



## RC Office

### Release Notes

v1.0.46.11

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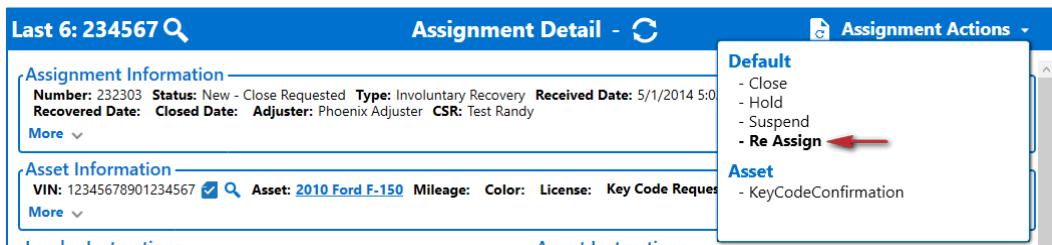
## Features

### 6328 – RCO – Assignment Reassign

Reassign functionality gives you the ability to take an assignment in an active status and reassign it to a vendor other than the one two which it was originally assigned.

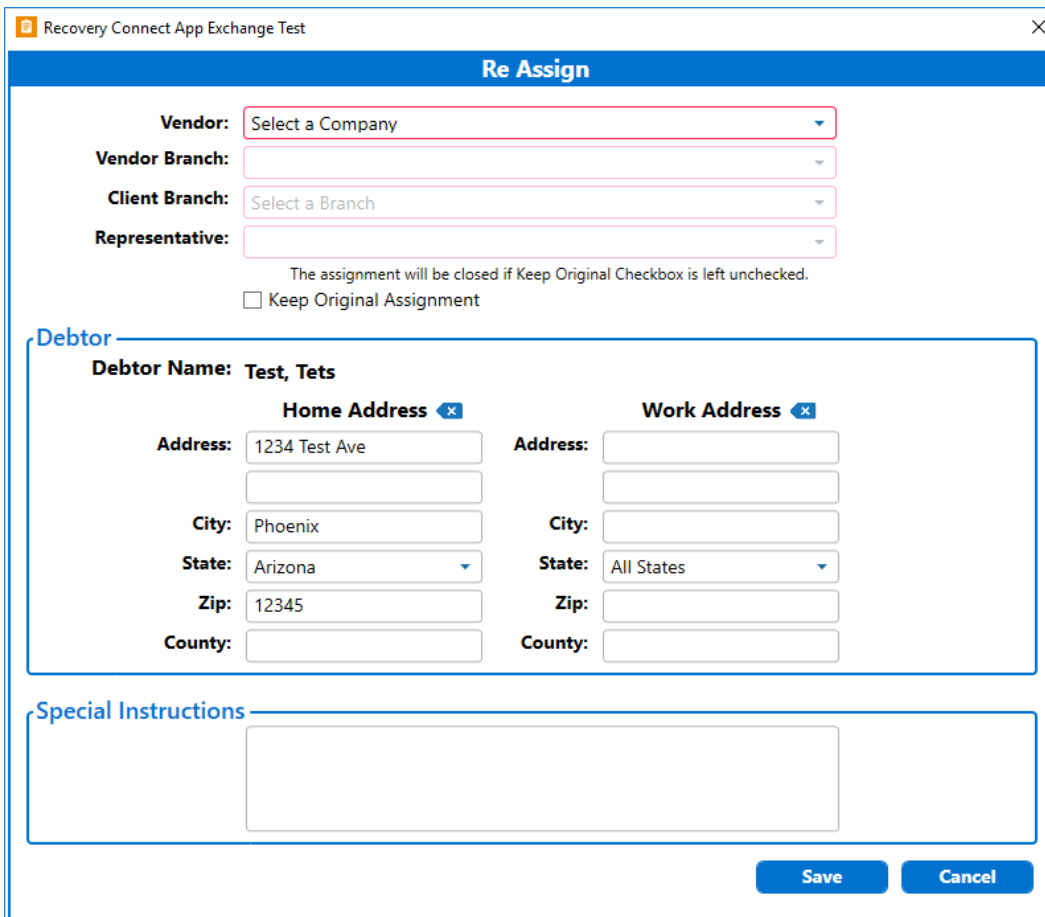
#### Accessing Reassign Functionality

Go to Assignment Actions and select Reassign on the Assignment Detail interface.



