



Billing & Collection Professionals

Welcome to ClientConnect! This document is an excellent tutorial to help you navigate your way through ClientConnect. If you have any questions about this application, please give us a call at 855-398-5338.

<https://bbs.clientconnectaccess.com>

Using ClientConnect

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Overview

ClientConnect is a web application that allows collection agencies to give their clients online access to accounts.

This document describes the major features of ClientConnect using an installation of ClientConnect that has not been customized in any way. Because ClientConnect can be customized and is permissions-based, your experience may differ from the examples shown in this document.

Recommended browsers

ClientConnect works best in Google Chrome, fairly well in Mozilla Firefox, and less well in Internet Explorer (IE). Internet Explorer sometimes has issues with ClientConnect due to its "compatibility mode" feature. If you experience any odd ClientConnect behavior, the easiest solution is to try a different web browser. One thing you can do to improve ClientConnect compatibility in Internet Explorer is:

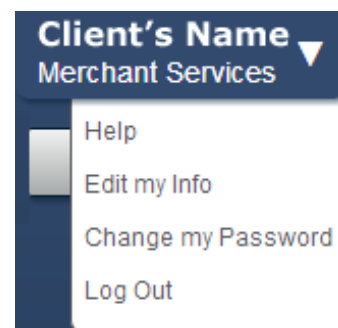
1. Log in to ClientConnect.
2. Press **F12** to open the Internet Explorer "developer tools" pane at the bottom.
3. In the toolbar of the developer tools pane, click on **Browser Mode** and choose **Internet Explorer 10**.
4. Log out of ClientConnect and back in.
5. You can press **F12** again to close the developer tools.

Logging in

To log in to ClientConnect:

1. Enter your Username and Password in the boxes provided.
2. If you forgot your password, click the "Forgot your password?" link.
3. Press the **Enter** key or click the **Login** button.

Note that the first time you log in, you will be prompted to change your password



Example of the ClientConnect login page:

A screenshot of the ClientConnect login page. The page has a white background with a black border. At the top left, it says "Log In" in bold. Below that, there are two input fields: "Username:" and "Password:". Below the password field, there is a link that says "Forgot your password?". At the bottom right, there is a blue button with the word "Login" in white.

Logging out

To log out, click on the arrow next to your username in the upper right corner and choose **Log Out**.

ClientConnect screen layout

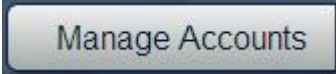

Below is an example of a default ClientConnect installation showing the different parts of the screen.

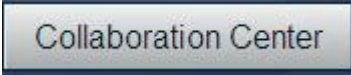
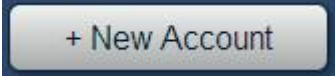
Example of the ClientConnect screen:

The screenshot shows the ClientConnect web application interface. At the top, there is a navigation bar with the ACME Collections logo, a 'Header' section, a 'User Menu' with an arrow, and 'Client's Name Merchant Services'. Below this is a 'Main Menu' with buttons for 'Manage Accounts', 'Reports', 'Collaboration Center', and '+ New Account'. The main content area is divided into three panes:

- Search Criteria Search Pane:** Contains search filters for 'Date Listed' (1/4/2010), 'To' (12/31/2010), and 'Client Code/Group' (1000-G - STOCKMANS). It includes an 'Edit' button and a 'Results' section showing 'Displaying 1 through 10 of 51' with a 'next >' button.
- Account Pane:** Displays account details for 'Barron, LINDA A' (Account # 414). It includes an 'Account Header' with 'Open Actively Working [AW]' status and a list of features: 'Included in Verification', 'RCK Charge Authorized by Client Number 985', and 'Point-Of-Sale RCK Authorized'. Below this is a 'Balance Detail' section showing a total balance of \$177.72, broken down into Principal, Court Costs, Attorney Fees, NSF, Interest, and Pending Payments. An 'Account Timeline' section shows a check date of 6/22/2010 and a listed amount of \$128.72.
- Search Results Pane:** A table listing search results for accounts. The table has columns for 'Account Name', 'Balance', and 'Client Status'. The highlighted row is for 'Barron, LINDA A' with a balance of \$177.72 and status 'Client Number 985'.

At the bottom of the account pane, there are tabs for 'Debtors', 'Payments', 'Transactions', 'Notices', and 'Attachments'. The 'Debtors' tab is active, showing details for 'LINDA A Barron - Primary' with fields for Agency Debtor #, Last Name, First Name, and Address. A 'View Notes' button is also present.

