Overview of what the menus on the client info page are

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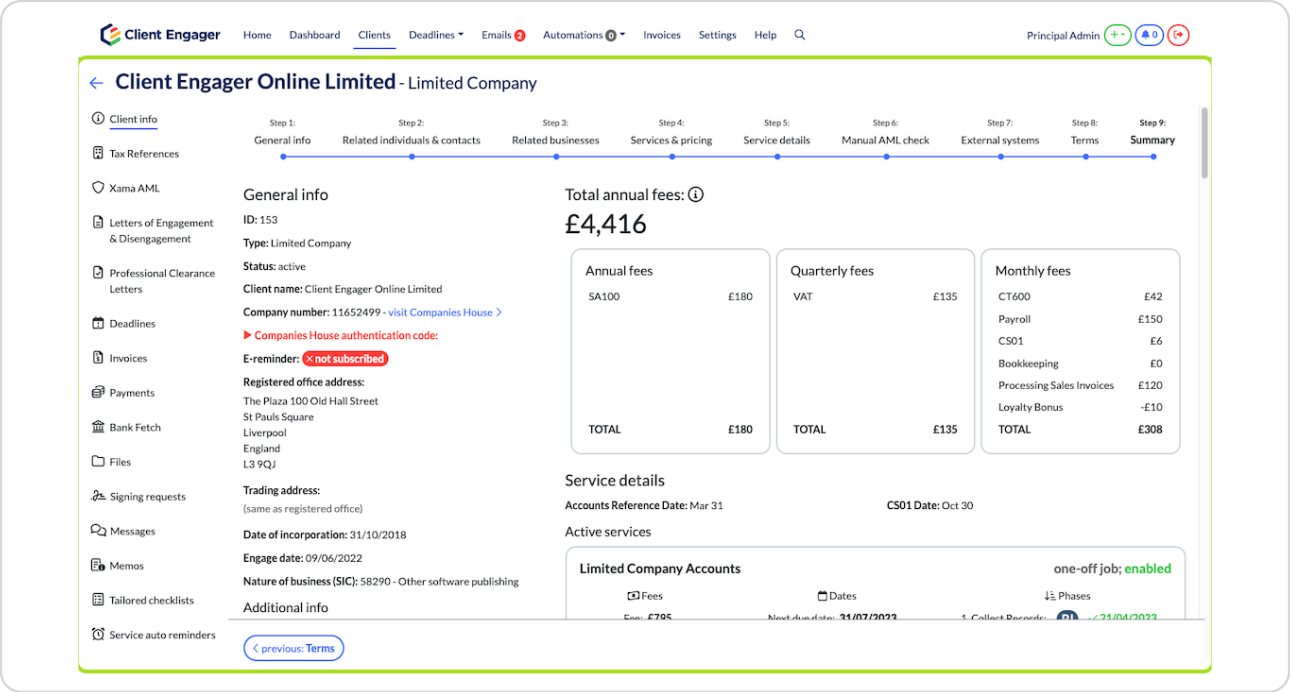
Created by	Creation Date	Last Updated
Johann Goree	June 3, 2023	June 3, 2023

STEP 1

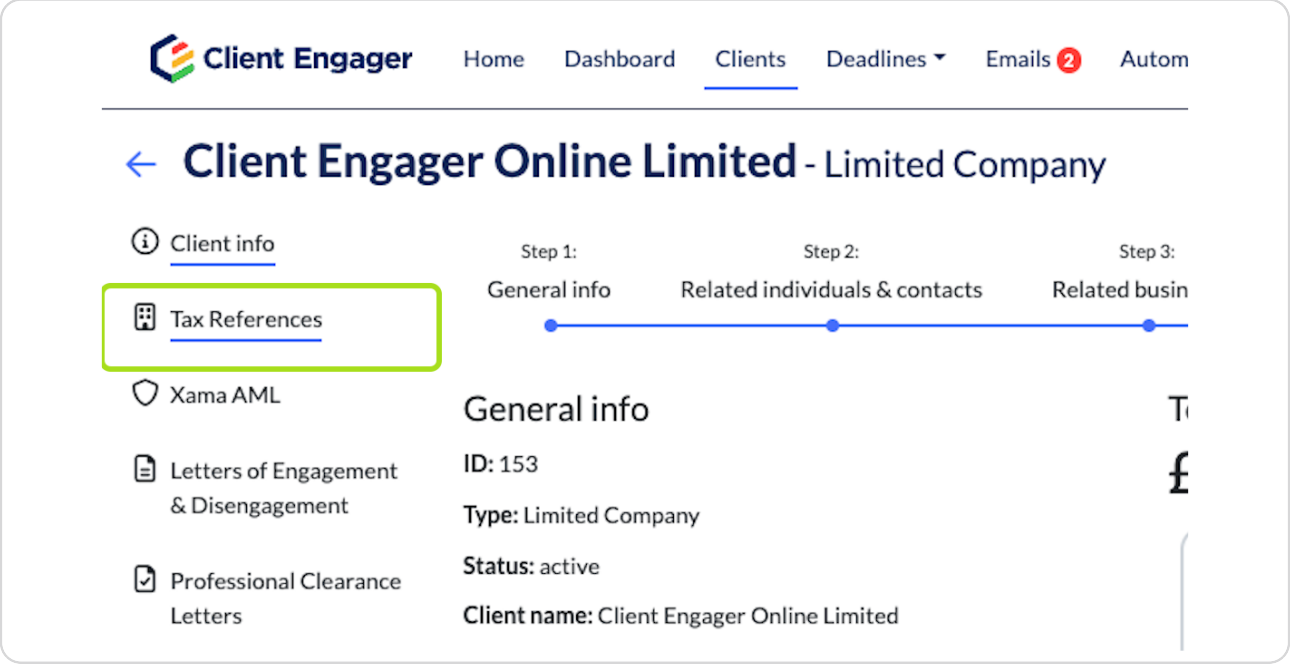
By clicking on a clients name it opens their record.

There are two main menus
- Steps 1 -9 along the top, these are the setup menus that you may need to go into to change details
- The left-hand menu where you carry out actions or see details for the specific client you are looking at



