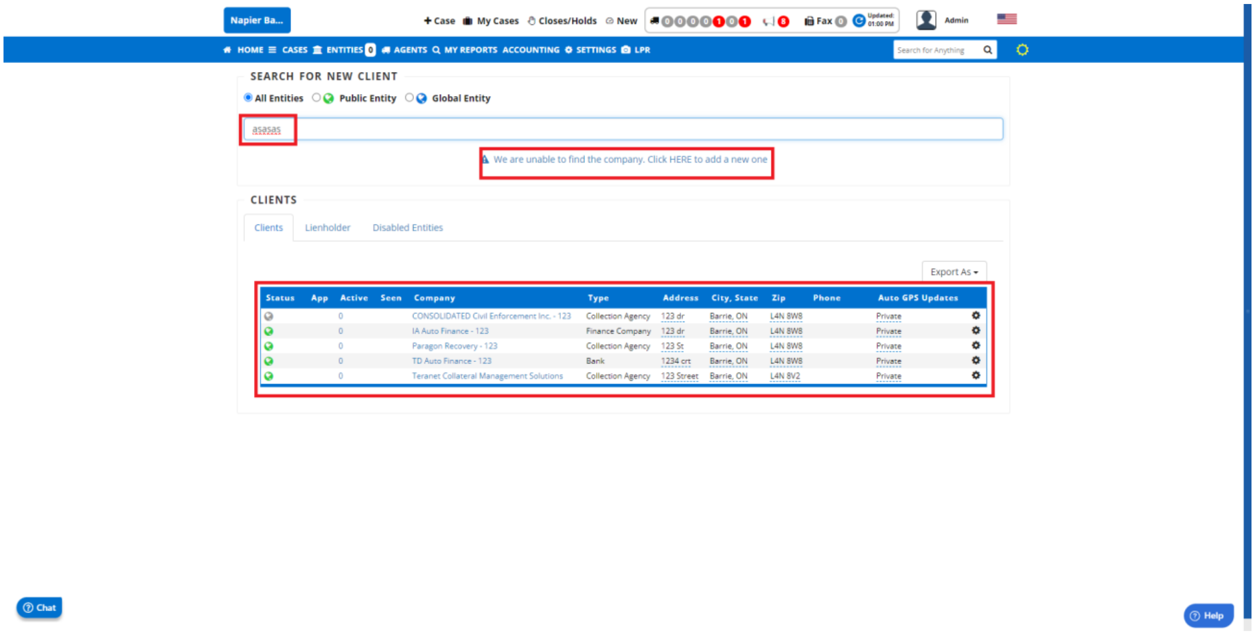
Clients in Recovery Connect allow you to view, manage, and assign clients to a case/file. In Recovery Connect you can easily add lenders and lien holders to assign them to cases, and view and manage your records with. Clients must be created first to create a case, as each case must have a client assigned to them.

Creating a Client

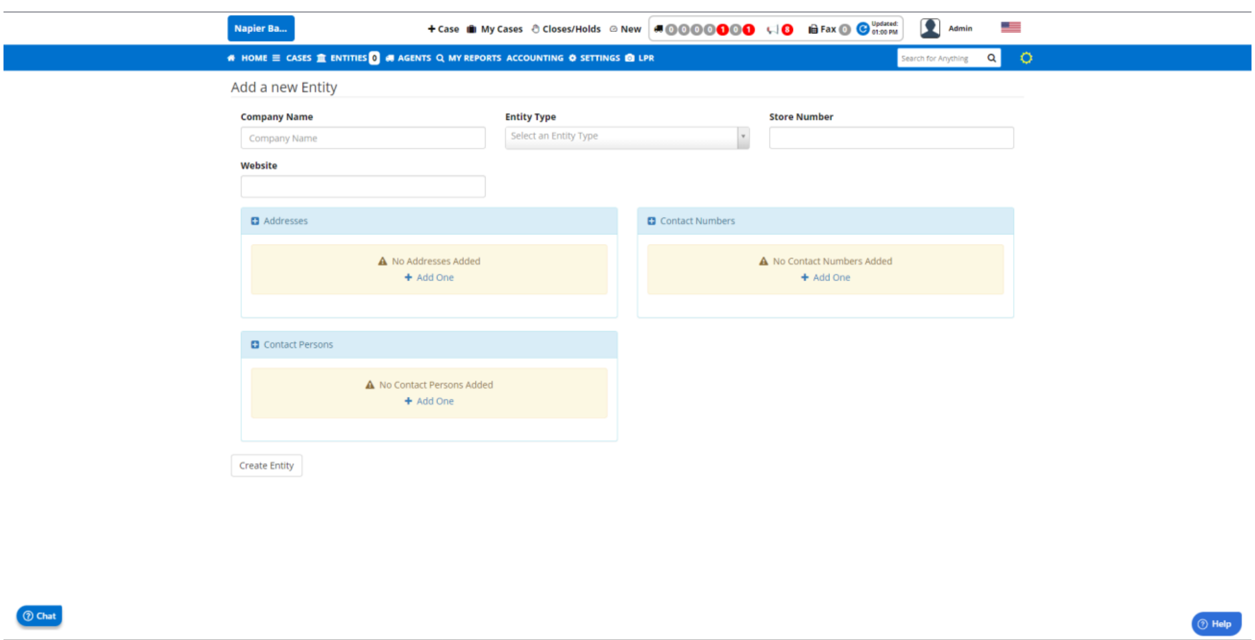
Creating a client is the next step required prior to making a case or viewing historical records after employees/bailiffs have been created. To create a client, you can hover over the "Entities" drop down menu item near the top left of the screen in the blue banner. Once there click on the "Clients" drop down menu item to access the client management system:



In this section you can view all your existing clients. To create a new one, either search for an existing on in the search bar at the top of the page, or type in gibberish in the search bar to be prompted to create a new custom client. This option is recommended as it allows you more flexibility in your client creation:

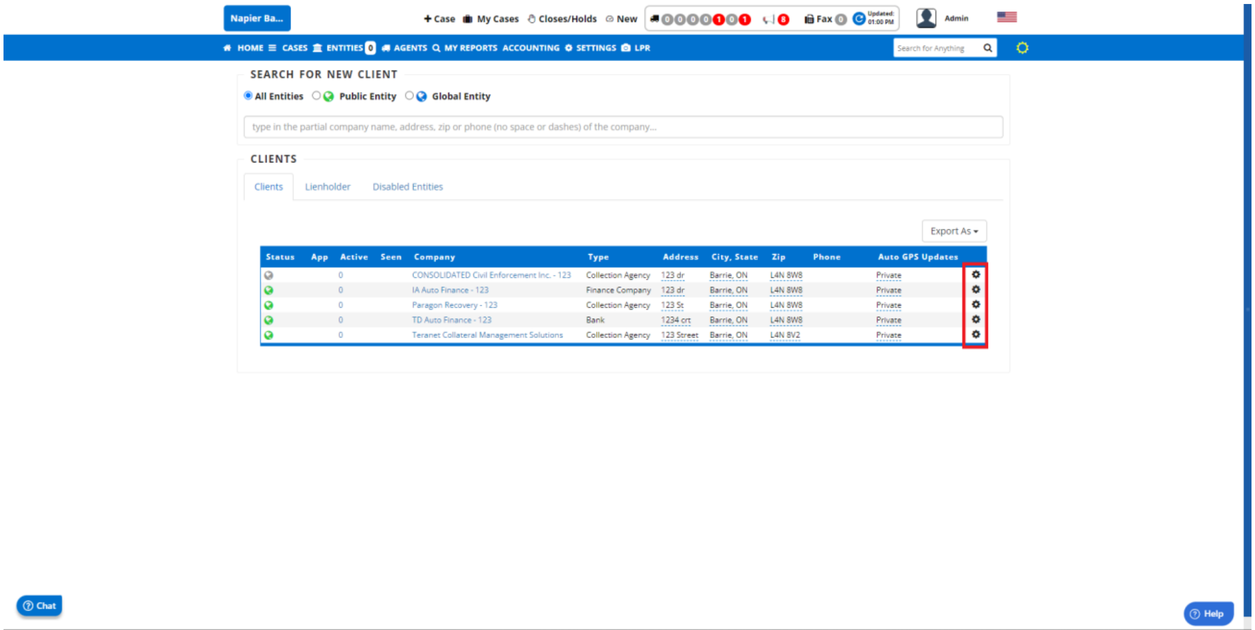


When you create a new custom client, you will be prompted to enter the client's information ranging from address to contact information. You will be required to name the client and add an address. It is also recommended you add the client's website for easy access:



Editing a Client

To make edits and amendments to a client you can always go back to the client's main page and click on the gear next to the client's name and a pop up will appear to make edits to the client as you desire.

