

## **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.

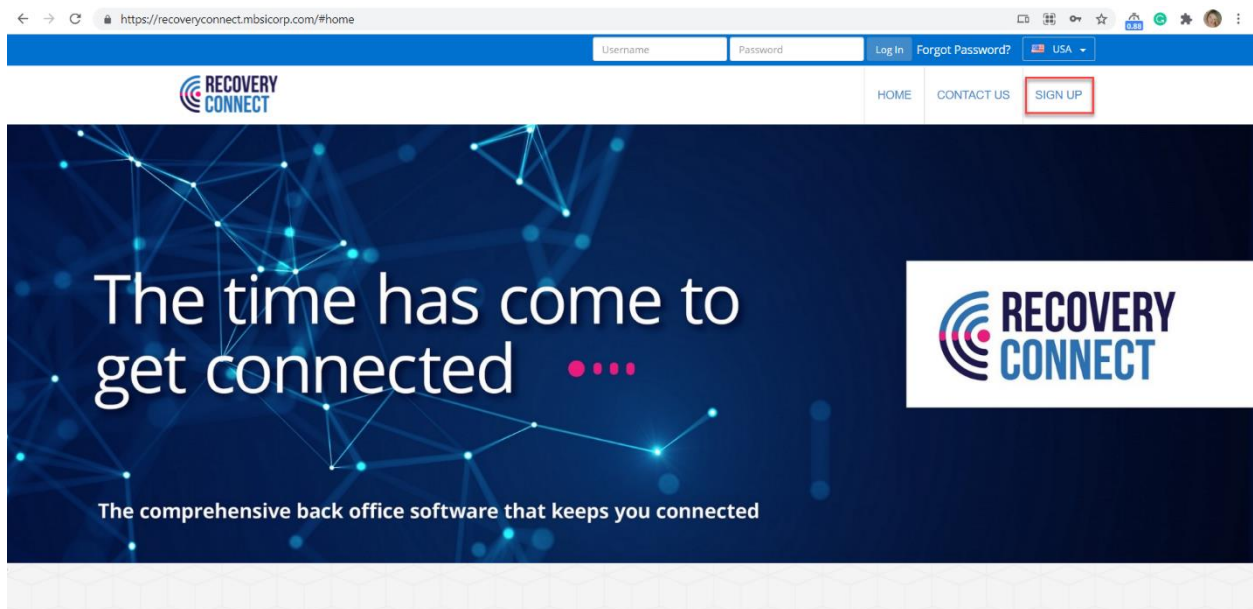
**Additional Resources:** Access links to supplementary materials, support channels, and updates related to Recovery Connect.

## 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.

**Sign Up**

1. Company Details | 2. Company Setup | 3. Promotions | 4. Terms Of service

Signup Code: Enter Signup Code

Company Name \*

Company Type \*

Address \*

Phone Number \*

Unit #

Fax Number

Address 2

Toll-free Number

Zip / Postal Code \*

City/State \*

US

Website

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

**Sign Up**

1. Company Details | 2. Company Setup | 3. Promotions | 4. Terms Of service

Choose Setup \*

Owner / Administrator

Create a New One or Choose From Existing Employees

First Name \*

Last Name \*

Direct Line \*

Email \*

Username \*

Password \*

Confirm Password \*

**Password Requirements**

- ✗ Capital Letter
- ✗ Lowercase Letter
- ✗ Number
- ✗ Minimum of 8 Characters
- ✗ Special Character
- ✗ Must not contain your username

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.

1. Company Details 2. Company Setup 3. Promotions 4. Terms Of service

**Terms and Conditions**

Software License and Services Agreement

THIS SOFTWARE LICENSE AND SERVICES AGREEMENT is made this 19 day of August , 2022 by and between MBSI Corp., an Arizona corporation with its principal address at 10851 N Black Canyon Hwy, Suite 500, Phoenix, AZ 85029 (hereinafter "Licensor") and **FIELD SERVICE TEST DEMO** with offices located at **17543 W TASHA DR** (hereinafter "Customer").

1. IN CONSIDERATION of the foregoing and mutual covenants set forth herein, and intending to be legally bound, the parties agree as follows:

**2. BACKGROUND**  
Licensor has developed and owns certain proprietary software, hereinafter referred to as RecoveryConnect, for use in the recovery/repossession industry ("Software"). Customer desires to obtain a license to use such Software and Licensor desires to license such Software to Customer and perform the services on the terms and conditions set forth herein.

**3. SCOPE OF THIS AGREEMENT**  
This Agreement defines the terms and conditions under which Licensor will design, develop, integrate, deliver, install, and support the Software.

**4. TURN-KEY BASIS**  
The Parties hereto acknowledge that the performance by Licensor of its obligations hereunder is to be done on a "turn-key" basis. This expression is understood to mean that Licensor is fully responsible, pursuant to the terms and conditions hereof, for the delivery of the Software in full conformity with the terms and conditions hereof.

**E-Signature**


[Save as PDF](#)

Your Fullname as it reads on your Government issued ID \*

Government issued ID Number \*

State / Agency of the government issued ID \*

Date Signed \*

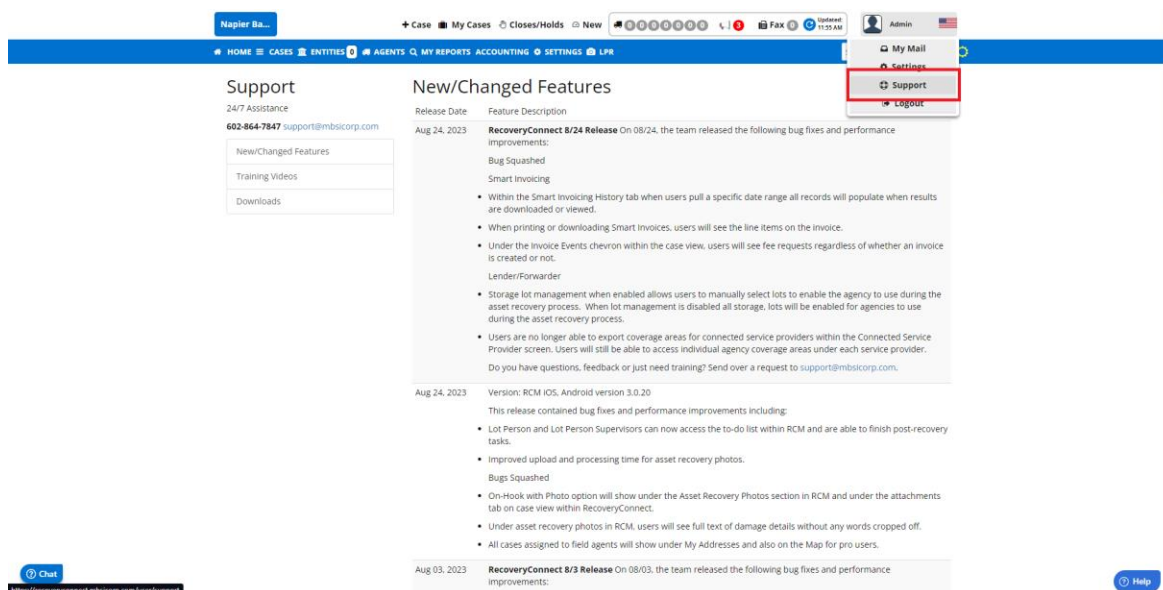
☐ I'm not a robot  reCAPTCHA  
Privacy - Terms

