



RECRUITMENT  
FUNDING SOLUTIONS



# Dancerace

## User Guide





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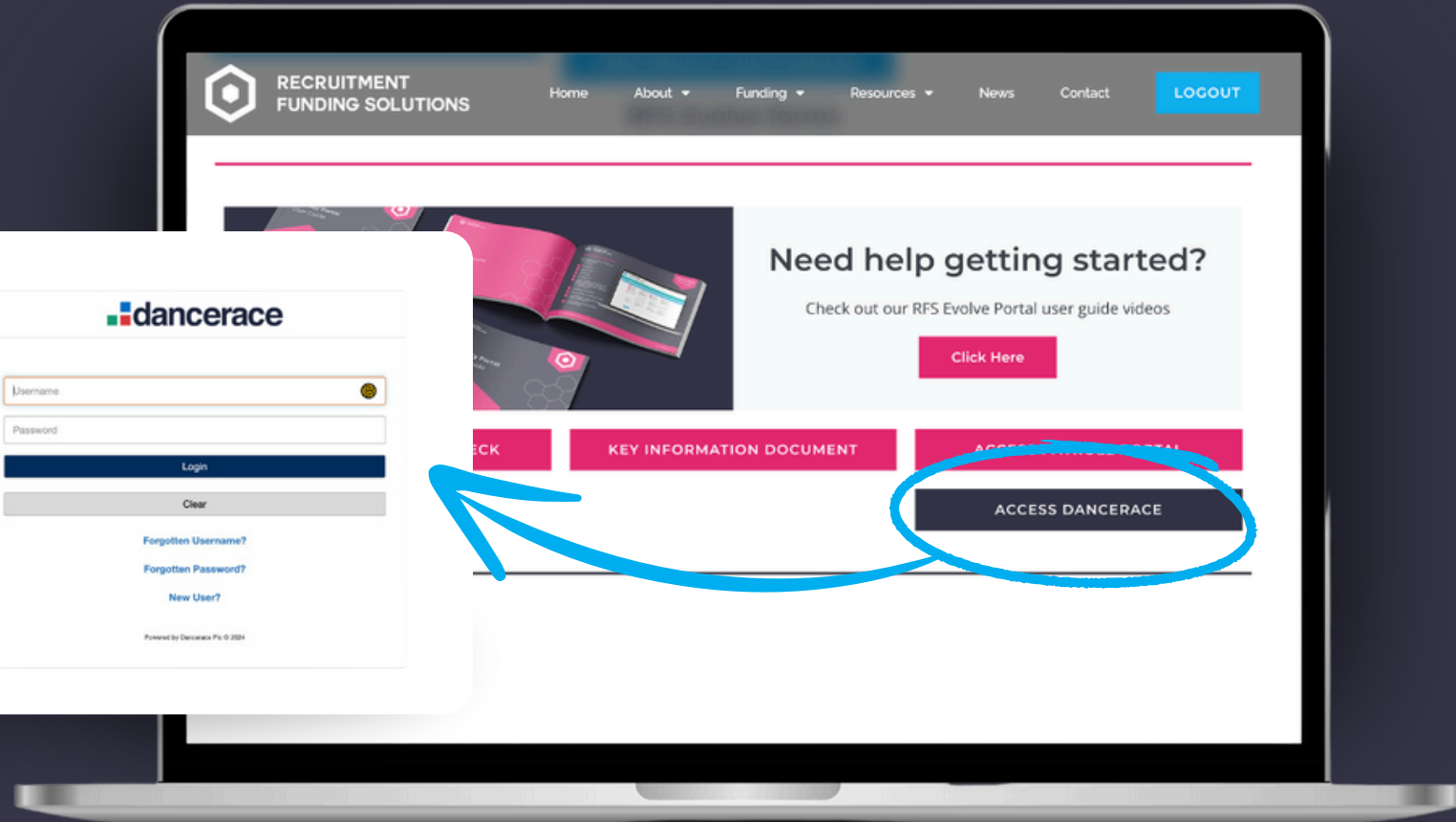
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# Logging in to Dancerace



## Logging in to your Dancerace

From you RFS portal page, click on  
**'ACCESS DANCERACE'**.



Enter your username and  
password into the Dancerace  
login screen and click 'login'

The login form is titled 'dancerace' and contains the following elements:

- Username input field
- Password input field
- Login button
- Clear button
- Forgotten Username? link
- Forgotten Password? link
- New User? link
- Powered by Dancerace Plc © 2024



