

GENERAL INFORMATION:

TECHNICAL SUPPORT

Office 386-676-9817
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Cell 386-527-3062

[WE HAVE A BACKUP SERVICE FOR \\$50.00 PER MONTH & \\$50.00 SETUP FEE!!](#)

Backups up your files to the internet so they are available to you 24 hours a day via password & user name.

BACKING UP RM2001:

Backing up your Recovery Manager Files is very important. This is the only way you can guarantee that your information is safe. Florida Database Technologies, Inc. has a backup service, call the office number above to inquire.

TO BACKUP RECOVERY MANAGER: Save all files located in the C:\RM2001 Folder.

SAVING: At times Approach will has you if you want to save the approach file. At this time, this function is disabled. **YOUR DATA IS AUTOMATICALLY SAVED WHEN YOU HIT "ENTER".**

AUTOMATIC NUMBERING SYSTEM

RM2001 has an automatic numbering system. The assigned Case Number is broken down as follows. ie. 03-02167, this case number would be 03 (Year)- (02) (Month) (167) this means it was the 167th account received during that month.

You can reset the numbering system anytime you wish on the Switchboard (F-9). Down at the bottom change the number you want RM2001 to assign next. Then Hit "Enter" and "Yes" to the question.

HINTS, TIP & COMMENTS:

IMPORTANT: Never delete a client. This will adversely affect the invoicing system and the recovery system.

TIP: Fill out everything about the account and unit you can. This WILL come in handy eventually.

SORT: Click on the field you wish to sort by. Then click on "Records" , Sort(A-Z) for ascending, etc.

SMARTICONS: (Bar of small icons) Put your mouse over each one and learn what they do (ie. Date Stamp, Time Stamp, Print, Print Preview, Spell Check, Duplicate Record, etc.)

CREATE NEW RECORD:

Click on "New Record" button at top left of the page. The program automatically assigns a case #, date, and the cursor is blinking at the the Vin #. Put the Vin # in and hit the "Tab" key. The cursor moves up to the Year, Make & Model and that information pops in. If it doesn't then type the info in about the unit, then hit the "Tab" key again to continue inputting information. When you get to the Debtor, Comaker, and POE's. The first field is the Name (INPUT LAST NAME, FIRST NAME) this is important for searching the last name easily. After the Name hit "Tab" and enter the Address then "Tab" again. This field is the "Zip Code" once entered hit "Tab" and select the city in the listing. If not there type in the name of the city. After you put the reposessor assigned to in the form you hit the "Enter" key to save the account to file.

SEARCHES:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

WILDCARD SEARCHES: You may do wildcard searches in any field that you know some of the info in that field, ie. You know in the other info box that you put a street name of Seminole Ave. in that box but don't remember the account. Then you press "Find" go to the other info box and type "*Seminole Ave*" in the box and hit "Enter" to perform the search. (Type a [star] Shift-8, then the word and [star] again.)

CREATE AN INVOICE:

Go to the account you wish to create the invoice for. Press "Create Invoice" button. Once in the invoice you can hit the "Space" bar or take the mouse and click on "Invoice Type", choose the type of invoice that you want to create and it will automatically create it via your billing preferences in the client information page. Edit any additional info that you wish to have on the invoice before you print it.

Print or Fax directly from within Recovery Manager.

You may also E-Mail invoices. Click on "Invoice Options" (while viewing an invoice) and click "E-Mail This Invoice."

ADDITIONAL INFO:

You can E-Mail the assignment directly out of RM2001 using Outlook Express. Click on "Management", "E-Mail This Assignment" and then hit send on the E-Mail. RM2001 will automatically address the E-Mail to the reposessor that the assignment as been assigned. You may change it on the E-Mail itself in Outlook Express.

The 3 Boxes under Automobile Disposition are open fields for release and delivery information.. They directly feed the info to the "Authorization To Release" form.

The "Blue Box" in the middle of the page is the "Last Six of the Vin #".

ADD NEW CLIENT:

Click on "New Client" the cursor will be blinking on Client Code. This code can be up to 7 digits long. Assign the client a new code and hit "Tab", Now your are at the Client Name. This is a 3 line field that requires you to enter the Name, Address, City, State & Zip. You must hit return to enter this info in each line. After you enter the name and address hit the "Tab" key to go to the next field and enter the information. Continue to us the "Tab" key until your last contact information is entered in the panel on the right.

The email address for the contact must be entered on the "Client Information" page.