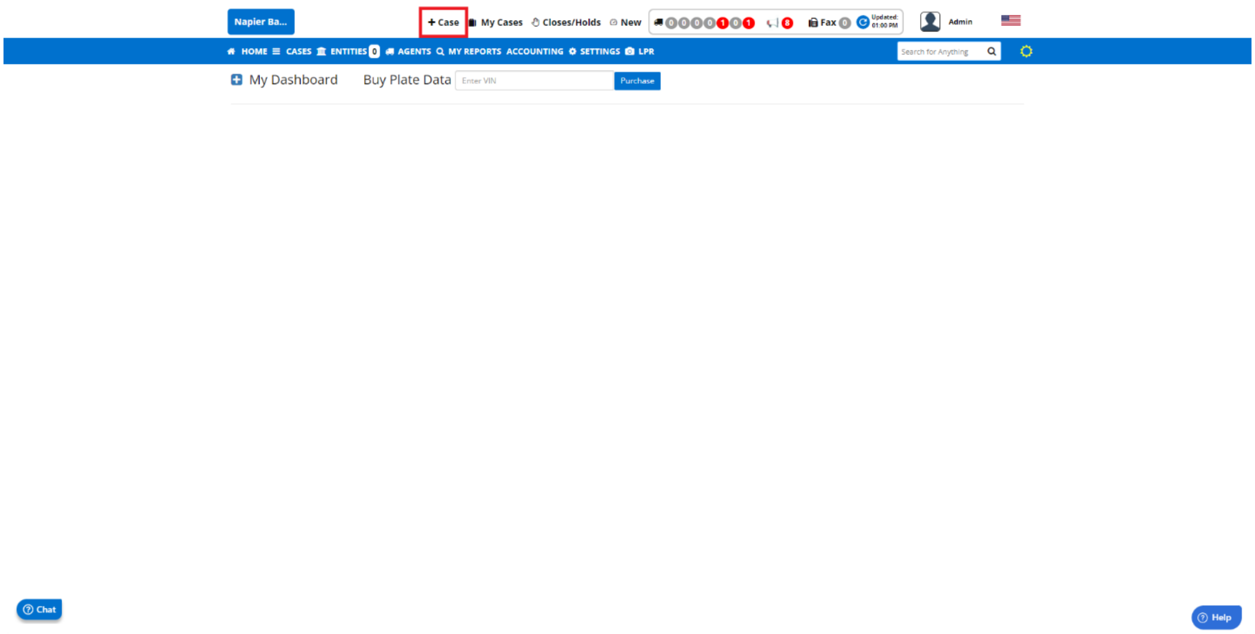


Cases

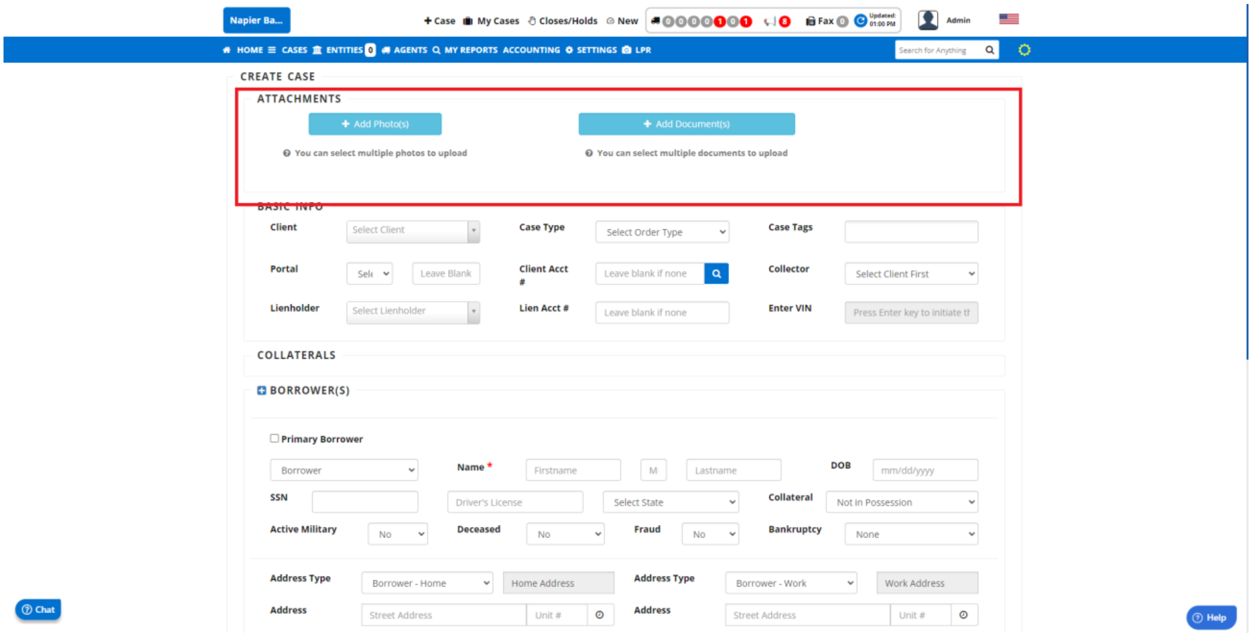
Cases (known as files in dash) are the meat and potatoes of Recovery Connect. With cases, you can view, modify, and update information pertaining to your files and quickly and easily communicate information to bailiffs in a quick and organized format. In this section we will cover how to make a case, case types, modifying cases, and other information about this integral part of Recovery Connect.

Creating a Case

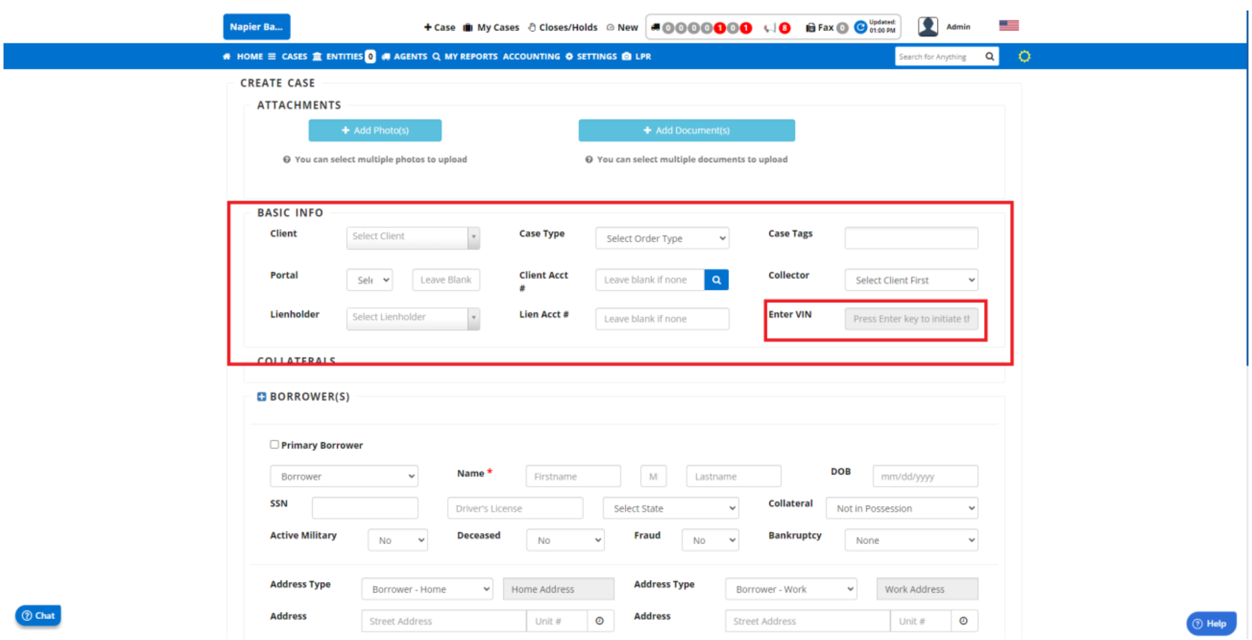
To create a case in Recovery Connect, you must first ensure you have created employees and clients first. Employees and Clients must be created prior to case creation both for technical reasons and best practices. Once those have been created, you can create a new case/file by going to the main Recovery Connect landing page. Once there, look at the top of the page and click on the + Case button near the middle top of the page:



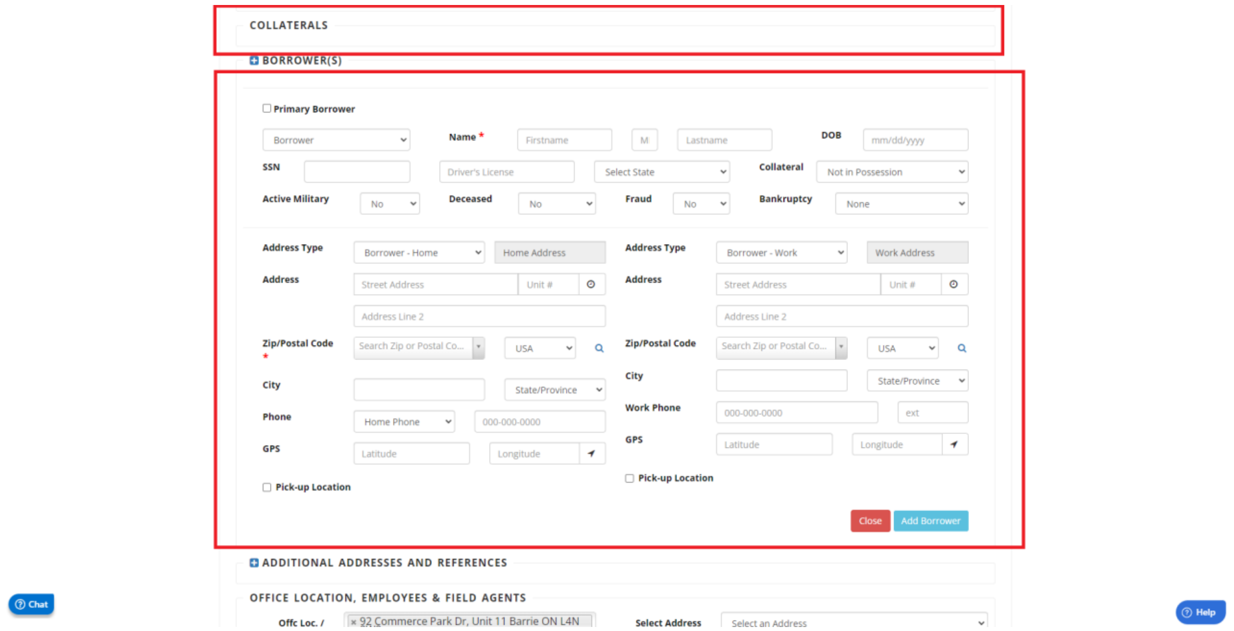
Once you click on it, you will be redirected to the case creation page, here you will be prompted to enter information about t he client, collateral, borrower, and who to assign the case to. You will be required to enter the client information and account number, the borrower's name and address, the collateral information of which you will need to enter either a VIN or loan number to be prompted with a drop down. Once the information has been entered, at the bottom of the page you can assign an existing bailiff to the case. The bailiff, or bailiffs will need to be assigned to the case to be able to access the information of the case and access it in the RCM mobile app. Here are the case creation sections:



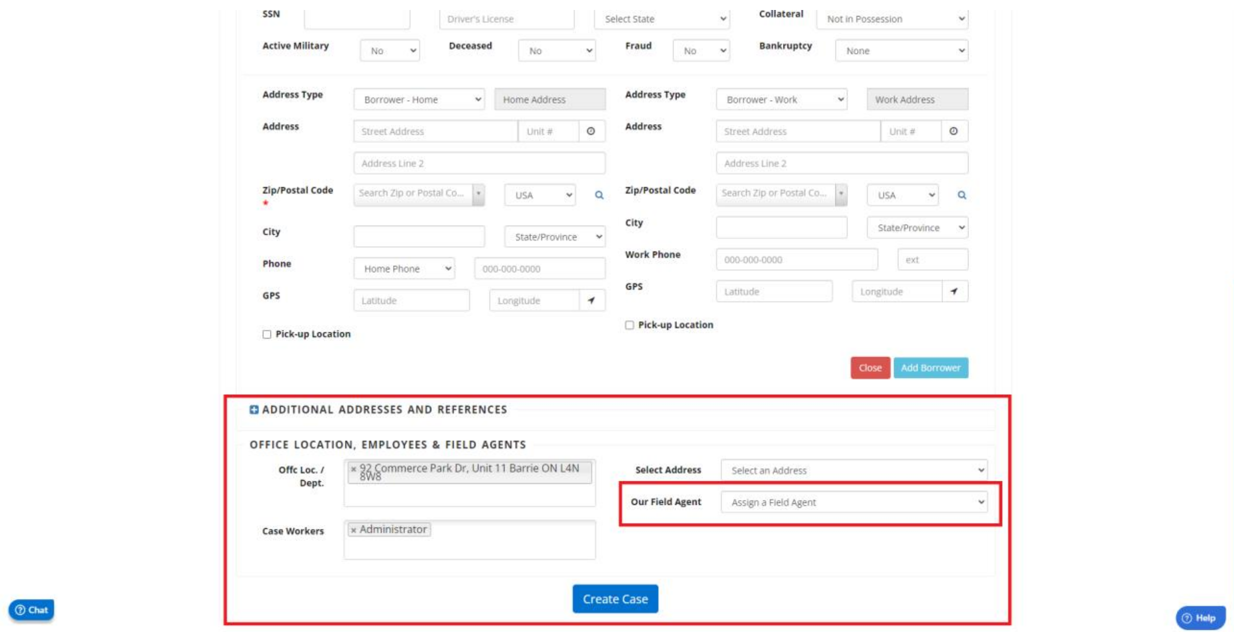
Attachments and photos section



Client information section



Collateral and debtor information section (Collateral section pops up once a VIN or loan number is entered in the basic info section)



Additional case information and bailiff assignment section

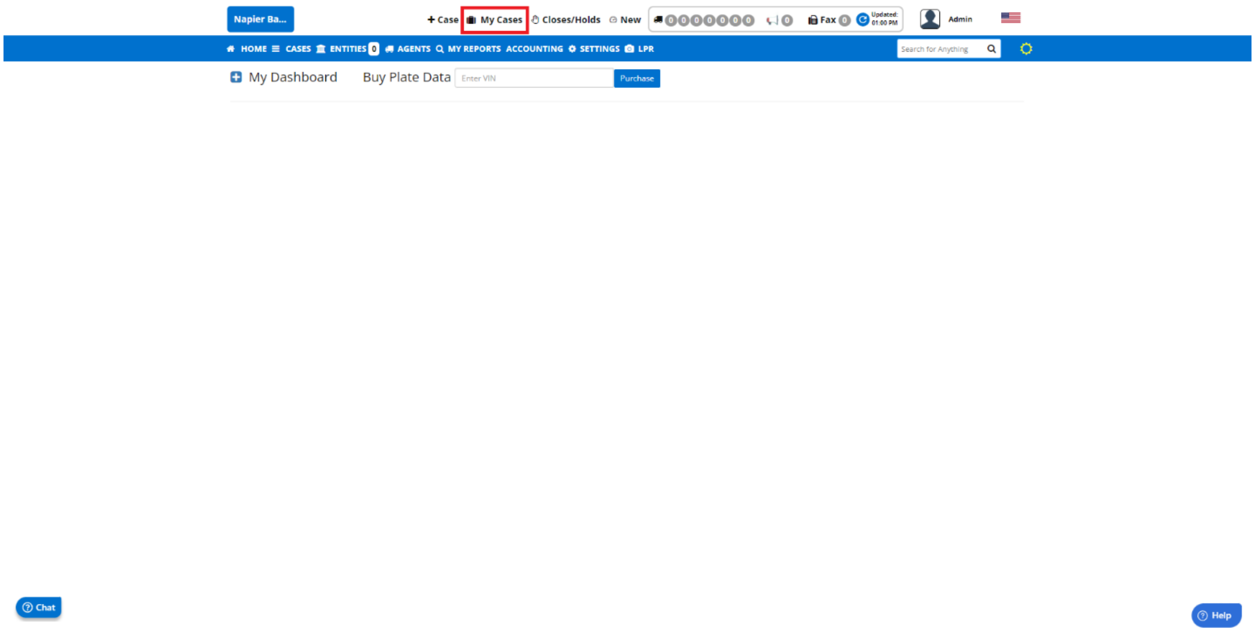
Once all the appropriate and required data is entered into the forms the case can be created by clicking the create case button at the bottom of the page.