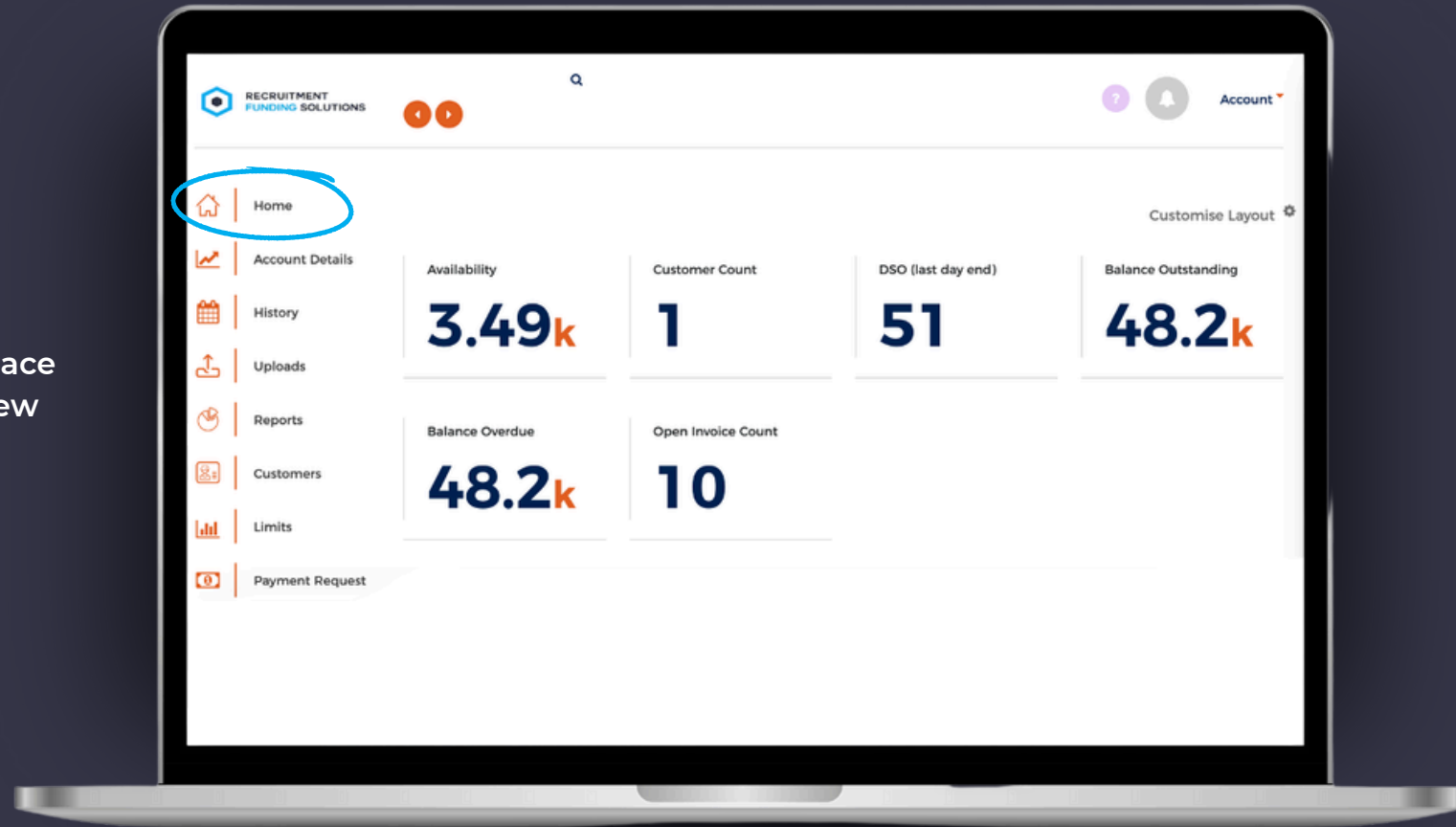
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# Dancerace dashboard



## Dancerace dashboard

On the homepage of your Dancerace dashboard, you will see an overview of your account details:





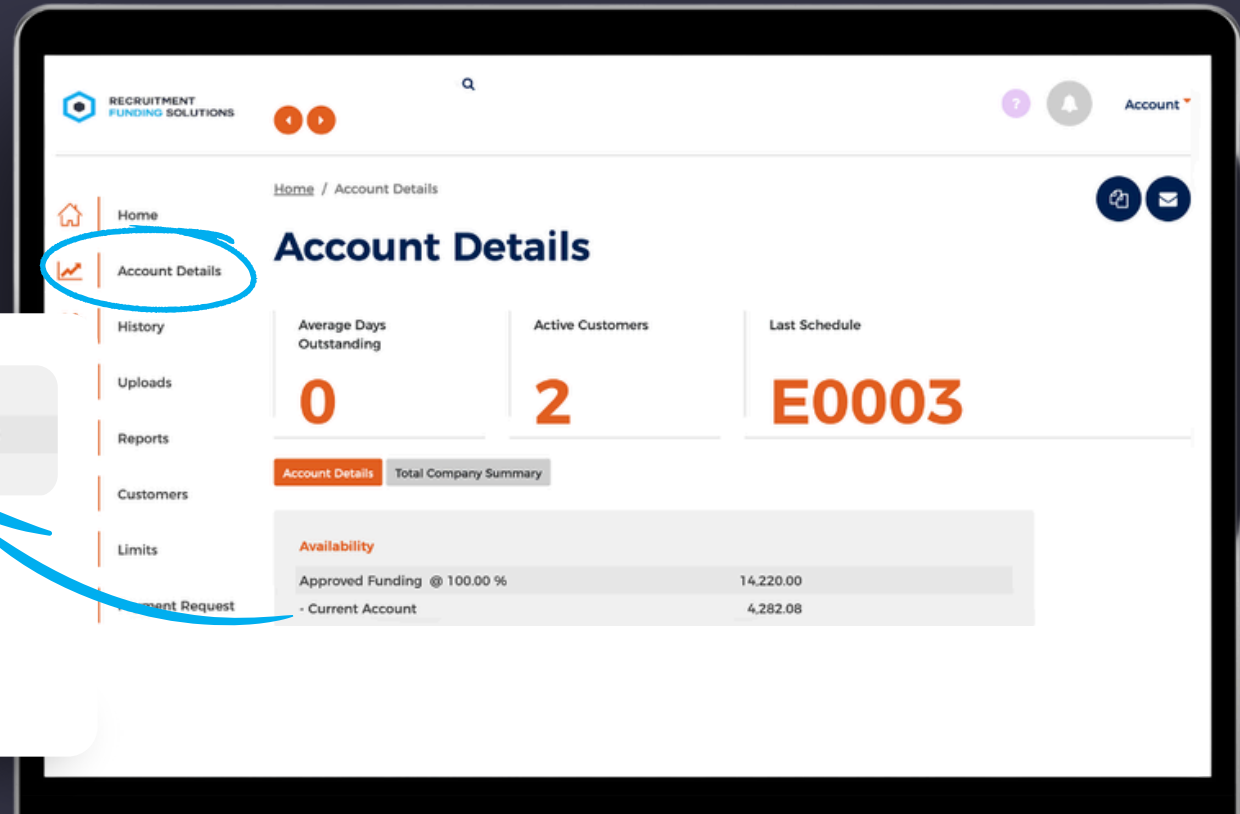
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# Account details