Once complete hit "Enter". If you have additional clients to input click on "New Client" and begin again.

ADDITIONAL INFO:

It is imperative that these forms are filled out correctly in order for the automated invoicing system to work properly.

You may have as many contact for each client as you wish.

Set up all the information on your clients you have to fully use the automation.

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ADJUSTERS RUN SHEET, HOLD HARMLESS, & HOT SHEET



ADJUSTER RUN SHEET:

The Adjuster Run Sheet is used to give to your employee to run the account.

TIP: Have your employee write their updates in the "Other Info" box .

This form is for viewing only. Editing must be done on the "Account Information Page" with the exception of the "Other Info" memo field.

HOT SHEETS:

Hot Sheets are reports for your employees to carry with them in the trucks. They are very handy when you spot that repo you have been looking for over the past 3 months. Keeps Vins, Tags, ID's handy on 1 form.

This form is for viewing only. Editing must be done on the "Account Information Page" with the exception of the "Other Info" memo field.

HOLD HARMLESS AGREEMENT:

The Hold Harmless Agreement is used to forward accounts to other repossessionors.

TIP: Have your agencies write their updates in the "Other Info" box and fax them to you .

This form is for viewing only. Editing must be done on the "Account Information Page" with the exception of the "Other Info" memo field.

ADDITIONAL INFO:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

Wildcard Searches are accepted.

VOLUNTARY SURRENDER:

The Voluntary Surrender Form is self generated, just print the form and take to customer for signature.

This form is for viewing only. Editing must be done on the "Account Information Page" with the exception of the "Other Info" memo field.

ACCOUNT LISTING:

Use this list feature to get quick list of Open, Closed, Hold or Repossessed Accounts with the touch of a button.

Quick Link button to Account Information Page to view entire account. All search capabilities available on this list with the "Find" button.

DIGITAL PICTURES:

IMPORT INSTRUCTIONS: Click on the field (1-6) where you want the picture to be. Click on Edit, Click on Picture, Click on Import. Locate the file on your computer and double click it. (We recommend JPEG files due to their small size.)

To Edit Picture Click on It, Hold Left Mouse button and draw.

To Edit the Pen Color, Click on Picture, Click on Picture Plus, Picture Plus Properties, Change Color & Thickness.

MEMO FIELDS: Under each picture that you import there is a small memo field that you can type notes about your picture. Just left click the mouse just above the bottom blue line of the picture. The cursor will blink in the field. Type your memo and hit "Enter". You can also use the "Tab" key to go from memo to memo.

E-mail or Fax these pics directly from the system using WinFaxPro or a similar program.

INVOICE REPORTS:

INVOICE REPORT: This report automatically generates a list for you of all the \$\$ that have been invoiced and are waiting for payment when you first go in it. It shows totals due by client and totals due for all clients at the bottom.

30, 60, 90 DAYS DUE: By clicking on this button it will generate a report of all the invoices that are overdue by at least that number of days and up depending on which button you pressed.

INVOICES PAID REPORT: By clicking on the "Invoices Paid" button you will see a report of all the invoices that have been paid, and any remaining balance due on the invoice.

EXPENSE / PROFIT REPORT:

EXPENSE REPORT: This report is simple and to the point. It gives you a list of all expenses posted to each account. You can with the help of "Find Assistant" do searches and get for example a list of all the expenses that 1 client generated & etc.

PROFIT REPORT: This report gives you the total of each invoice an account generates and subtracts the expenses posted to that account as well as any payroll posted to give you your total profit. It then separates is by Client and gives you totals for each of those clients.

PAYROLL REPORTS:

PAYROLL REPORT: This report automatically generates to give you a list of all the payroll that has been posted but not paid.. It shows totals due by employee and totals due for all employees at the bottom.

30, 60, 90 DAYS DUE: By clicking on this button it will generate a report of payroll that is due by at least that number of days and up depending on which button you pressed.

PAYROLL PAID REPORT: By clicking on the "Payroll Paid" button you will see a report of all the payroll that has been paid. This report using the "Find Assistant" will help with 1099's at the end of each year.

TO PAY PAYROLL: Click on Check # in Red Box, Insert the check number you will use to pay that payroll. Then click on "Post Pay" button next to payroll you wish to pay. Continue to do this for each payment using that check number. Once complete click on "Payroll Paid" to get the report.

