

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

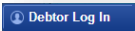
The new NDC site supports four permission account types of logins: Trustee, Debtor Attorney & Small Creditor, Creditor and Debtor. This guide will show you special functions only available on the Trustee permission account type and how it affects the view that Debtors will see. Remember the view for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

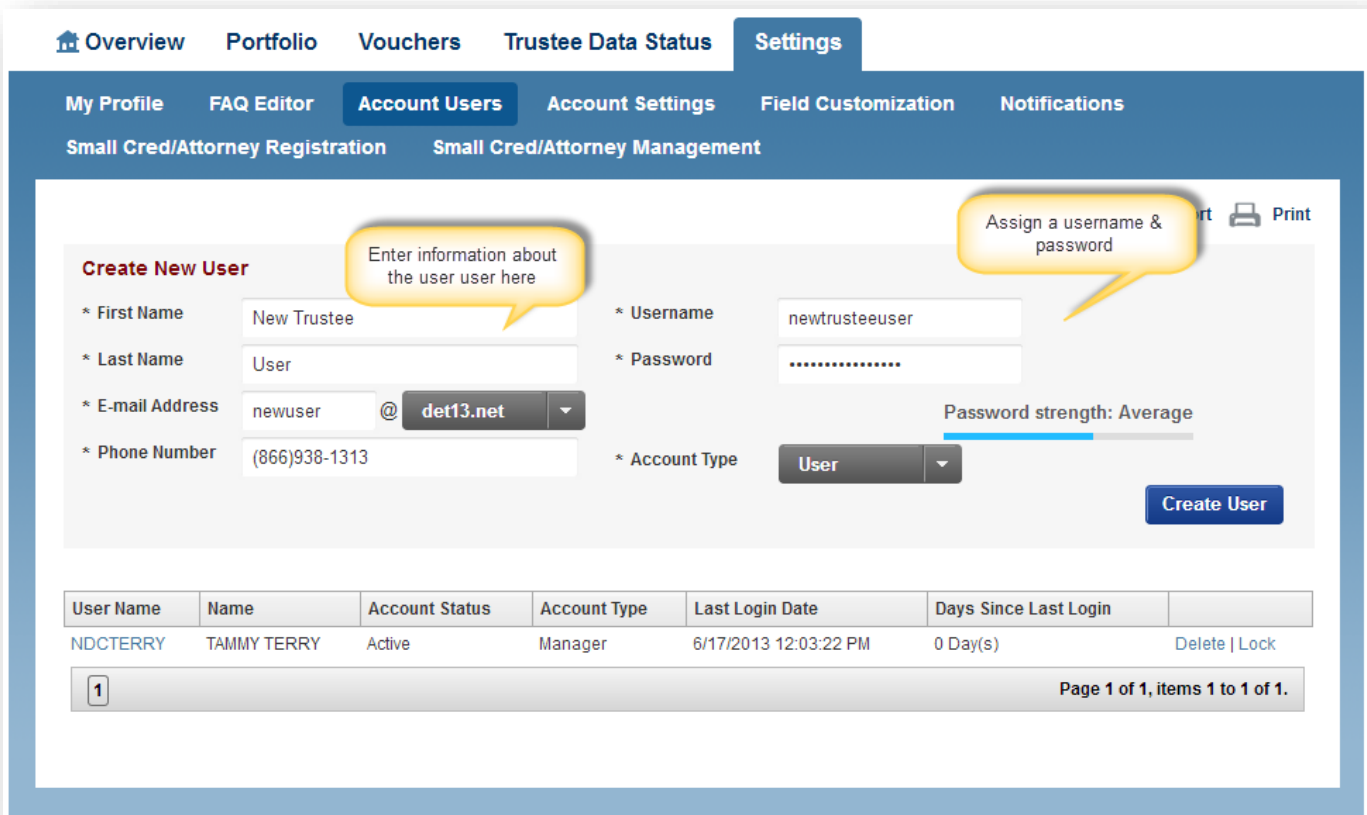


Or anyone can login on a 'fly-out' login area on the main graphic by clicking on the debtor Log In button:



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.



Create New User

Enter information about the user user here

Assign a username & password

* First Name: New Trustee

* Last Name: User

* E-mail Address: newuser @ det13.net

* Phone Number: (866)938-1313

* Username: newtrusteeuser

* Password:

* Account Type: User

Password strength: Average

Create User

User Name	Name	Account Status	Account Type	Last Login Date	Days Since Last Login	
NDCTERRY	TAMMY TERRY	Active	Manager	6/17/2013 12:03:22 PM	0 Day(s)	Delete Lock

Page 1 of 1, items 1 to 1 of 1.

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).