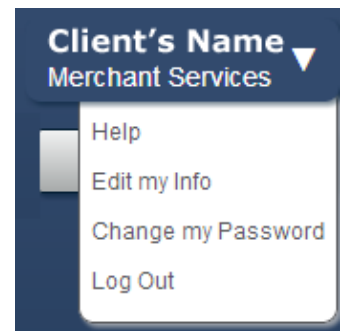
<p>Manage Accounts button</p> 	<p>This is the default page of ClientConnect. This screen is used to search for specific accounts and manage those accounts.</p>
<p>Reports button</p> 	<p>Clicking the Reports button will allow you to select any reports that may be available for you to view or run based on the permissions you have from your agency.</p>

<p>Collaboration Center button</p> 	<p>Takes you to Collaboration Center, a fast, secure, and convenient way for you to securely transfer files to and from your collection agency.</p>
<p>+New Account button</p> 	<p>Clicking the +New Account button will allow you to add new accounts to the system.</p> <p><i>Note: After submitting a new account, it will not be viewable until it is reviewed and processed by your agency.</i></p>

User menu

Hovering (holding the mouse) over the user menu in the upper right will open a menu from which you can access help, edit your personal information, change your password, and log out.

Example of the user menu shown at right.



Changing your account information

To update your name, username, and e-mail address, click on **Edit my Info** in the User Menu.

Click the **Save Changes** button to save any changes made.

To cancel without making changes, navigate to another location in ClientConnect or log out.

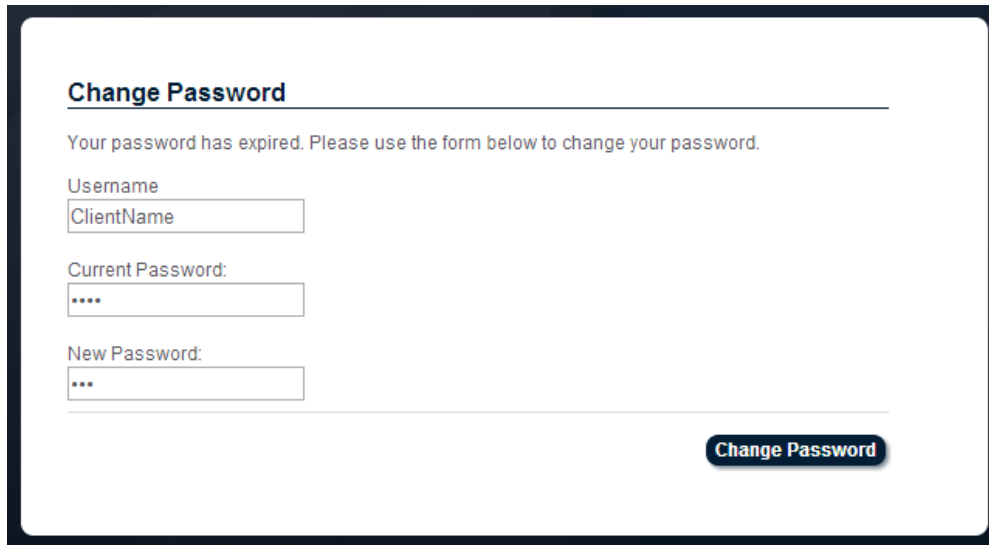
Changing your password

The first time you log into ClientConnect, you will be prompted to change your password.

To change your password at any time:

1. From the user menu in the upper right, click on **Change my Password**.
2. Enter your current password in the **Current Password** field.
3. Enter the new password in the **New Password** field.
4. Click the **Change Password** button, or click the **cancel** link to cancel the password change.

Example of the Change Password screen:



Change Password

Your password has expired. Please use the form below to change your password.

Username

Current Password:

New Password:

Change Password

Note: Contact your agency's ClientConnect administrator for questions regarding password requirements such as special characters, minimum number of characters, etc.

Searching for accounts

To search for accounts:

1. Click on **Manage Accounts** in the menu bar at the top.
2. Enter search criteria in the search fields.

Note: Acceptable date formats are mm/dd/yyyy, m/d/yyyy, m/d/yy, and mm/dd/yy.

Note: Names should be in LastName, FirstName format.

3. Click the **Search** button.

Example of the Search pane:

Search Criteria

Name:

Bank ID:

Bank Acct #:

Check Num:

Date Listed:

To:

Client Code/Group:

[clear](#)

- The search results will be displayed in a grid containing the Account Name, Account Number or Routing and Check Numbers, Balance and Last Activity Date, Client, and Status. If there are more than 10 search results, there will be "< previous" and "next >" buttons to navigate through the pages of search results.