## Account details

In this tab you can see your approved funding. This is your assigned accepted invoice.



### Availability

Approved Funding @ 100.00 %	14,220.00
- Current Account	4,282.08

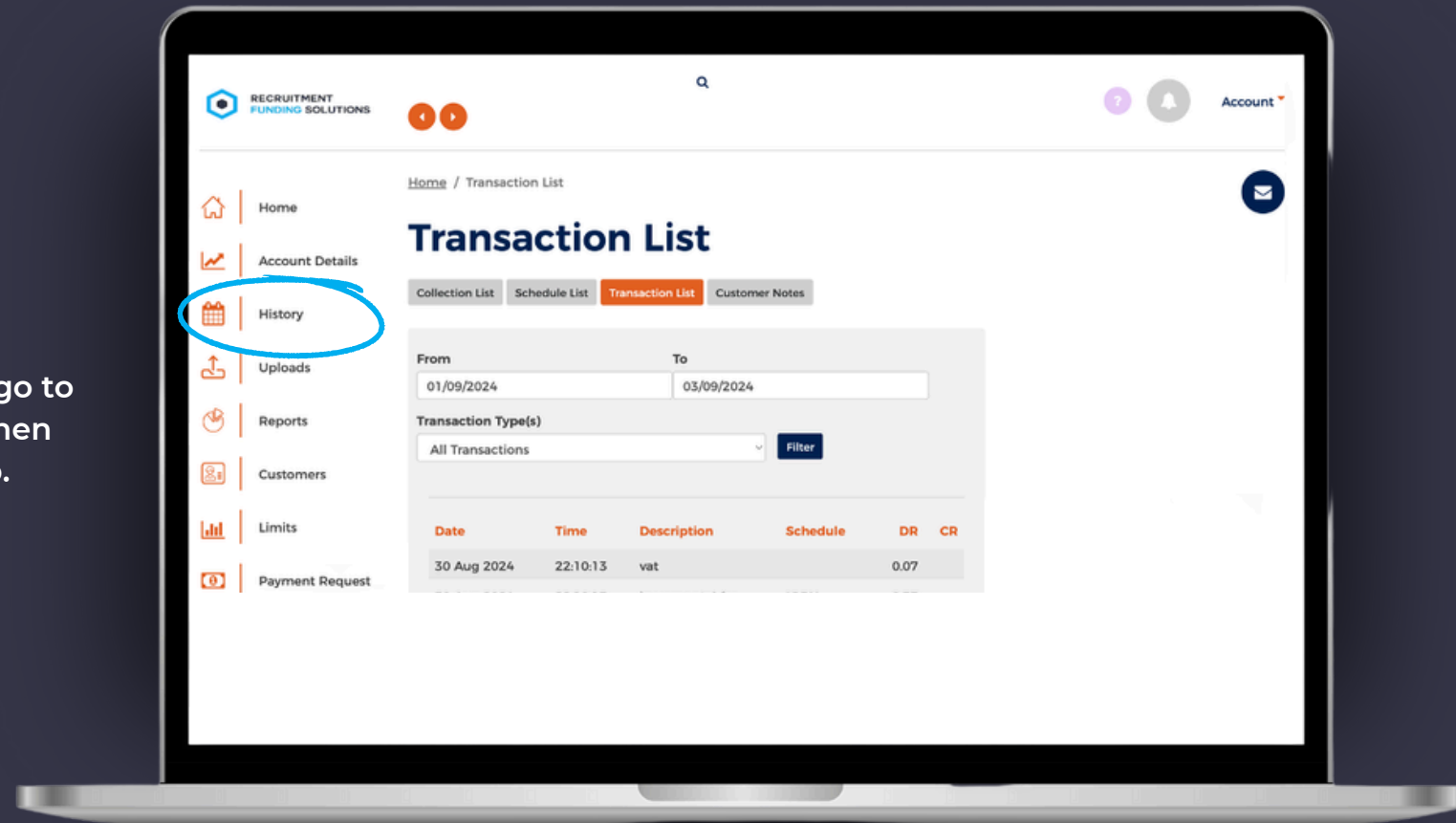
The **'Current Account'** line is what has been used from your approved invoices, this consists of VAT, Holiday pay, Pension, Employer NI, Disbursements and the RFS fee.