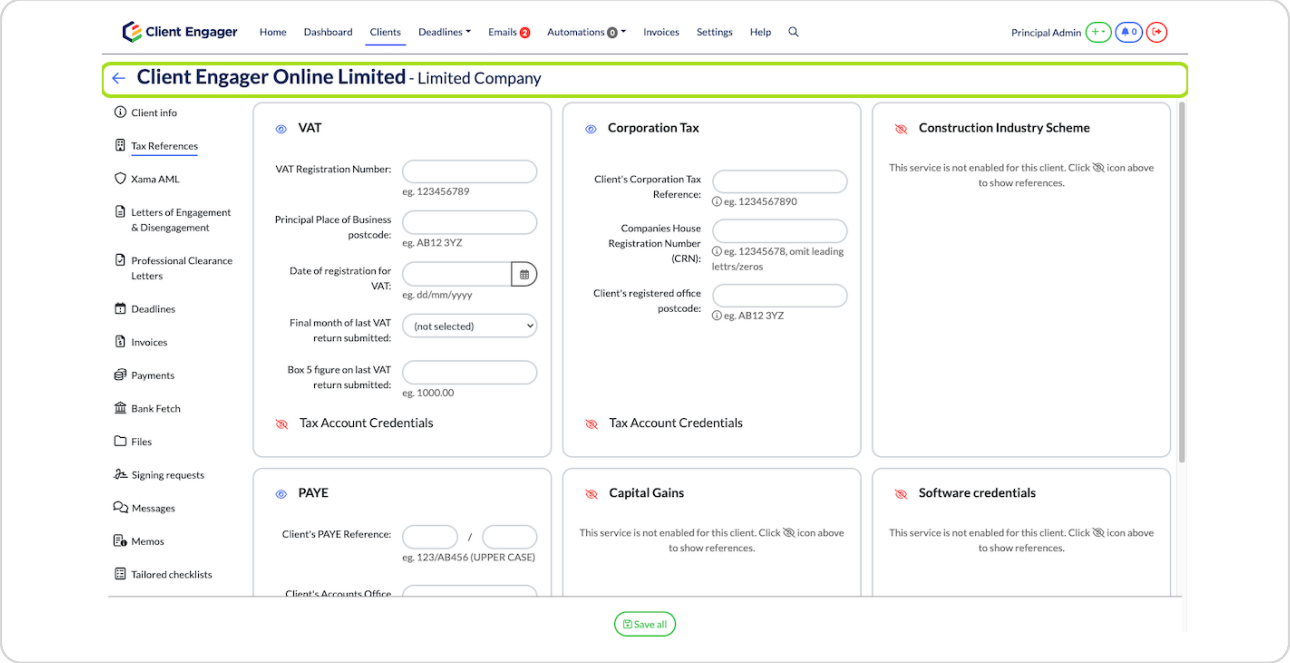
STEP 2

Tax References



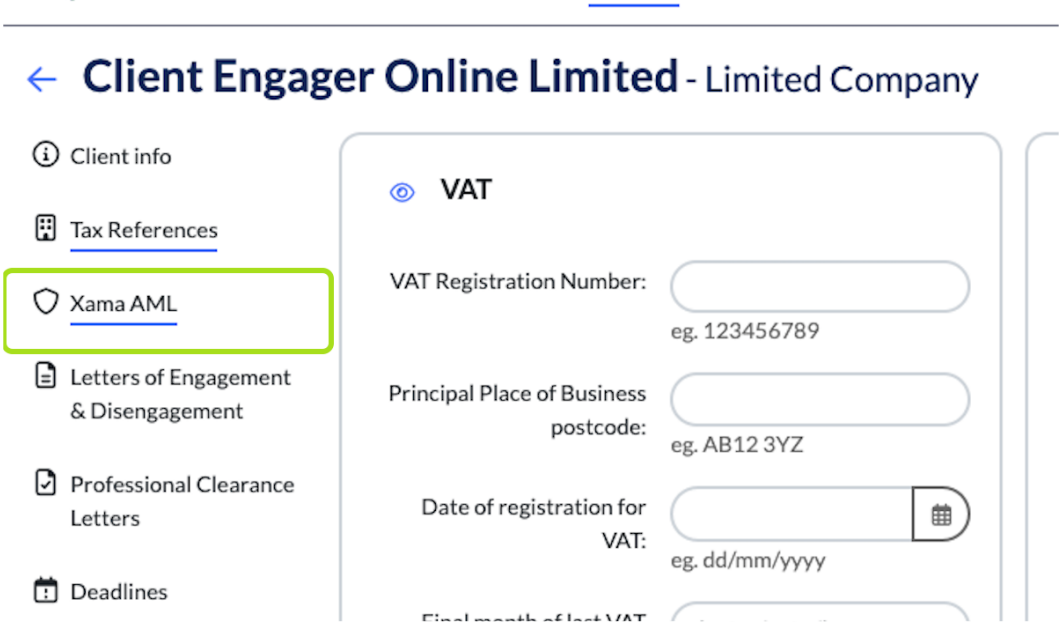
STEP 3

Here you can view and add UTRS etc



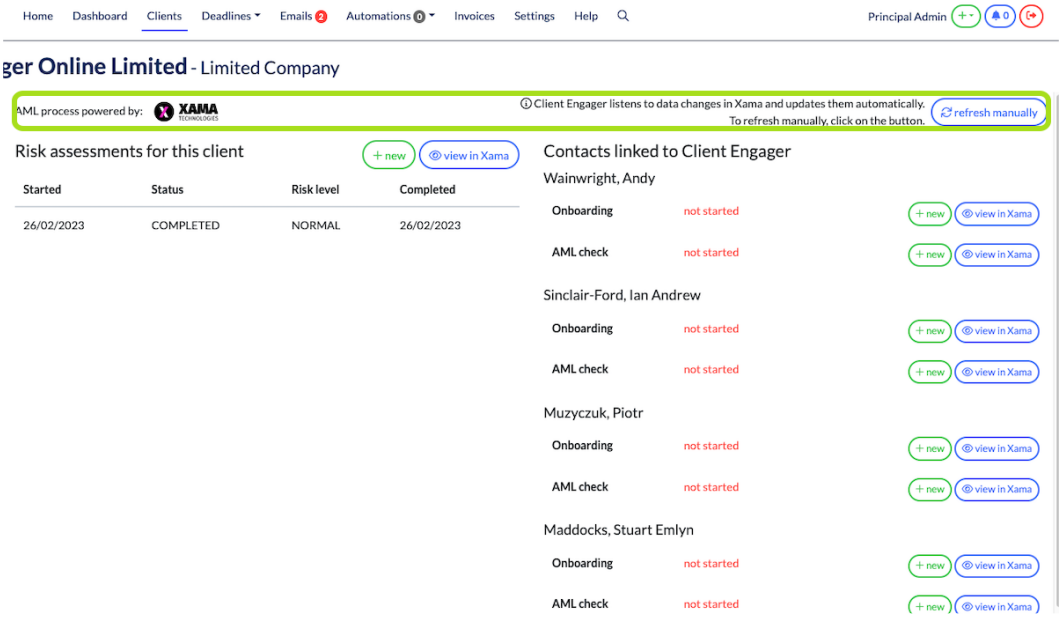
STEP 4

Xama AML



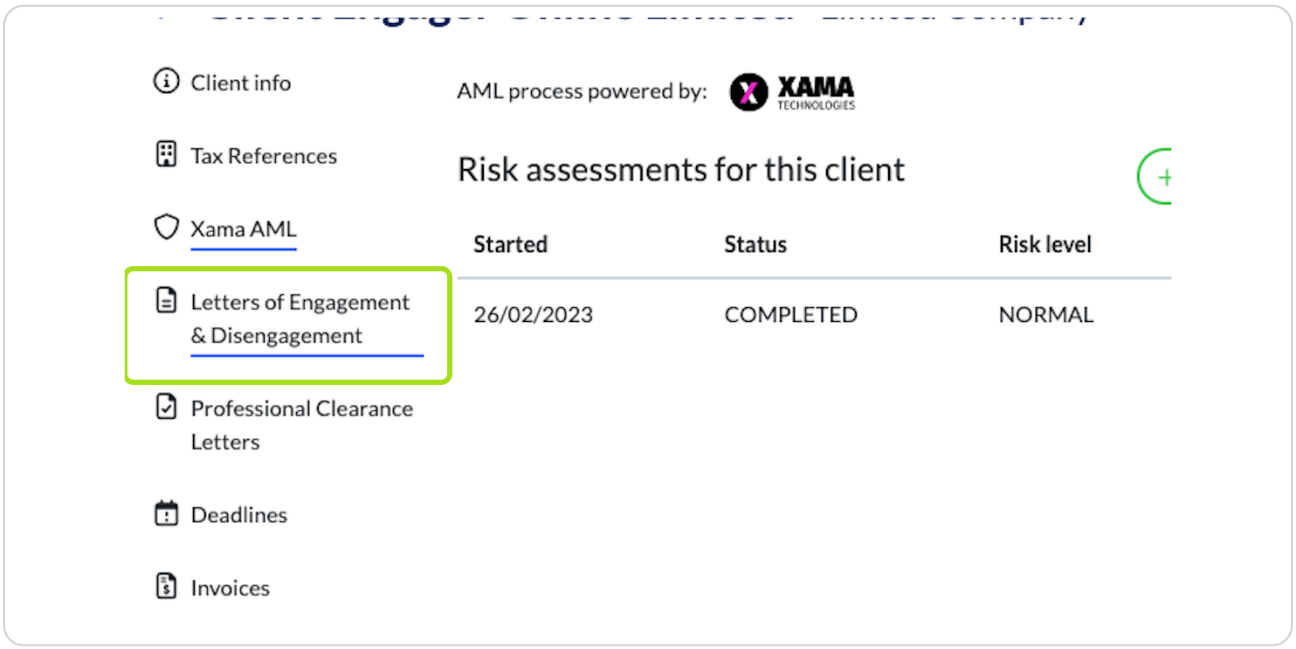
STEP 5

Here you will see an overview of the Risk Assessments and client ids stored on Xama if you have linked the accounts