Example of the Search Results grid:

Search Criteria

Date Listed: 2010-10-01

Results

Displaying 41 through 50 of 64407

Account Name ▲ Account #/Routing & Check #	Balance Activity/Check Date	Client Status
ABBOTT, RYAN 482	\$101.48 Nov 23, 2010	Client Number 554
ABBOTT, RYAN 486	\$98.77 Dec 4, 2010	Client Number 554 Guaranteed
ABBOTT, STEVEN J 761	\$0.00 Feb 26, 2011	Client Number 501 Returned
ABBOTT, SUSAN L 776	\$0.00 Mar 31, 2011	Client Number 494 Returned
ABBOTT, TABATHA 815	\$0.00 Sep 7, 2011	Client Number 494 Returned
ABBOTT, VALERIE A 864	\$0.00 Apr 30, 2012	Client Number 495 Returned

- To modify the search or perform a new search, click the **Edit** button.

- Click once on the desired account to view the details. The account details will be displayed in the account pane on the right side of the screen containing all account details.

The colored account header section at the top contains information about the account and the status of the debt, including name listed on the account, client's account number, type of account, and status of the account.

The account data region below the header contains general account information.

The balance detail region on the right contains balance details for all balances for this account.

Examples of the Account pane:

Consumer, Josie

25935 ✓ Included in Verification

Regular [R]

Open
normal [000]

Account Functions ▼

Balance Detail

Principal:	\$400.00
Court Costs:	\$0.00
Attorney Fees:	\$0.00
NSF:	\$0.00
Interest:	\$19.73
Pending Payments:	\$0.00
Total:	\$419.73

Account Timeline

Last Activity: 7/6/2015

Listed:	7/22/2015	\$400.00
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Client: Michelle's Mysteries

Agency Account Number: 25935

Original Debt Owner:

Patient:

Routing #:

Account #:

Check #: 0

Drivers License #:

Case #:

Next Credit Bureau Action: No Change

Comments:

Amount Guaranteed: \$0.00

Interest Rate: 15.00%

Agency Rate Description: Agency Rate

Agency Rate: 30.000%

Account Functions ▾

CONSUMER, JOHN

BP146891377C
Regular [R]

Paid
Paid in Full [PF]

✓ Included in Verification

<p>Client: CREDITOR CLIENT</p> <p>Agency Account Number: BP146891377C</p> <p>Original Debt Owner:</p> <p>Patient:</p> <p>Routing #:</p> <p>Account #:</p> <p>Check #: 0</p> <p>Drivers License #:</p> <p>Case #:</p> <p>Next Credit Bureau Action: No Change</p> <p>Comments:</p> <p>Amount Guaranteed: \$0.00</p> <p>Interest Rate: 5.50%</p> <p>Agency Rate: 30</p>	<h3 style="margin: 0;">Balance Detail</h3> <table style="width: 100%; border-collapse: collapse;"> <tr><td>Principal:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>Court Costs:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>Attorney Fees:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>NSF:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>Interest:</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>Pending Payments:</td><td style="text-align: right;">\$0.00</td></tr> <tr style="border-top: 1px solid #ccc;"><td>Total:</td><td style="text-align: right;">\$0.00</td></tr> </table> <h3 style="margin: 10px 0;">Account Timeline</h3> <table style="width: 100%; border-collapse: collapse;"> <tr><td colspan="3">Last Activity: 5/3/2012</td></tr> <tr><td>Listed:</td><td style="text-align: center;">9/14/2012</td><td style="text-align: right;">\$200.00</td></tr> <tr><td>Last Payment:</td><td style="text-align: center;">7/30/2013</td><td style="text-align: right;">\$244.00</td></tr> </table>	Principal:	\$0.00	Court Costs:	\$0.00	Attorney Fees:	\$0.00	NSF:	\$0.00	Interest:	\$0.00	Pending Payments:	\$0.00	Total:	\$0.00	Last Activity: 5/3/2012			Listed:	9/14/2012	\$200.00	Last Payment:	7/30/2013	\$244.00
Principal:	\$0.00																							
Court Costs:	\$0.00																							
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NSF:	\$0.00																							
Interest:	\$0.00																							
Pending Payments:	\$0.00																							
Total:	\$0.00																							
Last Activity: 5/3/2012																								
Listed:	9/14/2012	\$200.00																						
Last Payment:	7/30/2013	\$244.00																						

Debtors
Payments
Transactions
Notices
Attachments

JOHN CONSUMER - Primary

View Notes

Agency Debtor #: BH24805

Last Name: CONSUMER

First Name: JOHN

Address: 987 BLOUNT ST
MANITOWOC, WI 54220

Entering a payment

To enter a payment:

1. Find the account for which you wish to add a payment.
2. Click on the **Payments** tab near the bottom and click the **Enter Payment** button, or choose **Enter Payment** from the **Account Functions** button at the top.
3. Enter the payment details.
4. Click the **Enter Payment** button.
5. To close the Enter Payment window without entering a payment, click the **cancel** link.