## Account details

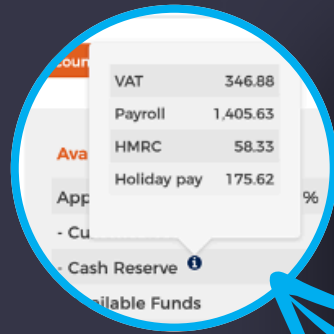
To look at the breakdown of this go to the **'History'** tab on the left and then click on the **'Transaction List'** tab.





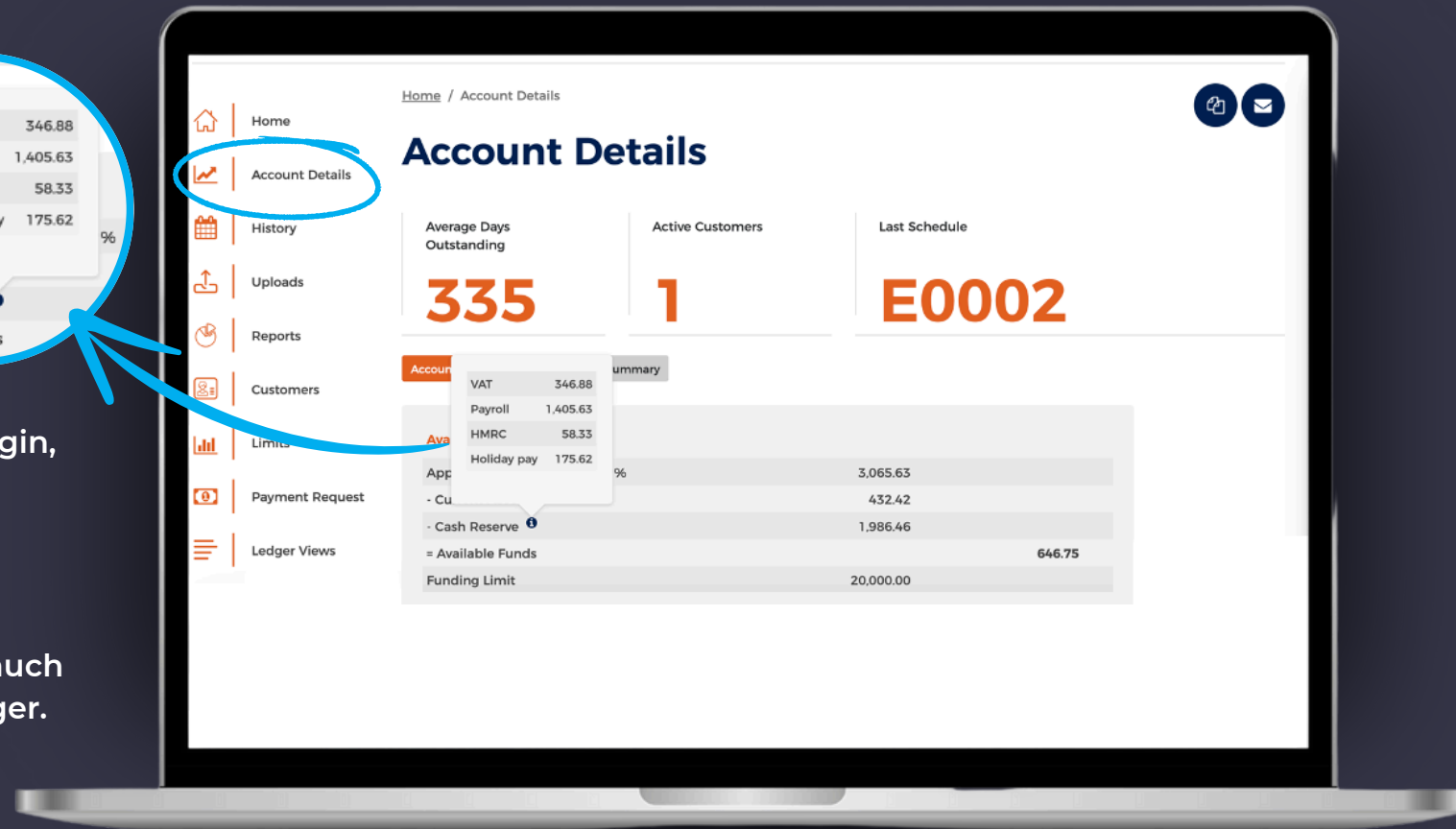
## Account details

**Cash Reserve** – if you hover over the ‘i’ this also gives you a breakdown of what has been reserved.



**Available funds** – This is your margin, you can request this on a Friday morning.

**Funding limit** – This is the overall amount agreed at sign up. How much we will fund for the complete ledger.





## Account details

**Disapprovals** – This will show anything that has gone over credit limit that has been disapproved from your margin, this will be held until the account is brought back into payment terms when it will be put back into your available funds.

**Client Account** – Click on the orange arrow to see the breakdown for Net Assignments and total invoicing for the month. The commission fee is the RFS fee plus VAT.