The screenshot shows the 'Assignment Detail' interface. At the top, there's a search bar with 'Last 6: 234567' and a refresh icon. Below it, the 'Assignment Information' section displays details like Number (232303), Status (New - Close Requested), Type (Involuntary Recovery), Received Date (5/1/2014 5:00), Recovered Date, Closed Date, Adjuster (Phoenix Adjuster), and CSR (Test Randy). The 'Asset Information' section shows VIN (12345678901234567), Asset (2010 Ford F-150), Mileage, Color, License, and Key Code Request. The 'Assignment Actions' dropdown menu is open, showing options: Default (Close, Hold, Suspend, Re Assign), Asset (KeyCodeConfirmation). A red arrow points to the 'Re Assign' option.

The **Reassign** interface will display.



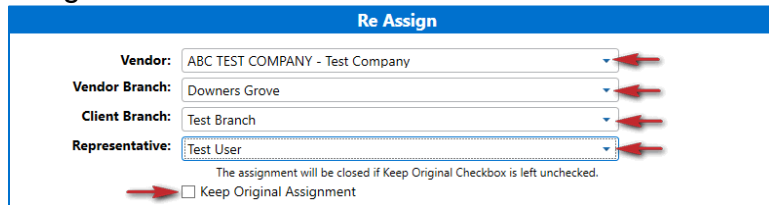
The screenshot shows the 'Re Assign' interface. It has a title bar 'Recovery Connect App Exchange Test'. The main section is titled 'Re Assign'. It contains several fields: 'Vendor' (a dropdown menu with 'Select a Company'), 'Vendor Branch' (a dropdown menu), 'Client Branch' (a dropdown menu with 'Select a Branch'), and 'Representative' (a dropdown menu). Below these fields, there's a note: 'The assignment will be closed if Keep Original Checkbox is left unchecked.' and a checkbox labeled 'Keep Original Assignment'. The 'Debtor' section is expanded, showing 'Debtor Name: Test, Tets'. It has two columns: 'Home Address' and 'Work Address'. Each column has fields for Address, City, State, Zip, and County. The 'Home Address' fields are pre-filled with '1234 Test Ave', 'Phoenix', 'Arizona', '12345', and an empty County field. The 'Work Address' fields are empty. At the bottom, there's a 'Special Instructions' section with a large text area. At the very bottom, there are 'Save' and 'Cancel' buttons.

#### Reassigning an Assignment

Only existing assignments that are not in the *Recovered* or *Recovered-Pending* status can be reassigned.

To reassign an assignment:

1. Open the **Reassign** interface.
2. Select the new **Vendor** and **Vendor Branch** with which the new assignment will be placed.
3. Select a Client Branch.
4. Select a **Representative**. This will be the assigned lender representative for the new assignment.