Example of the Enter Payment window:

Enter Payment

Payment Type:
Direct

Payment Amount:
 Total Amount: \$120.00
 Principal Balance: \$50.00
 Other: \$0.00

Remaining Balance:
 Collect
 Settle

[cancel](#) **Enter Payment**

Viewing notices

To view a list of notices for a given debtor:

1. Find the account for which you wish to view notices.
2. Click on the **Notices** tab near the bottom.

Debtors **Payments** **Transactions** **Notes** **Notices** **Attachments**

Notices

To: RYAN ABBOTT [LET 3] Letter 3
Feb 9, 2011

To: RYAN ABBOTT [Let 1] Letter 1
Jan 11, 2011

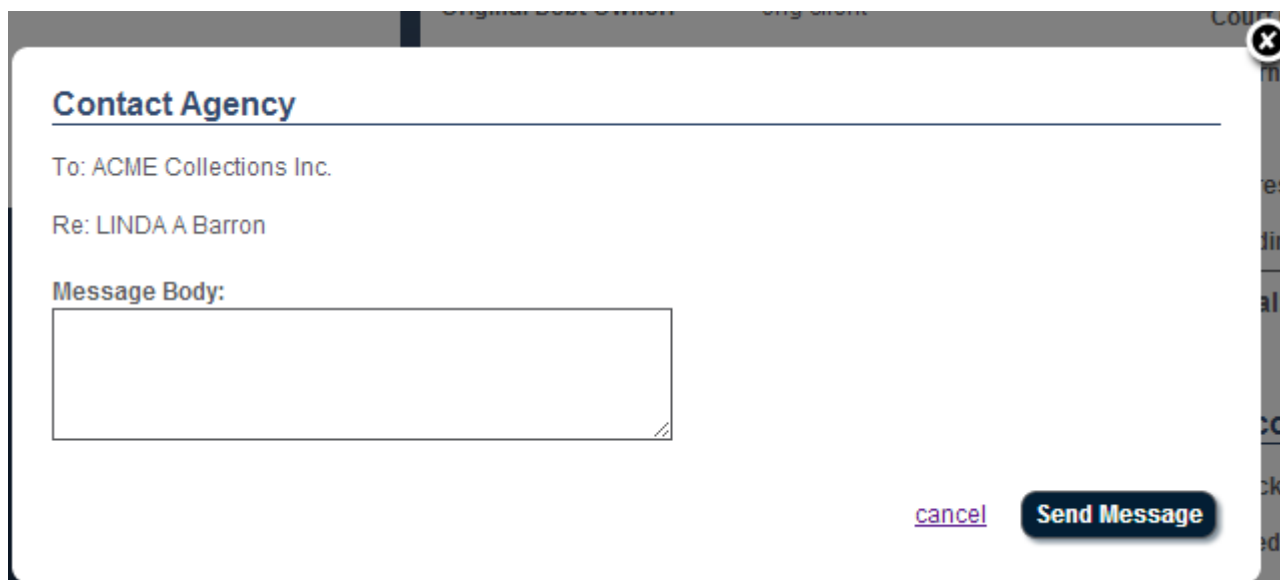
To: RYAN ABBOTT [Let 1] Letter 1
Dec 21, 2010

Contacting the agency

To contact the agency about an account:

1. Find the account for which you wish to make an adjustment.
2. From the **Account Functions** button at the top, choose **Contact Agency**.
3. Enter your message in the **Message Body** box.
4. Click the **Send Message** button.
5. To exit without sending the message, click the **cancel** link.

Example of the Contact Agency window:

A screenshot of a web application window titled "Contact Agency". The window has a close button (X) in the top right corner. Below the title, there is a horizontal line. The text "To: ACME Collections Inc." is displayed. Below that, "Re: LINDA A Barron" is shown. A large, empty text input box is labeled "Message Body:". At the bottom right of the window, there is a "cancel" link and a "Send Message" button.