☐ I / We accept these terms and conditions

**Sign Up**

PREVIOUS **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

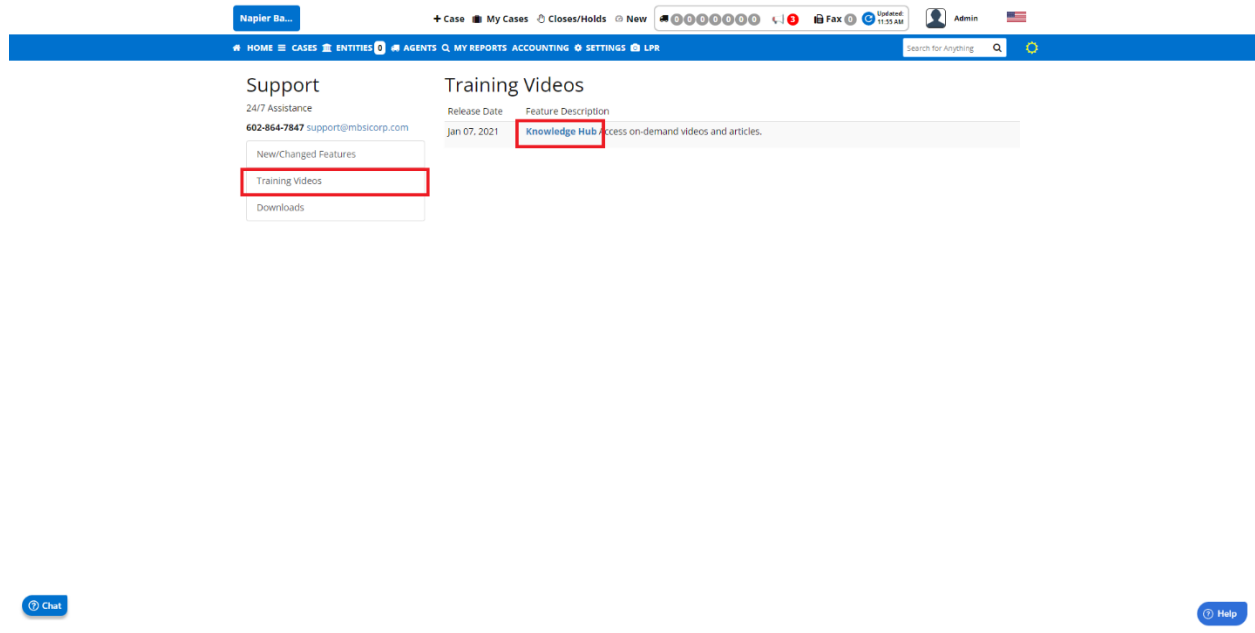
When using Recovery Connect or RCM, if you ever find your self requiring support or wanting to learn more about a given feature, you can access support through 3 different ways:

### 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

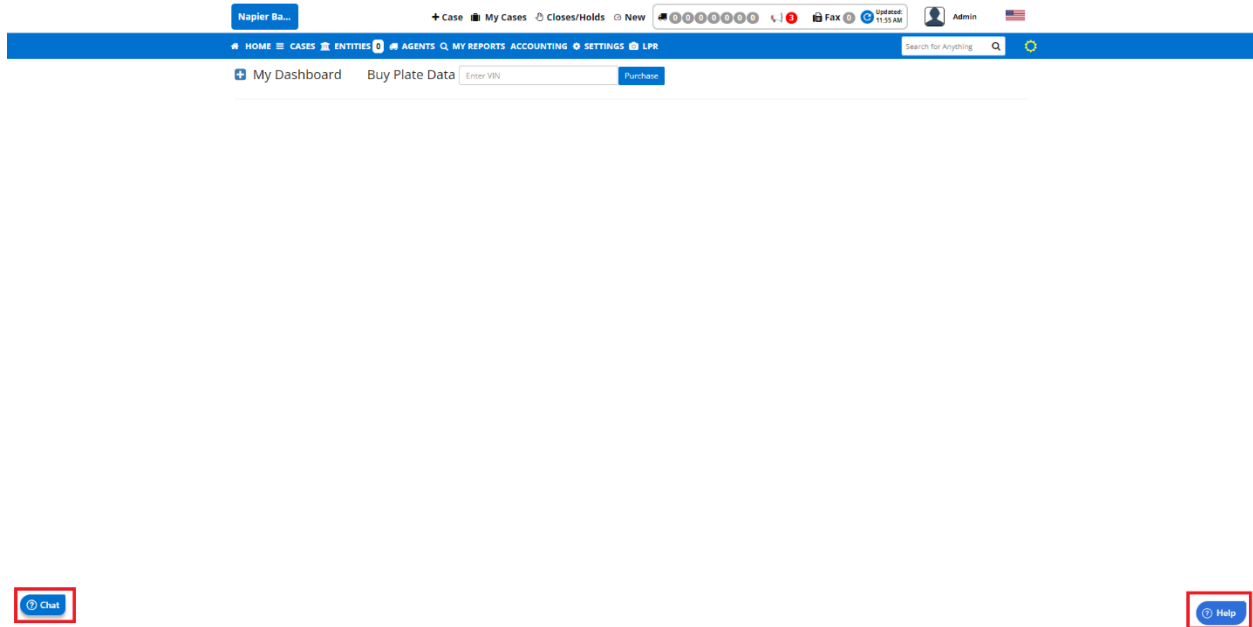
documentation. Alternatively, here is the link <https://mbsicorp.freshdesk.com/support/home>



## 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](mailto:support@mbsicorp.com)

Sales: [sales@mbsicorp.com](mailto:sales@mbsicorp.com)

## Managing Profiles and Settings

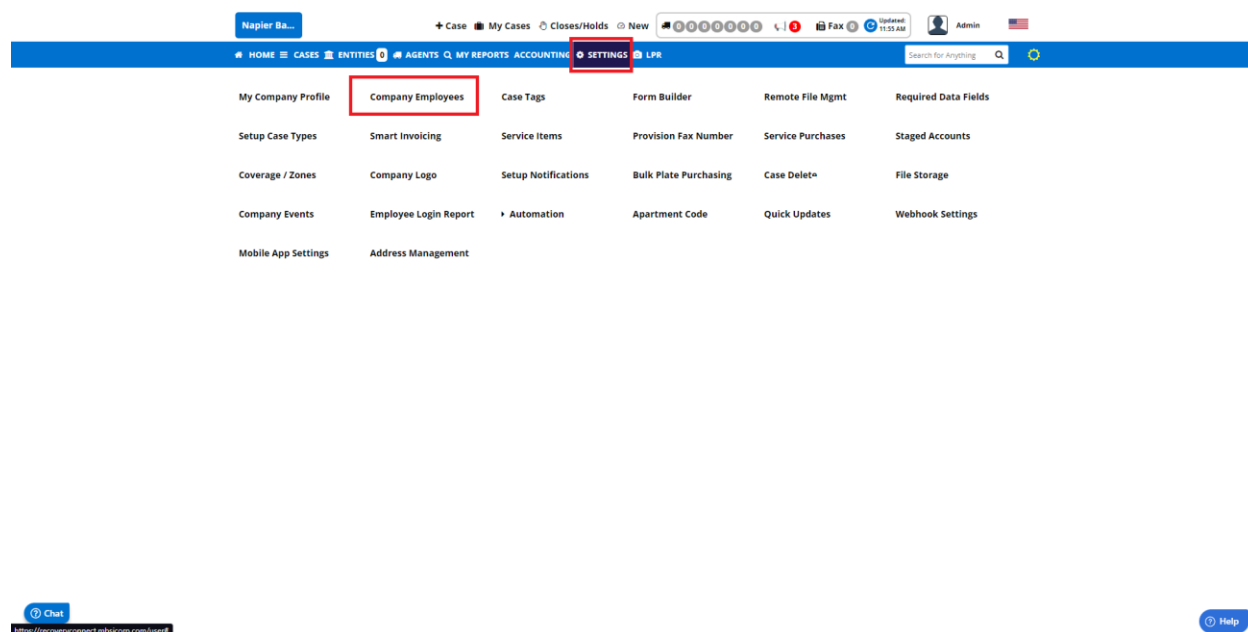
### Creating Employees

In Recovery Connect, setting up employees is essential to scaling business operations.

The software offers a vast array of possible employee types, however 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).

**Napier Ba...** + Case My Cases Closes/Holds New

HOME CASES ENTITIES AGENTS MY REPORTS ACCOUNTING SETTINGS LPR

**+ Employee List**

Active Employees Inactive/Other Employees Employee Roles

Advance Search

Employee ID	Fullname	Type	Email	Location	CARS Status	Status	Factor
418854	Admin Account	Administrator Manager Recovery Pro Owner Billing Manager Compliance Officer	nick@bailiff.on.ca			Active	Not Active
418962	Test Bailiff	Field Agent	nick@bailiff.on.ca			Active	Not Active
418900	Vanita Buchoon	Administrator	vanita@bailiff.on.ca			Active	Not Active

Chat Help

Once there, 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.

**Add New Employee**

**ACCOUNT INFORMATION**

Employee Name \*  
Firstname MI Lastname

Employee Type \*  
None selected

Available Case Type  
Selecting none defaults to All

Department/Group Team  
None selected None selected

SSN Hire Date Termination Date

Address  
Address 1 Unit #  
Address 2  
Zip Code US

Company Addresses \*  
☐ 92 Commerce Park Dr, Unit 11 Barrie ON L4N 8W8  
☐ 92 Commerce Park Dr Unit 11 Unknown NA 00000  
☐ 92 Commerce Park Dr Unit 11 Unknown NA 00000

Contact Numbers  
Choose Phone Type ext

**Username \***

**Email \***

**Password \***

**Password Confirmation \***

**Require Password Change Next Login**  
No

**Timezone \***  
Choose Timezone

**Status**  
Active

**Require Multifactor Authentication**  
No

**Password Requirements**

- Capital Letter
- Lowercase Letter
- Number
- Minimum of 8 Characters
- Special Character
- Must not contain your username

Generate Password  
Show Password

**Clone User Options**  
DO NOT CLONE

Cancel Save

Chat Help

## 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 your 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 where 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.