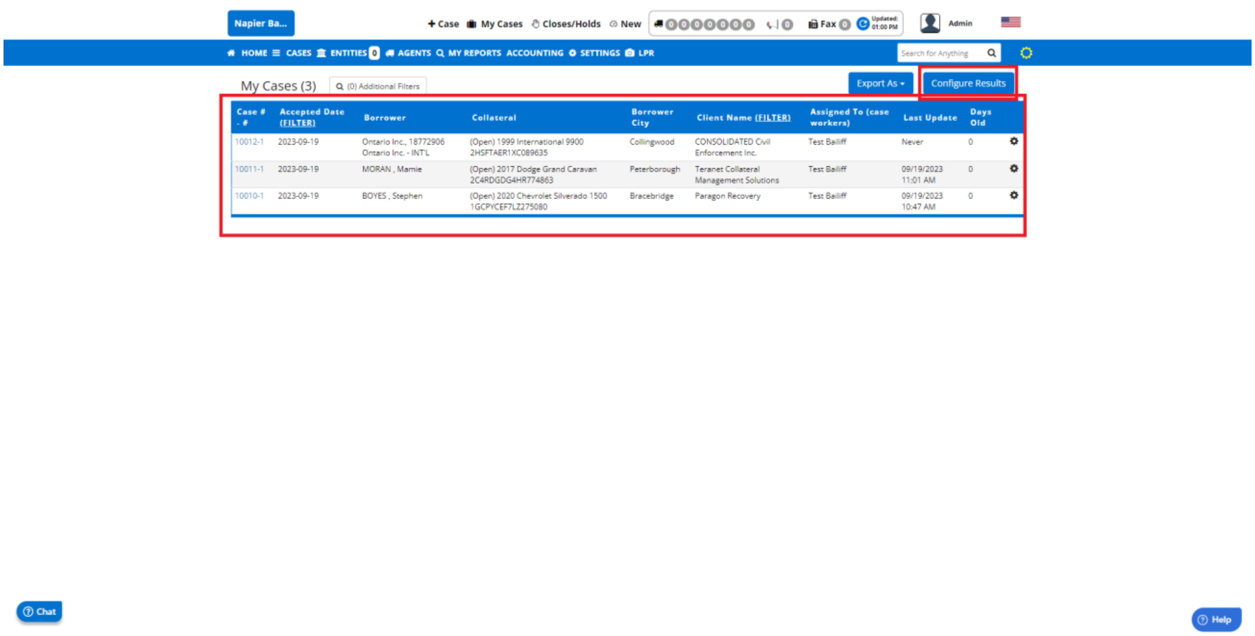
Accepting Cases and Holds/Closures

Field agents/service providers will need to accept a case before handling it. To do so, they will need to click on either the “new” or “closes/holds” button at the top of the screen. Once there they can click on the check box on the left side of the list of cases and then hit the accept or declined checked items button at the top of the list

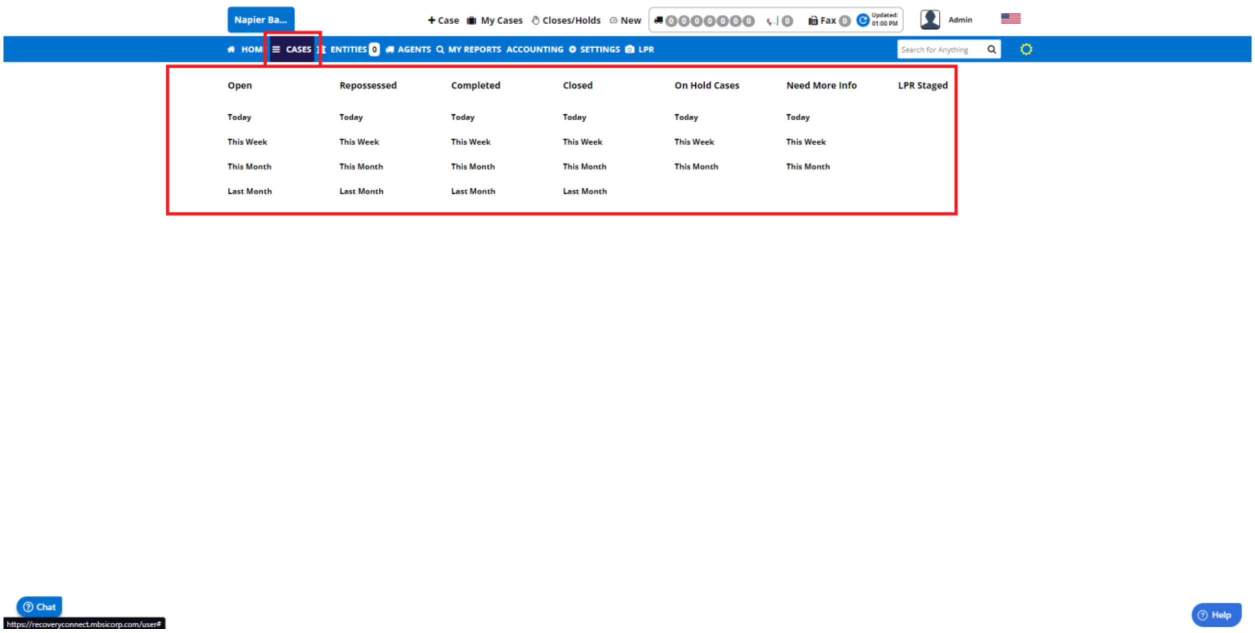
Viewing Cases

Created cases can be viewed in multiple ways. The first is to get an entire list of all open cases with the “My Cases” button at the top middle of the page above the blue banner. Clicking this button will land you on a page displaying all the currently open cases in a list form. You can then click on each individual case to view the details and make edits. This page also allows you to configure the results with an array of filters by clicking on the configure results button:



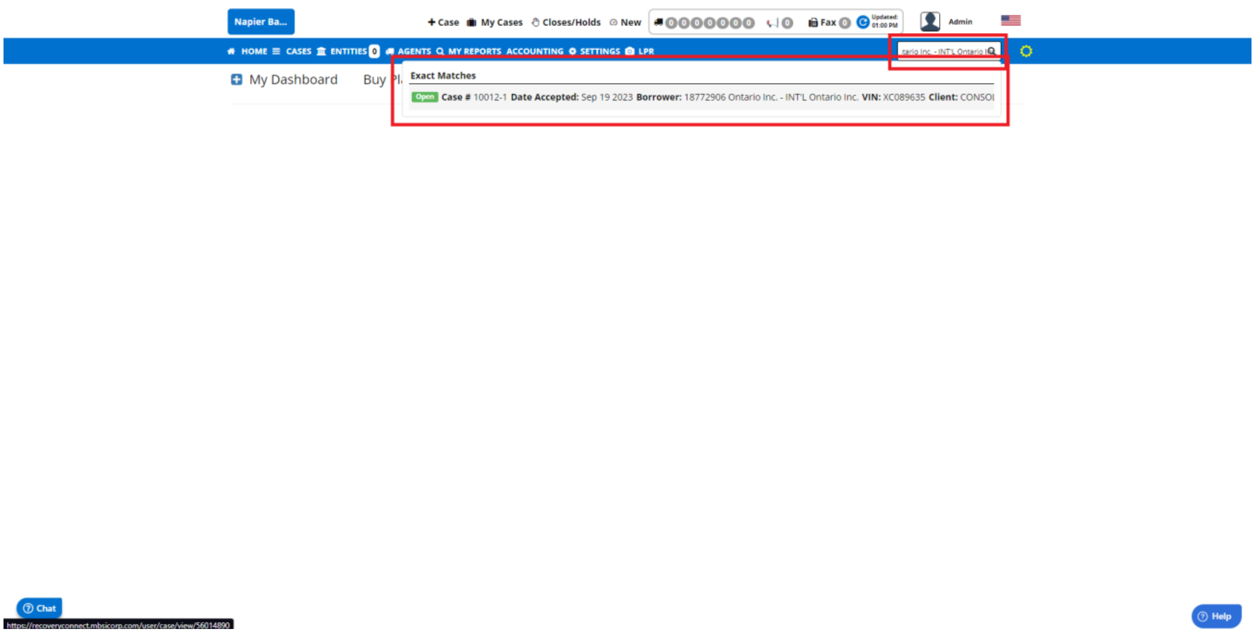


The second option to view/filter cases is the cases dropdown menu item in the middle left of the blue banner. Hovering over this option prompts you with a drop-down list allowing you to select cases by status. For instance, you can view only a list of cases that are open, on hold, or waiting for more information.



