

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

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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

ACI365™ 800-234-8727

Welcome Sara! | Orders Remaining:688 | Account Expires:09/30/2012 | Files:70 (41.8 MB) | Session expires in:01:29:16 | [Logout](#)

HOME ORDERS REPORTS MARKETING MANAGE HELP QUICK START

Client Information

Company Name:

Corporate Name:

Type: Bank

Address:

Zip:

Country: United States

Phone: - -

Fax: - -

Email Address:

Billing Email Address:

Preferred Client: ?

Send Late Notices: ?

Inactive: ?

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**

Edit Client Information

Client Notes

Company Name:

Corporate Name:

Type:

Address:

Zip:

Country:

Phone: - -

Fax: - -

Email Address:

Billing Email Address:

Preferred Client: ?

Send Late Notices: ?

Inactive: ?

?

4. Click **Add User**.

Add User

Please fill out all the information below and then click "Submit" to add the user to the system.

First name:

Last name:

Phone:

Email:

Username:

Password:

Challenge Question:

Answer:

Job Description:

Manager?

(Managers have access to view and edit *all* records.)

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**.

Edit Client Information

Client Notes

Date: 04/24/2009 11:23 AM
Entered By: Bellum, Sara
-----Notes-----
All client authorizations must be faxed to 386-246-1212. [Delete](#)

April Showers is the Chief Loan Officer.

Add Note

Company Name: Cypress Palm Bank
Corporate Name: Cypress Palm Bank
Type: Bank
Address: 24 Old Kings Road North
Zip: 32137
Country: United States
Phone: 386 - 246 - 3810
Fax: 386 - 246 - 3812
Email Address: loans@cypresspalm.com
Billing Email Address: ar@cypresspalm.com
Preferred Client: ?
Send Late Notices: ?
Inactive: ?

Update **Manage Users** ?

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.

Edit Client Information

Client Notes

Date: 04/24/2009 11:23 AM
Entered By: Bellum, Sara
-----Notes-----
All client authorizations must be faxed to 386-246-1212. [Delete](#)

April Showers is the Chief Loan Officer.

[Add Note](#)

Company Name:

Corporate Name:

Type:

Address:

Zip:

Country:

Phone: - -

Fax: - -

Email Address:

Billing Email Address:

Preferred Client: ?

Send Late Notices: ?

Inactive: ?

[Update](#) [Manage Users](#) ?

Merge Clients

Please note: clients must be of the same **type** in order to be merged. Once merged, clients **CANNOT** be unmerged. Please proceed with caution. Check the box below to enable client merging.

Enable merge client function

[Merge](#)

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.