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

Contents

Overview

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

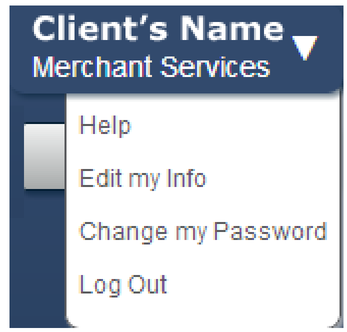
This document describes the major features of ClientConnect using an installation of ClientConnect that has not been customized in any way. Because ClientConnect can be customized and is permissions-based, your experience may differ from the examples shown in this document.

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:

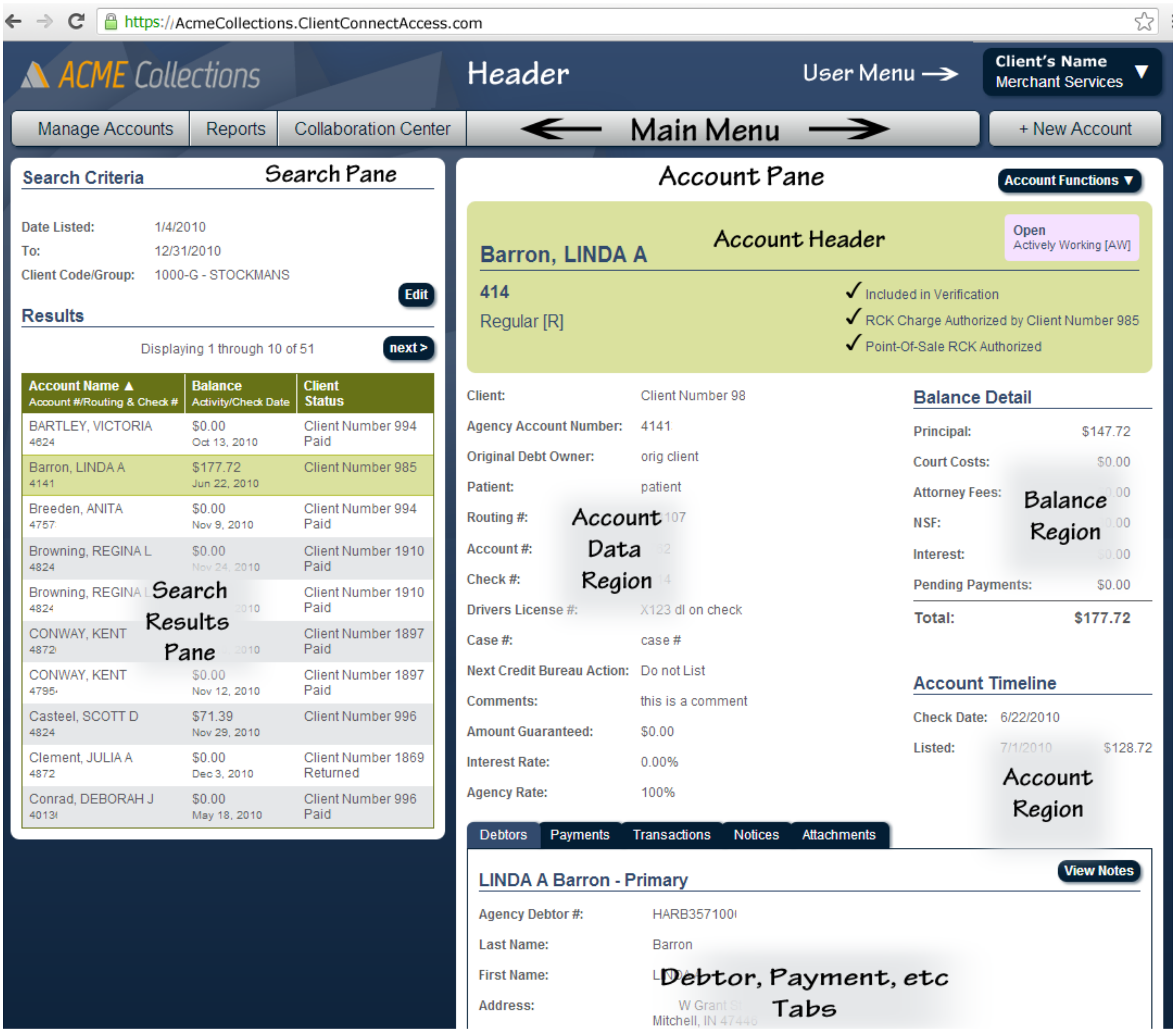
Logging out

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

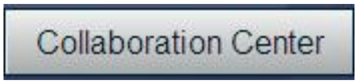
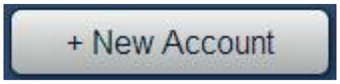
ClientConnect screen layout

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

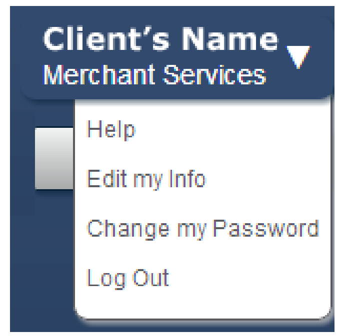
Example of the ClientConnect screen:



Manage Accounts button 	This is the default page of ClientConnect. This screen is used to search for specific accounts and manage those accounts.
Reports button 	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.

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

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.