STEP 6

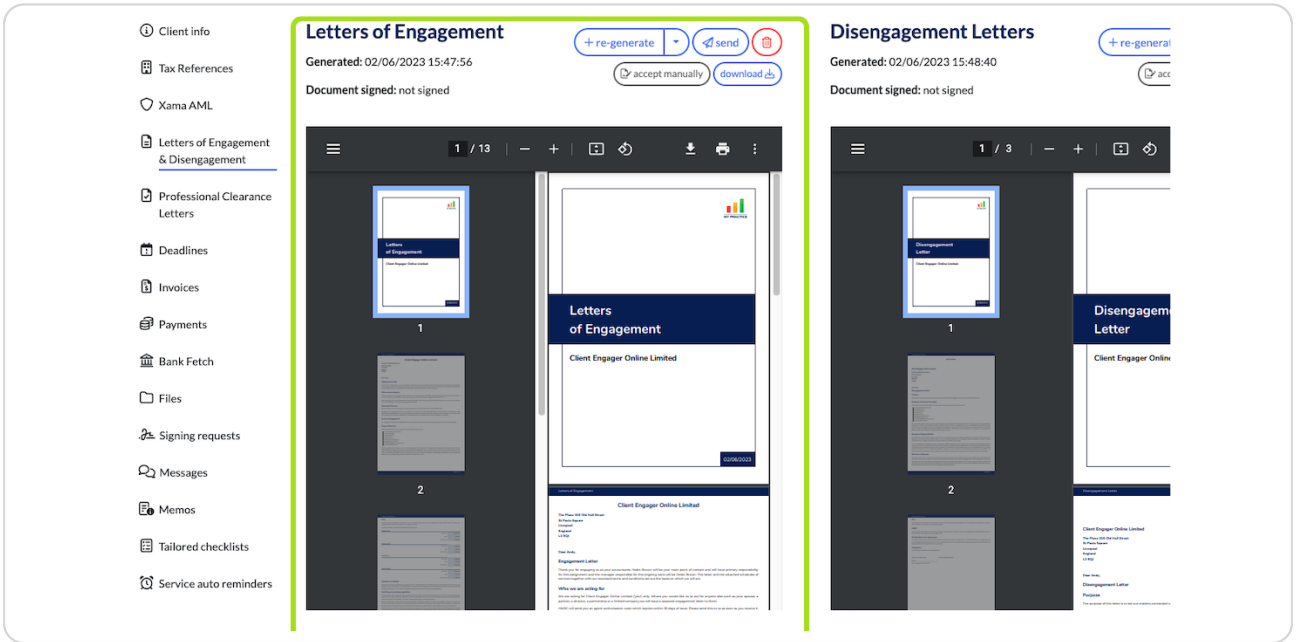
Letters of Engagement & Disengagement



STEP 7

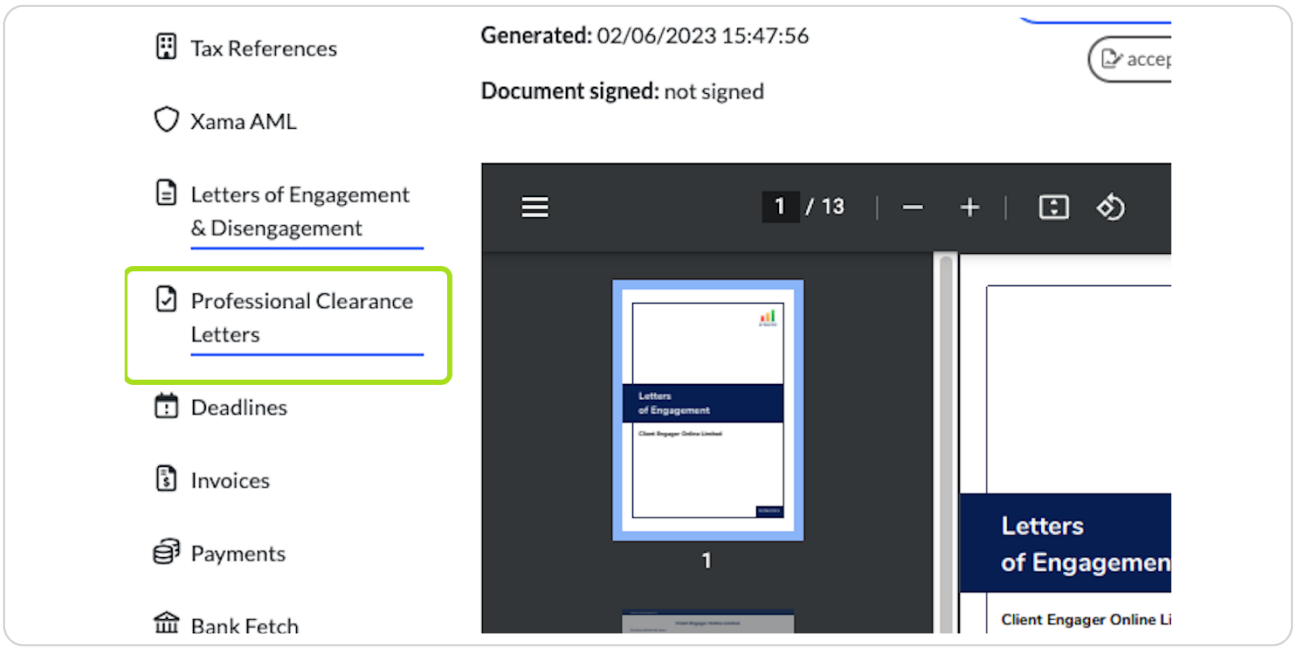
Here you see and generate letters of engagement and disengagement

