

Acclipse Secure Client Manager

Managing Secure Client Areas



Course objective

Acclipse Secure Client Manager enables you to provide a secure area on your website for each client. You can upload confidential documents for each client; increasing their ease of access to important information. Your clients can also use their secure area to send confidential documents back to you. This course is designed to cover the Acclipse Secure Client Manager functionality and cover narrating BankLink transaction.

Course duration

1 hour

Course content

The Basics

- Opening Acclipse Secure Client Manager
- Secure Client Manager layout
- Saving your password

Secure Client Areas

- Creating a secure client area
- Renaming a secure client area
- Editing standard secure area content
- Deleting a secure client area

Secure client users

- Adding a new user to a secure client area
- Adding an existing user to another secure client area
- Editing and deleting a user

Files and documents

- Documents section layout
- Creating new folders
- Adding and deleting default document folders
- Adding & deleting document folders from an individual secure area
- Uploading files from a computer
- Uploading files via Acclipse PDF Manager
- Processing documents in the upload queue

Scheduling content

- Scheduling documents
- Reviving expired documents
- Receiving files from clients

Email notifications

- New users & passwords
- New files
- New BankLink files

Working with BankLink

- Understanding the BankLink workflow
- Exporting BankLink files to Acclipse Secure Client Manager
- Uploading BankLink files to secure areas
- Processing BankLink files
- Viewing BankLink files across secure areas
- Viewing BankLink files for an individual secure area
- Narrating BankLink files with CodeIT
- Downloading returned files
- Taking files offline
- Reviving files
- Importing files back into BankLink