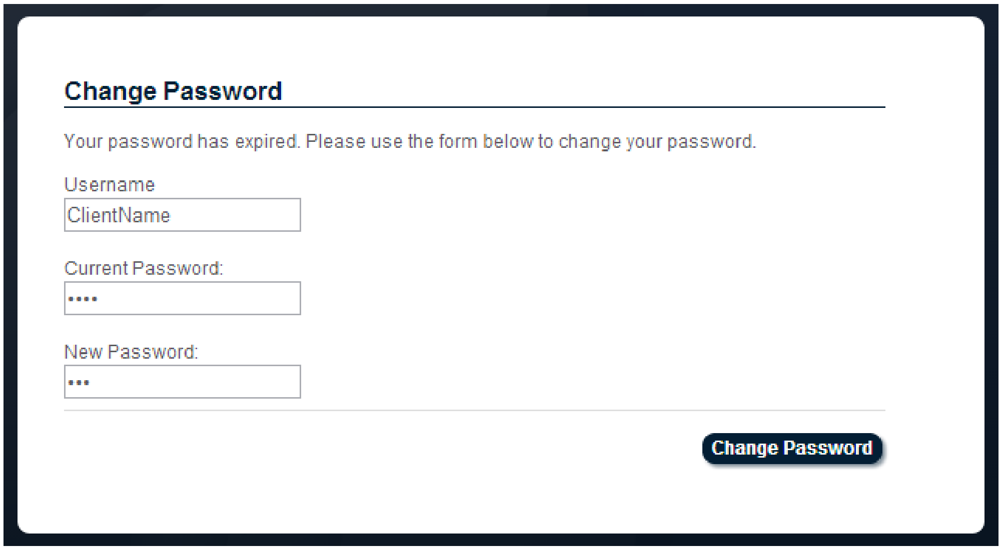
Changing your password

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:



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:

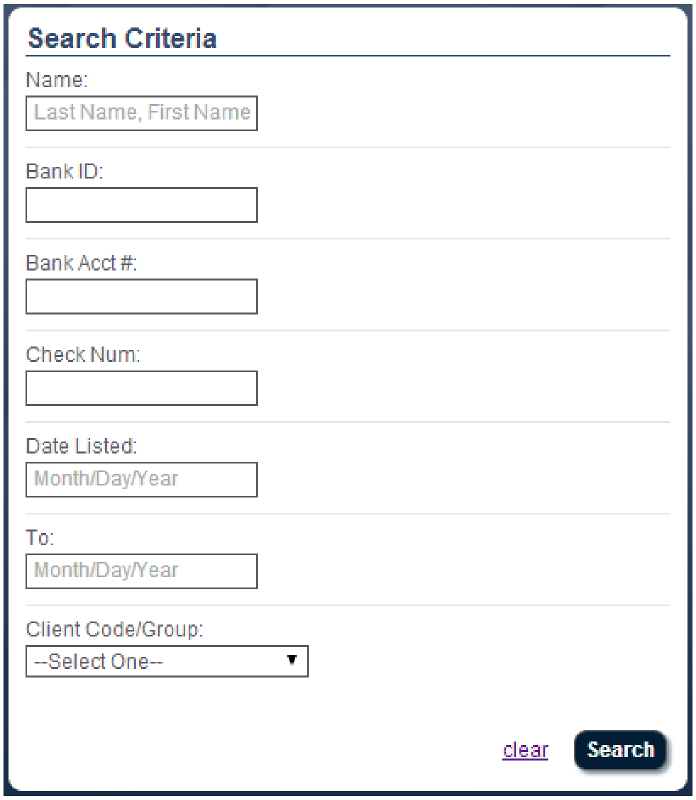
1. Click on **Manage Accounts** in the menu bar at the top.
2. Enter search criteria in the search fields.

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.

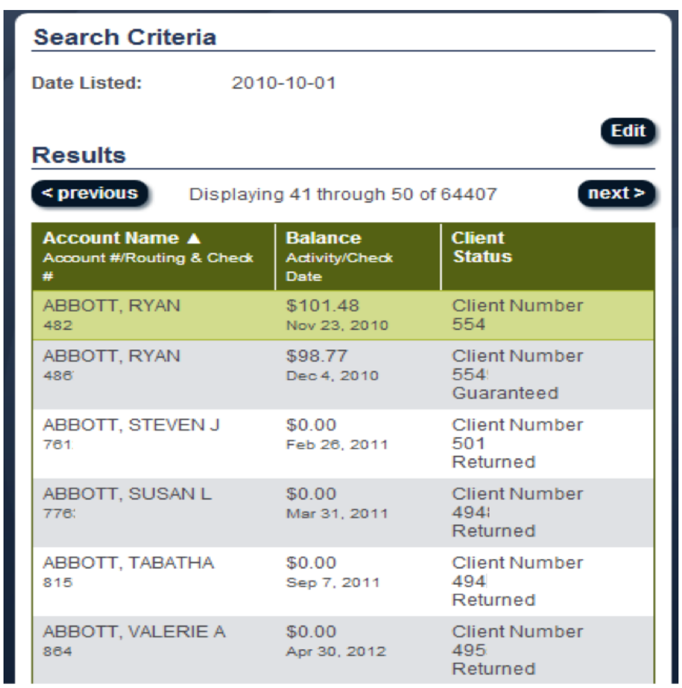
3. Click the **Search** button.

Example of the Search pane:



4. 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:



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

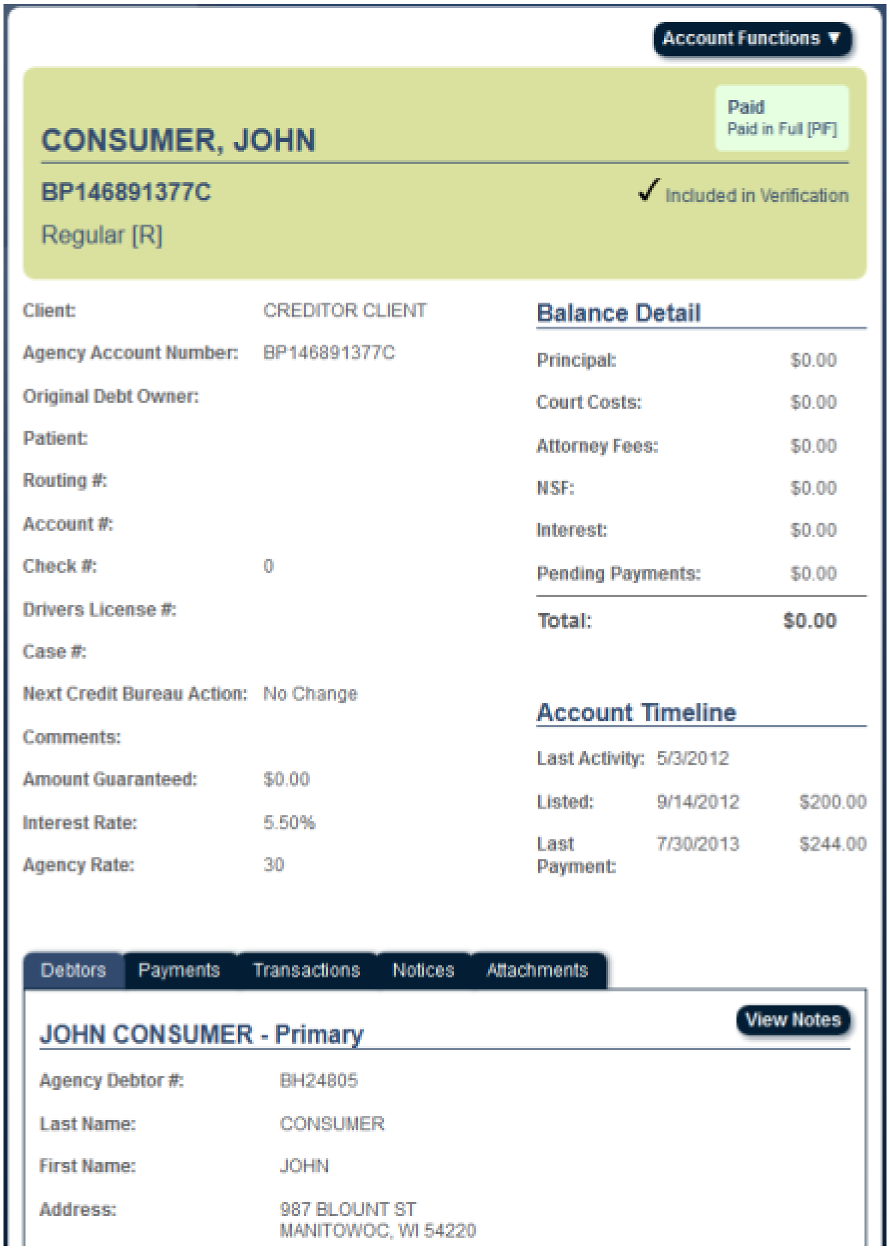
6. Click once on the desired account to view the details. The account details will be displayed in the account pane on the right side of the screen containing all account details.

   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:

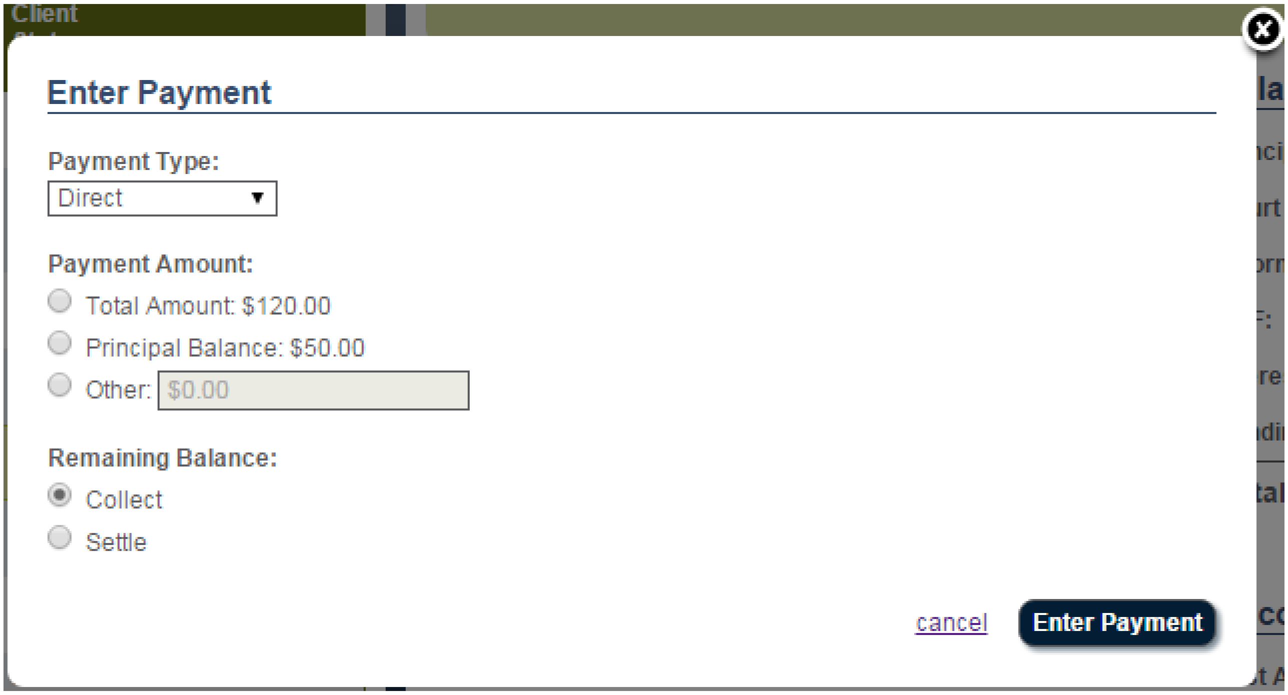


Entering a payment

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:



Viewing notices

To view a list of notices for a given debtor:

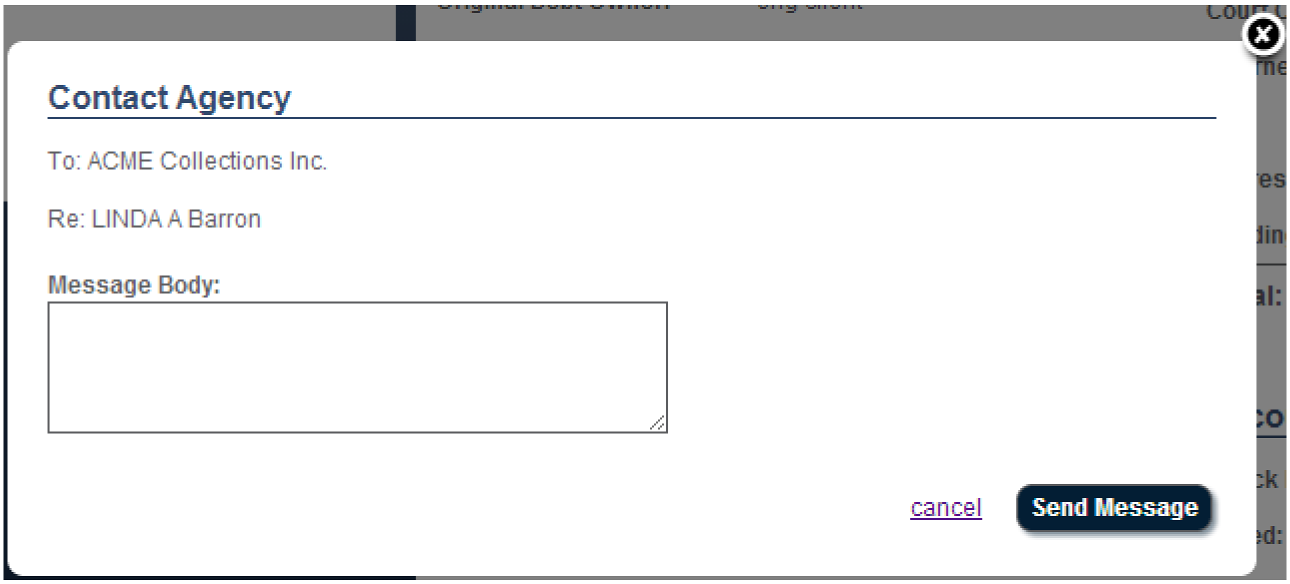
1. Find the account for which you wish to view notices.
2. Click on the **Notices** tab near the bottom.

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:



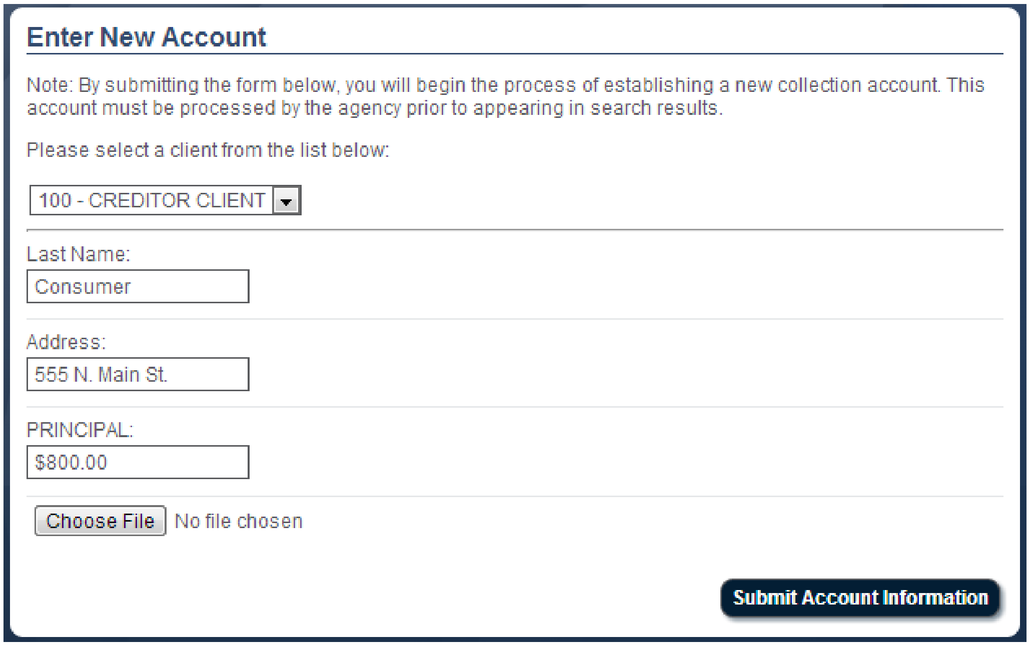
Entering a new account

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.

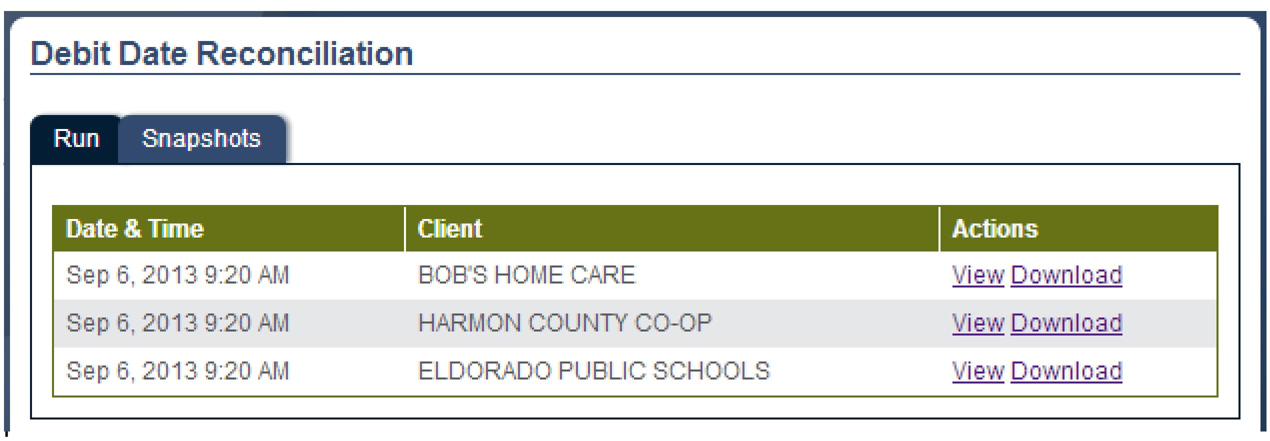
   Note: Only one file attachment may be added when entering a new account. Files are limited to 10MB in size. Additional files or files that are not account-specific can be uploaded via Collaboration Center (if the agency permits).
5. When finished entering the account, click the **Submit Account Information**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