There's a more detailed guide on this area in the guide list



STEP 8

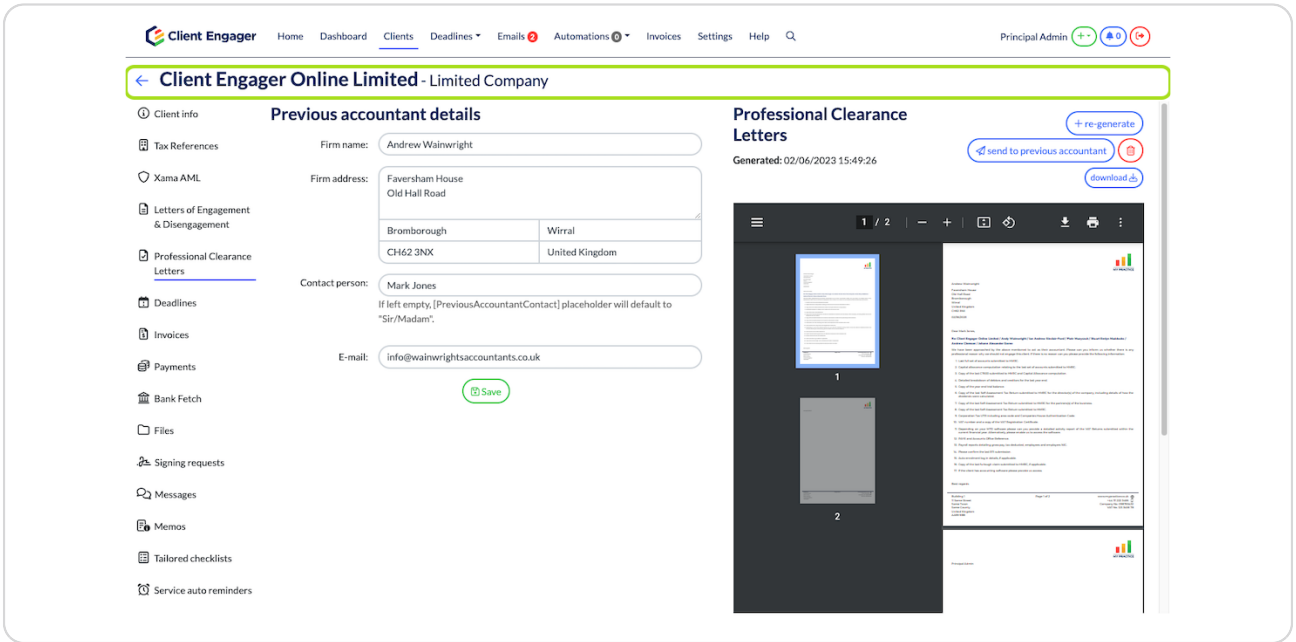
Professional Clearance Letters



STEP 9

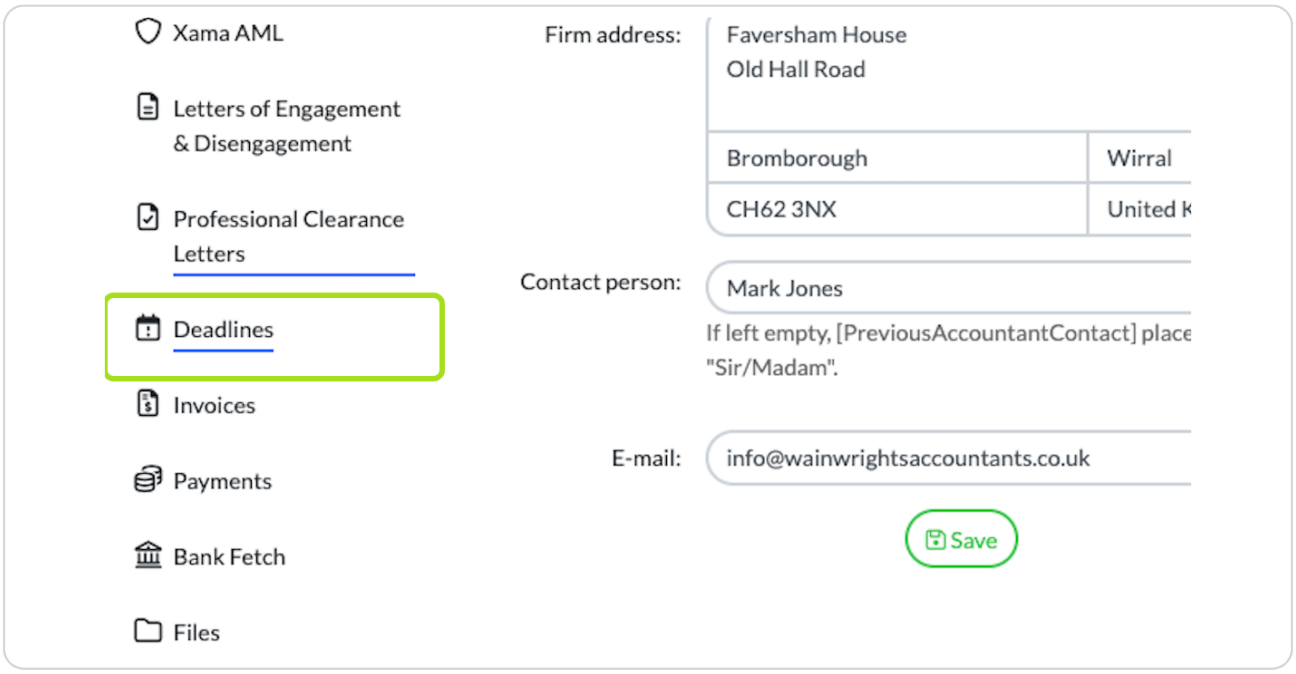
Here you can view and generate Professional letters of clearance