**Amount Due** – This is the amount we need to collect in from end clients.

Disapprovals		▲
Age	0.00	
Disputes	0.00	
Contras	0.00	
Funding Limit	0.00	
Concentration	0.00	
Reserve	0.00	
Verification	0.00	
Total Disapproved:		0.00
Approved Debt:		3,065.63
Client Account		▲
Opening Balance	2,759.14	
+ Net Assignments	0.00	
+ Bad Debt Payout @ 0.00%	0.00	
- Payments	0.00	
Charges		
Retrospective	0.00	
Commission/Fees	0.00	
Disbursements	0.00	
Refactoring	0.00	
Incremental Fee	105.37	
VAT	20.56	
Factors Discount	0.00	
Total Charges		125.93
Amount Due	Month To Date:	2,633.21



# Uploads

You do not need to take any action on the uploads area of the dashboard, as RFS will do all uploads.



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# Reports

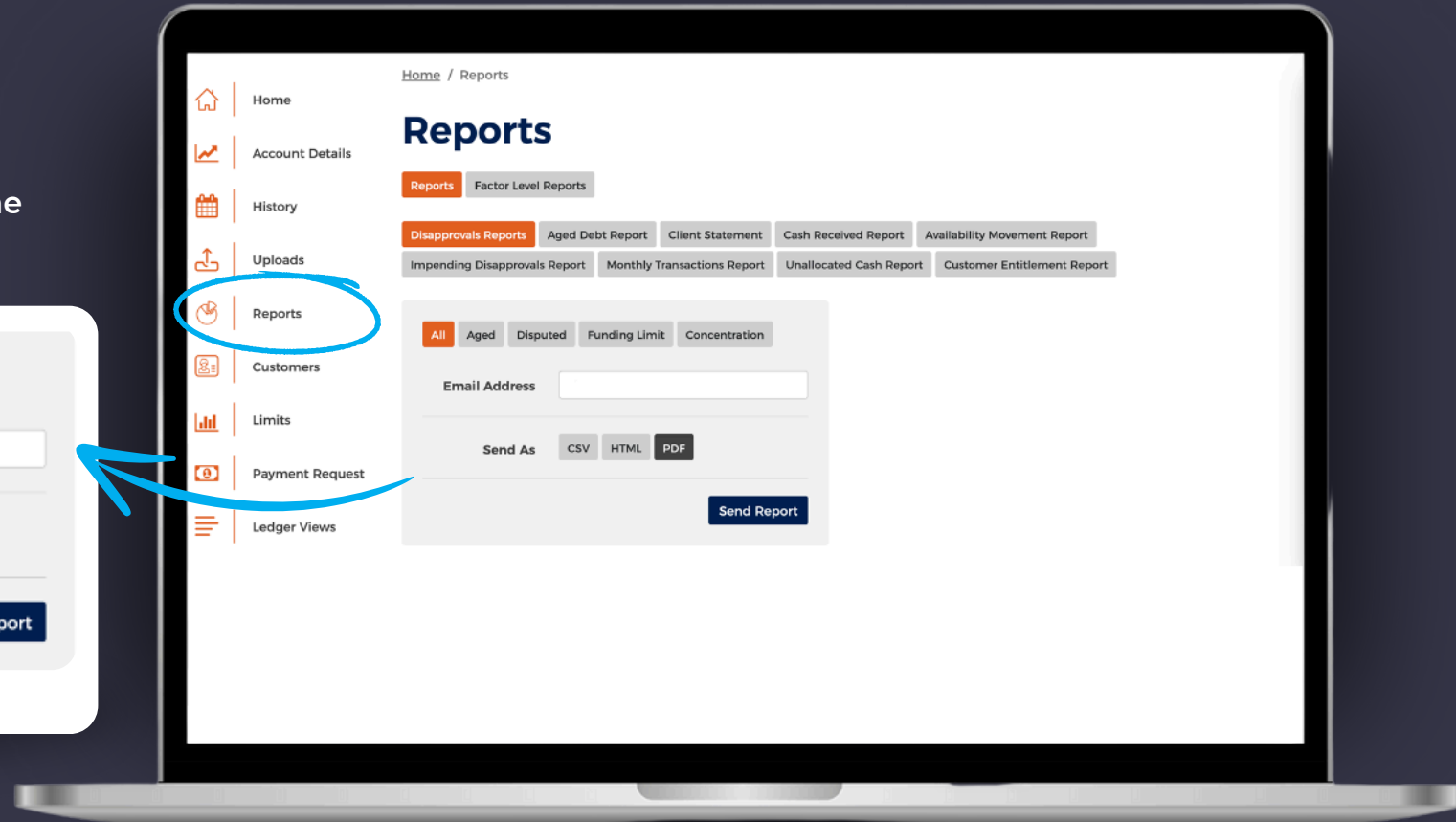


## Reports

All these reports can be downloaded and an email will be sent to you within 5 minutes of the request.

A close-up of the report generation form. It features a row of filter buttons: 'All' (highlighted in orange), 'Aged', 'Disputed', 'Funding Limit', and 'Concentration'. Below this is an 'Email Address' input field. Underneath the input field are 'Send As' buttons for 'CSV', 'HTML', and 'PDF'. A 'Send Report' button is located at the bottom right of the form. A blue arrow points from the 'Reports' menu item on the laptop screen to this form.