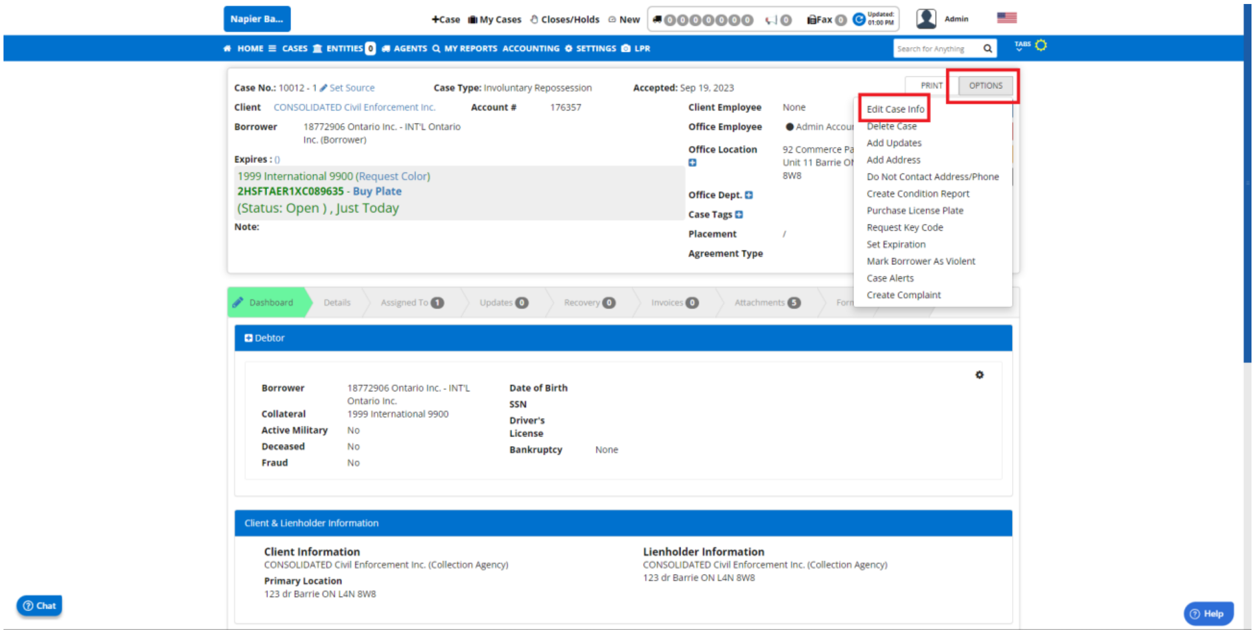
Clicking on one of the drop-down items will present you with cases that have that associated status assigned to them, where you will then be presented with a list of cases in which you can click on an individual case and make amendments or view information as needed.

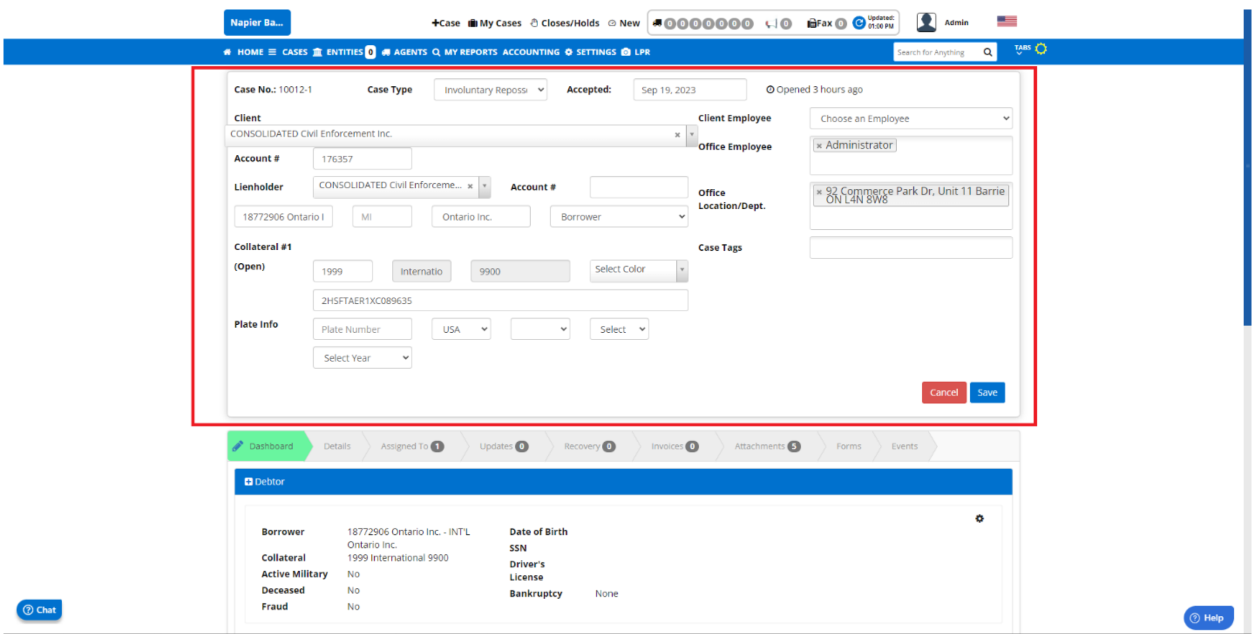
An alternative to using case filters and viewing lists of cases is the search bar at the top right of the blue navigation banner. This search bar allows you to search by name, vehicle, case number, etc. simply start typing in the search bar and click on the desired result.



Editing a Case

When you need to edit a case, you can do so by using the previously discussed methods to pull a case up and view it. Once viewing it, you will be landed on the case overview. You can then click on the options drop-down menu on the top right of the page. The first option is the edit case option. Addionatialy you can add updates here and do various other functions. Once you click on the “edit case info” drop-down item, you will be prompted to change the case details at the top of the page where you can make amendments as needed:



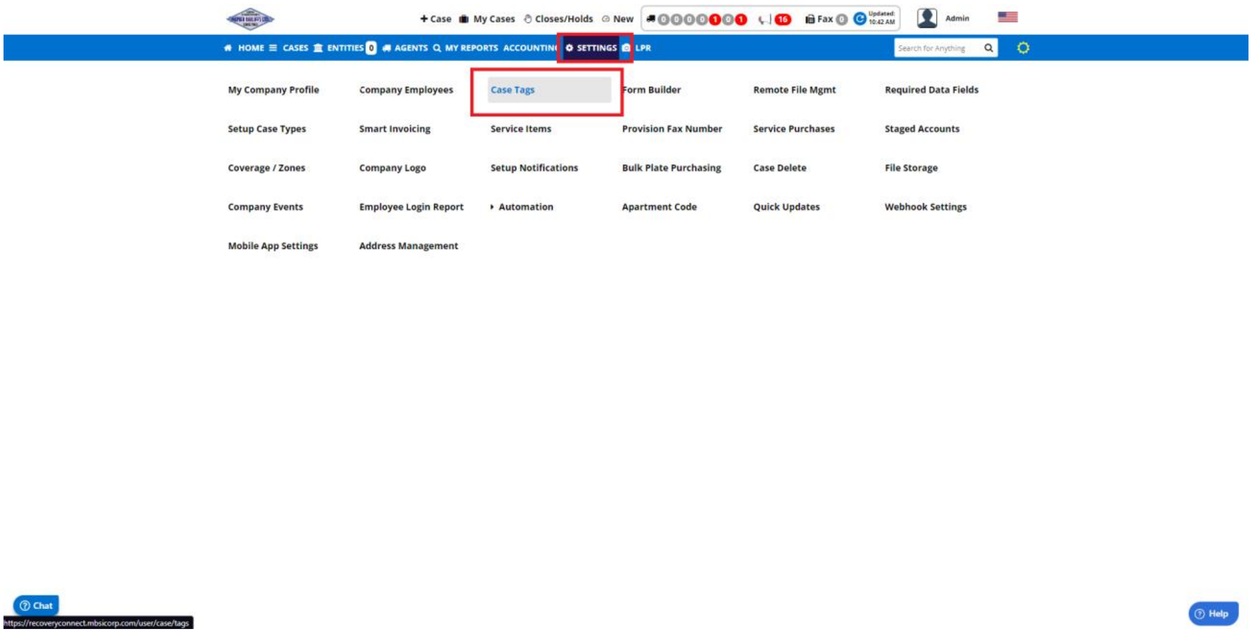


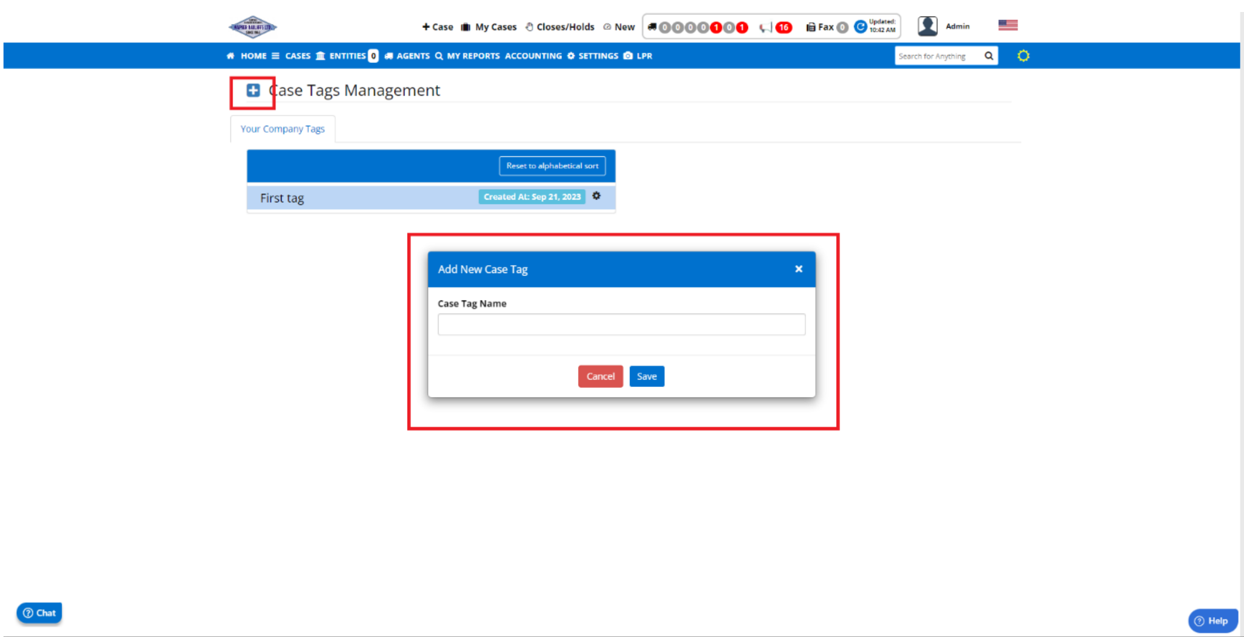
Case Tags

Case tags allow you to add extra context to a case. You can make a case tag that will represent some additional categorizing information for a case in the case tag management section. To create case tags, hover over settings tab in the blue-ribbon navigation and select

“Case Tags”. Once there, click the addition button next to the title, and assign your tag a name.

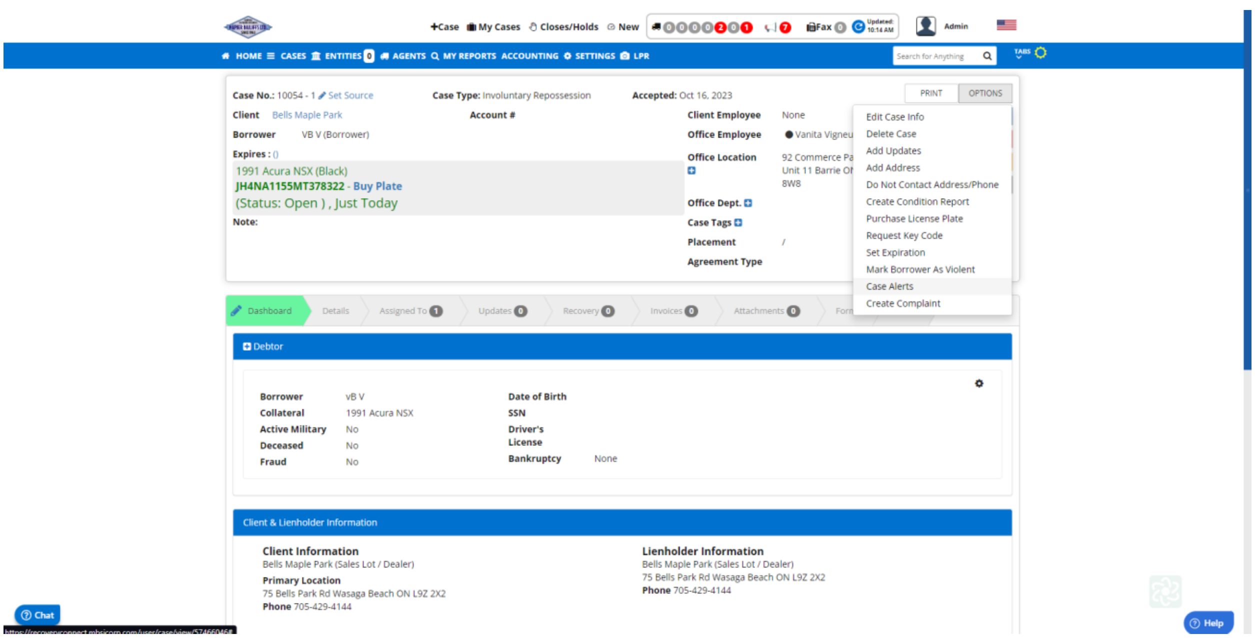
Once a case tag is created, you can assign new cases made that tag in the case creation screen.