There's a more detailed guide on this area in the guide list



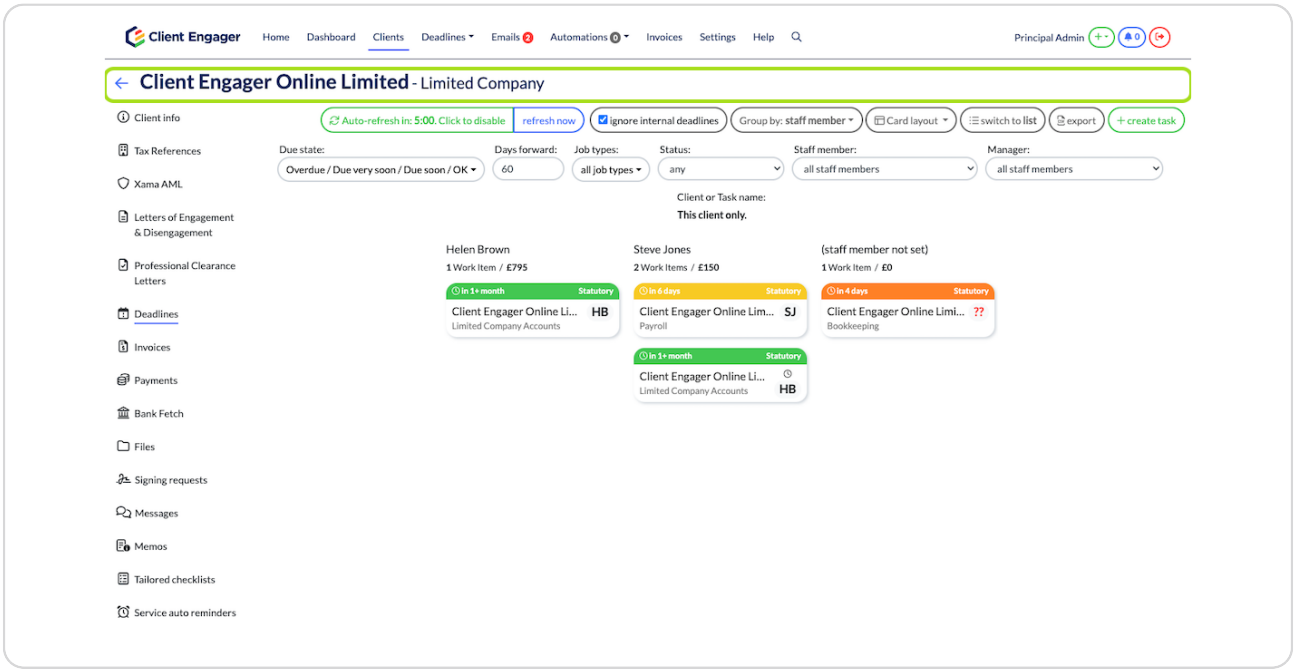
STEP 10

Deadlines



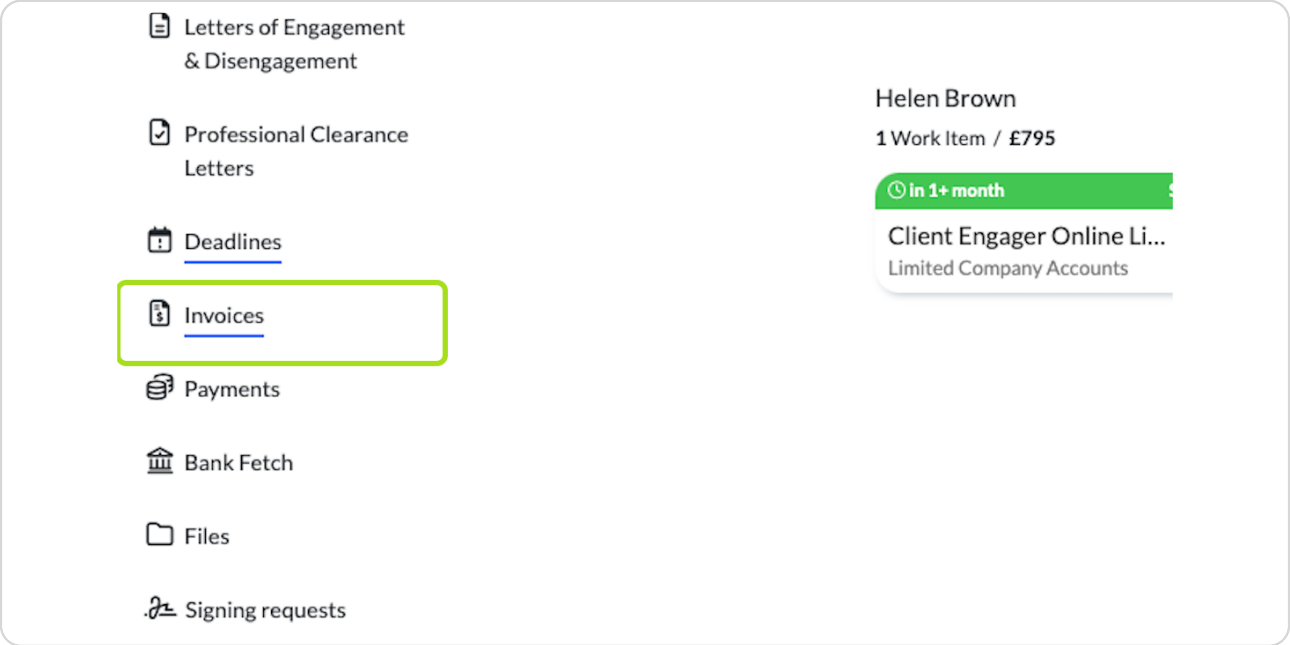
STEP 11

Here you can see deadlines specific to this client



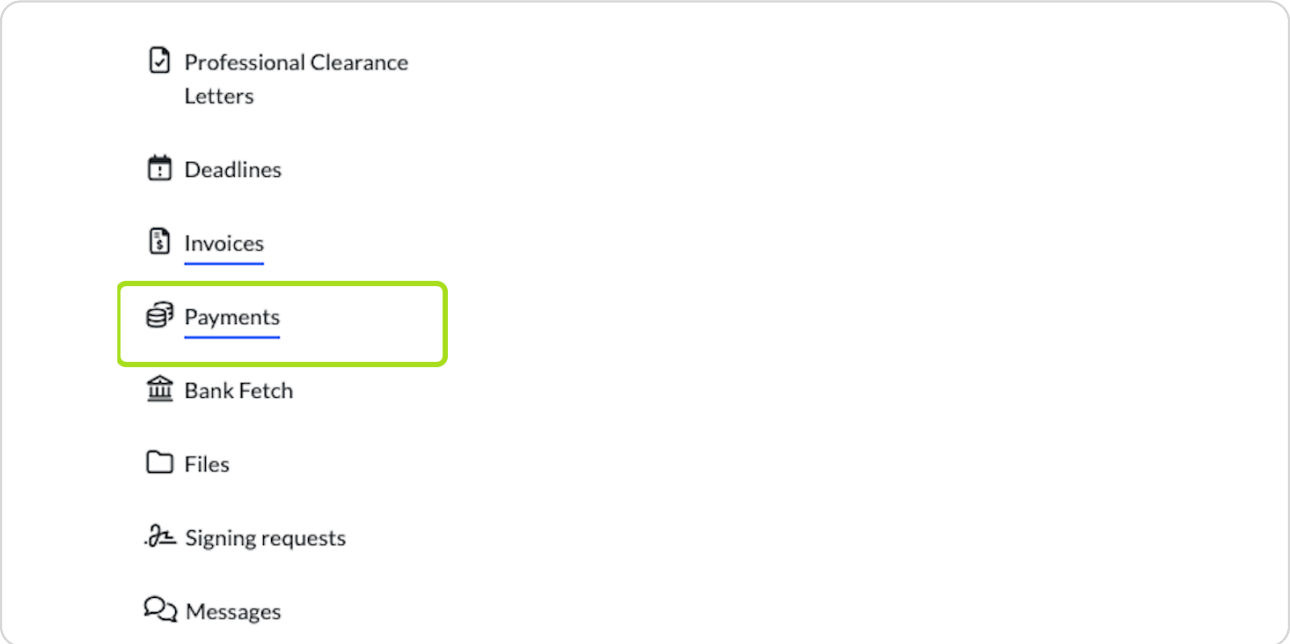
STEP 12

Invoices, if linked to a bookkeeping solution such as QBO the invoices related to this client show here



STEP 13

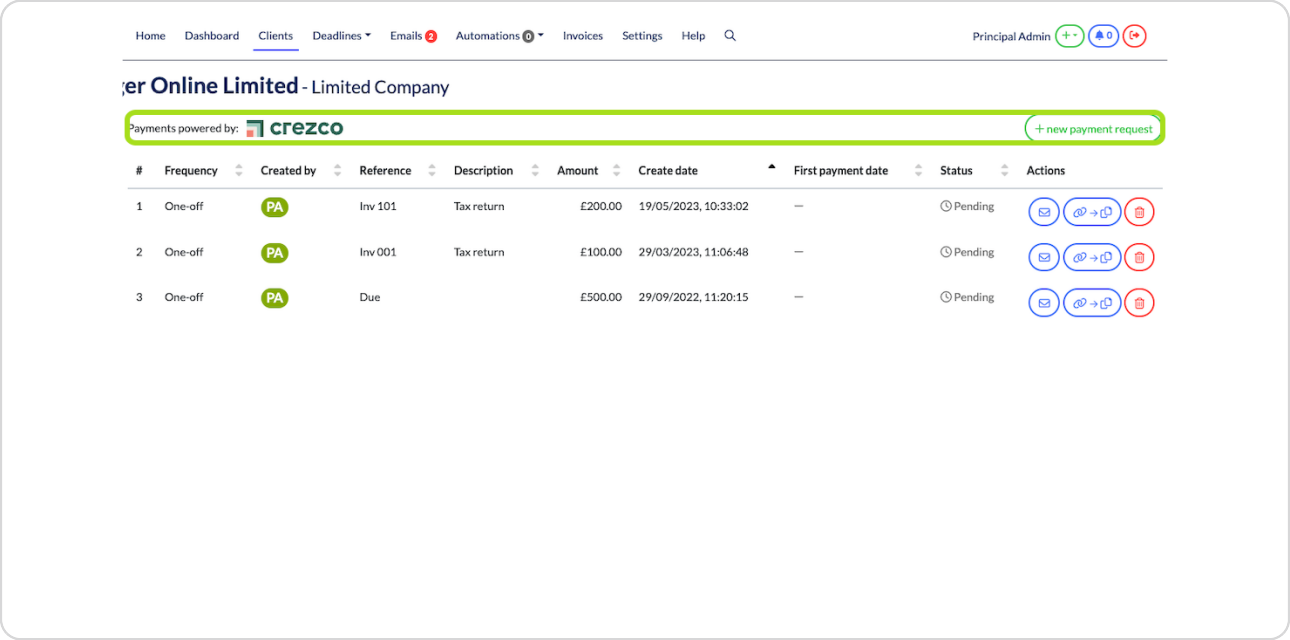
Payments



STEP 14

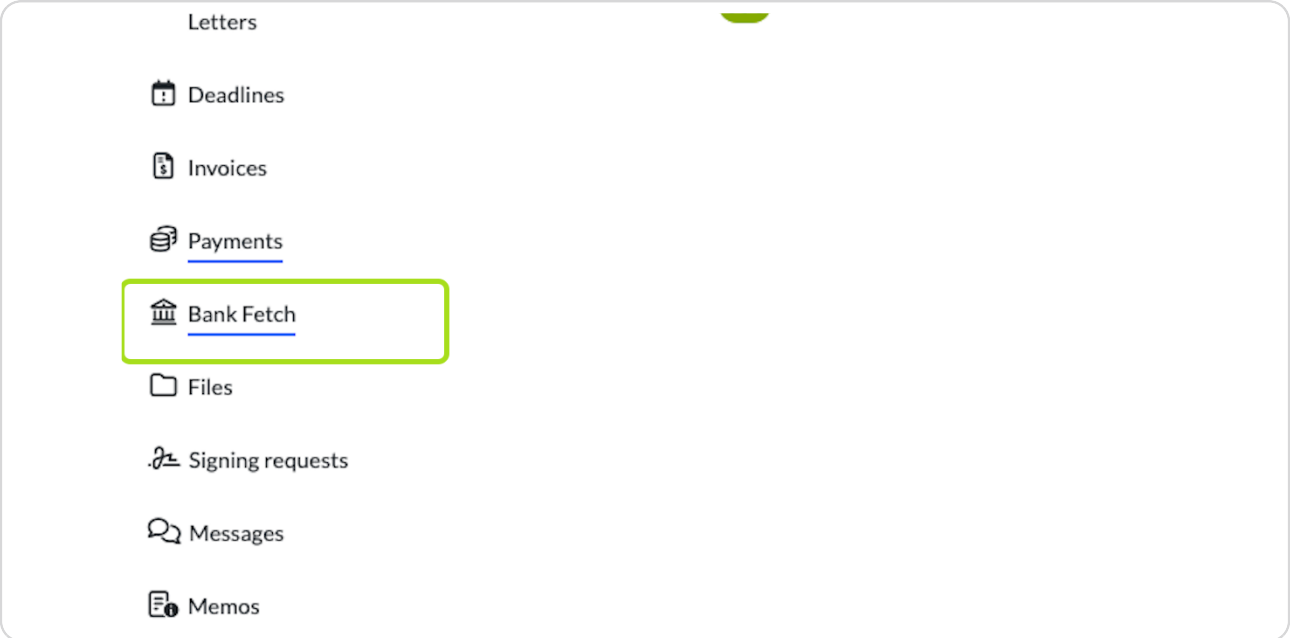
Here you can create and send payment request links powered by Crezco

There's a more detailed guide on this area in the guide list



STEP 15

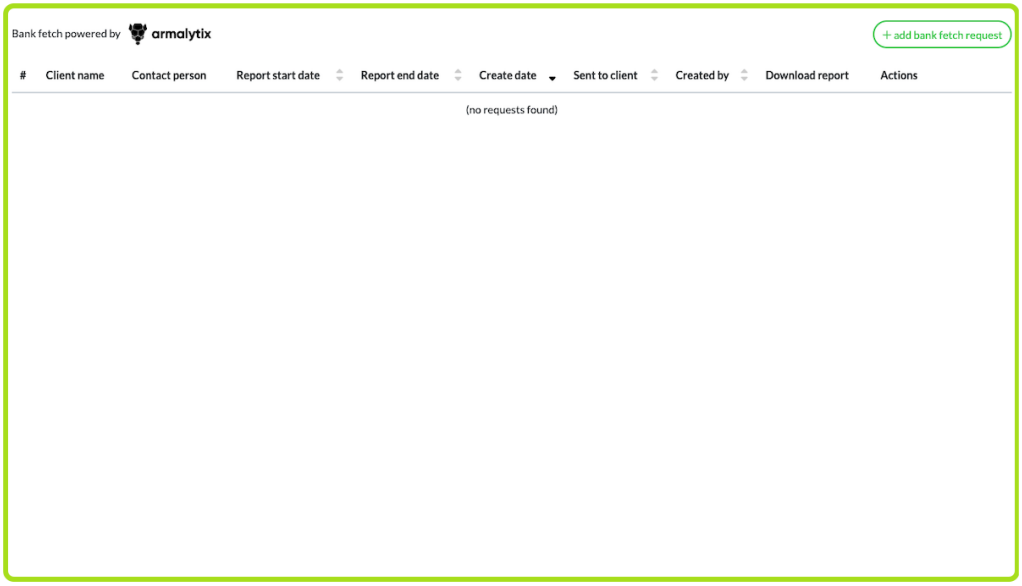
Bank Fetch



STEP 16

Here you can request bank fetch data from the client and see and download a list of bank fetch reports requested in the past