Welcome Tammy Terry
DETR2
[My Profile](#)

You last logged in
June 14, 2013 at 6:16PM CST
from 192.168.237.122

NDC Notifications

May 08, 2013
The National Data Center launches NDC.ORG

September 03, 2012
Rebecca Connolly has been appointed a US Bankruptcy Court Judge

August 05, 2012
Rebecca Connolly has been appointed a US Bankruptcy Court Judge

[See All Notifications](#)

Support Inquiries

- + Nov 19, 2012 - I have misplaced my log on information. can you please send it to me or allow me to st up a new account.
- + Nov 19, 2012 - I maied my money order for\$113.10 on Nov. 9 and have not seen it received on the case summery. Has it been received and if not should I send another one?
- + Nov 19, 2012 - I submitted change of address to James Warr office back in April. apparently, you have not received the new address which is: Pamela Bennett 28046 Hoover Rd. Apt. 4 Warren, MI 48093 4160. Please send e mail for confirmation

Quick Case Search

Example: 1101234
(Search by case number, SSN, or Last Name)

Advanced Case Search

Active Users Reports Milestone

Creditors	Active Debtors	Active Debtors Attorneys
60	4	0
View Report	View Report	View Report

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.

Active Debtors View Report

Click here to see the same view as a Debtor

Name	Case ID	Last Login	
MOORE test, David	0559056	4/1/2013 4:35:05 PM	Impersonate TESTER
snapper, daver22	1243367	4/4/2013 2:15:27 PM	Impersonate dsnapp
Nolen, Peggy	0961356	5/13/2013 1:50:02 PM	Impersonate dimples
toler, roddy	1243367	6/13/2013 6:12:42 PM	Impersonate tolerrod

[Export](#) [Print](#)

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

Create New FAQ

* Question
How to make an electronic payment to

* Answer
If you would like to make an an electronic payment, please use www.tfs.com or www.epay.com

body p u strong

Create FAQ

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.

Overview Portfolio Vouchers Trustee Data Status Settings

My Profile FAQ Editor Account Users Account Settings Field Customization Notifications

Small Cred/Attorney Registration Small Cred/Attorney Management

Select any field that is displayed to alter how it behaves on the website

Print

Field Customization

Case Summary / Debtor Information - DBA

Label: DBA

Show this field
 Hide this field

Change the label or completely hide the field from Debtors

Add Help Text for the popups

Help for Debtors

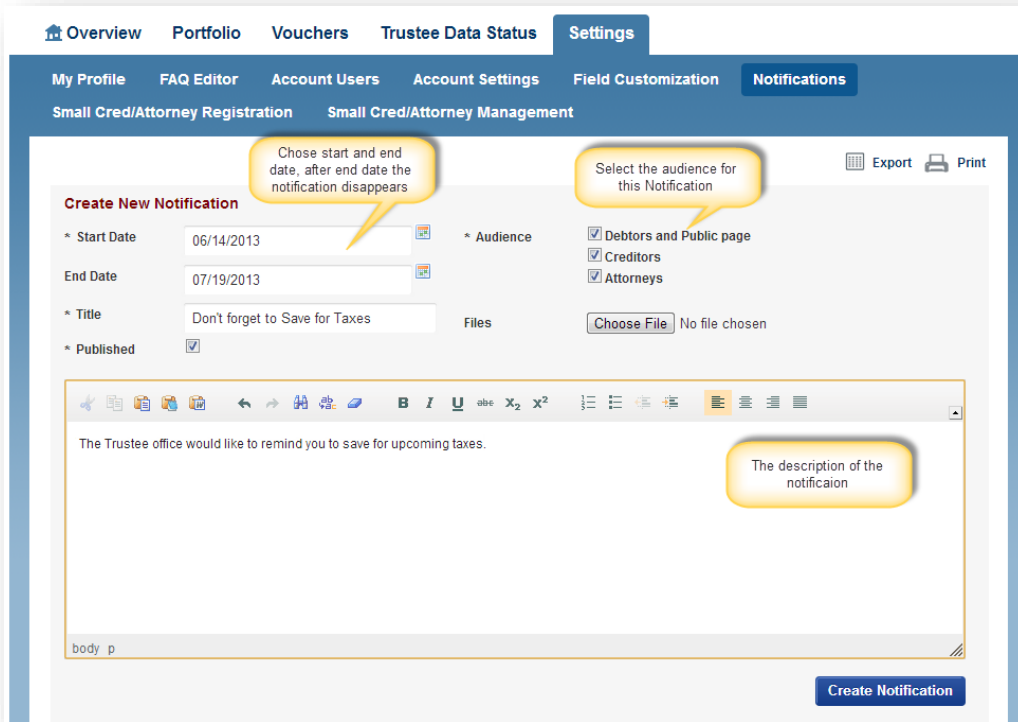
body

Help for Attorneys and Creditors

Save

Notifications Editor

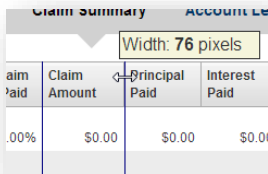
Notifications have a start and end date



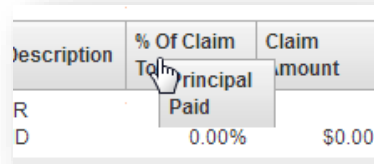
Grid/Column Adjustments

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.

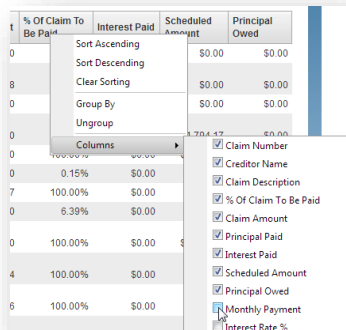
Change the width of any column



Change the order of columns



Right click anywhere 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

