

Client Management

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Client Management Menu

The Client Management module contains many functions that are used by clerical and upper management SedonaOffice Users. Each option within the module is secured by User Group Security permissions.

Cancellations – Selecting the Cancellations option will display the Cancellation Queue. This is a list of all Customers pending a cancellation. This form is also used to setup a new cancellation record for a customer. Cancellations are discussed in the Client Management section of this Help.

Collections – The Collections option will display a list of all active Collection Profiles. The Collections option is discussed in depth in the Client Management section of this Help.

Company Rate Change – The Company Rate Change is a program that is typically used by upper management SedonaOffice Users to perform global rate increases for recurring lines based upon criteria selected and entered by the User. This topic is discussed in depth in the Client Management section of this Help.

Customer Explorer – Selecting this option will open the Customer Lookup form; this is one of the methods used for locating and working with Customer Explorer records.

Customer Query Builder – This option will open the Customer Query Builder tool. This is a built in report writer with which Users may develop, save and print reports based on Customer information. General instructions on how to use this tool are covered in the Client Management section of this Help.

EFT Customer – This option displays a list of all Customers for which Credit Card or ACH information is on file within the Customer Explorer record.

Manage Chain Accounts – This option displays a list of Chain Account information. Chain Accounts are covered in depth in the Client Management section of this Help.

Master Account Mgmt – This option opens the list of all Master Accounts setup in the company. For more information, see the section titled Master Accounts in the Client Management section of this Help.

New Customer – Selecting this option will open the New Customer data entry form. For more information, see the section titled Creating a New Customer in the Client Management section of this Help.

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