Add your email here





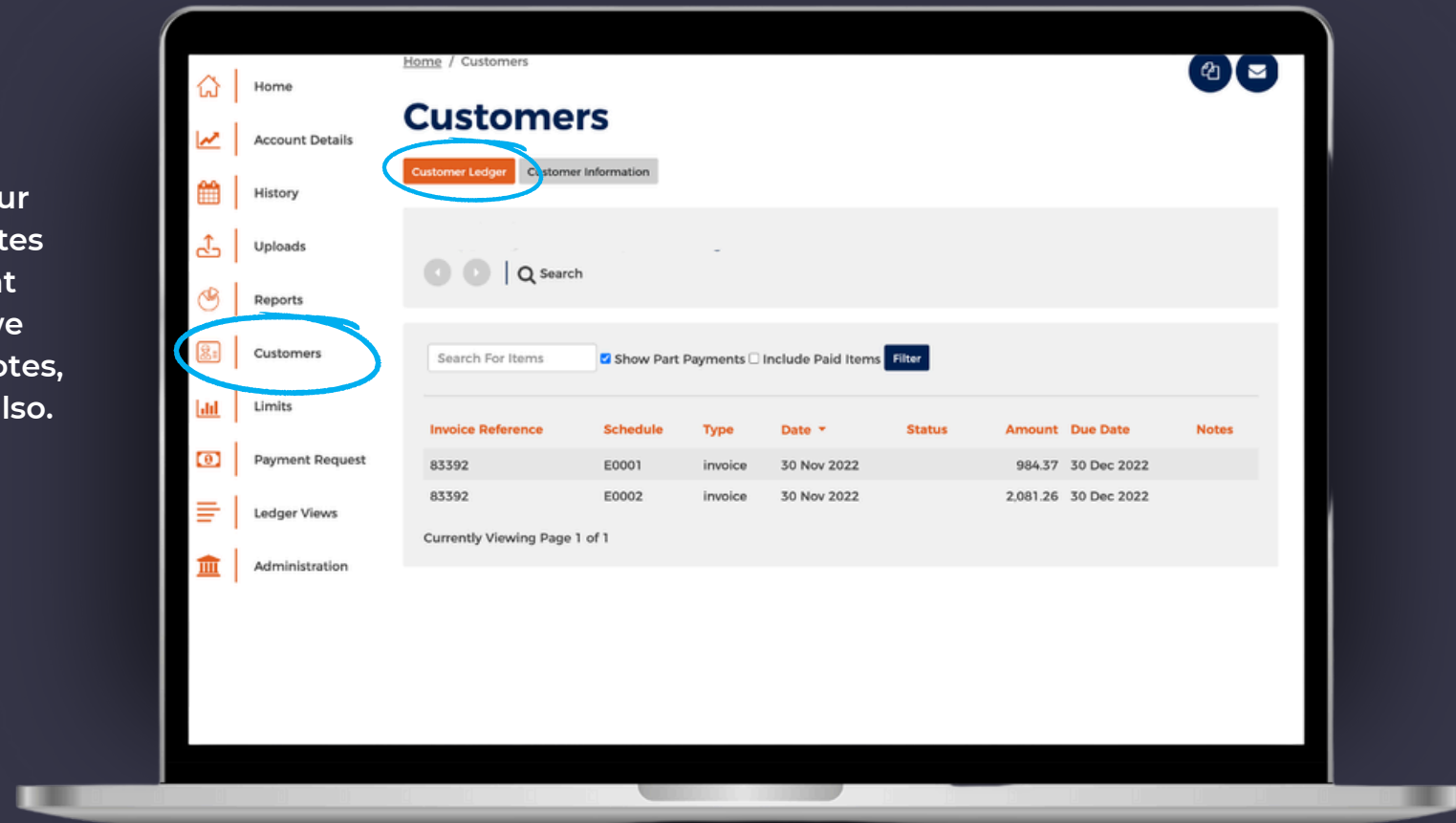
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# Customers



## Customers

This is where you can drill into your customer ledger, you can add notes on if you have spoken to the client and there is anything you think we need to know, we can also add notes, if we have spoken to your client also.