Entering a new account

To enter a new account:

1. Click the **New Account** button in the upper right.
2. Choose a client from the **Please select a client from the list below** menu.
3. Fill in the fields.
4. If the agency permits uploading of account documents, there will be a **Choose File** button, as shown below. To add a file, click the **Choose File** button and select the desired file.

Note: Only one file attachment may be added when entering a new account. Files are limited to 10MB in size. Additional files or files that are not account-specific can be uploaded via Collaboration Center (if the agency permits).

5. When finished entering the account, click the **Submit Account Information** button.

Example of the Enter New Account window:

Enter New Account

Note: By submitting the form below, you will begin the process of establishing a new collection account. This account must be processed by the agency prior to appearing in search results.

Please select a client from the list below:

100 - CREDITOR CLIENT ▾

Last Name:
Consumer

Address:
555 N. Main St.

PRINCIPAL:
\$800.00

No file chosen

Viewing a report snapshot

A "snapshot" is a report that has been run for you. To view a report snapshot:

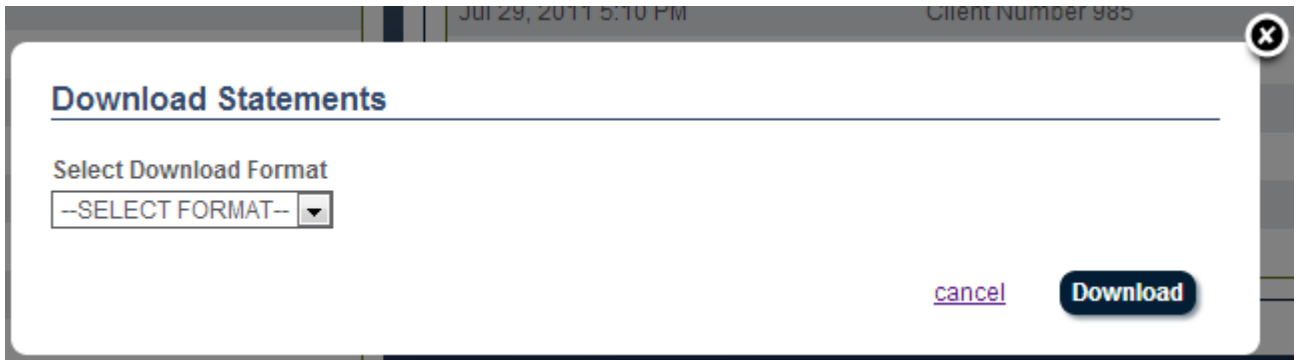
1. Click on **Reports** in the menu bar at the top.
2. Reports with available snapshots will have a date listed in the **Last Snapshot** column.
3. Click on the desired report.
4. On the right side, click on the **Snapshots** tab.
5. Click the **View** link to view the report, or click the **Download** link to download it to your computer.

6.

Debit Date Reconciliation

Date & Time	Client	Actions
Sep 6, 2013 9:20 AM	BOB'S HOME CARE	View Download
Sep 6, 2013 9:20 AM	HARMON COUNTY CO-OP	View Download
Sep 6, 2013 9:20 AM	ELDORADO PUBLIC SCHOOLS	View Download

It is available in only one format (PDF), it will download automatically according to your web browser's settings. If the report is available in more than one format, you will be prompted to select the download format, as shown below. Choose a format from the menu and click the **Download** button.



Note: When opening a report downloaded in Excel format, you may receive a warning message saying that the format and extension don't match and that it may be unsafe to open the file. Rest assured that these files are perfectly safe and that you may go ahead and open them.

Running a report

To view a report:

1. Click on **Reports** in the menu bar at the top.
2. Choose the desired report from the list.
3. Enter the report parameters.
4. To view the report on the screen, click the **View** button. The report will be displayed in a separate window in PDF format. Use the PDF controls that appear when you hover your mouse over the lower right corner to save or print the report.
5. To export/save the report, click the **Export** button.
6. Choose a format from the **Select Export Format** menu and click the **Export** button.

Collaboration Center

Collaboration Center is a fast, secure, and convenient way for you to securely transfer files to and from your collection agency.