Example of the Enter New Account window:

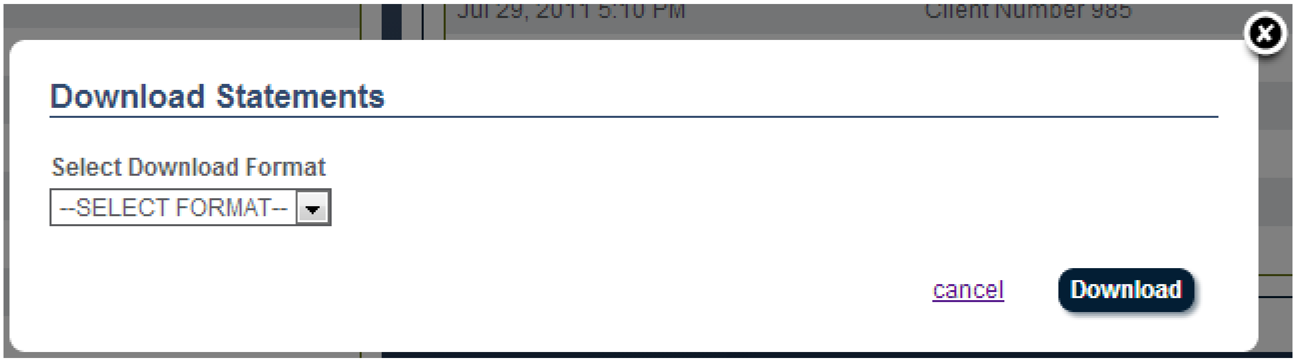


Viewing a report snapshot

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. 

t 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.

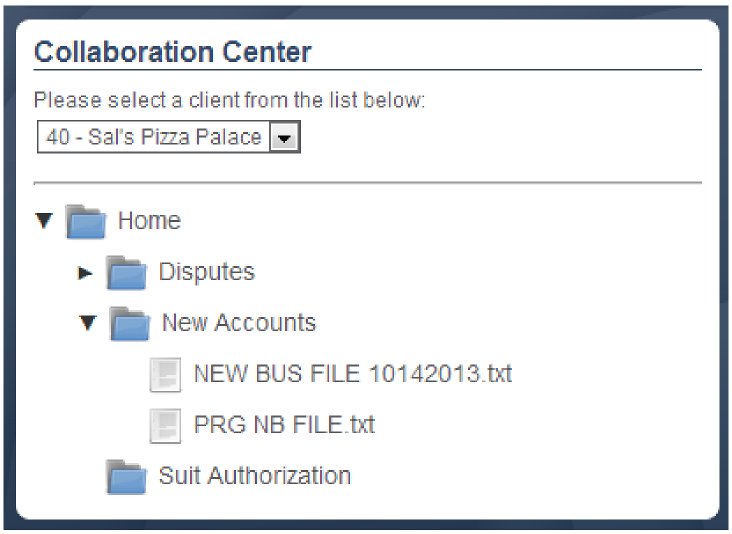
To access Collaboration Center:

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

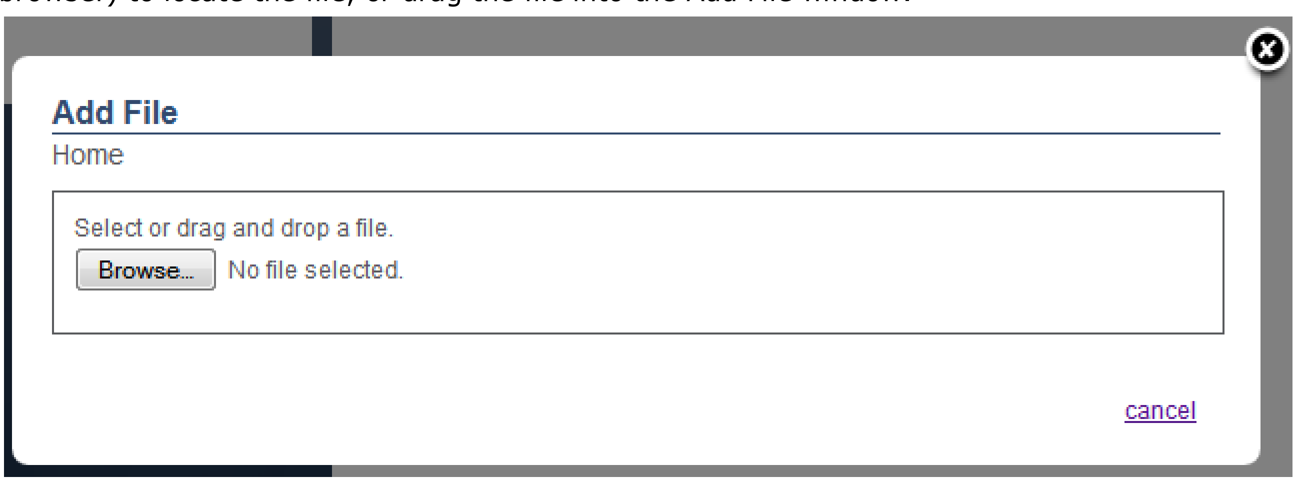
To add a file to Collaboration Center:

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

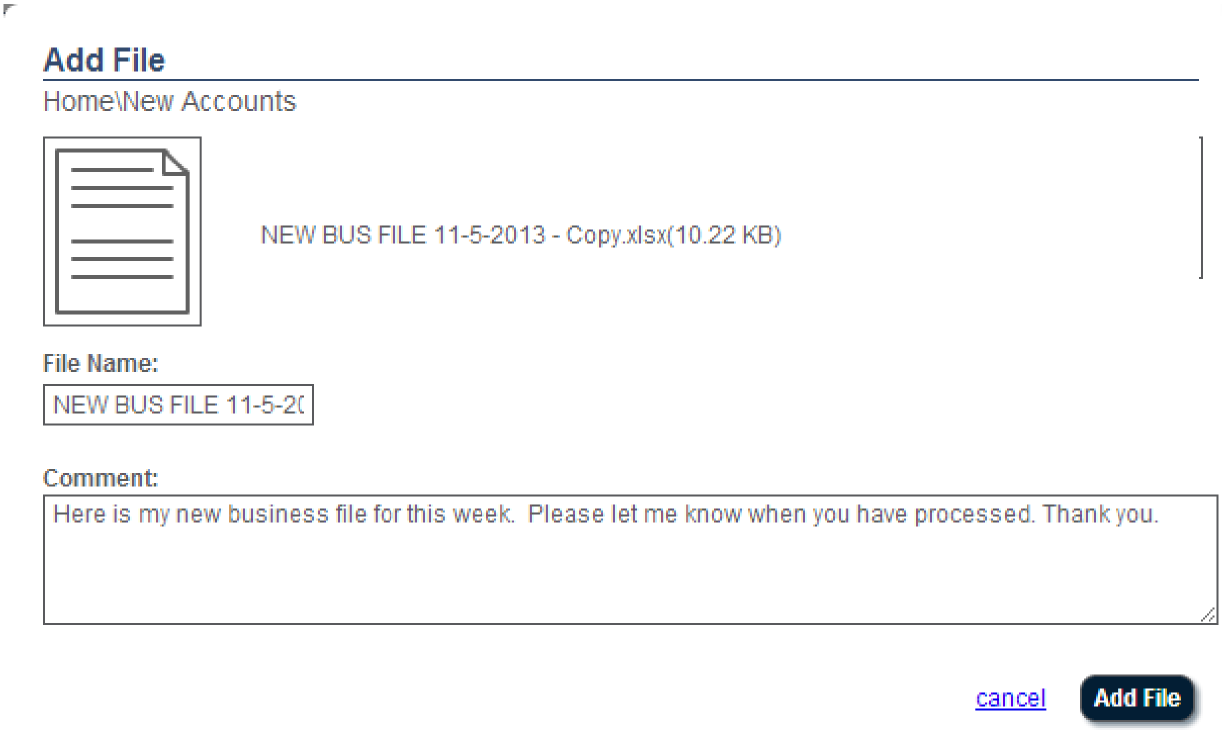


2. Click the **Add New File** button on the right side of the Collaboration Center window.

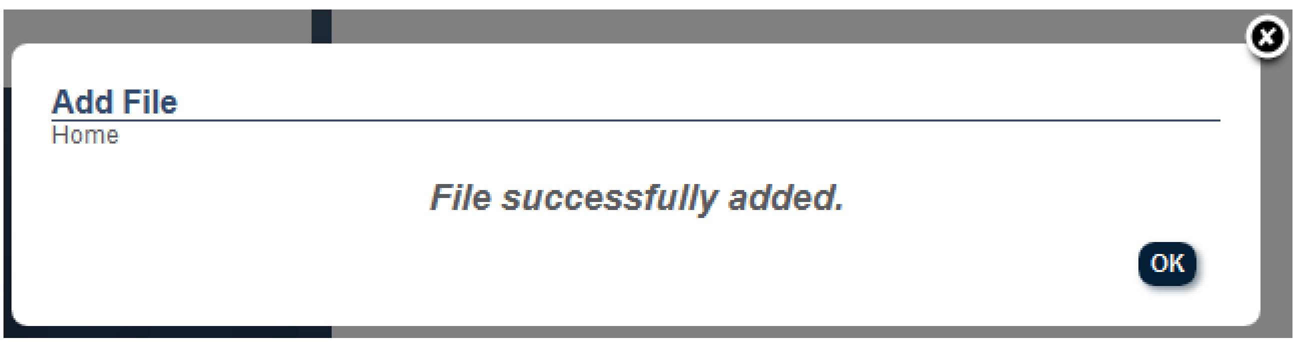
3. In the **Add File** window, click the **Browse** or **Choose File** button (button names may vary by browser) to locate the file, or drag the file into the Add File window.



