NATIONALDATACENTER
CHAPTER 13 BANKRUPTCY CASE INFORMATION

Trustee System Admin Quickstart Guide

Let's get Going

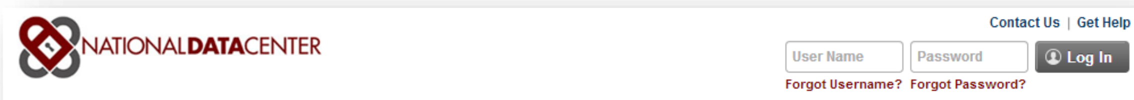
This is a quick start guide to getting started with the new NDC Trustee functionality. Remember we've changed over to our new home address: www.ndc.org

Types of Accounts

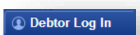
The new NDC site supports four permission account types of logins: Trustee, Debtor Attorney & Small Creditor, Creditor and Debtor. This guide will show you special functions only available on the Trustee permission account type and how it affects the view that Debtors will see. Remember the view for Trustees is different than the view for any other type of account.

Login

The first major change you'll see is the login has moved to the upper right side of the screen. Hint: Trustees, Debtors, Creditors and Attorneys can long in here

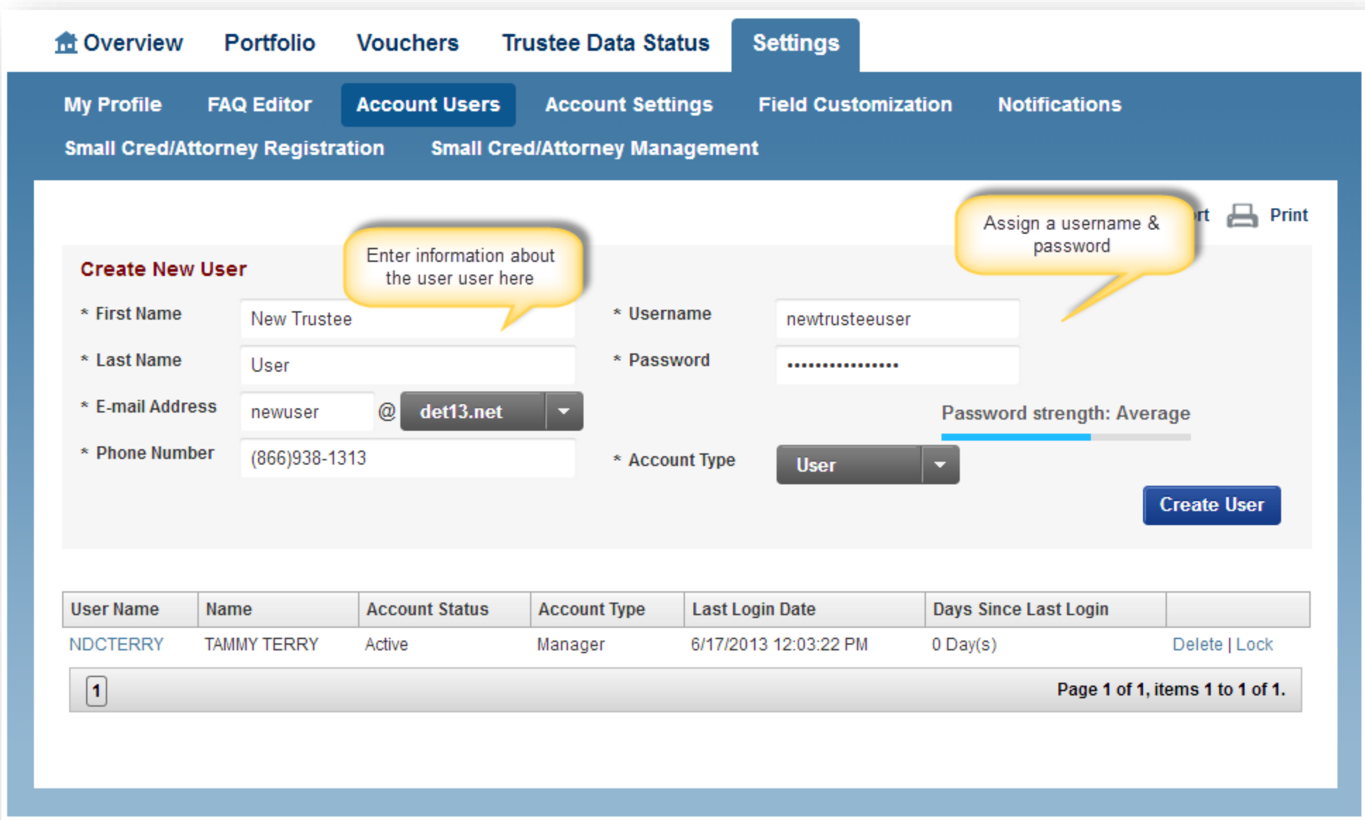


Or anyone can login on a 'fly-out' login area on the main graphic by clicking on the debtor Log In button:



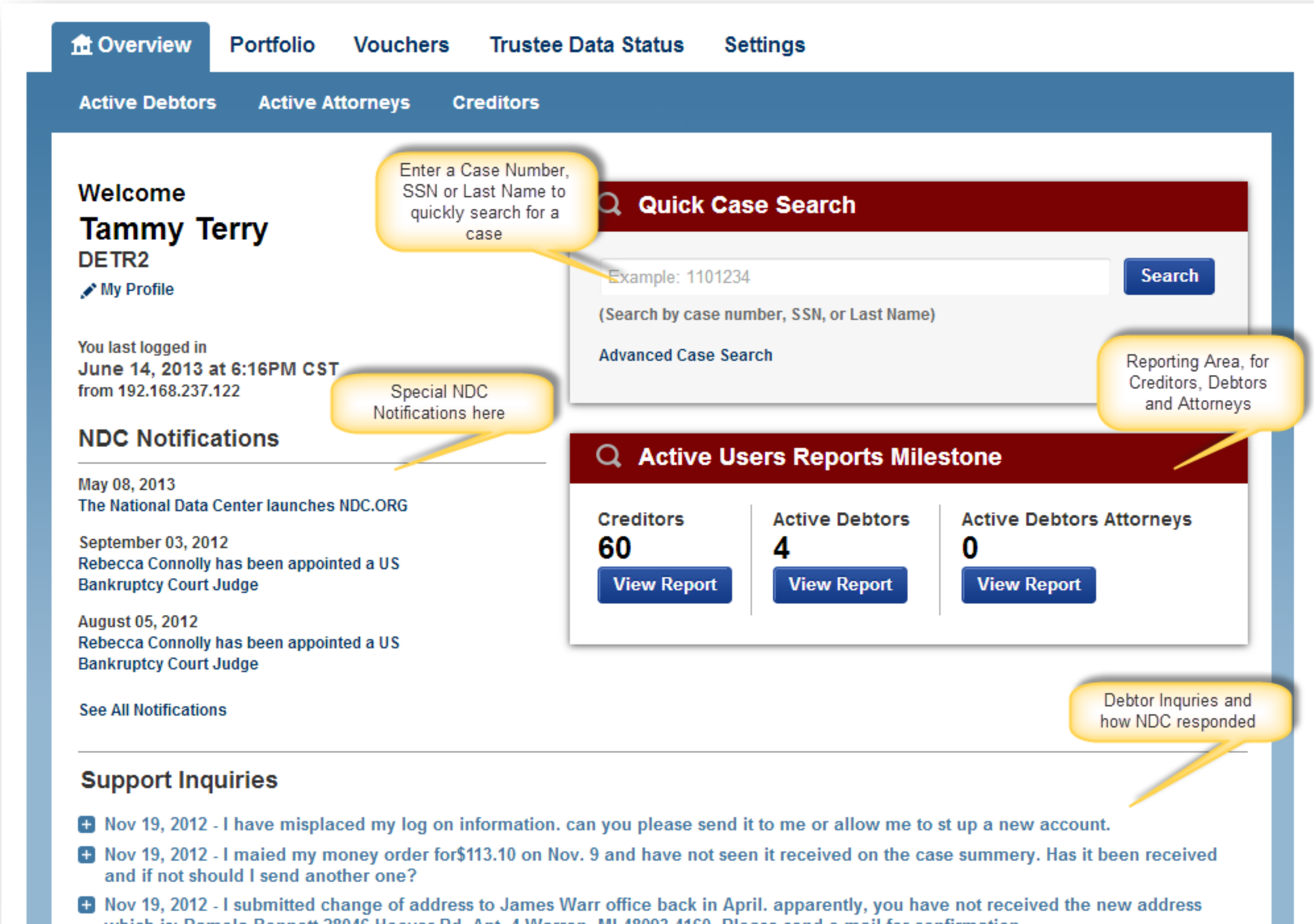
Create Users for your office

You should have been given a trustee level username and password for access to the NDC. Continue to configure other office team members using Settings > Account Users > Create Users. Use the screen below to enter additional office/team members. Note for Account Type: 'User' creates a basic login with Trustee account permissions. 'Manager' creates a login with the Trustee account permissions plus the ability to add or delete other logins.



