

Client Management Overview

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This module contains many functions used by clerical and management-level SedonaOffice Users. User Group Security permissions secure each option within this module. Please refer to the [User Group Security](#) topic for each permission setting.

Follow the links below for information on each option within the Client Management Module.

[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 set up a new cancellation record for a customer. The Cancellation module is used when a customer is being canceled completely.

Cancellations are discussed in a separate section of this Help.

[Collections](#)

The Collections option will display a list of all active Collection Profiles. The Collections module is used for managing past-due customers.

The Collections option is discussed in depth in a separate section of this Help.

[Company Rate Change](#)

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

[Customer Explorer](#)

Selecting this option will open the Customer Lookup form; this is the main method for locating and working with Customer Explorer records.

[Customer Query Builder](#)

The Customer Query Builder is an ad-hoc report designing tool with which Users may develop, save, and print reports based on Customer information. General instructions on how to use this tool are covered later in 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 later in this Help.

[Master Account Mgmt.](#)

This option opens the list of all Master Accounts set up in the company. For more information, see the Master Accounts section later in this Help.

[New Customer](#)

Selecting this option will open the New Customer data entry form.