TO REQUEST PAYROLL REPORT: Click on the "Payroll Request" button to the right of the report header. put in the dates you wish to pay payroll for and the name of the person. (If you wish to pay everyone for that date period leave the name blank.) Once the report is generated then proceed to pay each employee using the method above. Remember to change the check number if you are writing multiple checks to complete your payroll.

ON LOT REPORT:

ON LOT REPORT: This report automatically generates a list for you of all the repossessions that are still under your control, where they are and how long they have been there.

NOTE: In order for this report to work properly you must use the "Status of Repossession" and the "Date of Repossession" fields correctly as follows... When a unit is repossessed and still in your control the "Status of Repossession" is "Repossessed - Pending", once the unit is released you then change the "Status of Repossession" to "Repossessed". The "Date of Repossession" will be filled out on the Condition Report or on the Account Information Page.

ACCOUNT INFORMATION PAGE (BLANK):

This forms use is simple. If your client or anyone needing an assignment form this is the one to use. It puts the information in the same format as your data entry to make things easier. The name and case # do not print on the form.

A Hold Harmless Agreement is also there.

Just Print or Fax directly from within Recovery Manager.

OPEN DELIVERY REPORT:

OPEN DELIVERY REPORT: This report automatically generates a list of all the units that you have set up for delivery.

IMPORTANT: If you repossess a unit and your client wants it to be delivered there is a check box on the bottom of the Account Information Page. In this check box click on it to insert a check. Over to the right under "Automobile Disposition" there are 3 blank field lines. I use the first line for Delivery or Release (ie. "Deliver To Florida Auto Auction" or Release to Florida Auto Auction"). The 2nd & 3rd are open for any other information you might want to use them for. Setting appointment times, confirmation numbers, etc

ADDITIONAL INFO:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

Wildcard Searches are accepted.

MAGNIFYING GLASS: This is the look of the cursor in "Print Preview" you must be in this mode to view the totals. To get back to regular mouse click on "F1" or the "Browse" button.

VEHICLE RELEASE (AUTHORIZATION):

This form is used to authorize employees or agents to release units on your behalf. Remember the boxes under "Automobile Disposition" on the Account Information Page. The first box of this page feeds information to this authorization form. Mark the check box for Release or Delivery.

Print or Fax directly from within Recovery Manager.

VEHICLE RELEASE (TRANSPORT):

Use this form to have Transport or Towing Companies sign for picking up units from your facility.

Print or Fax directly from within Recovery Manager.

NOTE: Also on the "Condition Reports" there is a place for them to sign as well to verify the condition of the unit.

VEHICLE RELEASE (BACK TO DEBTOR):

Use this form anytime a customer is redeeming a repossessed unit from you. The release protects you and your lien holder once it is signed from any legal action.

Once this form is signed keep it in the Case File.

Print or Fax directly from within Recovery Manager.

VEHICLE RELEASE (TOWING COMPANY):

This one is a little different and there is not much use for it, however, I created this form for one reason. TO HELP GET CARS OUT OF IMPOUND. I used this as my authorization letter from the client and 90% of the time it worked. I always faxed it to them and had them approve it first.

Print or Fax directly from within Recovery Manager.

ADDITIONAL INFORMATION:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

Wildcard Searches are accepted.

FIRST UPDATE SHEET:

This is like all other forms in Recovery Manager. You input the information in each field and hit the "Tab" key to go to the next field. Only one box can be checked per line. To put the check in the box, press the "Space Bar" or simply click on it with the mouse. Memo fields under each part of the update allows for additional comments. Once complete click on "Submit" down at the bottom right of the form. This will submit the update to text and allow emailing direct from Outlook Express.

NOTE: The date changes each time you put a new update in.

UPDATE SHEET / IN HOUSE LOG:

The "Update Sheet" is basically a long memo field with the account information at the top. There are several recommended steps to inputting an update. First, you must change the date on the form to today's date. Then "Tab" down to the memo field. Make sure before you start typing to have the cursor at the beginning of the box with nothing highlighted. Date & Time stamp memo and type in update.

Print or Fax directly from within Recovery Manager.

UPDATE REPORT:

This report is generated automatically using the information put in the "Date of Update" field. If you fill out the client information correctly with a number of days between updates, RM2001 will automatically check the last update and if it has been more days than you have set in your clients information it will show on the report.

SUBMIT UPDATES:

Type in any info that you wish on the update and click "Submit Update". There are also 5 generic update (that you can change) to the right of the data box. The buttons next to the 5 generic updates will auto post the update to it right in the data box and then you just click on "Submit Update". Once the update is submitted the program will take you to the Account Updates to view the update, from here you can Auto E-Mail the update or all the updates by clicking on the appropriate button.