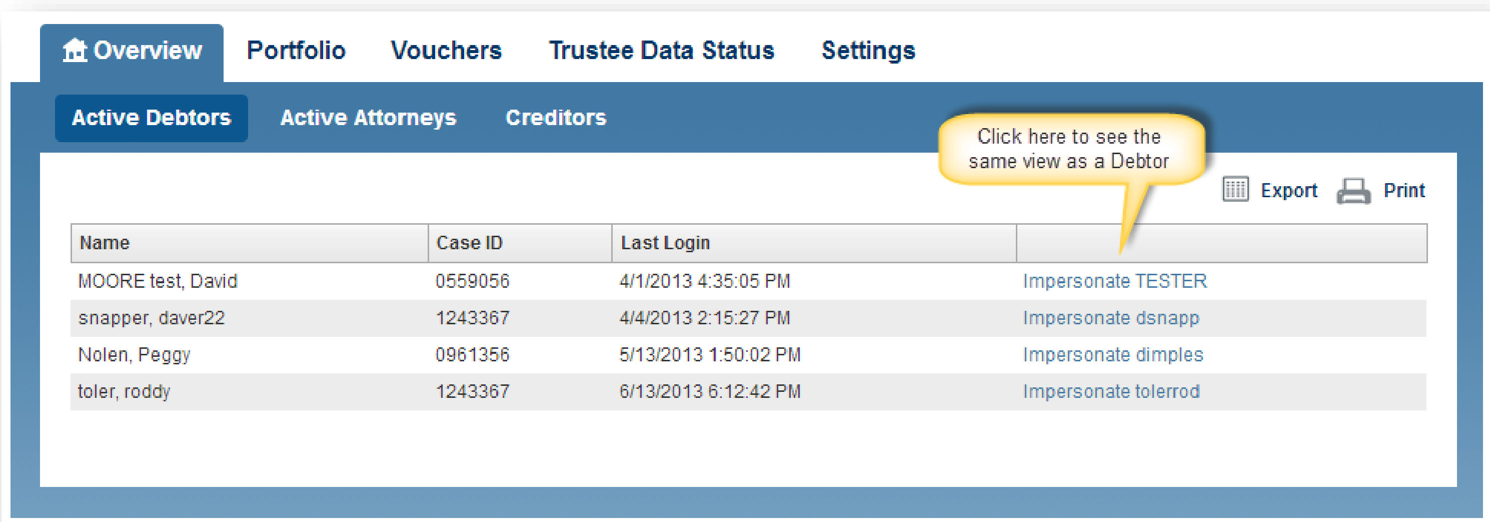
New Overview Page

The overview page – a completely new page that summarizes some of the most frequently asked questions. Note the trustee overview page is a bit different than a debtor's overview page. To see the exact debtor overview, use the impersonate function (described below).



