ACI365™

Adding and Editing Clients

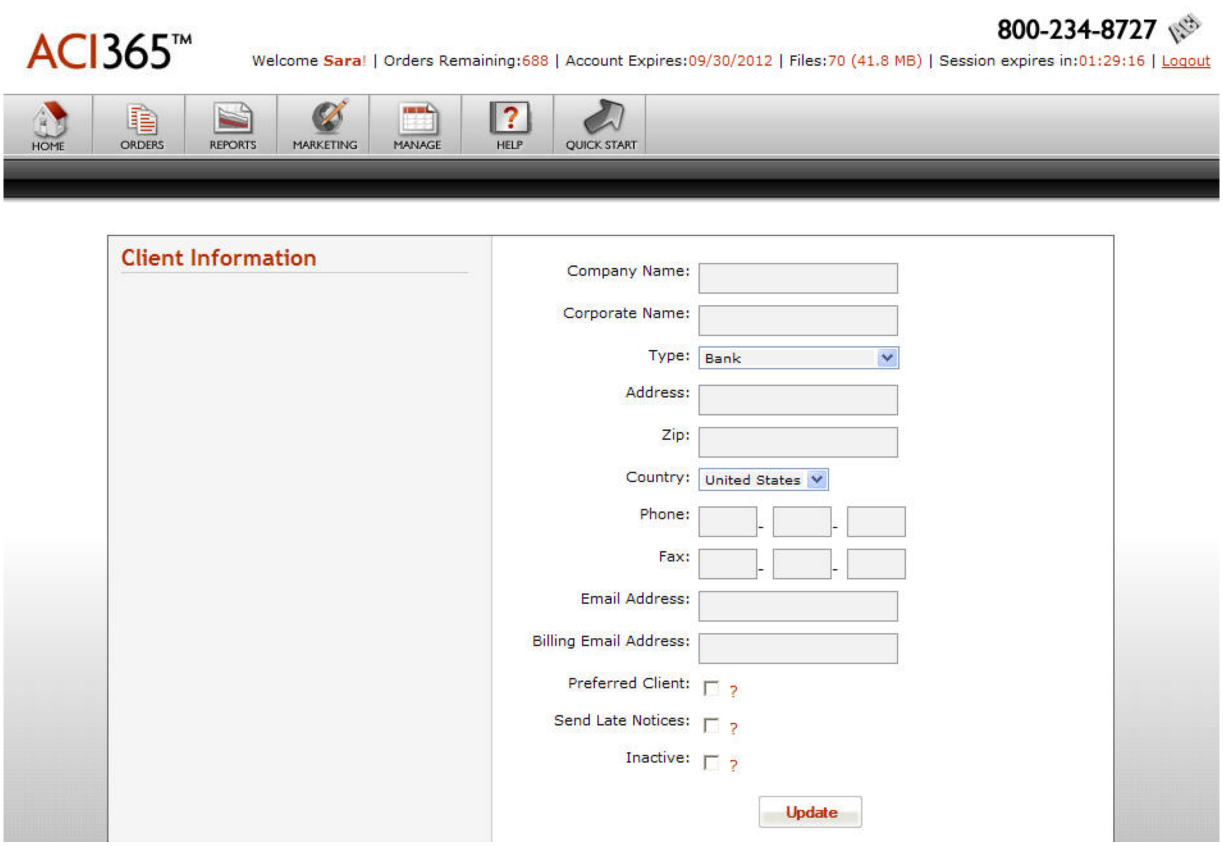
This document provides instructions for adding and editing clients, and creating client accounts.

Client Management

Add a Client

1. In the *Management* section, click **Client Information**.
2. Click **Add Client**.
3. Enter client information and click **Update**. See *Client Details* for additional information.
4. Verify the city and state and click **Continue**.
5. Click **Home** to return to the ACI365 homepage.

Client Details



Company Name

The name that the client does business as.

Corporate Name

The legal entity name, which may be the same as the Company Name.

Type
Select a client type from the drop-down list. When viewing client lists, clients can be sorted by type to refine the number of clients displayed.

Address
The client's street address.

ZIP
The client's ZIP Code. ACI365 locates the city and state based on the ZIP Code.

Country
The client's country of domicile.

Phone
The client's telephone number.

Fax
The client's fax number.

Email Address
The client's e-mail address. Communication from the site, including status updates, is sent to this e-mail address.

Billing Email Address
A second e-mail address for reference purposes.

Preferred Client
Select *Preferred Client* if the client receives preferred pricing as entered in the *Product Fees*.

Send Late Notices
Select *Send Late Notices* to enable the automated late notification system for this client.

Inactive
Select *Inactive* to remove the client from active client lists.