CONDITION REPORT (HELP DESK)



EDITING A CONDITION REPORT:

To edit the condition locate the account using "Find". Then, like the other forms you edit the condition report by hitting the "Tab" key to go from field to field.

All the condition reports are in the same format and data entry, just tab through each one.

Print or Fax directly from within Recovery Manager.

CREATING A INVOICE FROM THE C/R:

CREATE INVOICE: Click on the "Create Invoice" button while on the account you wish to invoice. Choose whether to use automatic invoicing or manual. Manual Invoicing just tab through and fill out form. Automatic click on "Invoice Type" and choose what you are billing.

COMMENT & TIPS:

COMMENT: Use your caplock on this form. The form looks much better that way. The Police Dept & Inventory should be typed normally.

TIP: Be careful on what you put on this report, you could be held liable for any omissions. I learned this from experience.

ADDITIONAL INFORMATION:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

Wildcard Searches are accepted.

CREATE NEW INVOICE:

If you choose not to create the invoice from the "Account Information Page" or any of the other forms then you can create it directly from the "Invoice" page. Click on the "Create Invoice" button and the cursor will blink at "Case #" put in the Case # of the account you are invoicing and hit the "Tab" key. Now put the "Client Code" of the client you are billing and hit "Tab". Now to auto invoice click on "Invoice Type" and choose what you are billing. If you wish to complete the invoice manually "Tab" through the invoice filling out each field as needed. Once you are complete hit "Enter".

POSTING BUTTONS:

POST PAYROLL TO THIS CASE: Click on the button, enter the employees name you are paying and hit "Tab" now enter the amount you are paying and hit "Enter"

POST PAYMENT TO THIS INVOICE: Click on the button and put the payers name in the box and hit "Tab", now put the check # in and hit "Tab", and now the amount of the payment and hit "Enter".

POST EXPENSE TO THIS CASE: Click on the button and put who the expense was paid to and hit "Tab", now put the check # (ie. Visa, Cash, 1234) hit "Tab", the amount of the expense and hit the "Enter" key.

SEARCHES:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

WILDCARD SEARCHES: You may do wildcard searches in any field that you know some of the info in that field. including memo fields.

ADDITIONAL INFO:

INVOICE TYPE: This button is used for auto invoicing at the clients pay rate set in the "Invoice Client Information".

STORAGE CALCULATOR: This will compute the amount of days between the two dates you input and give you an option to invoice the storage.

STORAGE FEES & INVENTORY FEES: These are automatic calculating fields. to use these continue hitting the "Tab" key until you get the cursor blinking in front of "Per Day" and put the amount per day of storage and hit "Tab" now put the # of days and hit "Tab" it will calculate the figure for you. Same with the Inventory Fees, first will be the amount of the inventory (ie. 35.00) + amount "Per Day" , and then the number of days it was stored.

EMPLOYEE INFORMATION (HELP DESK)



NEW EMPLOYEE:

NEW EMPLOYEE: Click on the "New Employee" button. The cursor will be blinking at "Employee Name" put that information in and hit the "Tab" key. Continue through the form hitting the "tab" key. Make sure have filled out all the information including Employee ID and Job Type. When complete hit "Enter".

Then click on "Login Settings" and set up the levels of access if any you want to give to each employee. This **MUST** be done to allow them to sign in to RM2001. Make sure you assign yourself and "Admin" passwords.

HINT: Be sure to fill out every field available. The more information in the long run the better.

Print or Fax directly from within Recovery Manager to put in Hard File if you use one..

ADDITIONAL INFORMATION:

You can search on any field in any form by hitting the "Find" key at the top of the program just left of center. Once you press that button all the fields on any form you are viewing go blank. You put the information you want to search by in the proper field and hit "Enter" to perform the search.

Wildcard Searches are accepted.

NOTE: The "Payscale" directly feeds this information to the invoice for payroll purposes. If these figures are wrong the automation will not function properly.



F-KEY ASSIGNMENTS

- F-1 Print Preview**
- F-2 Submit Update**
- F-3 Account Information**
- F-4 Account Listing**
- F-5 Find**
- F-6 Hot Sheet**
- F-7 Invoice**
- F-8 Auto / Truck CR**
- F-9 Switchboard**
- F-10 On Lot Report**
- F-11 Employee Information**
- F-12 Client Information**

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