Employees / Administrator

Employee Information **Manage Login/Password** Manage Route/Permissions Manage Notifications

**ACCOUNT INFORMATION**

Employee Name \*  
 Admin MI Account

Owner  
☒ Company Owner

Employee Type \*  
 6 selected

SSN Hire Date Termination Date

Address  
 Address 1 Unit #  
 Address 2  
 Zip Code U

Company Addresses \*  
 92 Commerce Park Dr, Unit 11 Barrie ON L4N 6W8

Username  
 napierballiffs

Email  
 nick@balliff.on.ca

Password

Password Confirmation

Require Password Change Next Login  
 No

Timezone \*  
 Eastern Standard Time

Status  
 Active

Generate Password  
 Show Password

Additional Authentication Settings  
 No

LOGIN DAYS RESTRICTION  
 Local Time: Thu, Sep 28, 2023 10:53 AM | Timezone: US/Eastern

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Chat Help

## 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.

The screenshot shows the Napier Ba... web application interface. The top navigation bar includes links for Home, Cases, Entities, Agents, My Reports, Accounting, Settings, and LPR. A user profile dropdown menu is open, showing options for My Mail, Settings, Support, and Logout. The Settings page is displayed, showing a sidebar with Account Information, Account Settings, Notification Settings, and Mobile App Settings. The main content area is titled 'Personal Settings' and contains sections for Account Information (Employee ID: 418854), Upload Avatar, and Timezone.

**Personal Settings**

**Account Information (EMPLOYEE ID: 418854)**

☐ Out of Office

**Firstname**  
Admin

**Lastname**  
Account

**Display Name** (This is the name others will see under RC)  
Administrator

**Email**  
nick@balliff.on.ca

**RISC Education Email**

**Email Signature**

**Timezone**  
Eastern Standard Time

**Upload Avatar**

[Upload Avatar](#)

[Save](#)

**Account Settings**

- Account Information
- Account Settings**
- Notification Settings
- Mobile App Settings

**ACCOUNT SETTINGS**

**LOGIN INFORMATION**

Username: napierbailiffs

Current Password (Enter Current Password To Save Any Changes): Enter Current Password To Save Any Changes

New Password (Leave this blank to retain current password): Leave Blank To Retain Current Password

New Password Confirmation (Leave this blank to retain current password): Leave Blank To Retain Current Password

☒ Generate Secure Password ☐ Show Password

**Password Requirements**

- ✖ Capital Letter
- ✖ Lowercase Letter
- ✖ Number
- ✖ Minimum of 8 Characters
- ✖ Special Character
- ✖ Must not contain your username

**Security Questions**

Select three security questions below. These questions will help us verify your identity should you forget your password

Security Question: What is your favorite color?

Answer: \*\*\*\*\*

**Require Multifactor Authentication**

No

Save

**Notification Settings**

- Account Information
- Account Settings
- Notification Settings**
- Mobile App Settings

**Mobile Numbers**

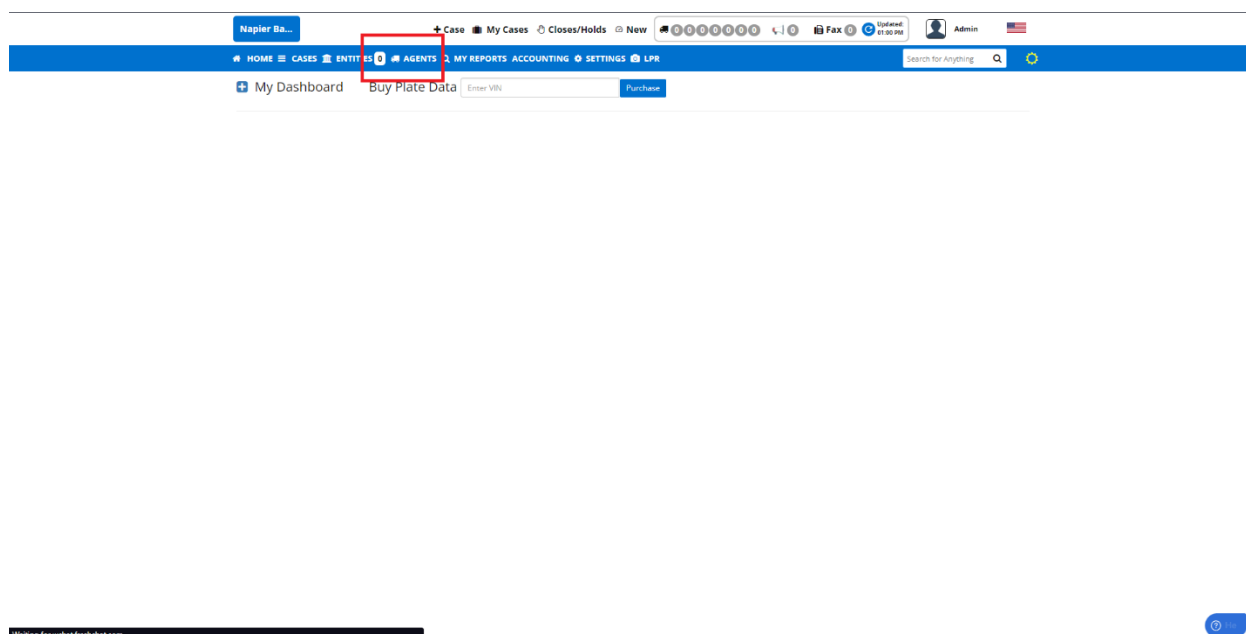
AT&T Wireless  
705-241-8697

**Notification**

Notification	Website	Mobile	Email	SMS
Case Info Updated By Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Case Put On Hold By Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Case Type Condition Report Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collateral Marked Repossessed/Completed By Agent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New Case Document Added	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Private Case Update Added	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Public Case Update Added	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

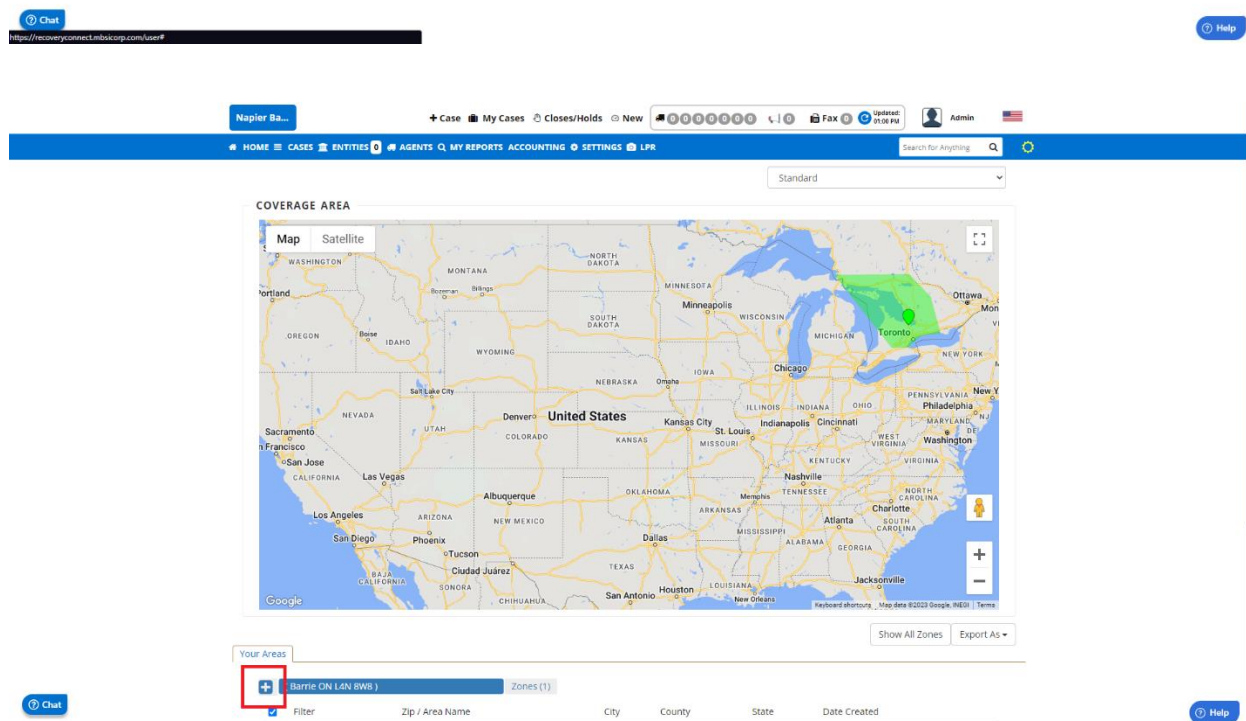
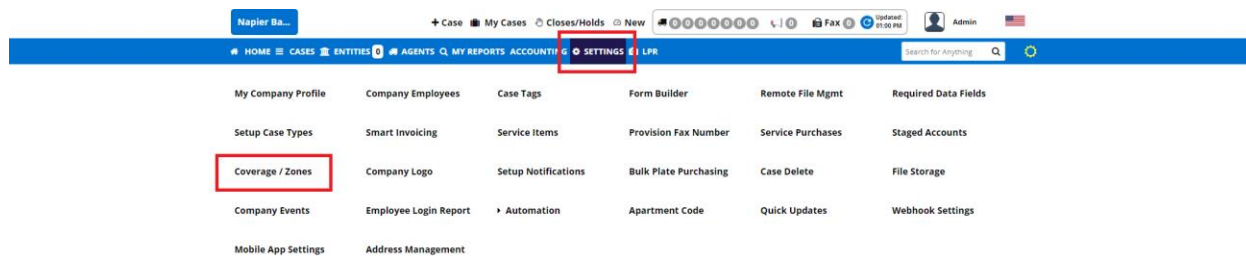
## Viewing Bailiffs and Setting Zones for Bailiffs