There's a more detailed guide on this area in the guide list



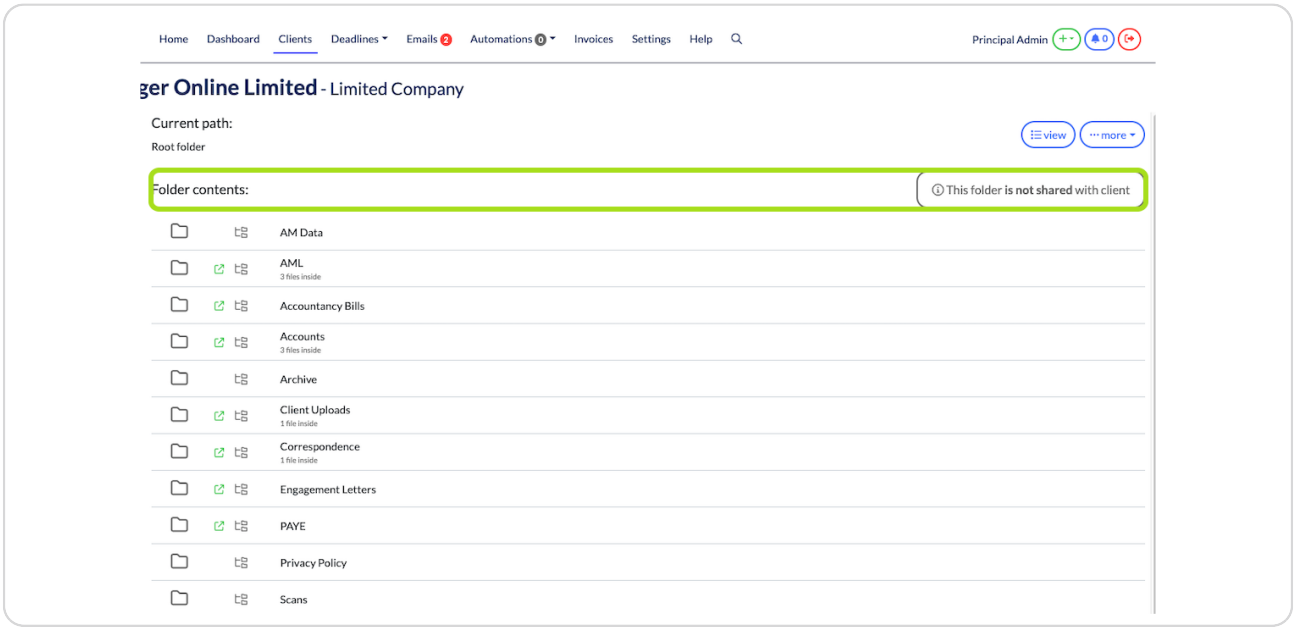
STEP 17

Files

STEP 18

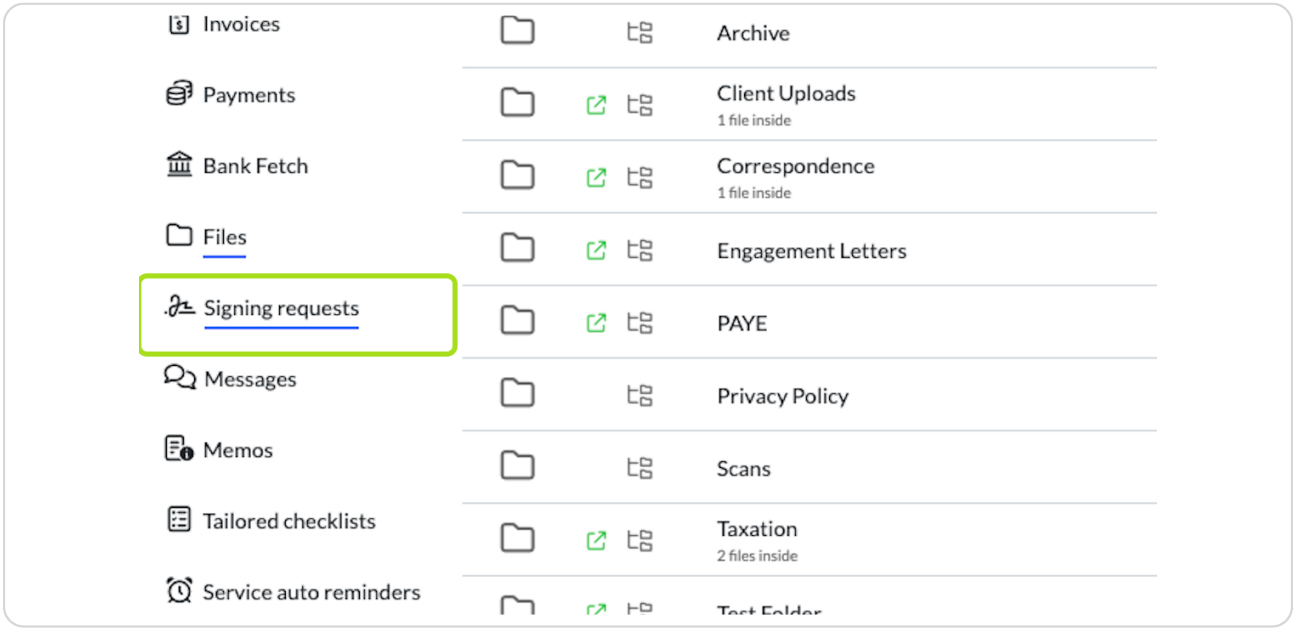
Here you can view and upload files to the client records

There's a more detailed guide on this area in the guide list



STEP 19

Signing requests - here you can see all signing requests sent to the client and each status