Edit a Client

1. In the *Management* section, click **Client Information**.
2. Click the **Edit** link for any client.

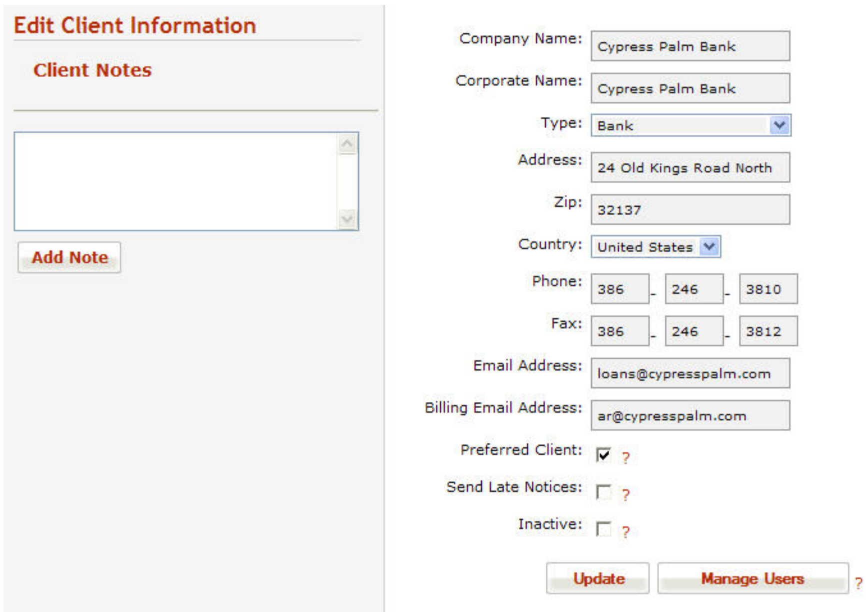
   > TIP: Select *Show Inactive Clients* to include inactive clients in the client list.

3. Enter client information and click **Update**.
4. Click **Home** to return to the ACI365 homepage.

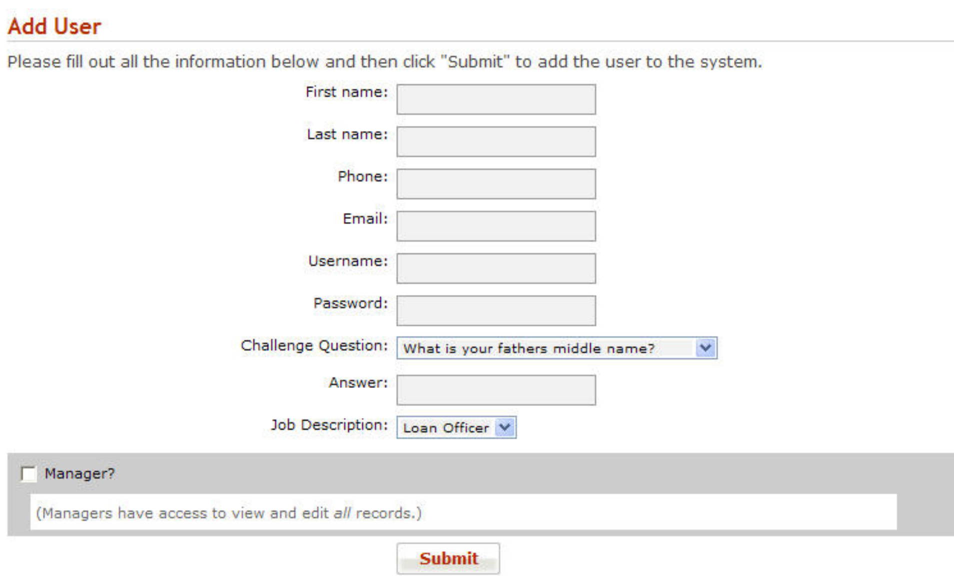
Create a Client Account

With login credentials, clients can place orders and review order statuses on the company website.

1. In the *Management* section, click **Client Information**.
2. Click the **Edit** link for any client.
3. Click **Manage Users**



4. Click **Add User**.



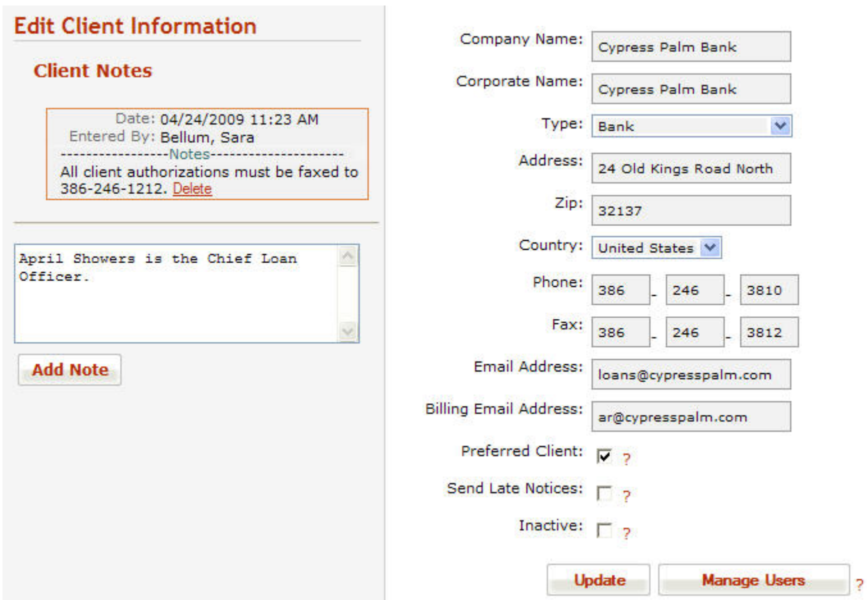
5. Enter the user's *First Name*, *Last Name*, *Phone Number, Email* Address, and the *Username* and *Password*.