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



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

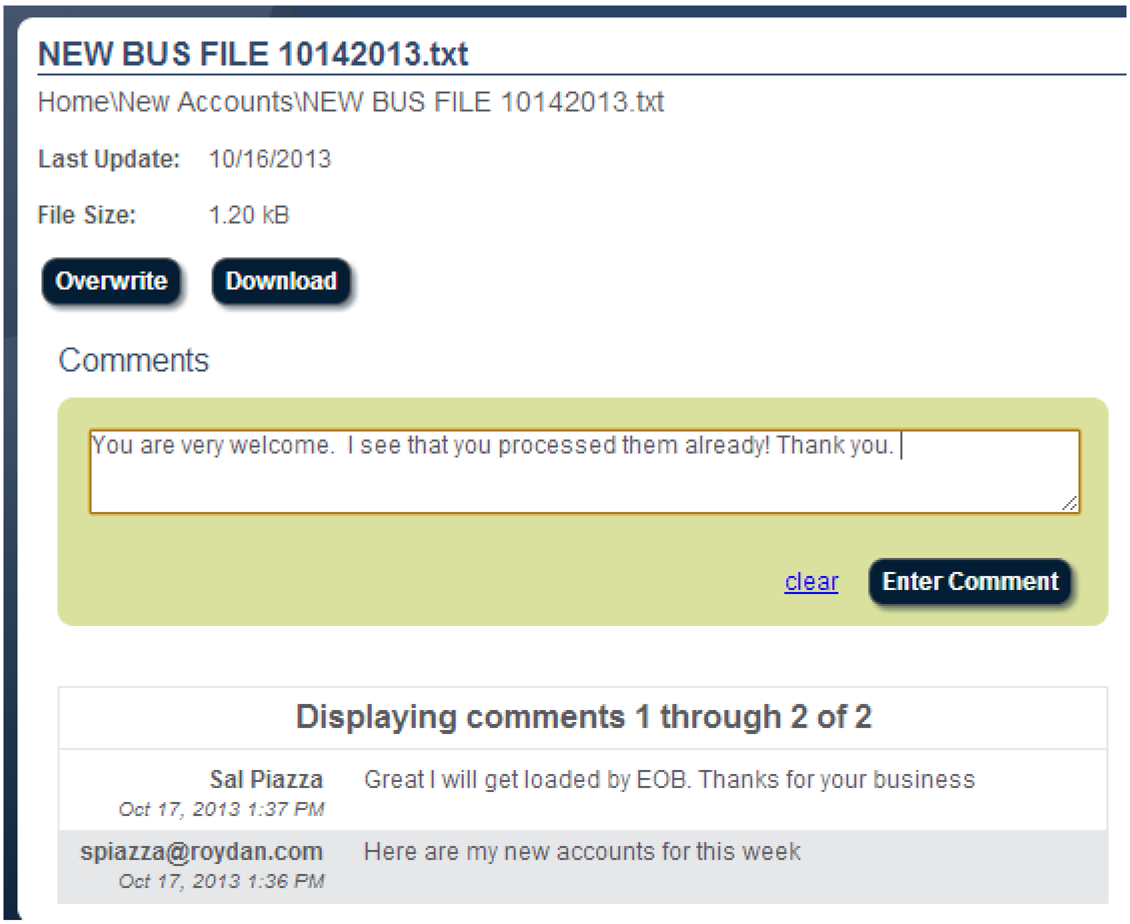


Note: Files are limited to 10MB in size.

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.

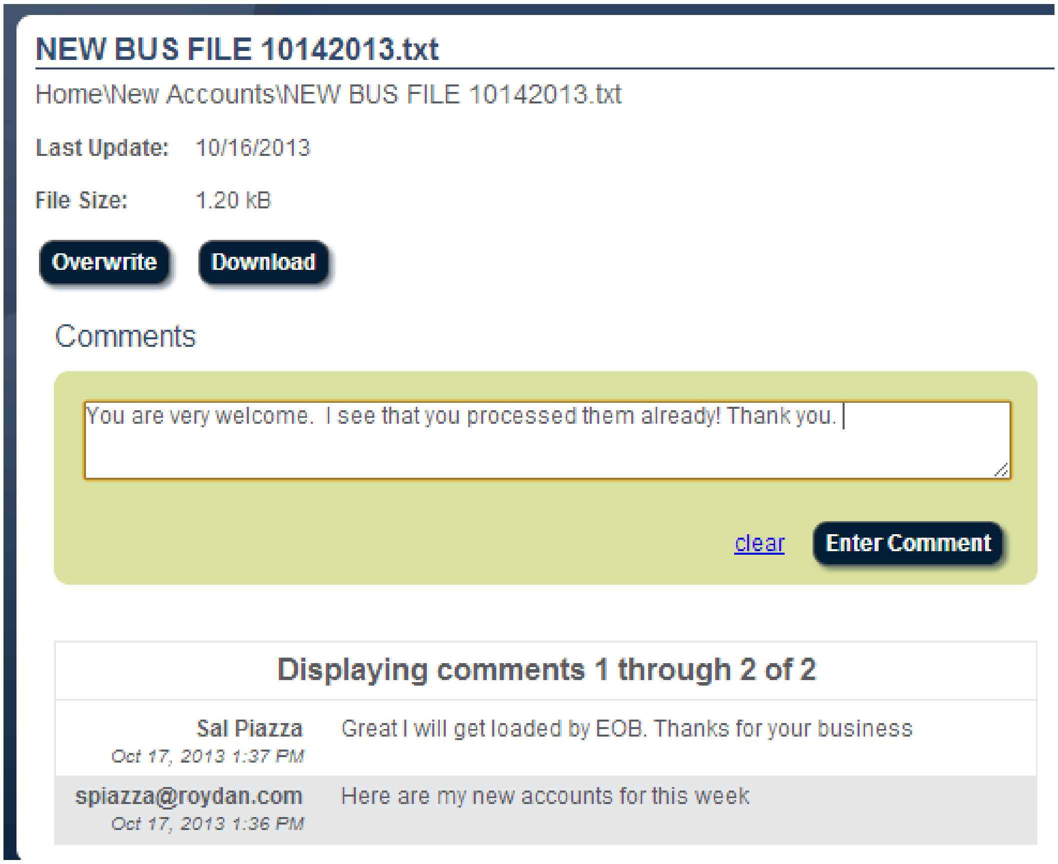


3. If prompted by your browser, choose whether to open or save the file and follow the instructions on the screen (this will vary depending upon your web browser settings).