**Re Assign**

Vendor: ABC TEST COMPANY - Test Company

Vendor Branch: Downers Grove

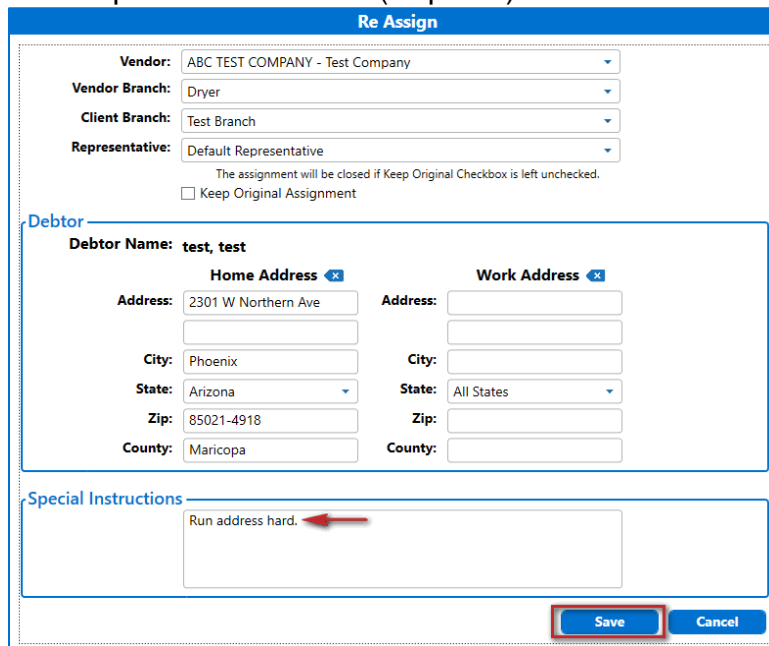
Client Branch: Test Branch

Representative: Test User

The assignment will be closed if Keep Original Checkbox is left unchecked.

☐ Keep Original Assignment

5. The **Keep Original Assignment** checkbox helps you determine the disposition of the original assignment. If you select the checkbox, the original assignment will be kept, if you don't the original assignment will be set to the *Close Requested* or *Closed* status (depending on the lender's business rules).
6. Verify or enter new address information. The interface will automatically load the Debtor and Co-Debtor Home/Work addresses available on the original assignment.
  - a. Click **Clear** to remove the old address information, then enter the new address information. At the very minimum the **Debtor Home Address** information must be completed to create the new assignment.
7. Enter Special Instructions (required).



**Re Assign**

Vendor: ABC TEST COMPANY - Test Company

Vendor Branch: Dryer

Client Branch: Test Branch

Representative: Default Representative

The assignment will be closed if Keep Original Checkbox is left unchecked.

☐ Keep Original Assignment

**Debtor**

Debtor Name: test, test

**Home Address** ✕

Address: 2301 W Northern Ave

City: Phoenix

State: Arizona

Zip: 85021-4918

County: Maricopa

**Work Address** ✕

Address:

City:

State: All States

Zip:

County:

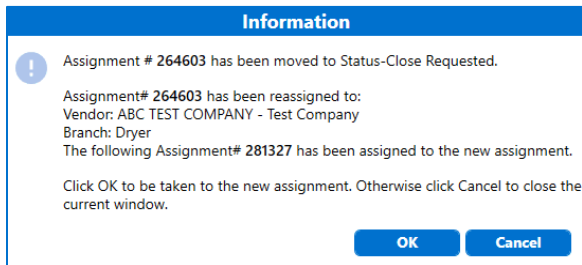
**Special Instructions**

Run address hard.

**Save** **Cancel**

8. Click **Save**.

A new Assignment will be created. If the **Keep Original Assignment** checkbox was not selected, the original assignment will undergo close procedures based on the lender's business rules. When the new assignment is created the form will refresh and show a confirmation screen with the new Assignment's **ID**, some assignment information, and the disposition of the original assignment.



**Information**

! Assignment # 264603 has been moved to Status-Close Requested.

Assignment# 264603 has been reassigned to:  
Vendor: ABC TEST COMPANY - Test Company  
Branch: Dryer  
The following Assignment# 281327 has been assigned to the new assignment.

Click OK to be taken to the new assignment. Otherwise click Cancel to close the current window.

**OK** **Cancel**

Click **OK** to be taken to the new assignment.

The newly created assignment will be placed with the selected vendor and will be in the *Dispatch* status.

## 7271 – RCO – DE Express

**DE Express** was developed to allow RC Office users to create assignments manually. Users accustomed to iRepo will be familiar with this functionality. Access to the interface is controlled by role permissions.