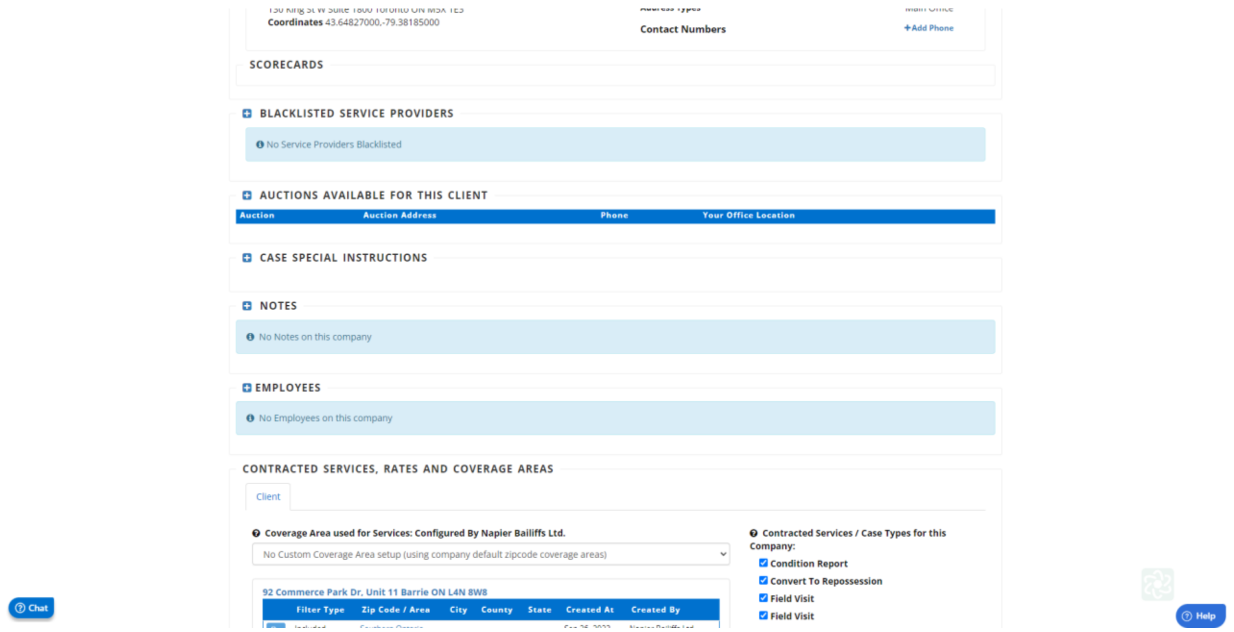
Case Alerts

Case alerts aloe you to set custom alerts and time-based reminders on specific cases. They are useful for both the bailiffs and the office as they allow you to document nontraditional or important events on your cases. An example of a use case for case alerts would be making a reminder after making a case to ensure that the case is updated by the bailiff after 48 hours. In this case you can set the case alert to be viewable by both the bailiff and the office. To set case alerts, first click on the case you wish to set the alert on. When on the individual case screen, select the options drop down menu and click on the “Case Alerts” drop down menu item. A screen will pop up allowing you to type what you want the alert to consist of as well as when you want to be alerted on the case alert. Make sure you click on the “make intrusive button” so the alert will be clearer to the view of the update.



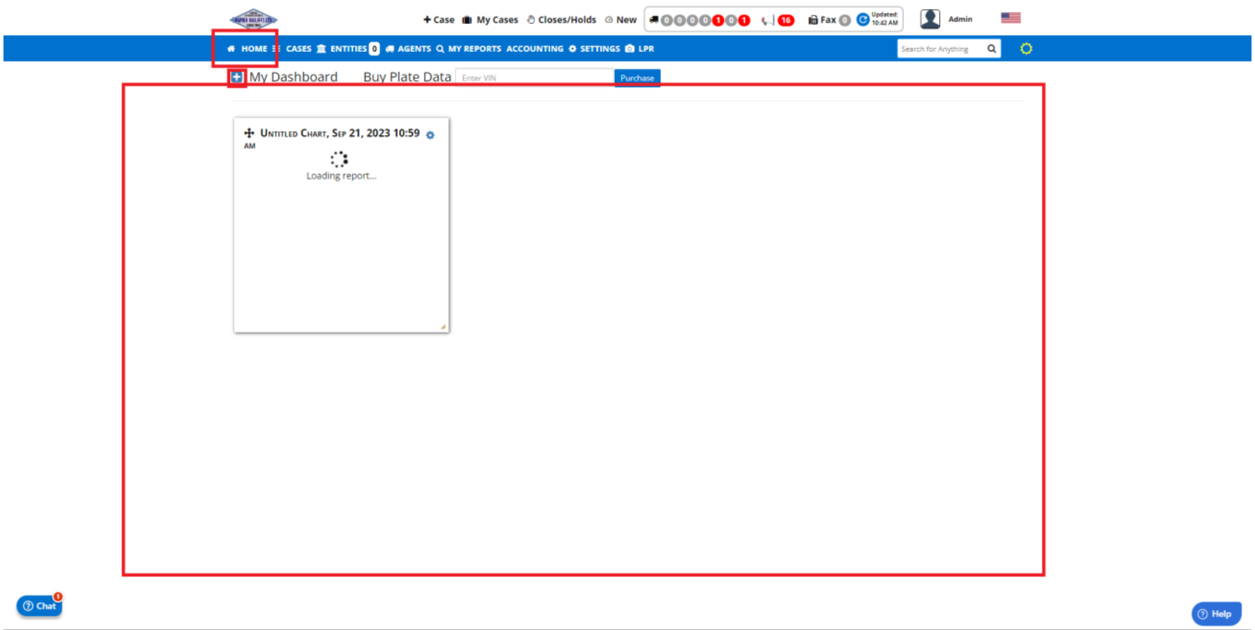
Client specific instructions

Client specific instructions allow you to set instructions for cases form a specific client. For instance, client specific update information or timelines can be set here to remind the bailiffs and the office of each client's particular cases demands. You can set client specific updates through entities > clients > click on the client you want to set the instructions on and then scrolling about halfway down the screen to the heading "Case Special Instructions".



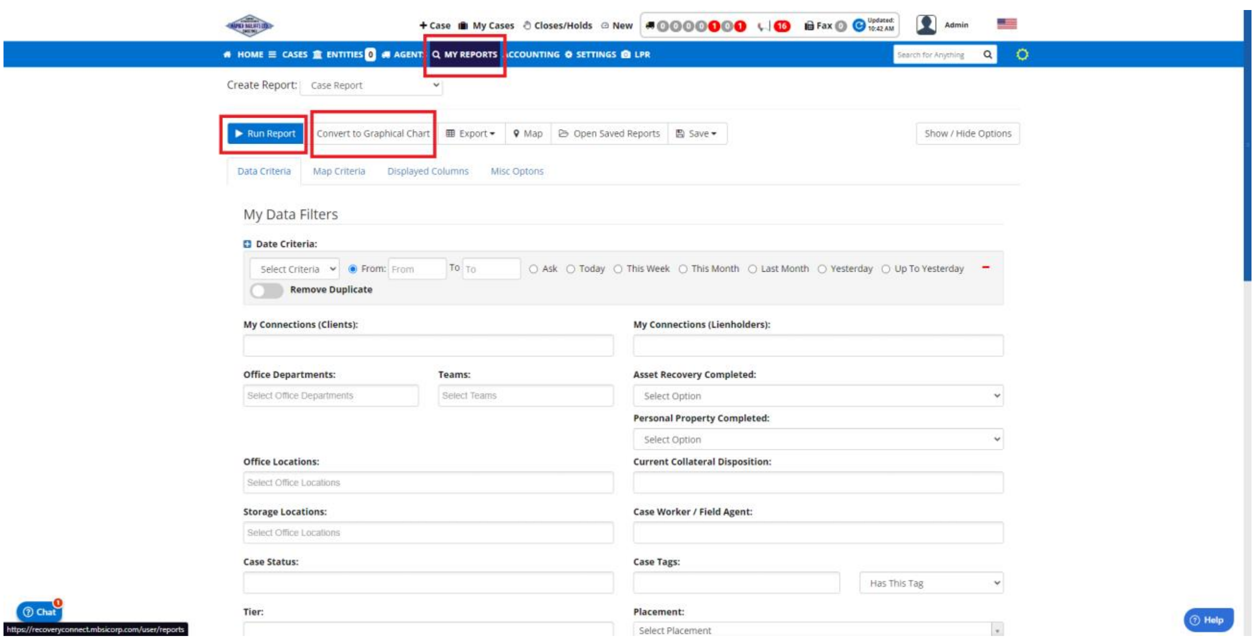
Dashboard and Reports

Recovery Connect features a dashboard area on the main home landing page that is blank by default. With this dashboard you can select various cases and aggregate data into reports and charts and display them on this page for a brief overview of the businesses data. To create/add to the dashboard, you must first create a report. A report serves as a custom array of data you choose to report on, the dashboard can then have several reports pinned to it.