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



Agents

Field Agents (2) - Zones

No Shift Data

John GL...

No Shift Data

Addresses 0 New 0 No Hits < 3 Days 0

Zones 0 Address Hit Ratio 9%

Repos This Shift 0 Week 0 Month 0

No App Data

Hits per shift

No app data

Last Location: No Data

Test B...

No Shift Data

Addresses 0 New 0 No Hits < 3 Days 0

Zones 0 Address Hit Ratio 9%

Repos This Shift 0 Week 0 Month 0

No App Data

Hits per shift

No app data

Last Location: No Data

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

Assign Zone

Choose a Zone

Choose a Zone

Southern Ontario - Zone

United States

Case Types to Assign:

Condition Report Convert to Repossession Field Visit Fieldvisit (Mortgage) Field Visit (Vehicle)

Impound Voluntary Impound Repossession Inspection Investigate Involuntary Repossession

LPR Repo Only Non-Collateral Assignment Pictures Skip To Repo Store Only Transport

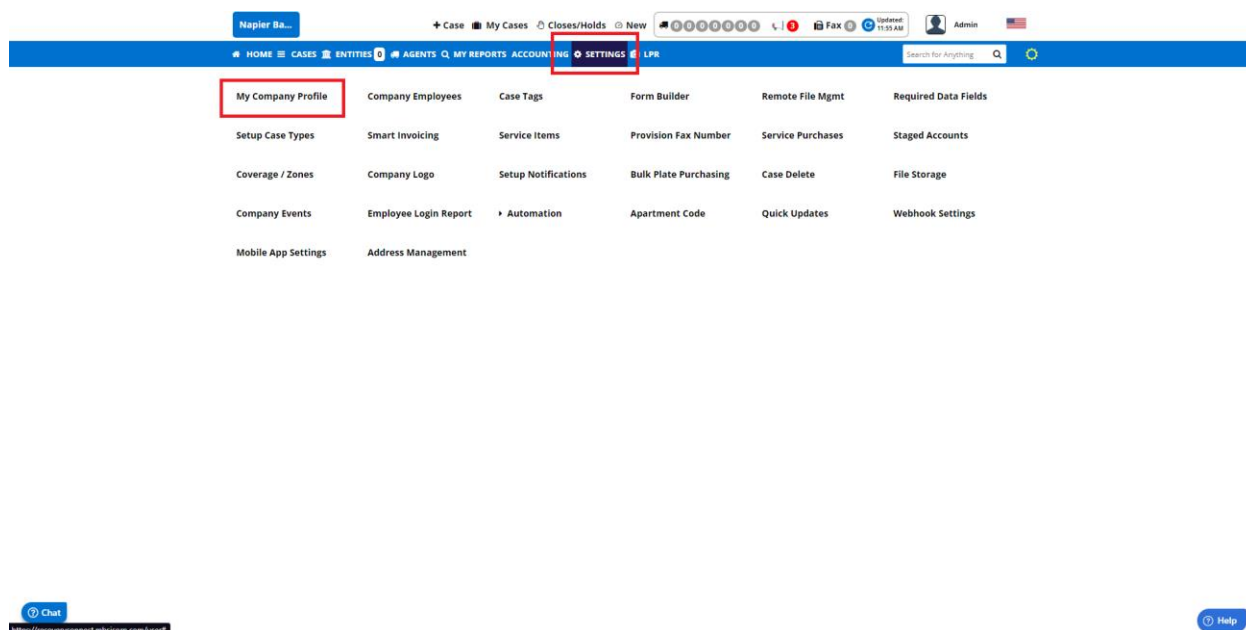
Voluntary Repossession

Cancel Assign

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:



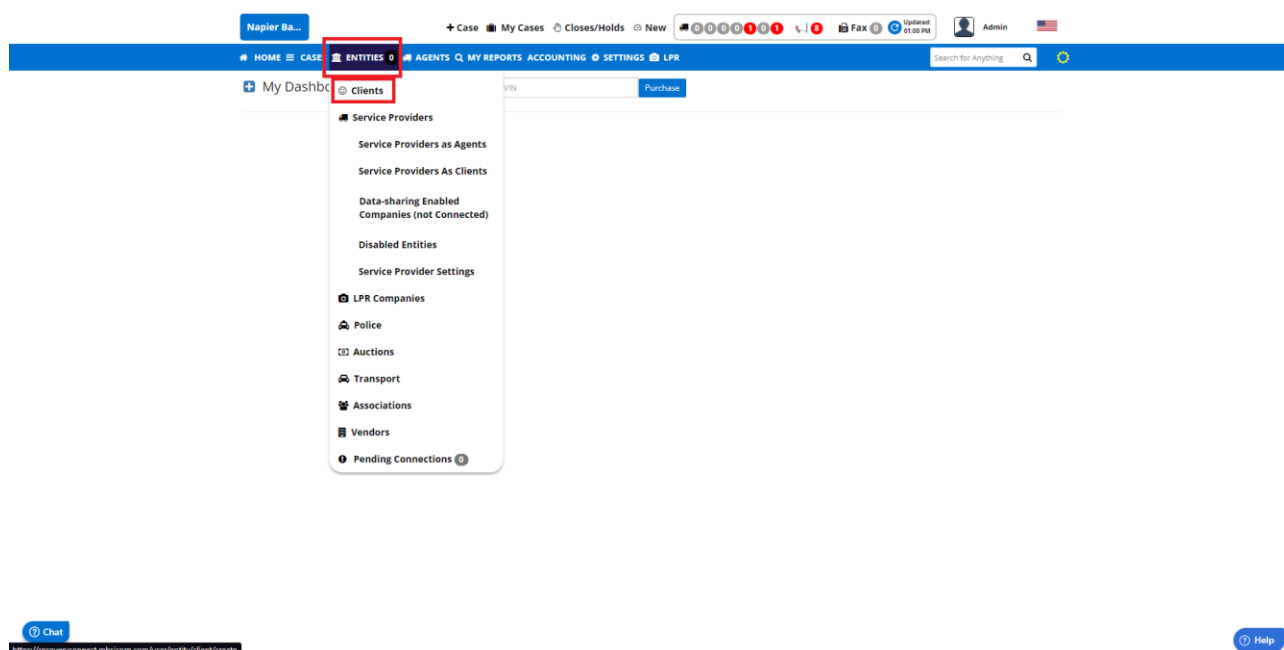
Withing this section, you can modify an array of options for the company profile, if you need help in completing a specific task here, refer to the support or documentation.