### Enabling the New Data Entry Express

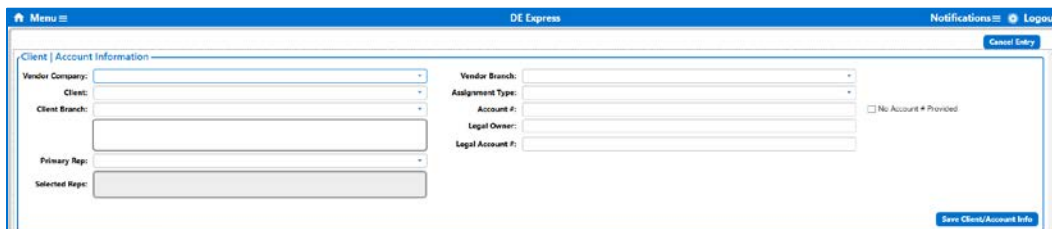
To enable DE Express access you must log in with a user that has access to the **Administration** menu and do the following:

1. Go to **Administration** Menu > **Roles**. The **Roles** interface will display.
2. Select a **User Type**.
3. Select a **Role Group**.
4. Click **Search**. The disabled and enabled roles for the user type and role group combination you selected will display.
5. Select the **DE Express** role item from the **Disabled** field, and click **Add Selected Roles**.

The role will be enabled for all users matching the user type and role group. After access is granted, the DE Express menu item will display on the Assignment menu upon next login.

### Creating an Assignment Using DE Express New

Go to **Administration** > **DE Express** to open the **DE Express** Interface.



**Menu** **DE Express** **Notifications** **Logout**

**Client | Account Information**

Vendor Company: [Dropdown] Vendor Branch: [Dropdown]  
Client: [Dropdown] Assignment Type: [Dropdown]  
Client Branch: [Dropdown] Account #: [Text] ☐ No Account # Provided  
Primary Rep: [Dropdown] Legal Owner: [Text]  
Selected Rep: [Text] Legal Account #: [Text]

**Save Client/Account Info**

There are four main areas that need to be completed to create an assignment; **Client/Account Information**, **Asset Information**, **Debtor**, and **Other Information**.

### *Client/Account Information*

Select a vendor from the **Vendor Company** dropdown. The **Client**, **Client Branch**, and **Selected Reps** fields will be automatically completed by the interface. Then select a **Vendor Branch**.

DE Express

Client | Account Information

Vendor Company: XYZ Repo - Test Company

Client: Test Client - Online

Client Branch: Test Branch - 4427 N 27th Ave Phoenix, AZ 85018-888-7777

Additional Rep:

Selected Reps:

Vendor Branch: Phoenix

Assignment Type:

Account #:

Legal Owner:

Legal Account #:

☐ No Account # Provided

Save Client/Account Info

The right column of fields contains account information; **Assignment Type**, and **Account #** are required fields. The latter requirement can be fulfilled by selecting the **No Account # Provided** checkbox. When all required and additional fields are completed, click **Save Client/Account Info**.

DE Express

Client | Account Information

Vendor Company: XYZ Repo - Test Company

Client: Test Client - Online

Client Branch: Test Branch - 4427 N 27th Ave Phoenix, AZ 85018-888-7777

Additional Rep:

Selected Reps:

Vendor Branch: Phoenix

Assignment Type: Involuntary Recovery

Account #:

Legal Owner:

Legal Account #:

☒ No Account # Provided

Save Client/Account Info

The form will refresh and the newly created assignment has been assigned an **RecoveryConnect ID (RCID)**.

Assignment: 15393155

Client / Account Information

Vendor Company: 1512 Reps - Test Company

Client: Test Client - Online

Client Branch: Test Branch - 4417 N 27th Ave Phoenix AZ 85018-888-7777

Additional Rep:

Selected Reps:

Vendor Branch: Phoenix

Assignment Type: Involuntary Recovery

Account #: No Client Account #

Legal Owner:

Legal Account #:

Set LPR Transfer Days

Though the assignment has been created, it only has the most basic information, and as such is not complete; asset and debtor information must be added in order to have a complete iRepo assignment.

### Set LPR Transfer Days

The **Set LPR Transfer Days** button displays after the **Save Client/Account Info** is clicked. This is functionality for those lender companies that use the MBSi Tier Transfer process. Click **Set LPR Transfer Days**.