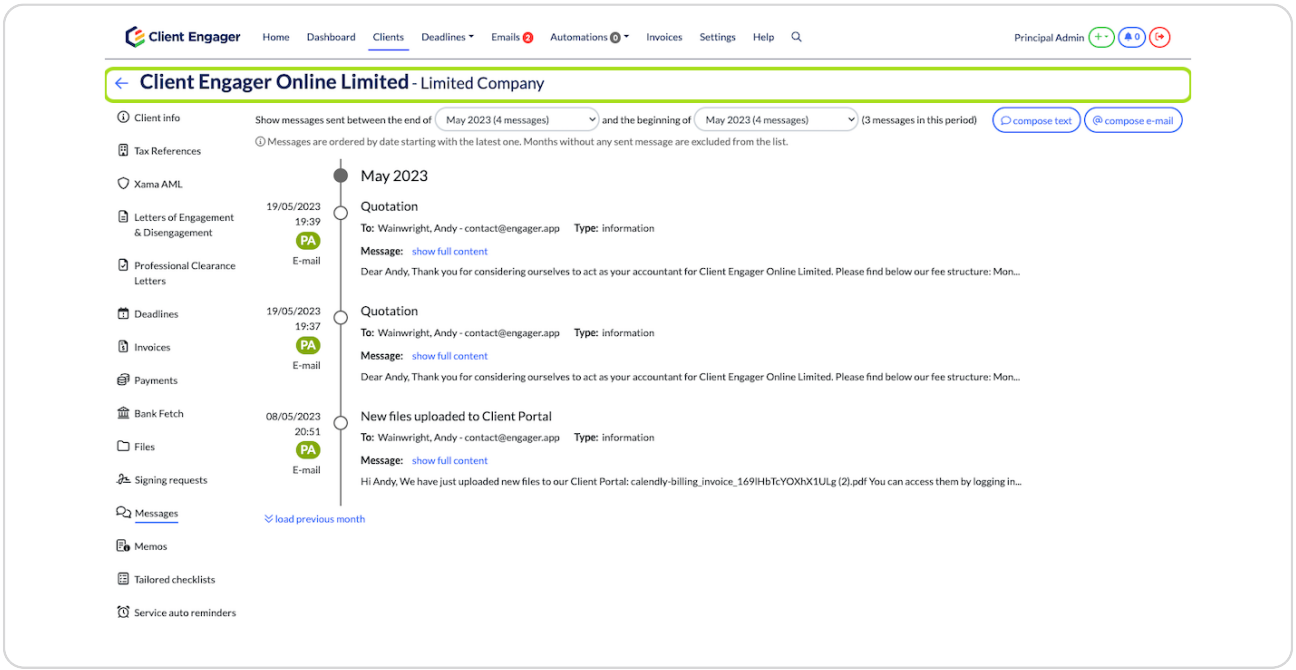


STEP 20

Messages

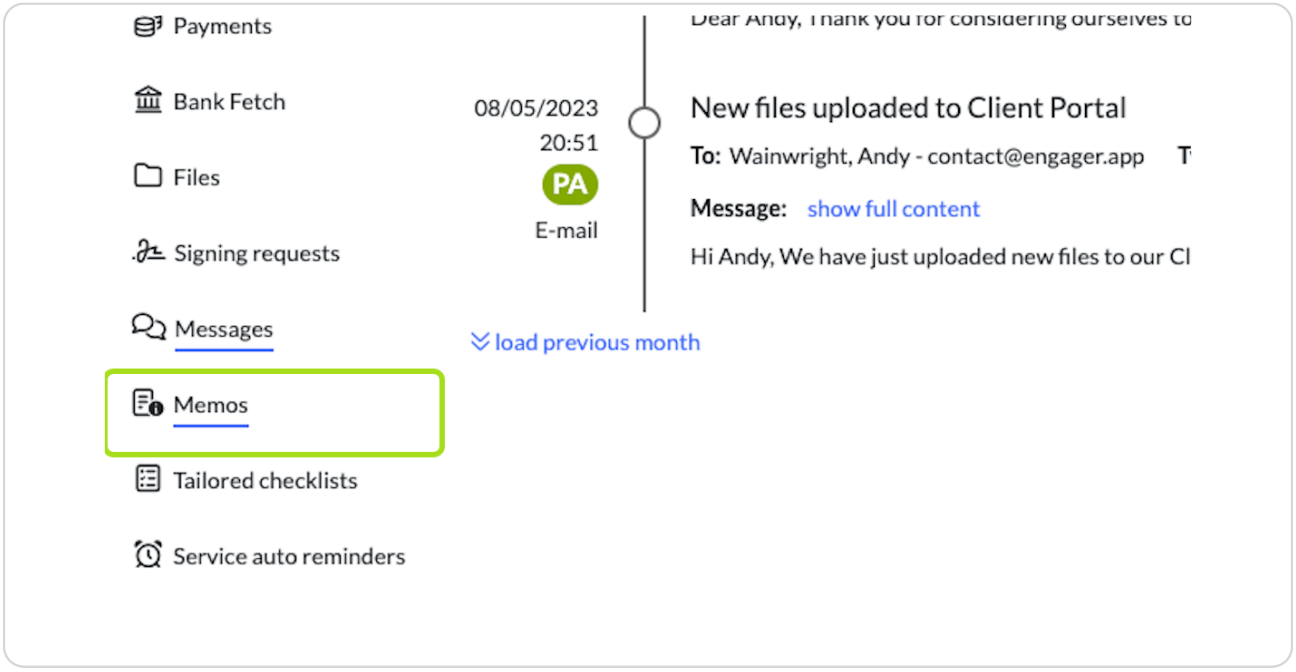
STEP 21

Here you can see all emails and texts sent via Client Engager



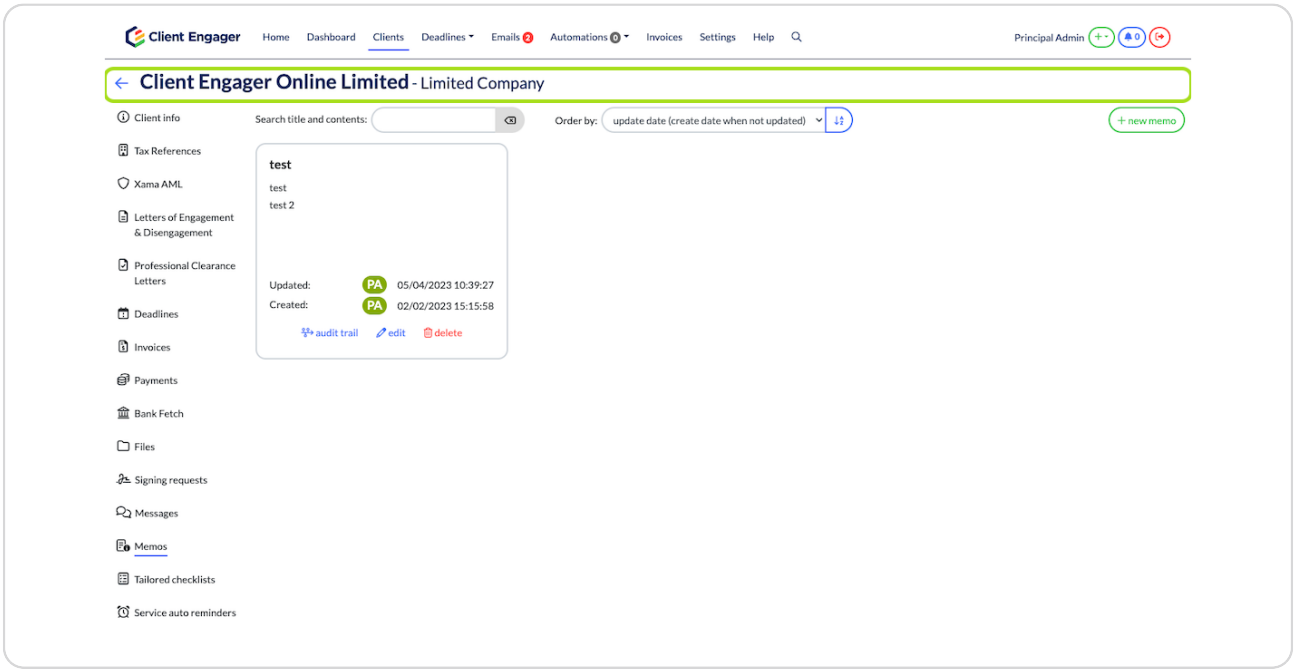
STEP 22

Memos



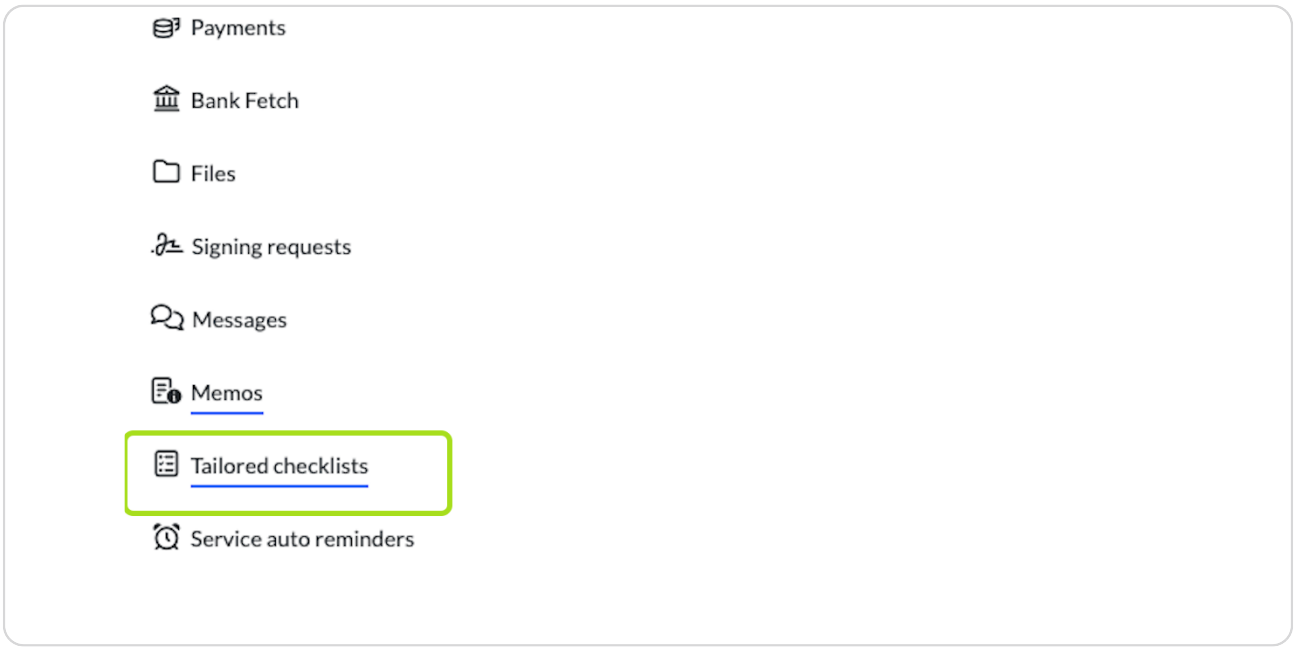
STEP 23

Here you can add and view memos/notes on this client



STEP 24

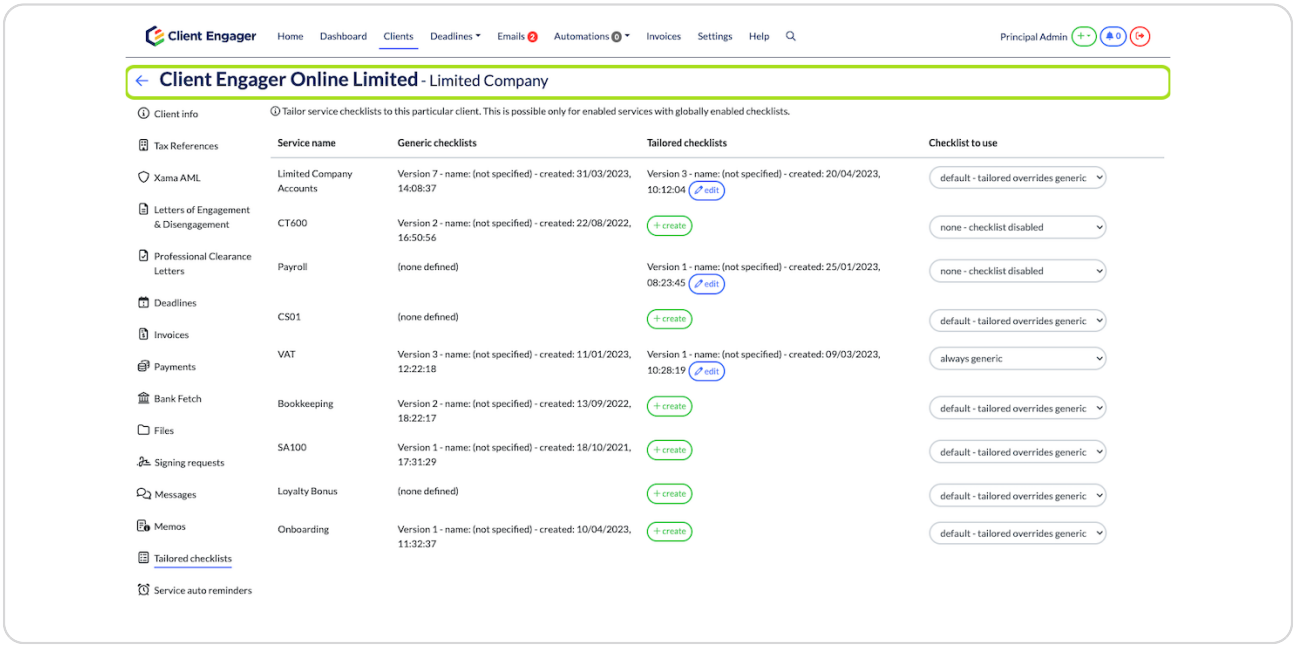
Tailored checklists



STEP 25