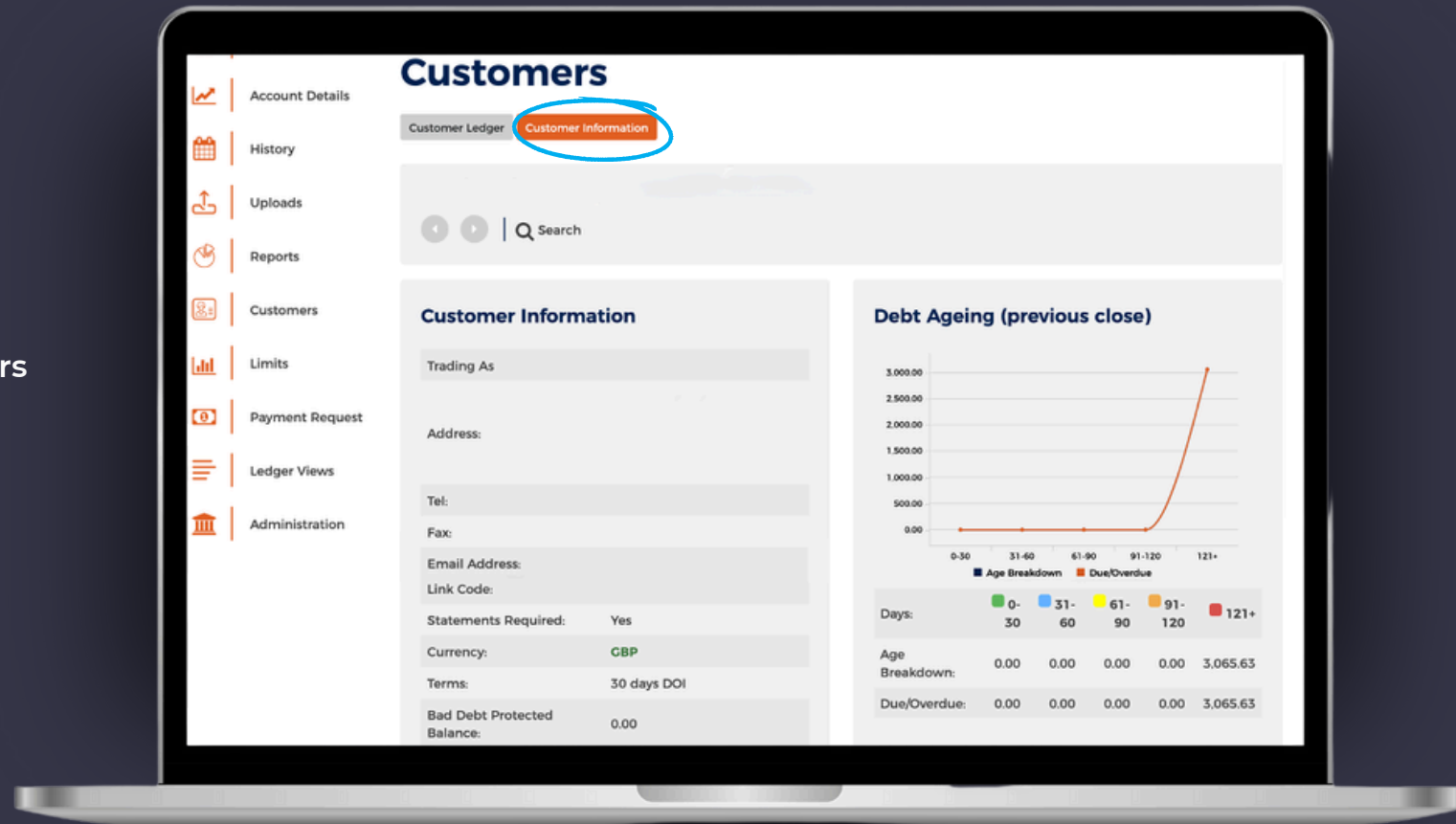






## Customers

Customer information shows payment terms, and the customers contact information.





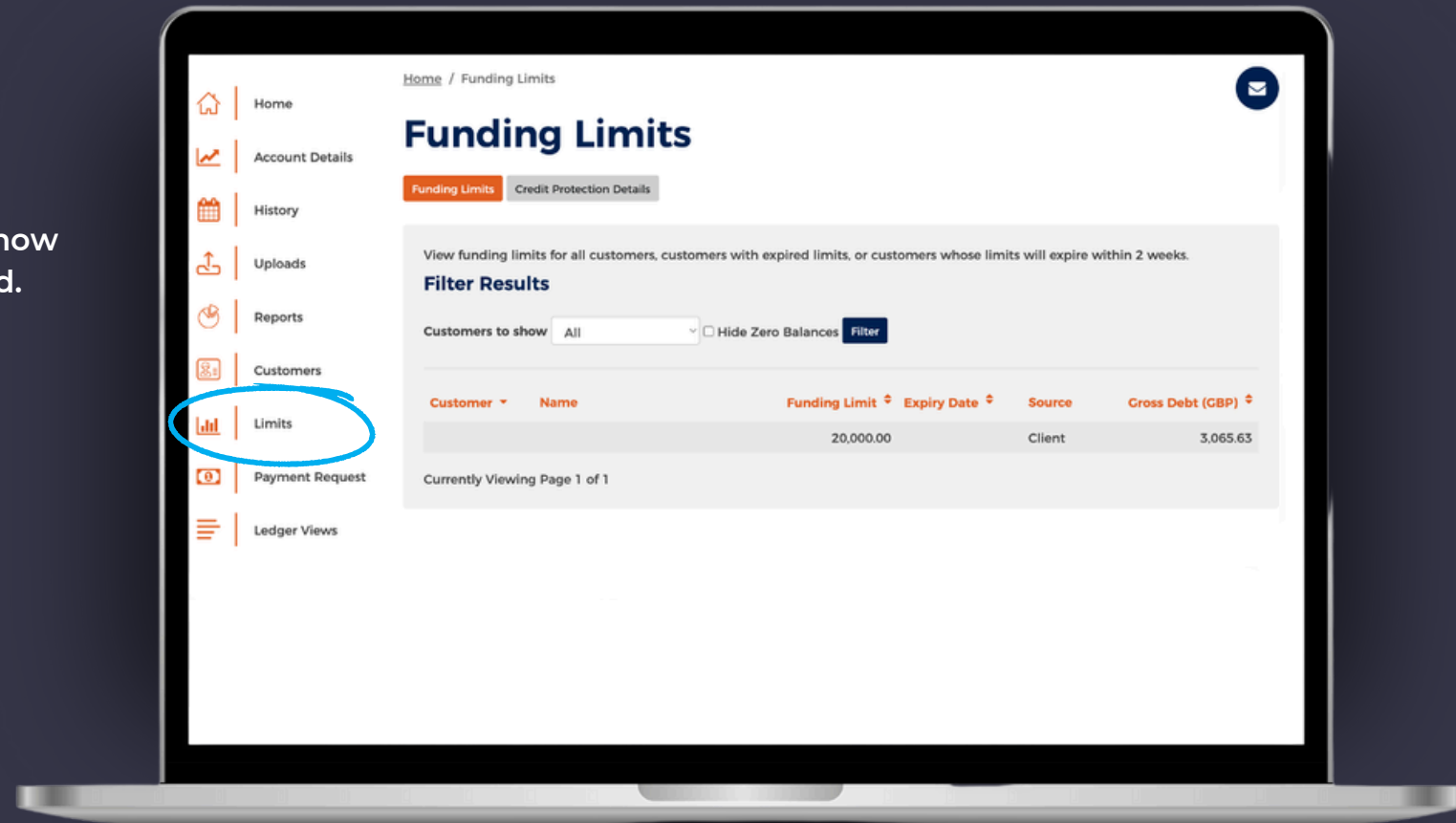
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# Limits