Assignment: 15393155

Client / Account Information

Vendor Company: 1512 Reps - Test Company

Client: Test Client - Online

Client Branch: Test Branch - 4417 N 27th Ave Phoenix AZ 85018-888-7777

Additional Rep:

Selected Reps:

Vendor Branch: Phoenix

Assignment Type: Involuntary Recovery

Account #: No Client Account #

Legal Owner:

Legal Account #:

Set LPR Transfer Days

The **Set LPR Transfer Days** dialogue will display. It provides functionality that allows you to set a tier transfer partner for this assignment. Enter the information (all fields are required) and click **Save**.

Set LPR Transfer Days

Vendor: ABC TEST COMPANY - Test Company

Vendor Location: Dryer

Create Assignment Type: Involuntary Recovery

Transfer Days: 30

Save Cancel

### Asset Information

This area only requires the **Year**, **Make** and **Type** be entered to complete the assignment. However, entering a complete **VIN** and clicking **VIN Check** will search for the asset information and auto complete it. Once the vehicle information is loaded post VIN Check, select an **Asset Type**.

### Additional functionality

The following functionality can also be found on the **Asset Information** section:

- **VIN Check OK** – when the system selects this checkbox after a VIN check is done, it signifies that the VIN Check was successful.
- **Duplicate VIN OK** – when a VIN check is conducted and the system finds another assignment with the same VIN it will display the assignment for review. If you determine that it's ok that two assignments are open for the same VIN, select this check box to continue creating the assignment. Otherwise, click **Cancel Entry**
- **Add Asset** – clicking this button will generate another instance of the **Asset Information** fields to enable the entry of a second asset on the assignment.
- **Primary Asset** – when more than one asset has been added to the assignment, this checkbox allows you to select which of the assets will be run as the primary asset on the assignment. If only one asset has been added to the assignment this checkbox will be selected by default and disabled.

Fill in any additional asset information. Debtor information is next.

### Debtor Information

This section provides fields for the user to enter the Primary Debtor's information and functionality to add other debtors and addresses.

To enter primary debtor information:



1. Enter **First Name** and **Last Name** (Required)
2. Enter **Address, City,** and **State.**
  - a. Click **Address Check** (optional). RC Office will search to see if the address is valid, and refresh to reveal all known address information if it finds any.

#### *Additional debtor functionality*

- **Special Instructions** – click this button to automatically copy the address to the **Special Instructions** area (optional).
- **Add Address** – click this button to add one more addresses for the primary debtor. Repeat to add more addresses.
- **Add Phone** – to add one or more phone numbers for the primary debtor. Repeat to add additional phone numbers for the debtor.
- Click **Add Debtor** – click this button to add one more debtors along with their address and phone number information. The same information that is required for the primary debtor is required for secondary debtors.

#### *Other Information*

This area contains field for entering loan information and special instructions.

#### *Loan Information*

Loan information fields are provided to enter loan related information.

#### *Special Instructions*

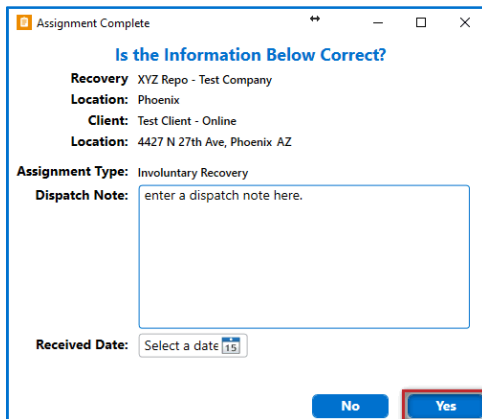
The **Special Instructions** section allows the user to enter any additional information not covered in the four sections above.

#### *Completing an Assignment*

When all required and optional fields are filled out, the form is ready to be completed. Click **Complete Assignment**.

### Confirm Assignment Information

A confirmation dialogue will display allowing the user to review main information on the assignment.