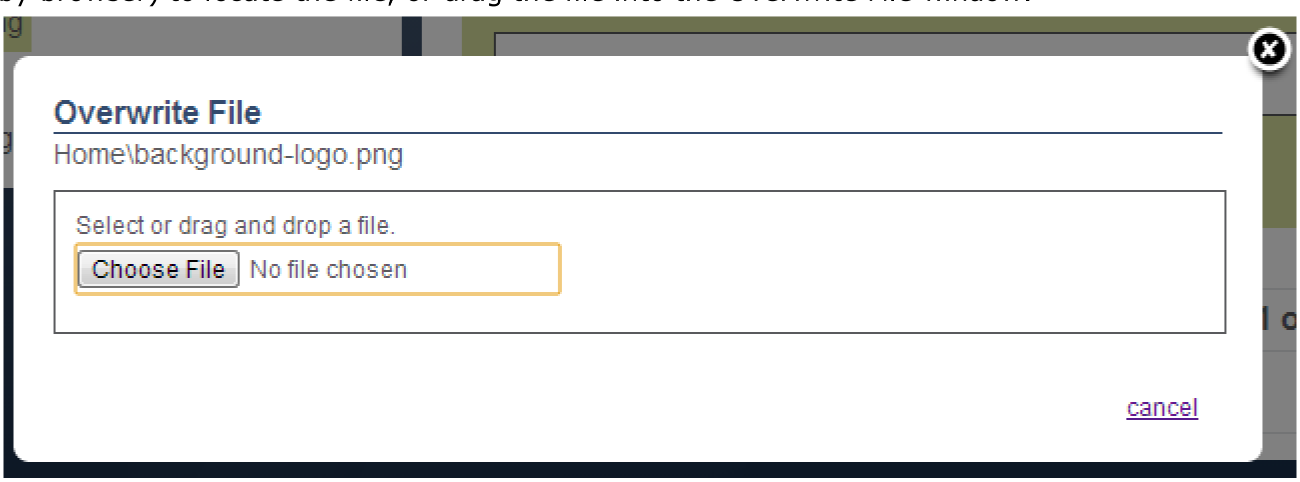
Overwriting (replacing) a file

To overwrite/replace a file in Collaboration Center:

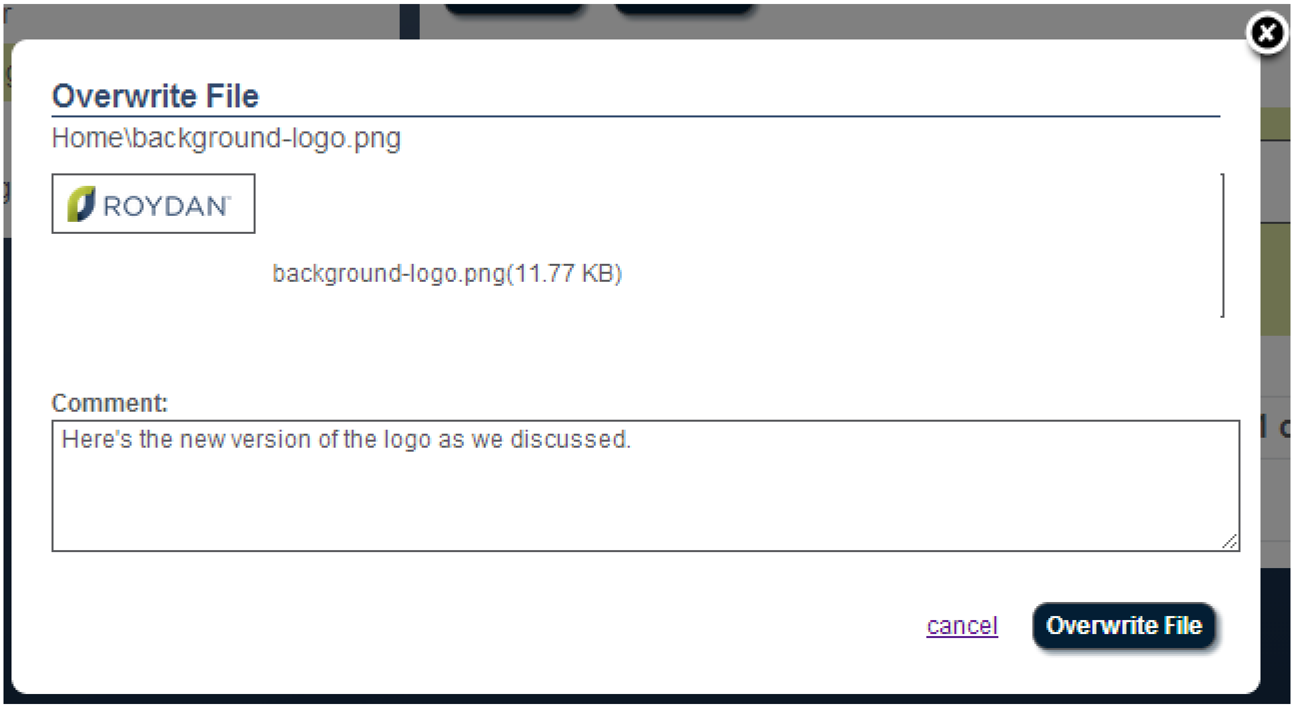
1. In the file tree on the left, click once on the file to highlight it.
2. Click the **Overwrite** button on the right side of the Collaboration Center window.



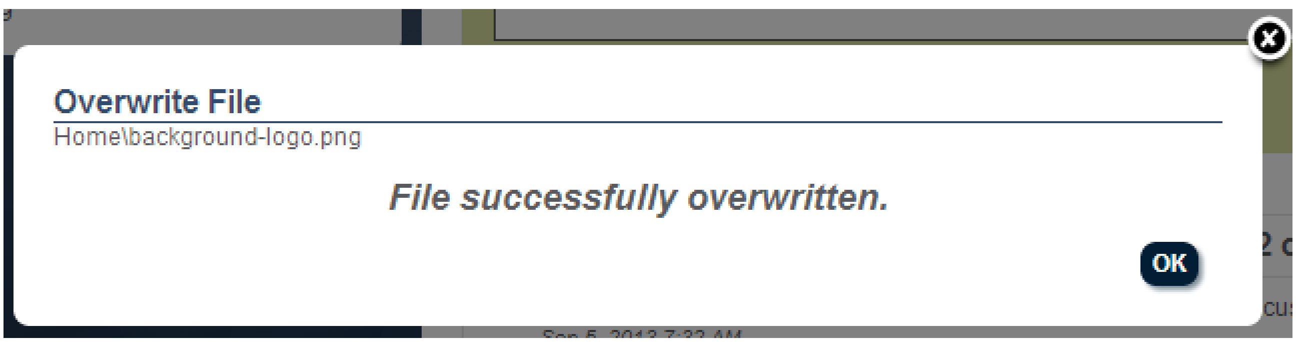
3. In the **Overwrite File** window, click the **Browse** or **Choose File** button (button names may vary by browser) to locate the file, or drag the file into the Overwrite File window.



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



5. Click the **Overwrite File** button.
6. 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:

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

3. The comment will be displayed below.