

Client Lists Instructions

To add a new Client to the Client Database:

1. In ClickFORMS, Click on Lists, Show Clients List or click on the Database icons on the Task Bar and select Show Clients List...



2. To add a new Client, Click on [New] and then enter the Clients information and enter a Quick Lookup Identifier, Click on [Save].

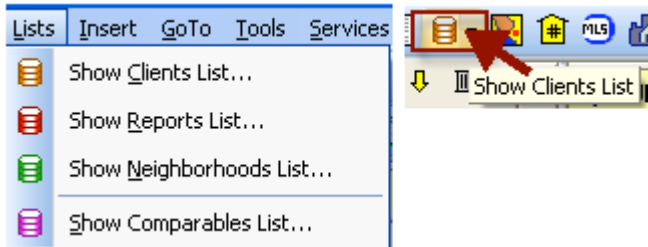
The image shows the 'Client List' window. At the top, there are buttons for 'New', 'Save', 'Delete', 'Transfer', and 'Close'. The 'New' button is highlighted with a red box. Below the buttons, there are tabs for 'Contact Info', 'Preference', and 'Export/Print'. The 'Contact Info' tab is selected. The form contains the following fields:

- Identifier: Well Fargo
- ID: 129
- Mr/Mrs: Mr
- First: Jack
- Last: Jones
- Company: Wells Fargo Bank
- Address: 1897 Meridian Ave
- City: San Mateo
- St.: CA
- Zip: 95116
- Phone: 999-555-4455
- Fax: [empty]
- Cell Ph.: [empty]
- Pager: [empty]
- E-Mail: JJ129@earthlink.net
- Notes: [empty text area]

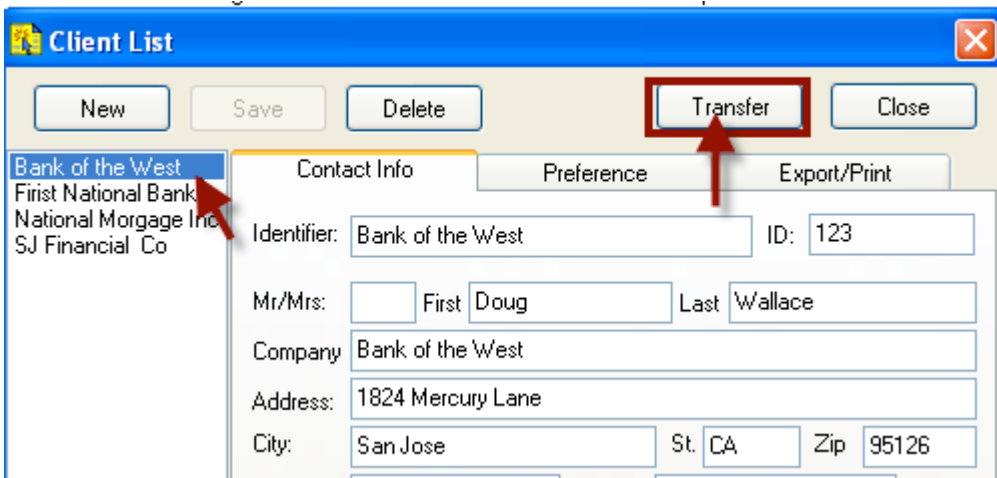
At the bottom left of the window, it says 'Number of Clients: 1'.

To transfer a Client to your report:

1. In ClickFORMS, Click on Lists, Clients List or the Clients Database Icon



2. In the Clients Quick Look-up List, Click on the Client or type the first letter or two of the Client/Lender Name on the Keyboard you wish to Transfer to your Report then Click on [Transfer].



3. The data is transferred to the appropriate cells in the Report.