## 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 one 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:

**SEARCH FOR NEW CLIENT**

☒ All Entities
 ☐ Public Entity
 ☐ Global Entity

123456789

We are unable to find the company. Click [HERE](#) to add a new one

**CLIENTS**

[Clients](#)
[Lienholder](#)
[Disabled Entities](#)

Export As -

Status	App	Active	Seen	Company	Type	Address	City	State	Zip	Phone	Auto GPS Updates
	0			CONSOLIDATED Civil Enforcement Inc - 123	Collection Agency	123 St.	Barne, ON	L4N 8W8		Private	
	0			IA Auto Finance - 123	Finance Company	123 St.	Barne, ON	L4N 8W8		Private	
	0			Paragon Recovery - 123	Collection Agency	123 St.	Barne, ON	L4N 8W8		Private	
	0			TD Auto Finance - 123	Bank	1234 St.	Barne, ON	L4N 8W8		Private	
	0			Tenaxet Collateral Management Solutions	Collection Agency	123 Street	Barne, ON	L4N 8W2		Private	

[Chat](#) [Help](#)

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:

**Add a new Entity**

Company Name: 
 Entity Type: 
 Store Number:

Website:

**Addresses**  
 No Addresses Added  
[+ Add One](#)

**Contact Numbers**  
 No Contact Numbers Added  
[+ Add One](#)

**Contact Persons**  
 No Contact Persons Added  
[+ Add One](#)

[Create Entity](#)

[Chat](#) [Help](#)

## 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.

The screenshot shows the 'CLIENTS' section of the Recovery Connect application. At the top, there is a search bar for new clients with filters for 'All Entities', 'Public Entity', and 'Global Entity'. Below this is a table of existing clients. The table has columns: Status, App, Active, Seen, Company, Type, Address, City, State, Zip, Phone, and Auto GPS Updates. A red box highlights the gear icon in the rightmost column of the table, which is used for editing a client.

Status	App	Active	Seen	Company	Type	Address	City	State	Zip	Phone	Auto GPS Updates
0	0			CONSOLIDATED Civil Enforcement Inc. - 123	Collection Agency	123 dr	Barrie, ON		L4N 8W8		Private
0	0			IA Auto Finance - 123	Finance Company	123 dr	Barrie, ON		L4N 8W8		Private
0	0			Paragon Recovery - 123	Collection Agency	123 St	Barrie, ON		L4N 8W8		Private
0	0			TD Auto Finance - 123	Bank	1234 crt	Barrie, ON		L4N 8W8		Private
0	0			Tenaxet Collateral Management Solutions	Collection Agency	123 Street	Barrie, ON		L4N 8V2		Private

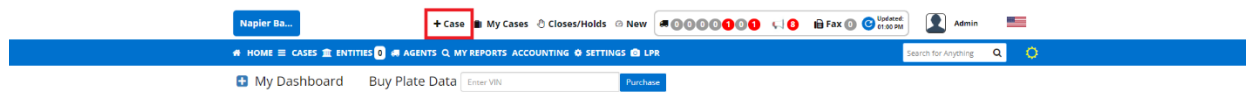
## Cases

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:



Chat

Help

Once you click on it, you will be redirected to the case creation page, here you will be prompted to enter information about the 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:

**Napier** Case My Cases Closes/Holds New Updated: 01:00 PM Admin US

**HOME** **CASES** **ENTITIES** **AGENTS** **MY REPORTS** **ACCOUNTING** **SETTINGS** **LPR**

**CREATE CASE**

**ATTACHMENTS**

[+ Add Photo\(s\)](#) [+ Add Document\(s\)](#)

☐ You can select multiple photos to upload ☐ You can select multiple documents to upload

**BASIC INFO**

Client:  Case Type:  Case Tags:

Portal:   Client Acct #:  Collector:

Lienholder:  Lien Acct #:  Enter VIN:

**COLLATERALS**

**BORROWER(S)**

☐ Primary Borrower

Borrower:  Name:    DOB:

SSN:  Driver's License:  Select State:  Collateral:

Active Military:  Deceased:  Fraud:  Bankruptcy:

Address Type:  Home Address:  Address Type:  Work Address:

Address:   Address:

[Chat](#) [Help](#)

### Attachments and photos section

**Napier** Case My Cases Closes/Holds New Updated: 01:00 PM Admin US

**HOME** **CASES** **ENTITIES** **AGENTS** **MY REPORTS** **ACCOUNTING** **SETTINGS** **LPR**

**CREATE CASE**

**ATTACHMENTS**

[+ Add Photo\(s\)](#) [+ Add Document\(s\)](#)

☐ You can select multiple photos to upload ☐ You can select multiple documents to upload

**BASIC INFO**

Client:  Case Type:  Case Tags:

Portal:   Client Acct #:  Collector:

Lienholder:  Lien Acct #:  Enter VIN:

**COLLATERALS**

**BORROWER(S)**

☐ Primary Borrower

Borrower:  Name:    DOB:

SSN:  Driver's License:  Select State:  Collateral:

Active Military:  Deceased:  Fraud:  Bankruptcy:

Address Type:  Home Address:  Address Type:  Work Address:

Address:   Address:

[Chat](#) [Help](#)

### Client information section

**COLLATERALS**

**BORROWER(S)**

☐ Primary Borrower

Borrower:  Name:  Firstname  M  Lastname  DOB:  mm/dd/yyyy

SSN:  Driver's License:  Select State:  Collateral:  Not in Possession

Active Military:  No  Deceased:  No  Fraud:  No  Bankruptcy:  None

Address Type:  Borrower - Home  Home Address  Address Type:  Borrower - Work  Work Address

Address:  Street Address  Unit #  Address:  Street Address  Unit #

Address Line 2:  Address Line 2:

Zip/Postal Code:  Search Zip or Postal Co...  USA  Zip/Postal Code:  Search Zip or Postal Co...  USA

City:  State/Province:  City:  State/Province:

Phone:  Home Phone  000-000-0000  Work Phone:  000-000-0000  ext.

GPS:  Latitude  Longitude  GPS:  Latitude  Longitude

☐ Pick-up Location ☐ Pick-up Location

**ADDITIONAL ADDRESSES AND REFERENCES**

**OFFICE LOCATION, EMPLOYEES & FIELD AGENTS**

Off. Loc. / Dept.:  92 Commerce Park Dr, Unit 11 Barrie ON L4N 8V8  Select Address:  Select an Address

Case Workers:  Administrator

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

SSN:  Driver's License:  Select State:  Collateral:  Not in Possession

Active Military:  No  Deceased:  No  Fraud:  No  Bankruptcy:  None

Address Type:  Borrower - Home  Home Address  Address Type:  Borrower - Work  Work Address

Address:  Street Address  Unit #  Address:  Street Address  Unit #

Address Line 2:  Address Line 2:

Zip/Postal Code:  Search Zip or Postal Co...  USA  Zip/Postal Code:  Search Zip or Postal Co...  USA

City:  State/Province:  City:  State/Province:

Phone:  Home Phone  000-000-0000  Work Phone:  000-000-0000  ext.

GPS:  Latitude  Longitude  GPS:  Latitude  Longitude

☐ Pick-up Location ☐ Pick-up Location

**ADDITIONAL ADDRESSES AND REFERENCES**

**OFFICE LOCATION, EMPLOYEES & FIELD AGENTS**

Off. Loc. / Dept.:  92 Commerce Park Dr, Unit 11 Barrie ON L4N 8V8  Select Address:  Select an Address