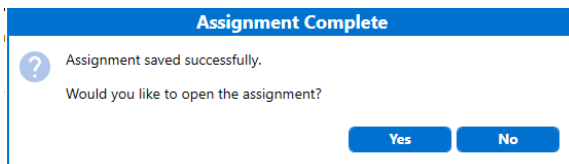
The screenshot shows a window titled "Assignment Complete" with a question "Is the Information Below Correct?". Below the question, the following information is displayed: Recovery: XYZ Repo - Test Company, Location: Phoenix, Client: Test Client - Online, Location: 4427 N 27th Ave, Phoenix AZ. Under "Assignment Type", it says "Involuntary Recovery". There is a "Dispatch Note" field with the placeholder text "enter a dispatch note here." and a "Received Date" field with a date picker set to 1/15. At the bottom, there are "No" and "Yes" buttons.

### Dispatch Note

Additionally, the user can enter a **Dispatch Note**. When the vendor opens the assignment in the *Dispatch* status, a dialogue will open displaying the representative-entered dispatch note.

To go back to DE Express and make corrections, click **No**. To finalize and complete the assignment, click **Yes**.

The Assignment will be finalized and the **Assignment Complete** dialogue will display informing you that the assignment was saved successfully, and giving you the opportunity to open the newly created assignment.



The screenshot shows a window titled "Assignment Complete" with a question mark icon and the text "Assignment saved successfully. Would you like to open the assignment?". At the bottom, there are "Yes" and "No" buttons.

- Click **Yes** to open the newly created assignment. The assignment will display and **DE Express** will remain in the background, ready for you to begin the assignment creation process again.
- Click **No** to be returned to the **DE Express** interface to begin the assignment creation process again.

### 7336 – RCO – AR Changes

The following changes have been made to the **Asset Recovery** form:

- Ability to maximize the form has been added.
- When you click **Show 25 More** on the **Storage Lot** dropdown, RC Office will execute a local refresh instead of a page refresh.
- The **Police Agencies** field will be auto populated based on the zip code entered as part of the recovery address. If no zip code is entered, the **Zip** field will be required for form completion.

### 7457 – RCO – Push Button Start Question

On the **Asset Recovery** and **Pre-Recovery Evaluation** forms, within the **Asset Information** section, a **Push Button Start** question has been added. It will be displayed when the form loads.

**Asset Recovery**

County: Maricopa

LPR Hit: ☐ YES ☒ NO

Storage Lot: Select Storage Lot

Notes:

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**Asset Information**

VIN: TESTVIN001 Year: 2015

Make: Eagle Model: Summit

Asset Style: Color: Blue

Access Interior: ☒ YES ☐ NO

Tow Dolly Used: ☐ YES ☐ NO

Property In Vehicle: ☐ YES ☐ NO ☐ UNKNOWN

Push Button Start: ☐ YES ☒ NO

Can Record Mileage: ☐ YES ☐ NO

Mileage:

Do you have keys: ☐ YES ☒ NO

Plan to obtain: ☐ YES ☐ NO

Asset Damaged: ☐ YES ☐ NO

Notes:

Selecting the “No” option on the **Access Interior** question of the **Asset Recovery** form, will make the **Push Button Start** a required field.

### 7481 – RCO – New Action – Access to Interior Post-Recovery

When an assignment is in the *Recovered* status, you can modify certain recovery information by using the **Asset Recovery Modification** action. Access to this functionality can be found on the **Assignment Actions** menu under the **Assignment Documents** section.

Last 6: 525128 Assignment Detail -

Assignment Actions

**Assignment Information**

Number: 271257 Status: Recovered - RCM Assignment Type: Involuntary Recovery Received Date: 6/2/2016  
 Dispatched Date: 6/15/2016 10:05:11 AM Recovered Date: 12/8/2016 12:20:00 PM Closed Date: Adjusted

**Asset Information**

VIN: 1G8JU54F42Y525128 Asset: 2002 Saturn L Series - L200 Mileage: 0 Color: Black License:   
 Storage Status: NewInventory Lot Location: Phoenix-Main - 2300 W Dunlap Ave Phoenix, AZ 85021

**Lender Instructions** **Agent Instructions**

**Assignment Actions**

- Default
  - Send To History
- Assignment Documents
  - On Hook
- Asset Recovery
  - Incident
  - Asset Recovery Modification
- Lender Interaction
  - Assignment Update

The **Have access to interior now** interface will display.