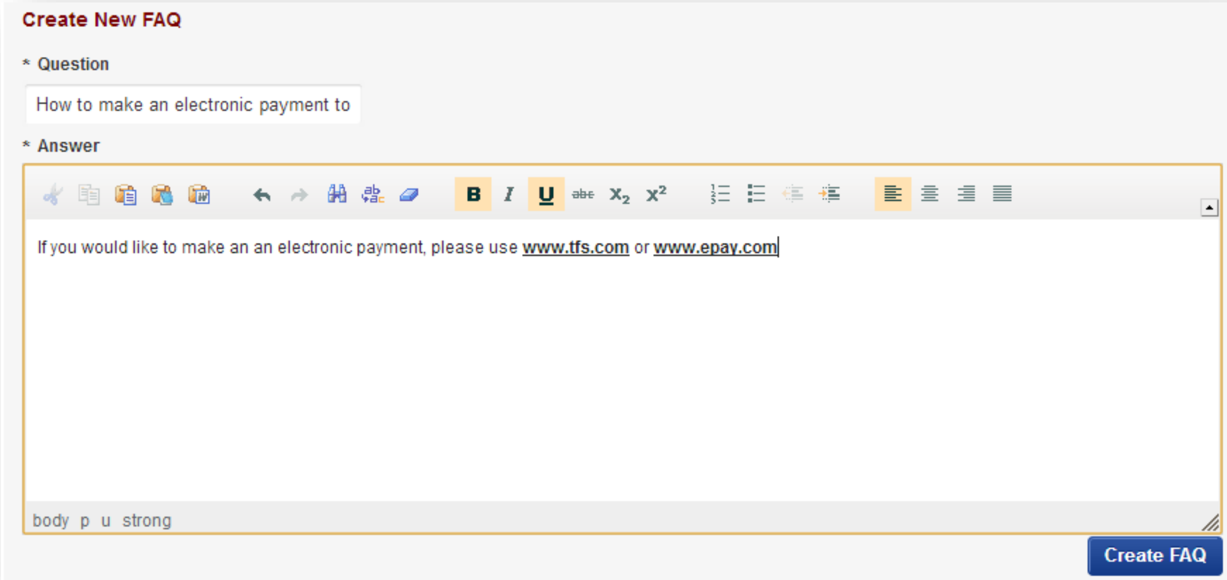
Reports – Active Debtors

If you hit the Active Debtors View Report button you're taken to this screen where you can actually 'impersonate' a debtor to see **exactly** what they would see if they were to log in to the NDC site.



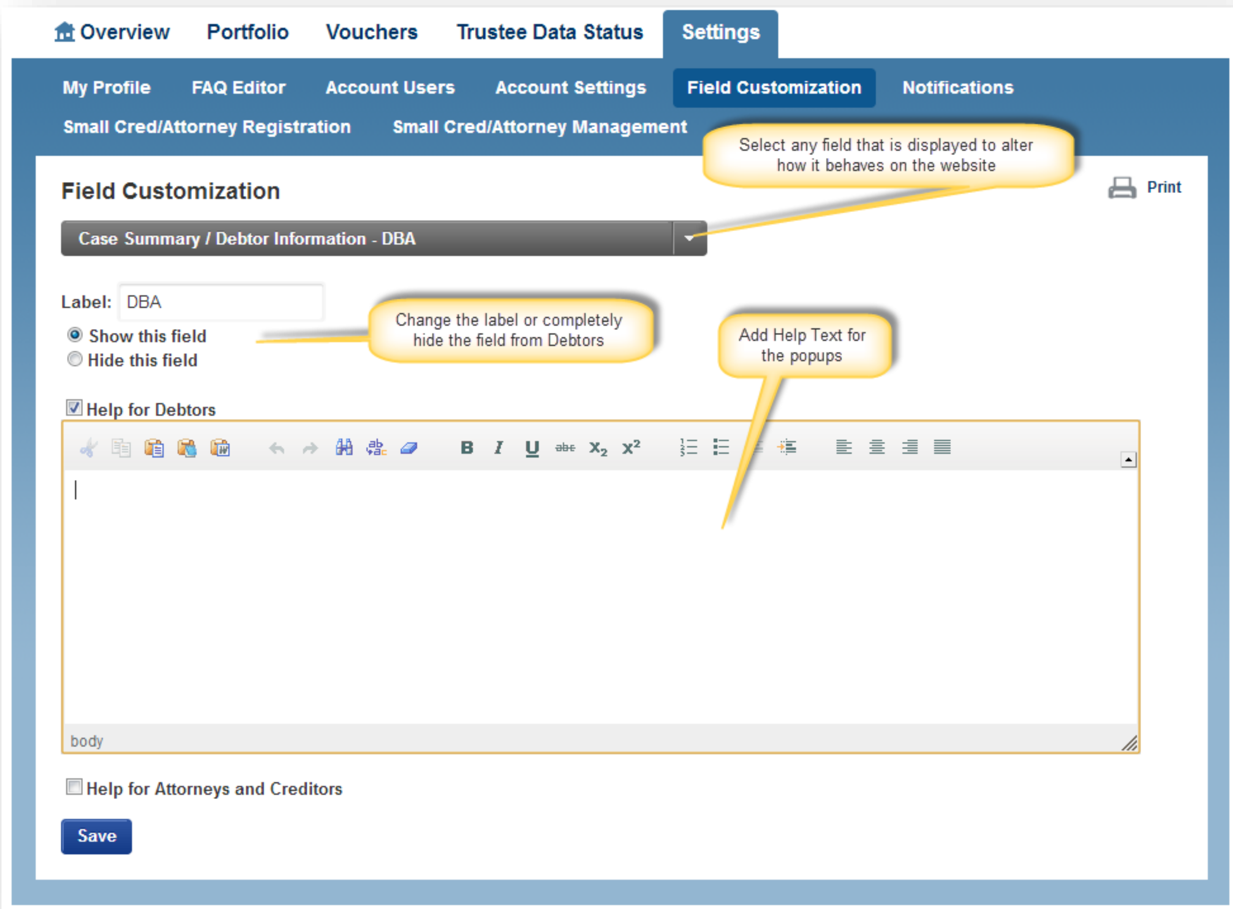
FAQ Editor

Select 'Settings > FAQ Editor > Create New FAQ' to create a new Frequently Asked Question. These questions show up at the bottom of the Debtor's Overview page