Case Workers:  Administrator

**Our Field Agent**  Assign a Field Agent

*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

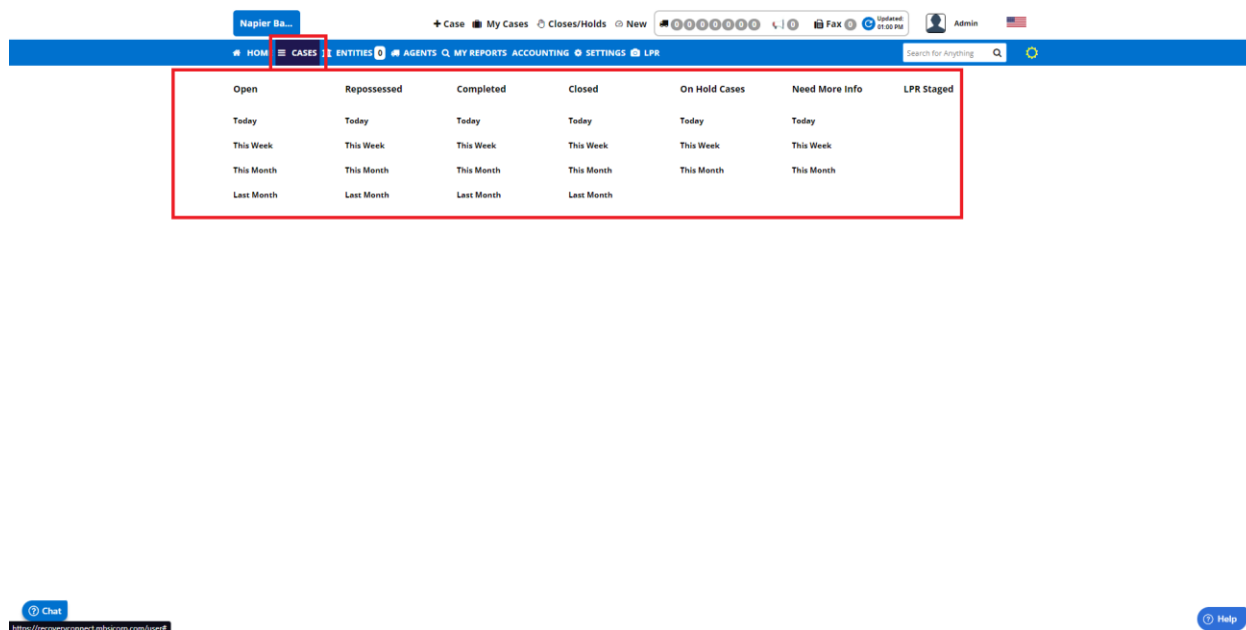
### **Viewing Cases**

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 screenshot displays the Napier Ba... software interface. The top navigation bar is blue and contains the following elements: a user profile dropdown labeled 'Napier Ba...', a '+ Case' button, a 'My Cases' dropdown menu (highlighted with a red box), and buttons for 'Closes/Holds' and 'New'. To the right of these are icons for a calendar, a fax, and a user profile labeled 'Admin'. Below the navigation bar is a search bar with the placeholder text 'Search for anything' and a magnifying glass icon. Below the search bar is a 'My Dashboard' section with a 'Buy Plate Data' button and an 'Enter VIN' input field. Below this is a 'Chat' button. The main content area shows a table of cases, with the 'My Cases (3)' dropdown menu (highlighted with a red box) and an 'Export As' button. The table has the following columns: Case #, Accepted Date (FILTER), Borrower, Collateral, Borrower City, Client Name (FILTER), Assigned To (case workers), Last Update, and Days Old. The table contains three rows of data.

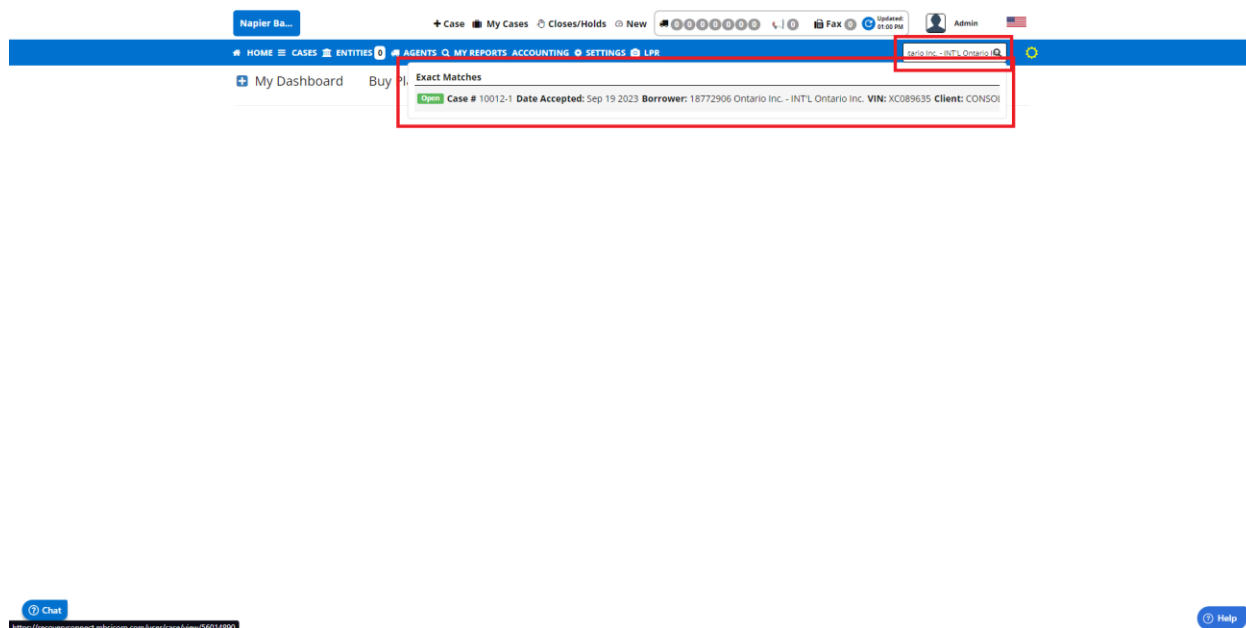
Case #	Accepted Date (FILTER)	Borrower	Collateral	Borrower City	Client Name (FILTER)	Assigned To (case workers)	Last Update	Days Old
10012-1	2023-09-19	Ontario Inc., 18772906 Ontario Inc. - INTL	(Open) 1999 International 9900 2H5PFAER1XC089635	Collingwood	CONSOLIDATED Civil Enforcement Inc.	Test Bailiff	Never	0
10011-1	2023-09-19	MORAN, Mamie	(Open) 2017 Dodge Grand Caravan 2C4RD02G4H774863	Peterborough	Teranet Collateral Management Solutions	Test Bailiff	09/19/2023 11:01 AM	0
10010-1	2023-09-19	BOYES, Stephen	(Open) 2020 Chevrolet Silverado 1500 1GCPYCEP7L2275080	Bracebridge	Paragon Recovery	Test Bailiff	09/19/2023 10:47 AM	0

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. Additionally 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 No.:** 10012-1 [Set Source](#) **Case Type:** Involuntary Repossession **Accepted:** Sep 19, 2023

**Client:** CONSOLIDATED Civil Enforcement Inc. **Account #:** 176357

**Borrower:** 18772906 Ontario Inc. - INTL Ontario Inc. (Borrower)

**Expires:** (0)  
 1999 International 9900 (Request Color)  
 2HSFTAER1XC089635 - Buy Plate  
 (Status: Open) , Just Today

**Note:**

**Client Employee:** None  
**Office Employee:** Admin Account  
**Office Location:** 92 Commerce Park Dr, Unit 11 Barrie ON L4N 8W8  
**Office Dept.:**  
**Case Tags:**  
**Placement:** /  
**Agreement Type:**

**PRINT** **OPTIONS**

- Edit Case Info
- Delete Case
- Add Updates
- Add Address
- Do Not Contact Address/Phone
- Create Condition Report
- Purchase License Plate
- Request Key Code
- Set Expiration
- Mark Borrower As Violent
- Case Alerts
- Create Complaint

**Debtor**

<b>Borrower</b>	18772906 Ontario Inc. - INTL Ontario Inc.	<b>Date of Birth</b>	SSN
<b>Collateral</b>	1999 International 9900	<b>Driver's License</b>	
<b>Active Military</b>	No	<b>Bankruptcy</b>	None
<b>Deceased</b>	No		
<b>Fraud</b>	No		

**Client & Lienholder Information**

**Client Information**  
 CONSOLIDATED Civil Enforcement Inc. (Collection Agency)  
 Primary Location  
 123 dr Barrie ON L4N 8W8

**Lienholder Information**  
 CONSOLIDATED Civil Enforcement Inc. (Collection Agency)  
 123 dr Barrie ON L4N 8W8

**Case No.:** 10012-1 **Case Type:** Involuntary Repossession **Accepted:** Sep 19, 2023 **Opened:** 3 hours ago

**Client:** CONSOLIDATED Civil Enforcement Inc.

**Account #:** 176357

**Lienholder:** CONSOLIDATED Civil Enforcement Inc. **Account #:**

**Collateral #1:** 1999 International 9900 **Select Color:**

**Plate Info:** Plate Number: 2HSFTAER1XC089635 **USA** **Select Year:**

**Case Tags:**

**Cancel** **Save**

**Debtor**

<b>Borrower</b>	18772906 Ontario Inc. - INTL Ontario Inc.	<b>Date of Birth</b>	SSN
<b>Collateral</b>	1999 International 9900	<b>Driver's License</b>	
<b>Active Military</b>	No	<b>Bankruptcy</b>	None
<b>Deceased</b>	No		
<b>Fraud</b>	No		

**Client & Lienholder Information**

**Client Information**  
 CONSOLIDATED Civil Enforcement Inc. (Collection Agency)  
 Primary Location  
 123 dr Barrie ON L4N 8W8

**Lienholder Information**  
 CONSOLIDATED Civil Enforcement Inc. (Collection Agency)  
 123 dr Barrie ON L4N 8W8

## 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.

The image displays two screenshots of a web application interface. The top screenshot shows the 'SETTINGS' menu with 'Case Tags' highlighted. The bottom screenshot shows the 'Case Tags Management' page with a modal for adding a new case tag.