Creating a Report

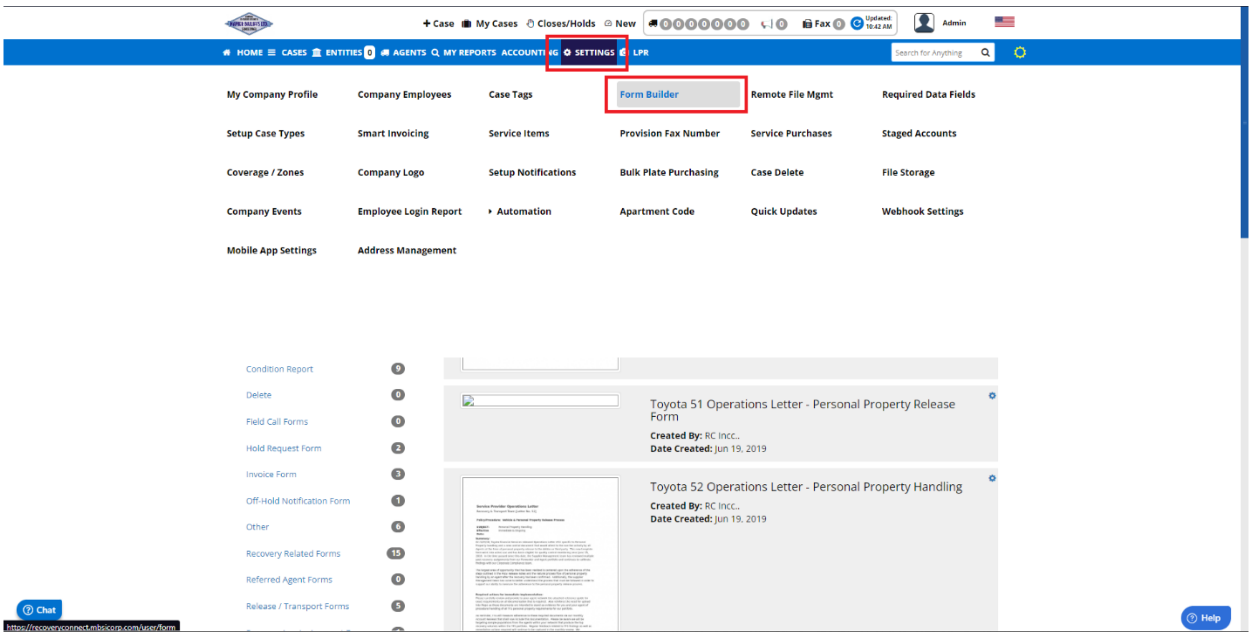
To create a report click on the reports section in the top middle of the blue banner. Once there, go through the various form options and choose what you desire to report on.

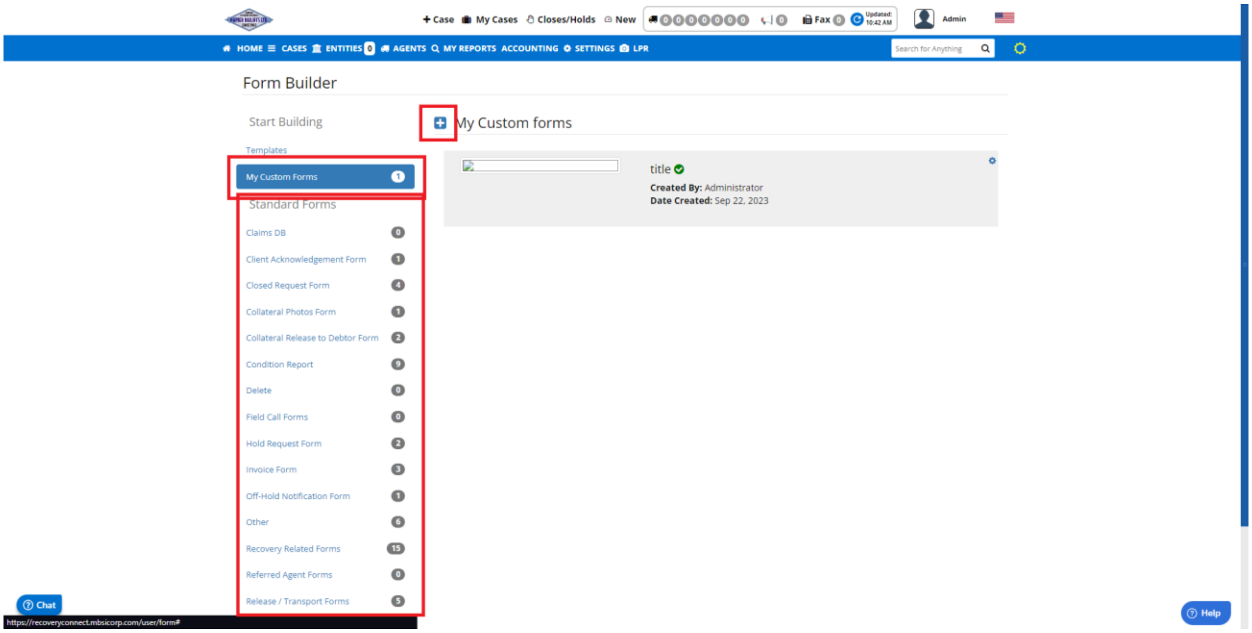


Once done, click on the run report button convert to graphical chart, depending on what analysis you wish to complete. You will be prompted to add it to your dashboard if you wish and if not, you can save the report. Additionally you can add it t your dashboard by clicking on the plus button next to dashboard on the main home landing page.

Form Builder

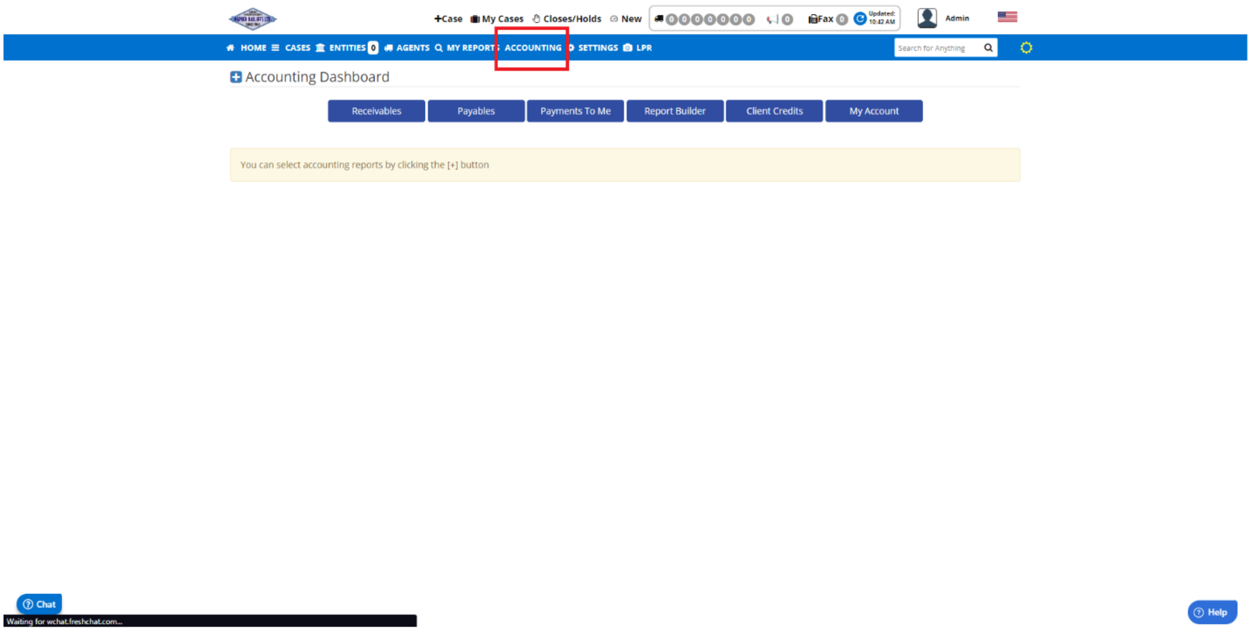
Recovery Connect allows you to build forms and use premade forms to serve to clients, debtors, and anyone else as needed. To access this capability, hover over the settings tab in the blue navigation ribbon, and click on form builder.





Accounting

Recovery Connect also provides you with the option of keeping track of accounting matters in the software. You can make reports, view payables and receivables, and more from the accounting tab in the middle of the blue navigation ribbon.



Notifications

Recovery connect allows you to view updates to all things in the software in the form of notifications. You can view notifications by refreshing the bubble at the top right of the screen. This will show you an overview of the most recent activity.

Common Terms

Below is a list of common terms to the business/Dash software and their respective names in Recovery Connect:

- Dashboard = Home page/landing page in Recovery Connect
- Projects = Cases in Recovery Connect
- Bailiffs and Staff = Company employees in settings/Agents tab in Recovery Connect
- Clients = Entities → Clients in Recovery Connect