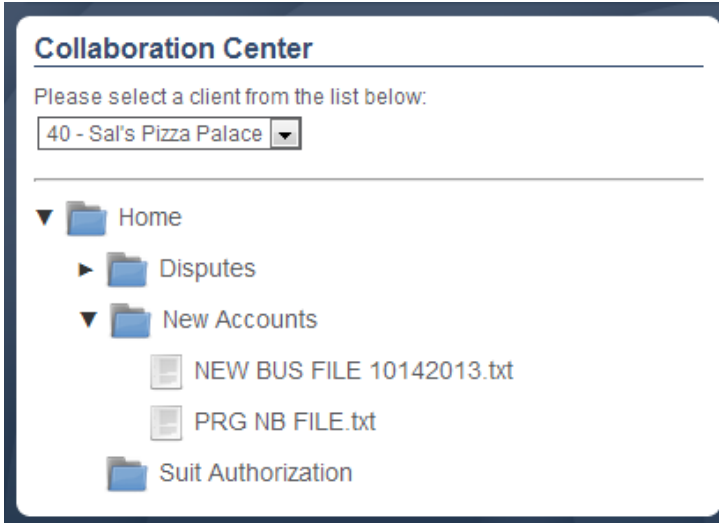
To access Collaboration Center:

1. Log in to ClientConnect using the **Username** and **Password** provided by the agency.
2. Click on **Collaboration Center** in the menu bar at the top of the page.
3. Select a client from the **Please select a client from the list below** drop-down menu and proceed with the desired action. See below for details.

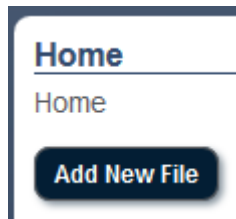
Adding a file to Collaboration Center

To add a file to Collaboration Center:

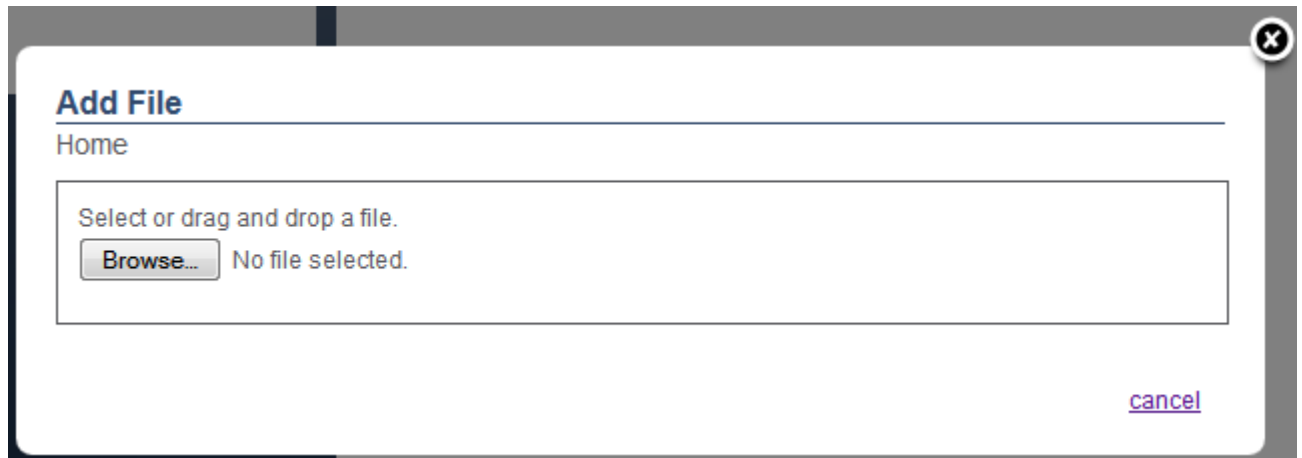
1. In the folder tree on the left, click on the folder into which you want to upload the file.



2. Click the **Add New File** button on the right side of the Collaboration Center window.



3. In the **Add File** window, click the **Browse** or **Choose File** button (button names may vary by browser) to locate the file, or drag the file into the Add File window.



- Once the file name and preview are shown in the window, enter any comments you wish in the **Comments** field (optional).

Add File
Home\New Accounts

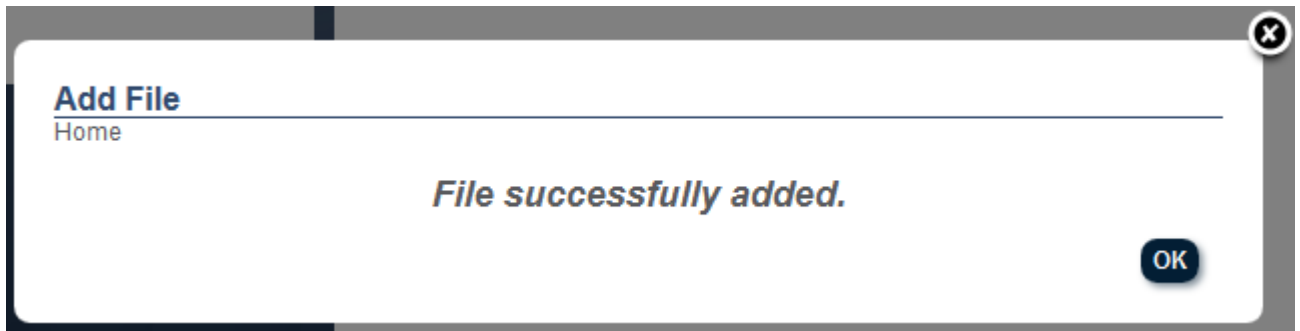
NEW BUS FILE 11-5-2013 - Copy.xlsx(10.22 KB)