> **TIP**: Select a *Challenge Question* and enter the answer. If the user forgets the password in the future, clicking *Forgotten Password?* on the login screen and entering the correct response to the *Challenge Question* allows the user to create a new password.

6. Select a *Job Description* from the drop-down list. Check the **Manager** box, if the user is a Manager. Managers have access to view and edit all records. Click **Submit**.
7. Click **Done** to close the *Manage Users* page.
8. Click **Home** to return to the ACI365 homepage.

Add Notes

1. In the *Management* section, click **Client Information**.
2. Click the **Edit** link for any client.
3. Enter client notes and click **Add Note**.



4. Click **Home** to return to the ACI365 homepage.

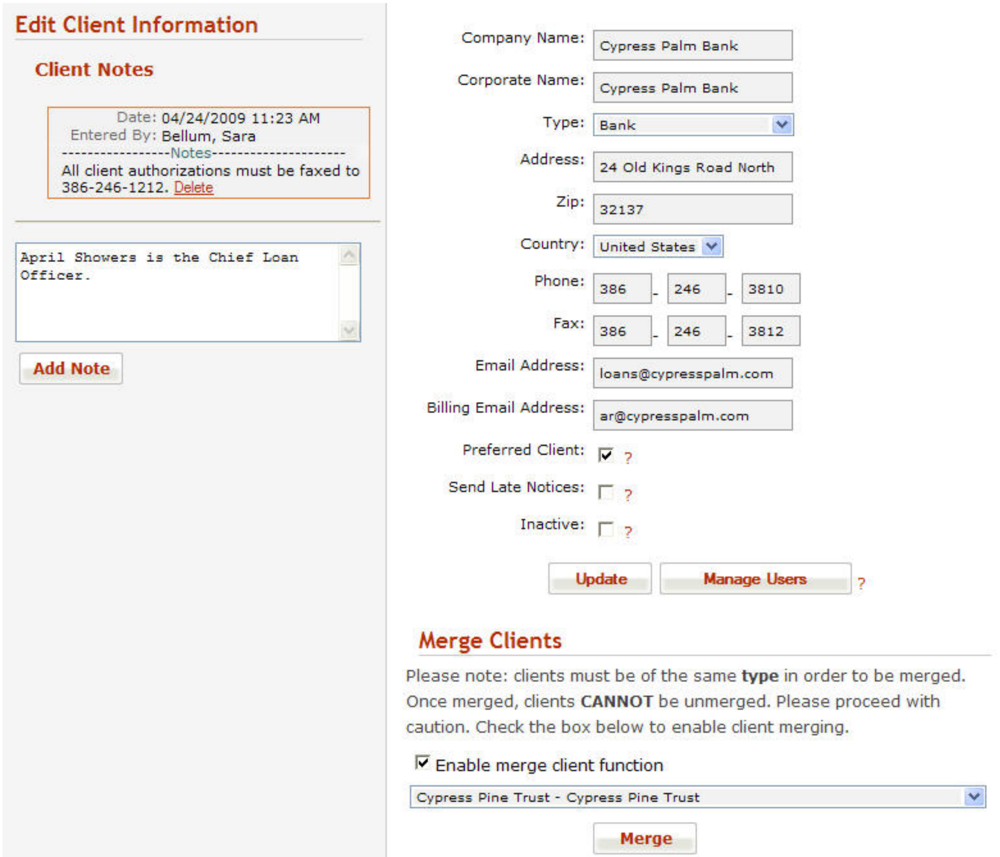
> **TIP**: To delete a client note, click the **Delete** link. The note is immediately deleted.

Merge Clients

The *Merge Clients* feature combines two clients under a single client entry. Merging deletes the selected client from the database and reassigns the client's orders to the *merge with* client.

1. In the *Management* section, click **Client Information**.
2. Click the **Edit** link for any client.
3. Select *Enable merge client function*.

4. Select the client to merge with from the drop-down list, and click **Merge**. The selected client's orders are reassigned to the *merge with* client.



> **NOTE**: To merge, clients must be of the same client type.

5. Click **OK** to confirm the merge, or click **Cancel** to abandon.

> **CAUTION**: Client merging is not reversible.

6. Click **Home** to return to the ACI365 homepage.

Search Clients

1. In the *Management* section, click **Client Information**.
2. Enter a keyword and click **Go**.

TIP: Select a client type from the *Filter by Type* drop-down list to refine the search.

TIP: Select a number or letter to display only those clients whose company name begins with the selected number or letter.

NOTE: *Keyword Search* overrides the type, and letter and number, filters.