



CADEX
UNIVERSITY

Cadex Solutions

Client Portal

HANDBOOK GUIDE



CADEX

Get difficult done.™



www.cadex-solutions.com

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Welcome to the Cadex Client Portal Guide!

This handbook is your one-stop resource for everything you need to know about using the Cadex Client Portal.

Inside, you'll find step-by-step instructions, helpful tips, and detailed explanations to ensure a smooth and effective experience. We're here to walk you through every feature and function so you can get the most out of the system.

Better Reach

Better Guidance

Better Tools



95+

Years in Operation



170

Countries Served



2,200+

Clients Globally



\$730m

Collected for
Clients Last Year



John Fisher

Chief Executive Officer (CEO)
Cadex Solutions





Introduction



What is the Cadex Client Portal?

The Cadex Client Portal is a secure, userfriendly platform designed to provide full transparency and real-time insight into placed accounts.



Who is it for?

It's built specifically for Cadex clients who want a streamlined way to manage and monitor their account activity.



How does this benefit our clients?

Clients can easily track account status and progress, access detailed activity logs, run reports, and stay up to date — all from one centralized location.

Access & Setup



Accessing the Portal

Once you've partnered with Cadex, our Client Experience team will reach out to provide everything you need to access the Client Portal.

The portal is fully browser-based and optimized for seamless performance within any modern web browser — no downloads or installations required.

Be sure to bookmark the website for easy access in the future



www.client-portal.cadex-solutions.com



Logging In

To log in, simply access the link, enter your email address and password, followed by a quick multifactor authentication step to ensure secure access.

You will receive a detailed email with step-by-step instructions for the login process.

System Overview

Once you're logged in, the platform will open to the **default page**, which displays a list of accounts placed with Cadex. Navigating the system is simple and intuitive, with little to no prior experience required.

Take a look at the **6 key items** available, highlighted in **red** in the image below. Each section is explained in more detail beneath the image.

The screenshot shows the CADEX system interface. The top navigation bar includes the CADEX logo (1), a main menu with 'Accounts', 'Reports', 'Placements', and 'Resources' (2), and a user profile dropdown for Benjamin Price (3). Below the navigation bar is the 'Accounts' section, which includes a search bar and filter options (4). The main area displays a table of accounts (5) with columns for Company, Client Ref, Agency Ref, Assign Date, Assign Amount, Total Due, Total Received, Last Trust Date, and Status. The table contains 10 rows of account data. At the bottom of the screen is a pagination control (6) showing page 1 of 147.

Company	Client Ref	Agency Ref	Assign Date	Assign Amount	Total Due	Total Received	Last Trust Date	Status
TEST	1022545	9617651	May 30, 2023	-\$96,000.00	-\$96,000.00	£0.00	--	Active
TEST	163900	3536686	May 11, 2016	-\$55,891.00	-\$80,934.76	\$0.00	--	Active
TEST	1029791	9617678	May 30, 2023	-\$59,749.20	-\$59,749.20	£0.00	--	Active
TEST	3263865	3536648	May 11, 2016	-\$40,708.00	-\$58,948.53	\$0.00	--	Promise
TEST	3263831	3536683	May 11, 2016	-\$13,060.00	-\$37,029.57	\$13,060.00	Jul 28, 2017	Active
TEST	9999345345	3536684	May 11, 2016	-\$27,337.00	-\$27,337.00	\$0.00	--	Close
TEST	521124032	C077565	Feb 20, 2025	-\$26,613.06	-\$26,613.06	\$0.00	--	Active
TEST	140343	A702918	Mar 18, 2024	-\$24,257.19	-\$25,593.00	\$0.00	--	Promise
TEST	27961544	C077559	Feb 20, 2025	-\$19,590.95	-\$19,590.95	\$0.00	--	Active
TEST	699718521	C077566	Feb 20, 2025	-\$18,377.06	-\$18,377.06	\$0.00	--	Active

- 1 Home Navigation:** Clicking the Cadex logo in the top-left corner will return you to the home page from anywhere within the platform.
- 2 Main Menu:** Located at the top center of the screen, the main menu gives you access to various sections of the platform, helping you quickly find the information you need.
- 3 Profile Options:** In the top-right corner, you'll find your profile settings, where you can view your account details or log out.
- 4 Sorting & Filtering:** Depending on the section you're viewing, additional options for sorting, filtering, and customizing your view may be available here.
- 5 Main Area:** Depending on the menu selected in section #2, a different screen will appear—this becomes the main area you're viewing. In our example, it displays a full list of accounts, packed with valuable information.
- 6 Pagination:** If a menu contains more information than can fit on one page, you'll find navigation buttons at the bottom of the screen to move between pages.