**Top Screenshot: Case Tags Management Page**

- Navigation bar: HOME, CASES, ENTITIES, AGENTS, MY REPORTS, ACCOUNTING, **SETTINGS**, LPR.
- Search bar: Search for anything.
- User profile: Admin, Updated: 10:42 AM.
- Case Tags Management section:
  - Buttons: + Case, My Cases, Closes/Holds, New.
  - Buttons: Chat, Help.
  - URL: <https://recoveryconnectmbakorp.com/user/case/tags>
  - Section: Case Tags Management
  - Sub-section: Your Company Tags
  - Buttons: Reset to alphabetical sort.
  - Table:

Tag Name	Created At	Actions
First tag	Created At: Sep 21, 2023	

**Bottom Screenshot: Add New Case Tag Modal**

- Modal Title: Add New Case Tag
- Form Field: Case Tag Name
- Buttons: Cancel, Save

## Case Alerts

Case alerts allow 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.

The screenshot displays a web application interface for managing cases. The top navigation bar includes links for Case, My Cases, Closes/Holds, New, and a search bar. The main content area shows details for Case No. 10054-1, including Client (Bells Maple Park), Borrower (VB V (Borrower)), and Case Type (Involuntary Repossession). A dropdown menu is open, showing options like Edit Case Info, Delete Case, Add Updates, Add Address, Do Not Contact Address/Phone, Create Condition Report, Purchase License Plate, Request Key Code, Set Expiration, Mark Borrower As Violent, Case Alerts, and Create Complaint. The Debtor section lists Borrower (VB V), Collateral (1991 Acura NSX), Date of Birth, SSN, Active Military (No), Driver's License, Deceased (No), and Bankruptcy (None). The Client & Lienholder Information section provides details for Bells Maple Park (Sales Lot / Dealer), including the Primary Location (75 Bells Park Rd Wasaga Beach ON L9Z 2X2) and Phone (705-429-4144).

## Client specific instructions

Client specific instructions allow you to set instructions for cases from 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".

The screenshot displays the client profile page for Napier Bailiffs Ltd. The page includes the following sections:

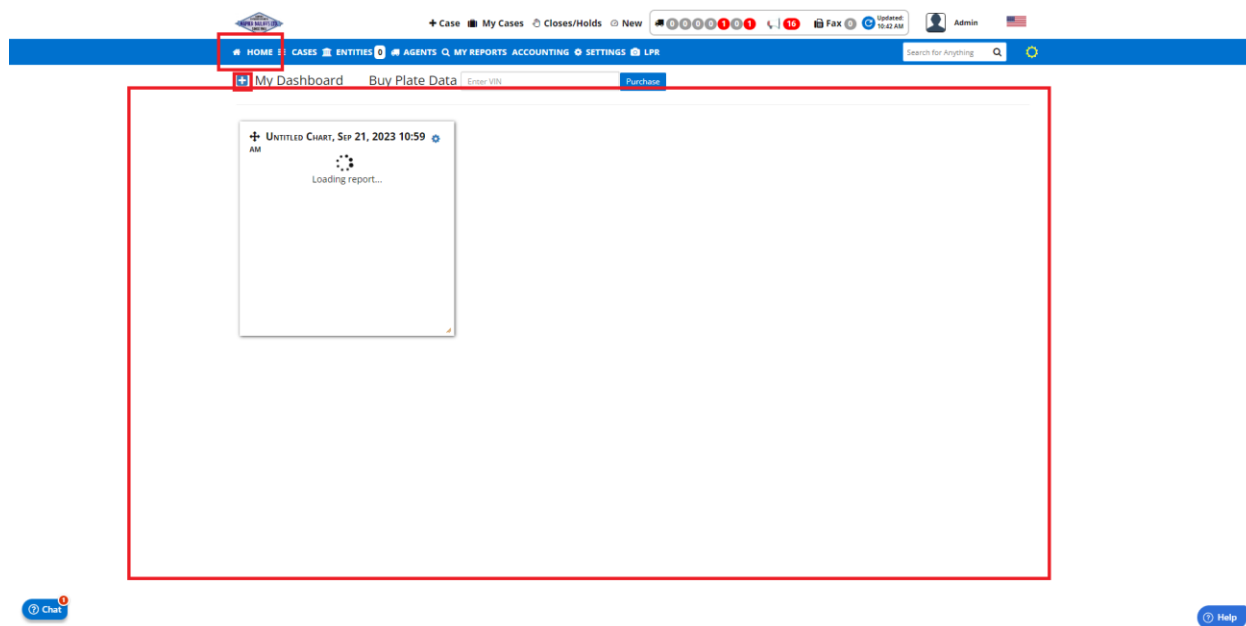
- SCORECARDS**: A section for tracking performance metrics.
- BLACKLISTED SERVICE PROVIDERS**: A section showing no service providers are currently blacklisted.
- AUCTIONS AVAILABLE FOR THIS CLIENT**: A table with columns for Auction, Auction Address, Phone, and Year Office Location.
- CASE SPECIAL INSTRUCTIONS**: A section for setting specific instructions for cases.
- NOTES**: A section showing no notes are currently present for this company.
- EMPLOYEES**: A section showing no employees are currently listed for this company.
- CONTRACTED SERVICES, RATES AND COVERAGE AREAS**: A section for managing services and coverage areas. It includes a dropdown for "Coverage Area used for Services: Configured By Napier Bailiffs Ltd." and a list of "Contracted Services / Case Types for this Company" with checkboxes for Condition Report, Convert To Repossession, Field Visit, and Field Visit.

At the bottom of the page, there is a "Chat" button on the left and a "Help" button on the right.

## Dashboard and Reports

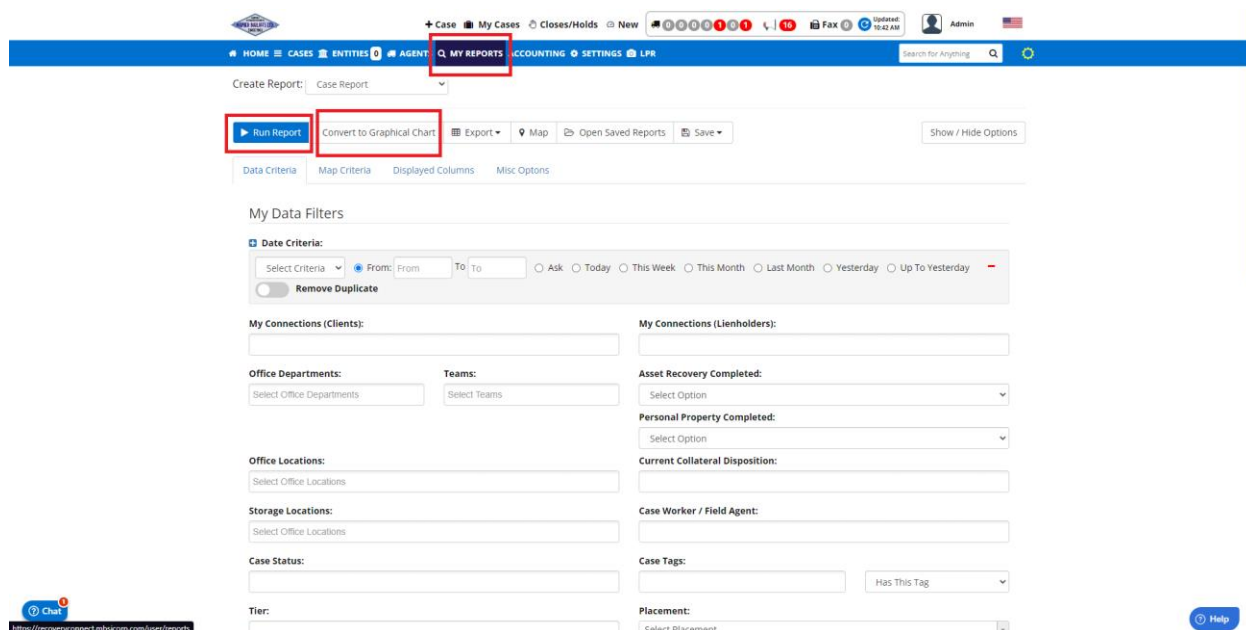
Recovery Connect features a dashboard area on the main home landing page that is blank by default. With this dashboard you can select various cases and aggregate data into reports and charts and display them on this page for a brief overview of the businesses data. To create/add to the dashboard, you 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.

