Adding Clients in Track

This document provides instructions for adding clients to the Track database. Once configured, clients are quickly and easily assigned to orders and appropriate fees are consistently applied.

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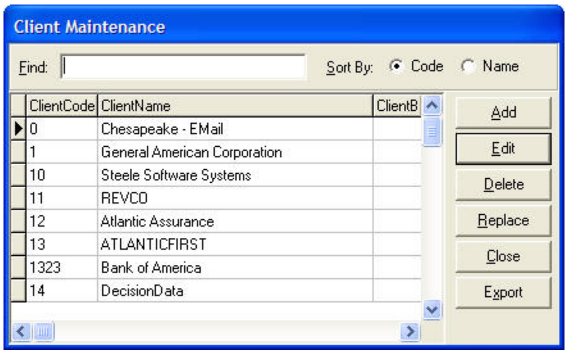
The Clients Database

Set up client fees and delivery options in the Clients database.

1. Open the Track program.
2. Click **Databases** > **Clients**.



3. Click **Sort By: Code** or **Name**.

   Code
   Sorts clients by *Client Code*.

   Name
   Sorts clients by *Client Name*.

4. Quickly find a client by entering the first few characters of the *Code* or *Name* in the *Find* field.
5. Select an action.

   Add
   Enter new client information.

   Edit
   Update existing client information.

   Delete
   Remove the client from the database.

   Replace
   Deletes the selected client from the database and reassigns the client’s orders to another client.

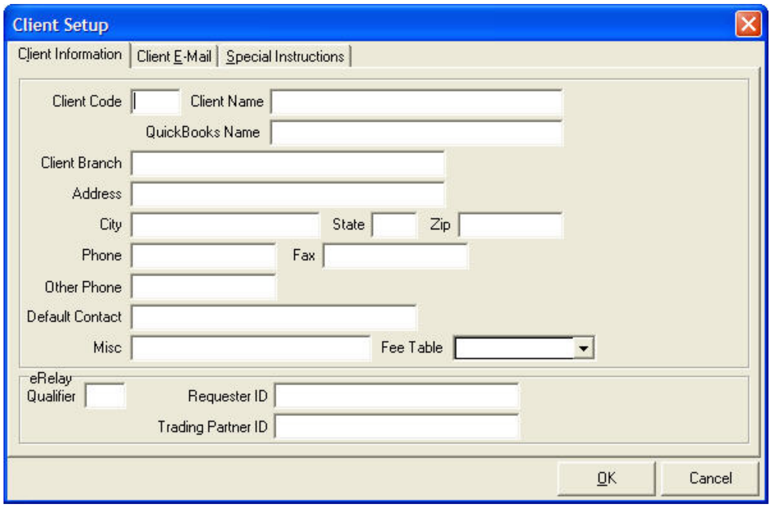
   Close
   Exit *Client Maintenance*.

   Export
   Exports the client list to a comma delimited (.CSV) file.

Adding Clients

Enter a new client record including contact information, e-mail profile, and special instructions.

1. Click **Add** to open *Client Setup*.



2. Enter the client information.

> **NOTE**: *Client Code* and *Client Name* are required fields. These fields may contain letters, numbers and hyphens.

3. Select the appropriate *Fee Table* (optional). The *Fee* section of the *Billing Info* tab in new orders automatically populates based on the *Job Type* selected for that order.

4. Click the *Client E-Mail* tab to enter the delivery address and select the appropriate electronic delivery service for each event (optional).

   Accept
   The address where electronic order acceptances are sent. This is primarily used for management companies with predefined profiles.

   Decline
   The address where electronic order declines are sent. This is primarily used for management companies with predefined profiles.

   Ack. w/Cond**.**
   The address where conditional acknowledgments are sent. For example, the order is declined because the fee is unacceptable. This is primarily used for management companies with predefined profiles.

   Status
   The address where electronic status updates are sent. This is primarily used for management companies with predefined profiles.

Appraisal
The address where appraisal reports are sent. This is typically an e-mail address but can also be a specific file path or FTP site.

Alt Appraisal
The address where add-on files are sent. Some management companies require the internal creation of additional files to be sent to separate addresses.

Service

Outlook 98/Exchange
Select this service if the data for the event is sent using a MAPI-compliant e-mail program.

File Copy
Select this service if the data for the event is not actually sent but is copied to a specified location.

File Move
Select this service if the data for the event is not actually sent but is moved to a specified location.

Direct LAN
Select this service if the data for the event connects directly to a pop2/smtp mail account without dialing.

5. Click the **Special Instructions** tab to add special instructions for the client.
6. Click **OK** to add the client to the database.

Editing Existing Clients

Edit existing client data using the Edit feature.

1. Click **Databases** > **Clients**.
2. Click **Sort By: Code** or **Name**, and enter the first few characters of the *Code* or *Name* in the *Find* field.
3. Select the client and click **Edit**.
4. Edit data in *Client Setup* and click **OK** to save changes.

Deleting Clients

Delete client records using the Delete feature. Deleting a client removes all references to that client from the order database.

1. Click **Databases** > **Clients**.
2. Click **Sort By: Code** or **Name**, and enter the first few characters of the *Code* or *Name* in the *Find* field.
3. Select a client and click **Delete**.
4. Click **Yes** to confirm deletion or click **No** to cancel.

Replacing Clients

The Replace feature deletes the client from the database and reassigns the client's orders.

1. Click **Databases** > **Clients**.
2. Click **Sort By: Code** or **Name**, and enter the first few characters of the *Code* or *Name* in the *Find* field.
3. Select a client and click **Replace**.
4. Select the replacement client from the drop-down list and click **OK** to update the database.

> **CAUTION**: The Order table must be updated to reflect this change. If the Track database is shared among users, ask all users to close any open orders and exit Track and File Lister. The replace process may take several minutes on large Order tables.

Exporting Clients

The Export feature exports the client database to a comma delimited .CSV (Comma Separated Value) file. Many popular database programs can import .CSV files.

1. Click **Databases** > **Clients**.
2. Click **Export**. Enter the name for the export file and select the destination location.
3. Click **Save**. The database exports.