Running your first client - an Overview

After logging in, click on Case Management from the menu bar located on the top left hand side of the screen. 

Agent Information

1. Under Case Management, click on **Manage Agents**

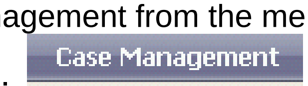

2. Click on **New Agent** 

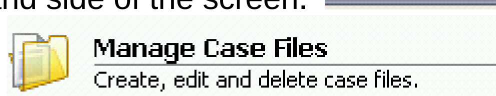
3. Type in the appropriate agent information in each field

4. To save the agent information, click **Save** from the tool bar

Note: * indicates a required field

Setting Up Your First Case

1. After logging in, click on Case Management from the menu bar located on the top left hand side of the screen. 

2. Next, click on 

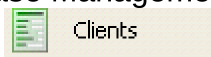
3. Manage Case Files screen opens. Click on **New Case File**


4. At the Data Entry screen, type in a new name for your case. Cases can hold multiple clients.
5. Click **Save** from the tool bar. 

6. Your new case has now been saved and listed.

Entering New Client information

1. Click the check box located next to the case name just created.

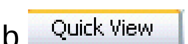

2. Under Case Management, located on the left hand side of screen, click on **Clients** 

3. The Manage Client page opens. Click on **New Client** 

4. At the Data Entry screen, type or select the appropriate information on the client in each filed.

TIP: There are multiple sections that make up the input screen. To collapse or open a section, click on the arrow located to the far right of the section title bar.

> Note: Product information is located to the left of the Data Entry screen. You can view all products available without changing any information to your client. Should you wish to change a product, make the change and be sure and click the APPLY button to save your change. 

5. To View the illustration results, click on the **Quick View** tab 

6. To run a report(s), click on the **Reports** tab and select report(s) desired and click the **Generate Reports** button 

7. To print a report, click on the printer icon from the tool bar, or select File|Print from the Menu bar.
8. To go back to the client input, click the **Data Entry** tab.
9. To save a client, click on **Save** from the tool bar.
10. To add a new client, click on Add Client from the tool bar in the Data Entry screen.

User Preference

Click on **User Preference** 

located on the tool bar to change your password, view or edit your personal profile.

To save changes, click on **Save** from the tool bar.