AssignmentID: 267056

Have access to interior now?

Can You Record Mileage? ☐ YES ☐ NO Mileage:

Front Seats

Odometer

Gear Shift

Rear Seats

Center Console

Engine Compartment

Save

At the top of the interface there is a question that asks, “**Can you record mileage?**” Next to it is a **Mileage** field where you can record the asset’s mileage. If you answer **Yes** to the question the mileage field will be required.

Additionally, you can upload images of the interior of the asset. The interface provides upload fields for the following vehicle features:

- Front Seats
- Odometer
- Gear Shift
- Rear Seats
- Center Console
- Engine Compartment
- Trunk Compartment

Upload the new pictures using the same upload procedure you use on the **Asset Recovery** form.

When you are finished making changes, click **Save**. The Asset Recovery form will be modified with the latest information.

### 7516 – RCO – User Certification Grid

A **Certifications** grid has been added to the **User Edit** interface for each user’s profile. It displays certifications that users have received as reported by Training Comply. The grid shows the following information regarding each certification the user has received:

- Company
- Test Name
- Test Status
- Certification Date
- Expiration Date

**Update Demo User1 Information**

User's Location: Phoenix | 2301 W Dunlap Ave Phoenix A ▾

Login ID: demouser1

Password:  Auto Generate

Confirm Password:

Password Duration: 60 Days ☒ Required password change at next login

Email Address:

Name: Demo  User1

User Type: Manager ▾

Date of Birth:  Last 4 of SSN/ITIN: XXX-XX- 1234

Save Cancel

**Phones**

All Phone Number Types ▾ 1 ( ) - Ext: ↺ +

Work (800) 555-1234

**Certifications**

Company	Test Name	Test Status	Certification Date
CARS	CARS California Certification	New	Jan 12 2017 12:00A

### 7577 – RCO – Personal Property Question

A **Property in Vehicle** field has been added to the **Asset Information** section of the **Asset Recovery** form. This field is required. It has three options:

- Yes
- No
- Unknown

AssignmentID: 267004 **Asset Recovery**

**Asset Information**

VIN: 1G6XE57Y1U194084 Year: 2001

Make: Cadillac Model: Deville

Asset Style:  Color:

Access Interior: ☒ YES ☐ NO Tow Dolly Used: ☐ YES ☐ NO

**Property In Vehicle:** ☐ YES ☐ NO ☐ UNKNOWN Push Button Start: ☐ YES ☐ NO

Can Record Mileage: ☒ YES ☐ NO Mileage: 100

Do you have keys: ☐ YES ☐ NO

Asset Damaged: ☒ YES ☐ NO

Airbag Deployed: ☒ YES ☐ NO

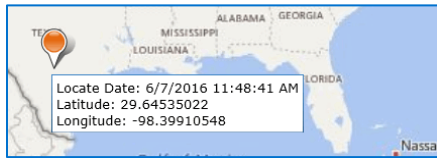
Asset Damage:  Hall Damage: ☒ YES ☐ NO

Add Damage

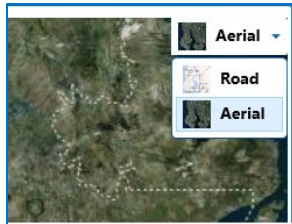
### 7599 – RCO – LPR Locates Changes

The following enhancements have been made to the **LPR Locates** interface:

- Latitude and Longitude information has been added to push pin tool tips.



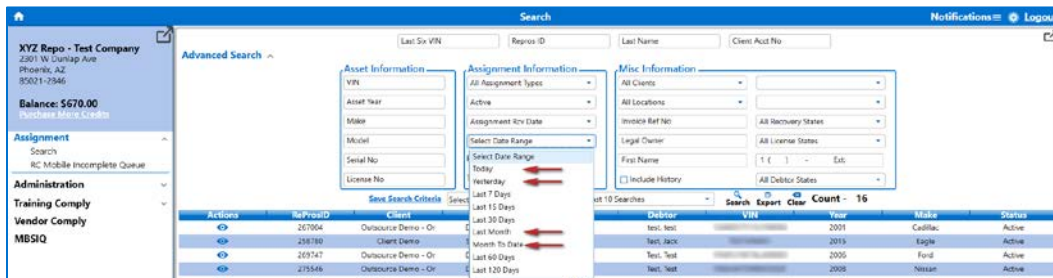
- The ability to switch between road and aerial view has been added.