File Name:
NEW BUS FILE 11-5-2013

Comment:
Here is my new business file for this week. Please let me know when you have processed. Thank you.

[cancel](#) **Add File**

- Click the **Add File** button.
- Once the upload is complete, the **File successfully added** message will be displayed. Click **OK**.



Note: Files are limited to 10MB in size.

Downloading a file from Collaboration Center

To download a file in Collaboration Center:

1. In the file tree on the left, click once on the file to highlight it.
2. Click the **Download** button on the right side of the Collaboration Center window.

The screenshot shows a file management interface for a file named "NEW BUS FILE 10142013.txt". The file path is "Home\New Accounts\NEW BUS FILE 10142013.txt". The last update date is "10/16/2013" and the file size is "1.20 kB". There are two buttons: "Overwrite" and "Download". Below the buttons is a "Comments" section with a text input field containing the text "You are very welcome. I see that you processed them already! Thank you." and a "clear" link. To the right of the input field is an "Enter Comment" button. Below the comments section is a table displaying two comments.

Displaying comments 1 through 2 of 2	
Sal Piazza Oct 17, 2013 1:37 PM	Great I will get loaded by EOB. Thanks for your business
spiazza@roydan.com Oct 17, 2013 1:36 PM	Here are my new accounts for this week

3. If prompted by your browser, choose whether to open or save the file and follow the instructions on the screen (this will vary depending upon your web browser settings).

Overwriting (replacing) a file

To overwrite/replace a file in Collaboration Center:

1. In the file tree on the left, click once on the file to highlight it.
2. Click the **Overwrite** button on the right side of the Collaboration Center window.

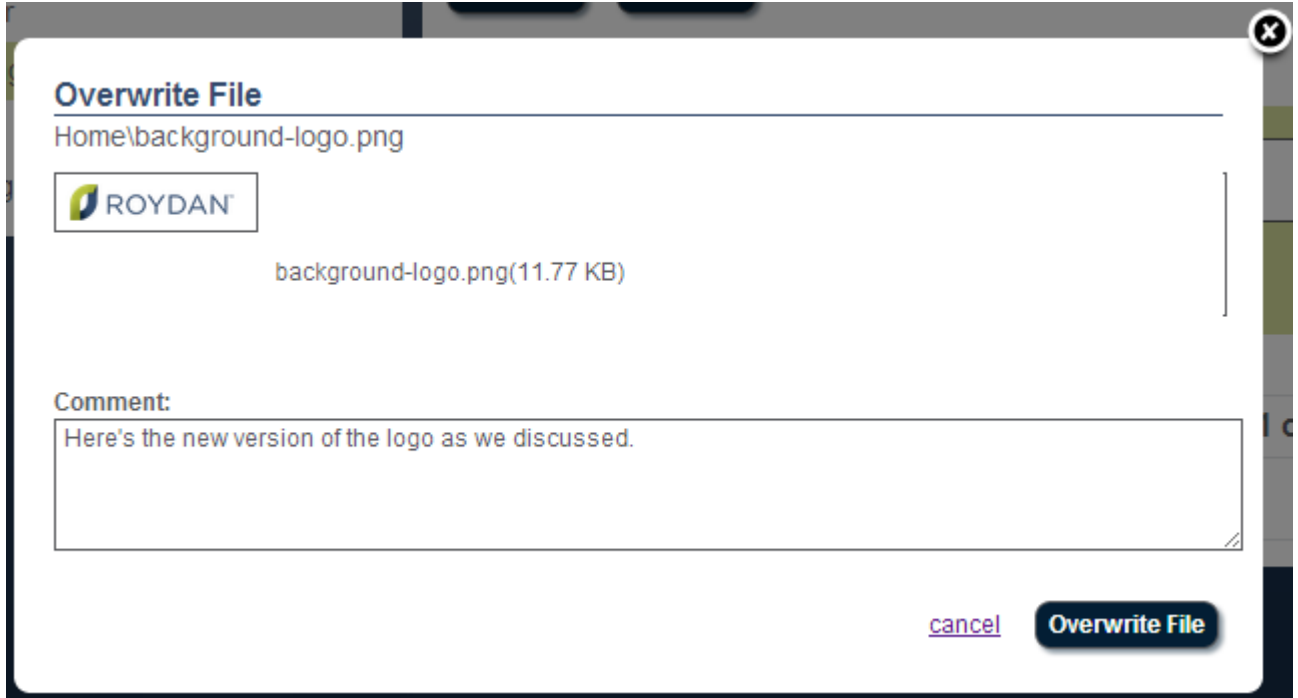
The screenshot shows a file details page for "NEW BUS FILE 10142013.txt". The file path is "Home\New Accounts\NEW BUS FILE 10142013.txt". The last update date is "10/16/2013" and the file size is "1.20 kB". There are two buttons: "Overwrite" and "Download". Below the buttons is a "Comments" section with a text input field containing the text "You are very welcome. I see that you processed them already! Thank you." and buttons for "clear" and "Enter Comment". Below the comments is a section titled "Displaying comments 1 through 2 of 2" with two comment entries:

Author	Comment
Sal Piazza Oct 17, 2013 1:37 PM	Great I will get loaded by EOB. Thanks for your business
spiazza@roydan.com Oct 17, 2013 1:36 PM	Here are my new accounts for this week

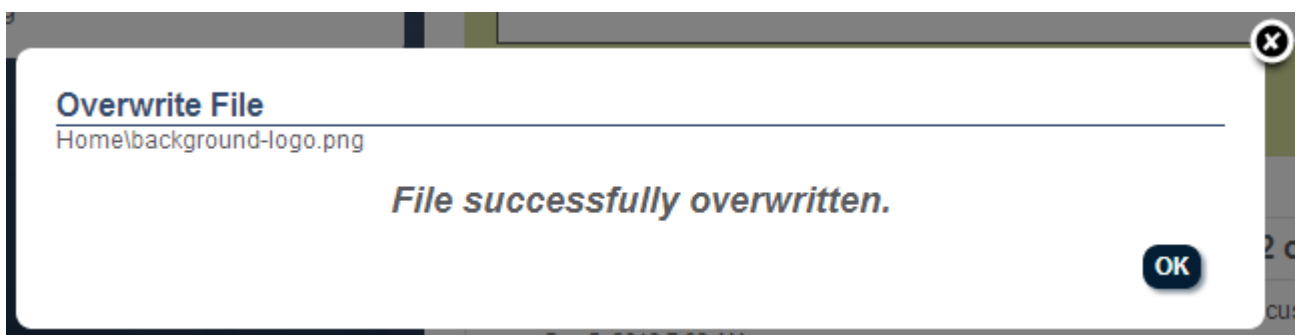
3. In the **Overwrite File** window, click the **Browse** or **Choose File** button (button names may vary by browser) to locate the file, or drag the file into the Overwrite File window.

The screenshot shows the "Overwrite File" dialog box. The file path is "Home\background-logo.png". The dialog contains a text input field with the placeholder text "Select or drag and drop a file." and a "Choose File" button. The text "No file chosen" is displayed next to the button. There is a "cancel" link at the bottom right of the dialog.

- Once the file name and preview are shown in the window, enter any comments you wish in the **Comments** field (optional).



- Click the **Overwrite File** button.
- Once the upload is complete, the "File successfully overwritten" message will be displayed. Click **OK**.



Adding a comment to a file

To add comments to a file that has already been uploaded:

- In the file tree on the left, highlight the file you wish to comment on.
- On the right side of the Collaboration Center window, type the comment in the Comments box and click the **Enter Comment** button.

VPInstaller.png

Home\VPInstaller.png

Last Update: 09/03/2013

File Size: 35.97 kB

Overwrite **Download**

Comments

Here's a comment on this file.

[clear](#) **Enter Comment**

Displaying comments 1 through 1 of 1

mwaack@roydan.com	Test comment
<i>Sep 4, 2013 2:54 PM</i>	

3. The comment will be displayed below.

VPInstaller.png

Home\VPInstaller.png

Last Update: 09/03/2013

File Size: 35.97 kB

Overwrite **Download**

Comments

[clear](#) **Enter Comment**

Displaying comments 1 through 2 of 2

mwaack@roydan.com	Here's a comment on this file.
<i>Sep 5, 2013 7:50 AM</i>	
mwaack@roydan.com	Test comment
<i>Sep 4, 2013 2:54 PM</i>	