



Client Setup

Once the system setup is complete, client records need to be created before new business can be entered or imported.

Each client record has its own list of default settings which dictate what functions can be applied to debtor accounts allocated to the client along with settings which control how and when invoicing should occur.

The settings available for each client are :-

- What **client type** settings to use for this client
- Whether Statutory Interest should be applied to commercial debtor accounts
- Special pricing for invoicing of fees
- Whether settlement discounts can be offered and at what %
- Whether a life cycle exists. E.g. 60 days to collect before automatic closure
- Whether to allow more than one debtor to be recorded per debt/account e.g. Joint Defendant or guarantor

The screenshot displays the 'Client: ACC000001, Accent Telecom PLC - ORCA Database Client' window. The interface is divided into several sections:

- Client Group Options:** Includes 'Apply' and 'Client Group Options' buttons.
- Navigation Tabs:** 'Main', 'Additional Client Information', 'Client Bank', 'Contacts', and 'Audit Trail'.
- Branches:** A list of branches with details for 'Head Office' (15 St. Pauls Street, Boroughbridge, York, YO51 9UN) and 'Contact Details' (Telephone: 0113 283722, Fax: 0113 238988, Email: info@accent.co.uk).
- Client Details:**
 - General:** Name (Accent Telecom PLC), Type (TEL VM), Account Reference Code (ACC01), Bank (T-mobile), Card Group.
 - Notes:** This client supplies low value overdue telephone accounts for collections that will be cut off with 30 days unless payment is made in full.
 - System:** Code (ACC000001), Created (20/11/2008 16:49:51), Active (checked), Debt Code Prefix (ACC), Last Used Debt Code (0), Date Of Last Debt.
 - Setup:** Includes sections for Basic, Financial, System Applied Status Codes, Payment Plan, Workflows, Documents, Service Level Agreement, Contract Number, SLA Life Cycle, and Security.

At the bottom, the status bar shows 'Database Connection: (local)\OrcaDemo' and 'Username: adtec'.