## 7600 – RCO – Search Changes

The following enhancements have been made to the **Search** interface:

- The **Select Date Range** dropdown now has the following fields:
  - Today
  - Yesterday
  - Last Month
  - Month to Date



## 7610- RC – RC Billing Options

Billing options have been modified on the Recovery Connect App Exchange for RC Office and RC Mobile as follows:

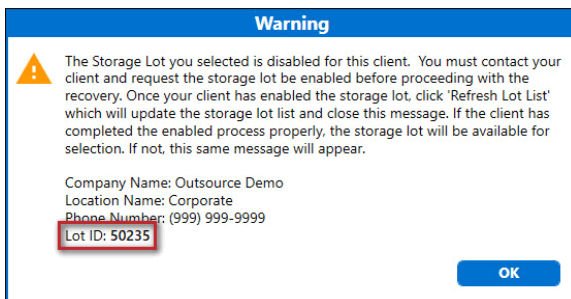
- RC Office (Vendor options)
  - By Company
    - \$9.95 per company per month
  - By Assignment
    - \$1 per assignment recovery (Best option when lower volume is expected)
  - RCO fees are in addition to normal MBSi Online Lender fees of \$2 to accept an assignment and \$1 to report a recovery. If the "By Assignment" option is selected, the additional \$1 recovery fee is only charged once per assignment when the recovery is submitted via RCO or RCM.



- RC Mobile (Vendor options)
  - By User
    - \$4.95 per user per month
  - By Recovery
    - \$1 per assignment recovery (Best option when lower volume is expected)
  - RCM fees are in addition to normal MBSi Online Lender fees of \$2 to accept an assignment and \$1 to report a recovery. If the “By Recovery” option is selected, the additional \$1 recovery fee is only charged once per assignment when the recovery is submitted via RCO or RCM.

### 7634 – RCO – Disabled Lot message Update

On the **Asset Recovery** form when you select a disabled lot from the **Storage Lot** dropdown a warning message displays informing you that you selected a disabled lot. The Lot ID for the disabled lot has been added to this message.



### 7635 – RCO – Lot Maintenance Lot ID

The Lot ID for each lot has been added to the Lot Information found on the **Storage Lots** interface.



### 7643 – RCO – Agent Lots, Lot ID

The Lot ID for each lot has been added to the Lot information found on the **Agent Lots** interface.

XYZ Repo - Test Company | Phoenix

**Enabled Lots**

- ☐ AZ-Jeff test lot - 551243  
487612 north any street  
Phoenix, AZ 85000
- ☐ Las Vegas Test Lot - 586379  
300 Stewart Ave  
Las Vegas, NV 89101
- ☐ Phoenix-Main - 2301  
2301 W Dunlap Ave 207  
Phoenix, AZ 85021
- ☐ Rory's Test Lot - 581501  
2301 W Dunlap  
Phoenix, AZ 85335
- ☐ sadfsadf - 586202  
2301 W TOWNLEY  
Phoenix, AZ 85021

**Disabled Lots**

- ☐ Asset In Transport - 541697  
Pending Storage Info  
Phoenix, AZ 85021-2846  
Maricopa County
- ☐ Rory Test - 531647  
123 test.  
phoenix, AZ 85020
- ☐ Test Lot 11 - 50235  
2301 W Dunlap Ave  
Phoenix, AZ 85021

1/6/2017 3:47:20 PM

### 7664 – WFDS – Check for Pure Data Report for PP and AD

In relation to FR 7237, during the attachment check when invoicing, a check for a completed Pure data report, Personal Property Form, and As set Delivery Form will also be conducted.