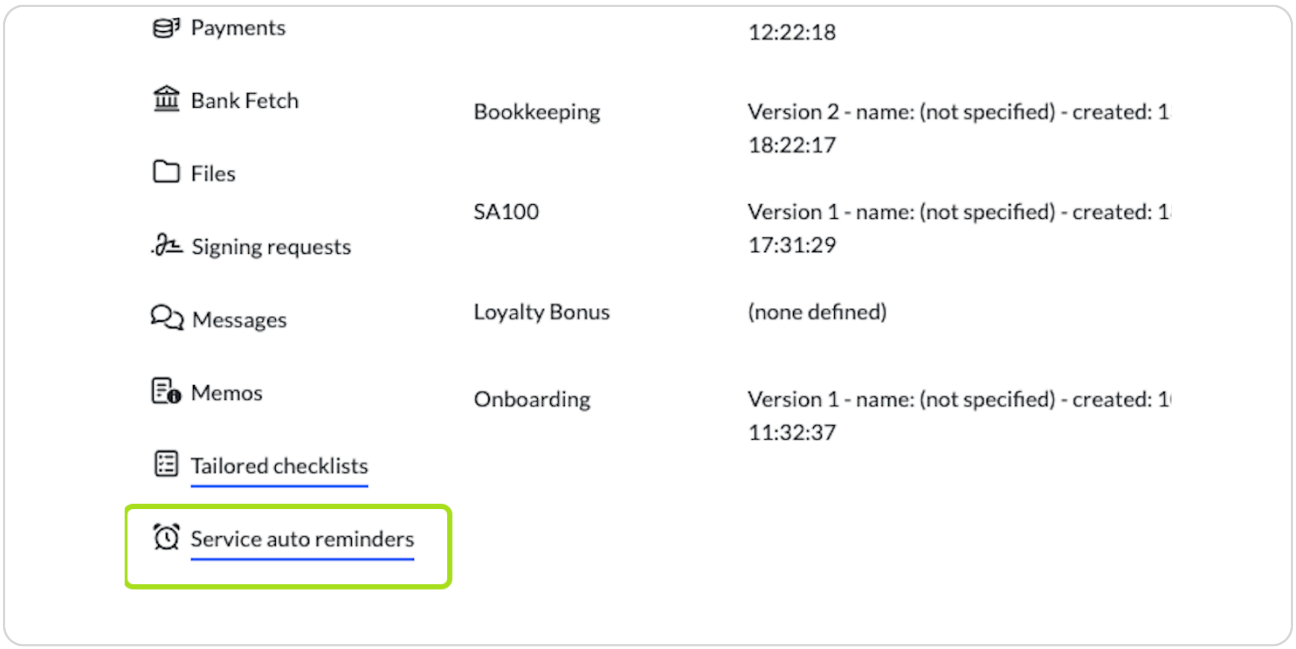
Here you can see and edit checklists for this specific client

There's a more detailed guide on this area in the guide list



STEP 26

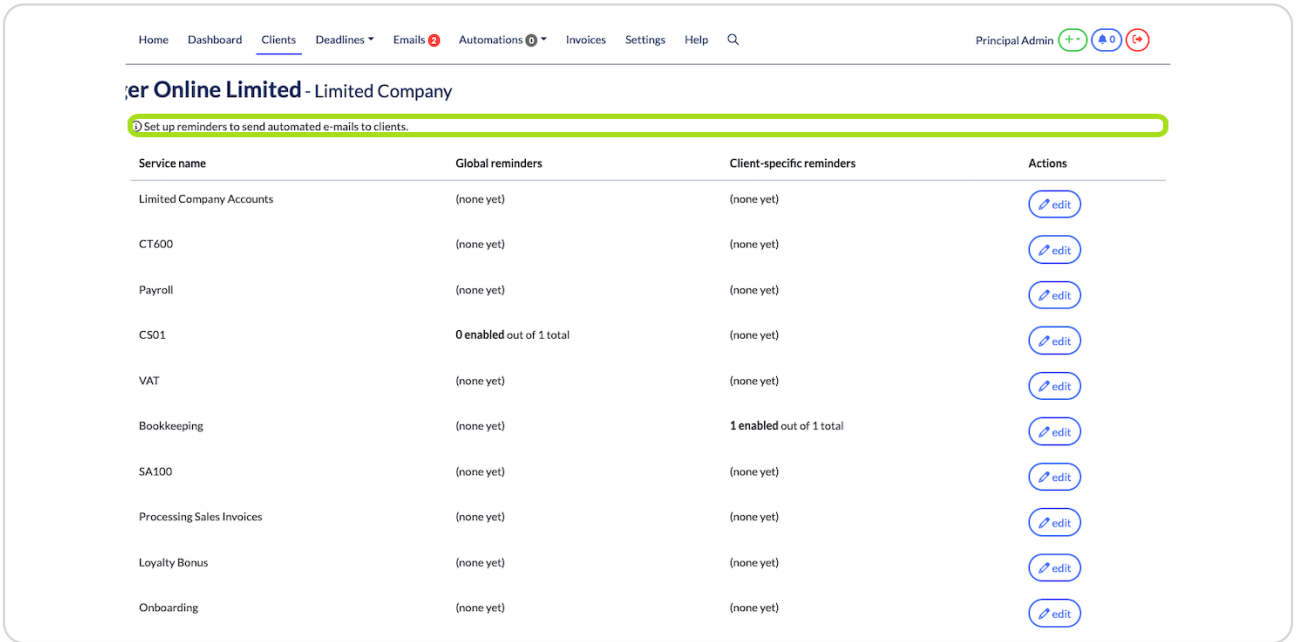
Service auto reminders



STEP 27

Here you can add or tailor automatic email reminders for this specific client

There's a more detailed guide on this area in the guide list



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