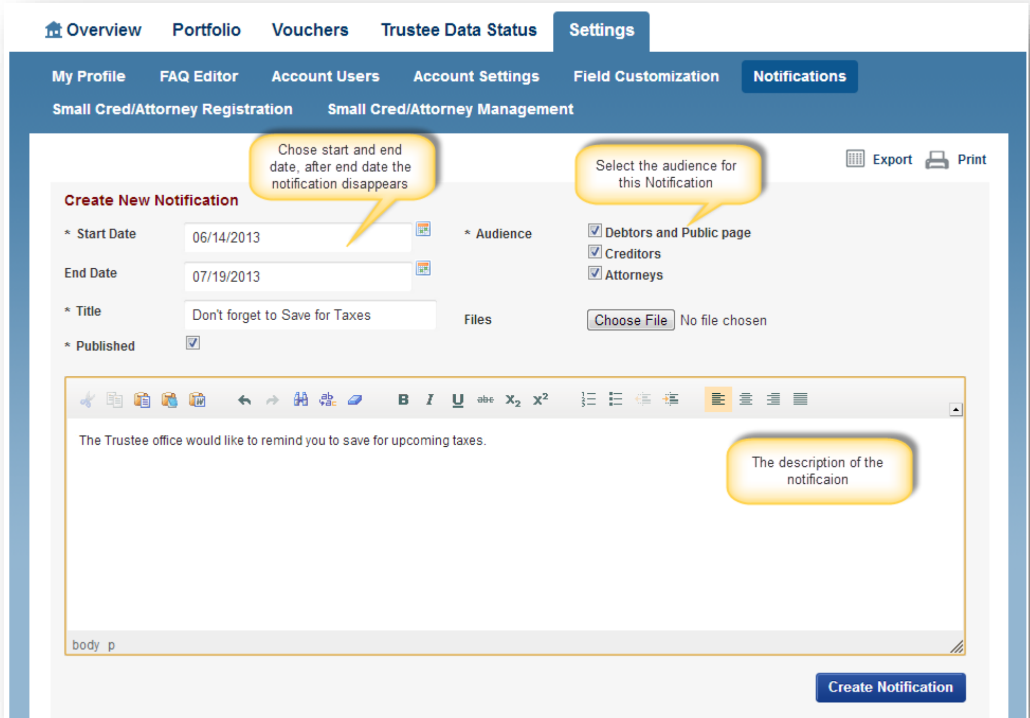
Field Customizations Editor

This allows you to turn on or off any field on the website, you can add Help text which can be setup differently for Debtors and Creditors/Attorneys. Hit the Save button to setup the configuration as you like.



Notifications Editor

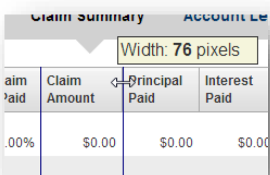
Notifications have a start and end date



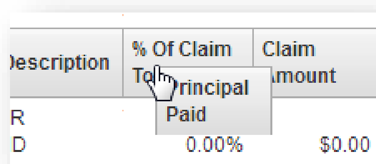
Grid/Column Adjustments

Change the view that your Debtors see for any grids: when you make changes to the **Claim Summary** or **Account Ledger** grids – Select the Portfolio tab, then choose a case. Then chose Case Summary or Account Ledger to adjust the grids, the grid settings affect all case and ledger displays for all users.

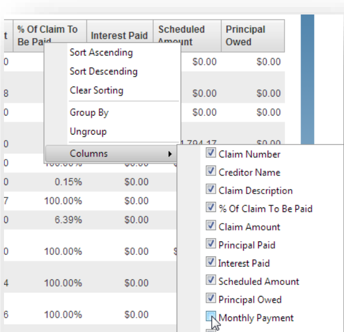
Change the width of any column



Change the order of columns



Right click anyhwhere on the column headings to bring up the column modifications – add or delete the columns



Once you're satisfied with the look of the grid, press Save Settings at the bottom of the page. Otherwise revert everything with Reset Settings