## Limits

Shows all Live Clients, how much credit we have on the client and how much of that credit you have used. Use this to keep an eye on your trading levels.





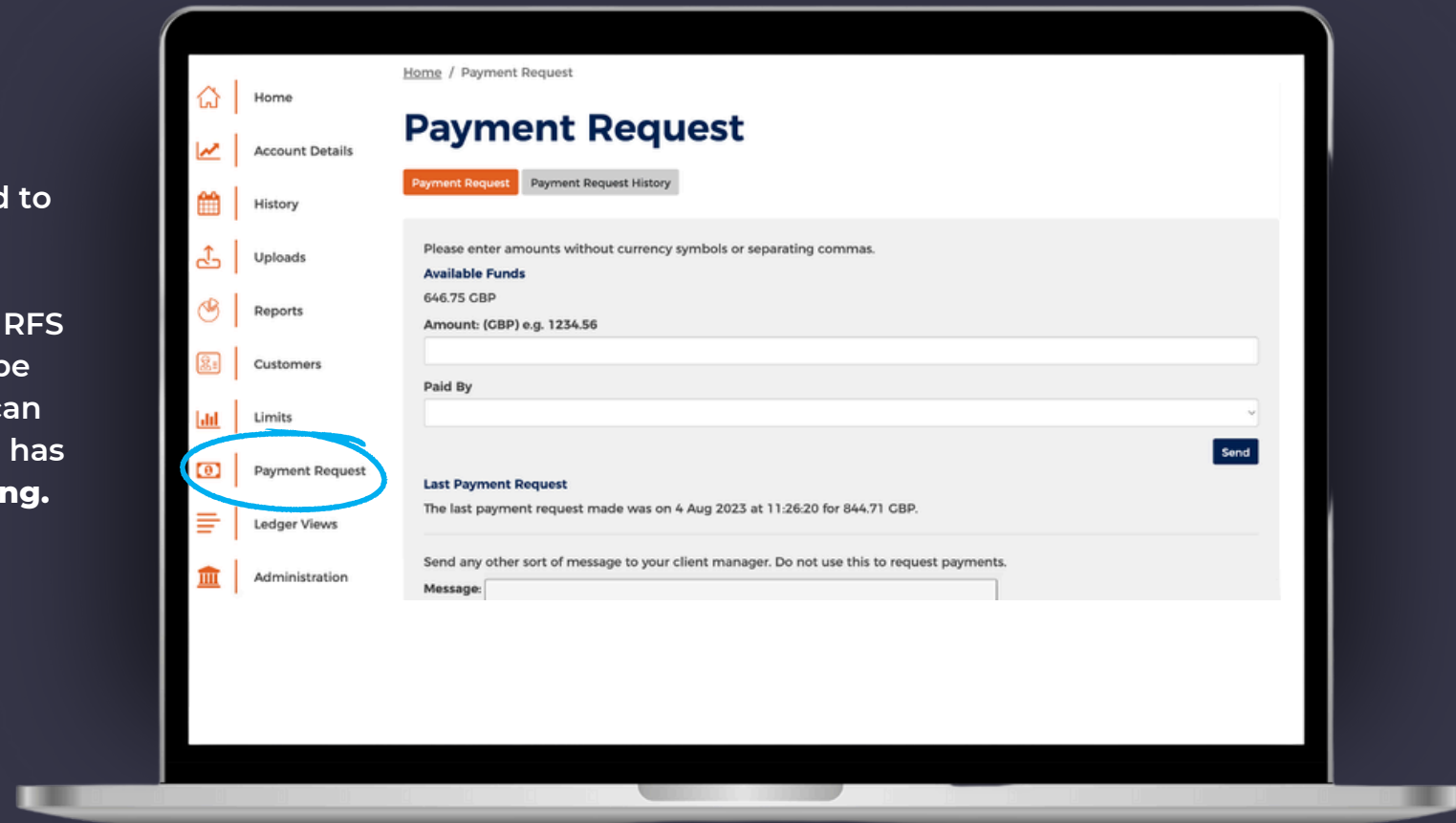
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# Payment Requests



## Payment request

To request your margin to be paid to you, please press the request payment type in how much you would like this will then send the RFS team an email and payment will be made to you. Payment requests can only be done once the pay period has been closed. **This is Friday morning.**





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# Dancerace

## User Guide



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