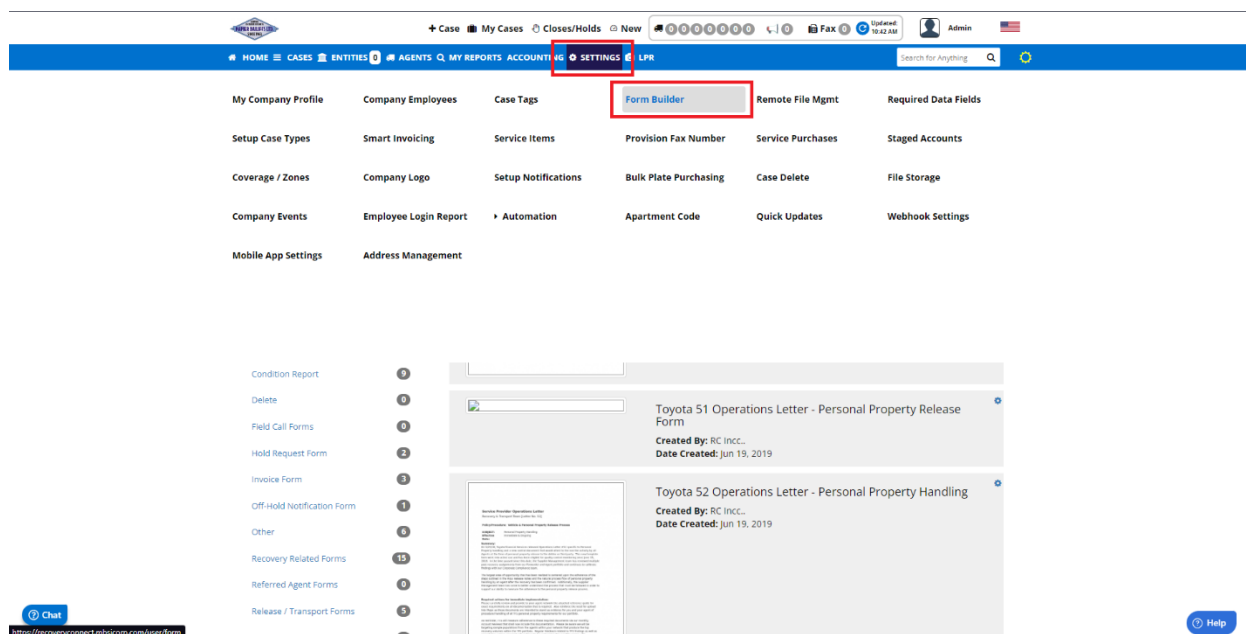


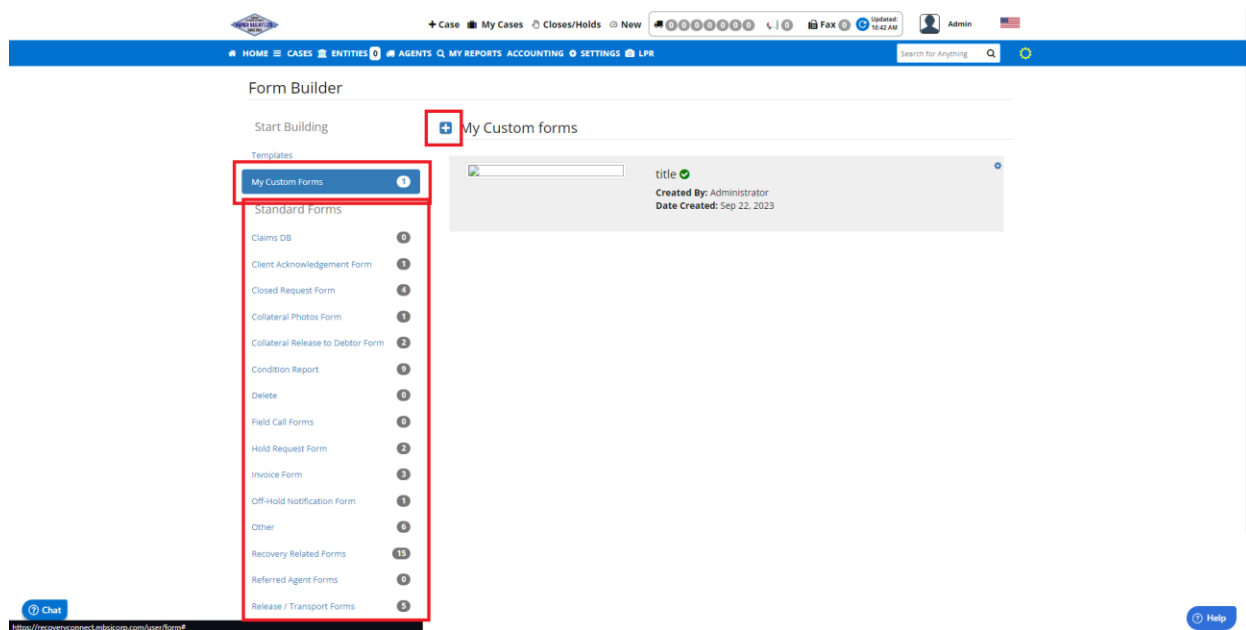
Once done, click on the run report button convert to graphical chart, depending on what analysis you wish to complete. You will be prompted to add it to your dashboard if you wish and

if not, you can save the report. Additionally you can add it to your dashboard by clicking on the plus button next to dashboard on the main home landing page.

## Form Builder

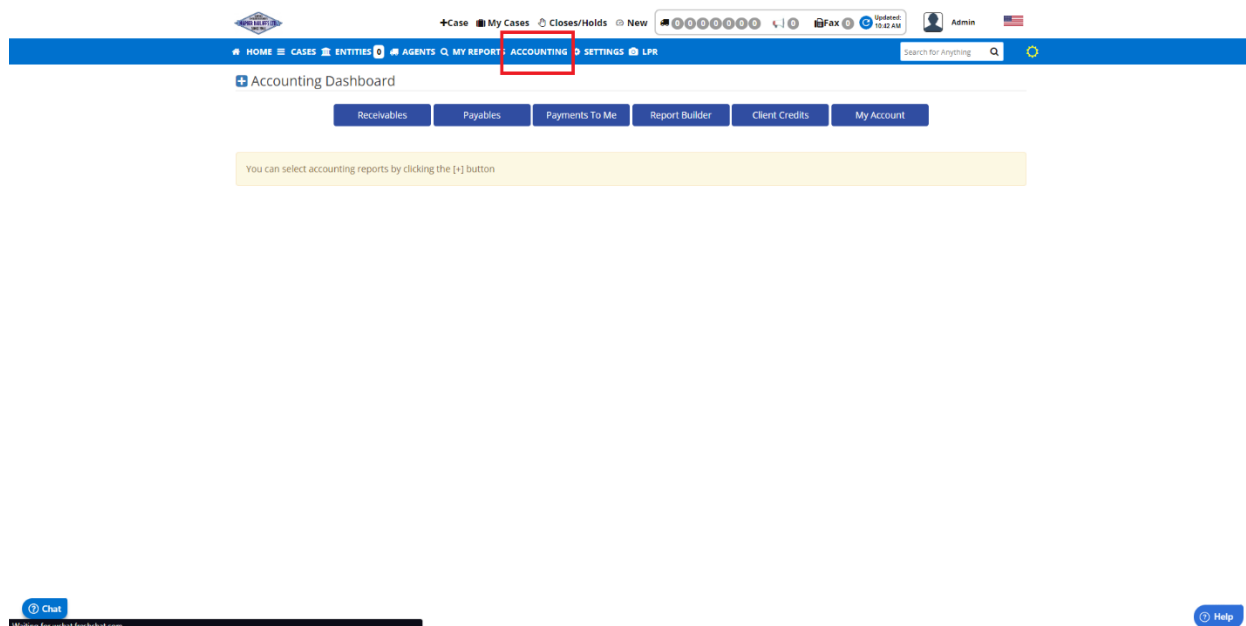
Recovery Connect allows you to build forms and use premade forms to serve to clients, debtors, and anyone else as needed. To access this capability, hover over the settings tab in the blue navigation ribbon, and click on form builder.





## 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