Navigation Menus, Sub-Menus and Buttons

At the top of the screen, you'll see several navigation buttons, each opening a different menu. Let's take a closer look at what each one does.

Accounts Button

Accounts

Reports

Placements

Resources

The **Accounts button** displays a complete list of accounts placed with Cadex. Let's break down the information available within this tab:

Company	Client Ref	Agency Ref	Assign Date	Assign Amount	Total Due	Total Received	Last Trust Date	Status
TEST	1022545	9617651	May 30, 2023	-\$96,000.00	-\$96,000.00	£0.00	--	Active
TEST	163900	3536686	May 11, 2016	-\$55,891.00	-\$80,927.11	\$0.00	--	Active
TEST	1029791	9617678	May 30, 2023	-\$59,749.20	-\$59,749.20	£0.00	--	Active
TEST	3263865	3536648	May 11, 2016	-\$40,708.00	-\$58,942.95	\$0.00	--	Promise
TEST	3263831	3536683	May 11, 2016	-\$13,060.00	-\$37,025.99	\$13,060.00	Jul 28, 2017	Active
TEST	9999345345	3536684	May 11, 2016	-\$27,337.00	-\$27,337.00	\$0.00	--	Close
TEST	521124032	C077565	Feb 20, 2025	-\$26,613.06	-\$26,613.06	\$0.00	--	Active
TEST	140343	A702918	Mar 18, 2024	-\$24,257.19	-\$25,589.67	\$0.00	--	Promise
TEST	27961544	C077559	Feb 20, 2025	-\$19,590.95	-\$19,590.95	\$0.00	--	Active
TEST	699718521	C077566	Feb 20, 2025	-\$18,377.06	-\$18,377.06	\$0.00	--	Active

- 1 Account Type:** You'll have instant access to a wide range of account information, with easy-to-use filters for active, closed, legal, and promise accounts. Just click any option to quickly narrow down the list.
- 2 Columns:** The list is organized into several key columns. Each column can be sorted in ascending or descending order by simply clicking on the column header.
- 3 Search Bar:** Allows you to quickly locate an account using the Client Reference Number.
- 4 Filters:** Clicking the filter icon reveals additional options, enabling you to search by Invoice Number and specify a date range for more refined results.

Clicking an account from the list will open its detailed view, providing even more information about that specific account. Let's break down the information available within these sub-menus.

OVERVIEW SUB-MENU

The screenshot displays the 'Overview' sub-menu for an account named 'TEST'. At the top, there is a header bar with the account name 'TEST', status 'Active', and 'ROU | Agency No: 3536683'. To the right, it shows 'Assign Date: May 11, 2016', 'Status: CLR', 'Assign Amount: -\$13,060.00', 'Total Received: \$13,060.00', and 'Other Due: \$0.00'. Below this is a navigation bar with tabs: 'Overview' (selected), 'Account Information', 'Payment', 'Invoice', and 'Communication'. The main content area is divided into two sections. On the left is the 'Account History' section, which contains a list of activities with dates, times, descriptions, and desk names. On the right is the 'Annotate Account' section, which includes a text input field for comments and a 'Submit' button. Red boxes and numbers 1 through 5 highlight specific areas: 1 points to the top header bar, 2 to the navigation tabs, 3 to the 'Print Work History' and 'Export All Notes' buttons, 4 to the 'Account History' list, and 5 to the 'Annotate Account' section.

- 1 Account information:** All essential account details are displayed at the top of the screen, including the account name, amounts, status, and more.
- 2 Navigation Tabs:** Each account includes multiple tabs, allowing you to easily navigate between account history, payment details, invoice information, and more.
- 3 Options:** Several options are available, allowing you to search the account history, filter by date or status, print the work history, or export the data.
- 4 Account History:** This section provides a detailed view of the account's activity, including dates, status updates, and actions taken.
- 5 Annotation:** In this section, you can leave a note that will be instantly visible to the collector handling the account at that time.

ACCOUNT INFORMATION SUB-MENU

Overview Account Information Payment Invoice Communication

Account Information Client ID: TEST01 Client Ref No: 82323979-920285-SJS-CXT1

BALANCE DETAILS CURRENCY: USD

Principal Due -\$214.73	Principal Received \$0.00	Interest Due \$16.98	Interest Received \$0.00
-----------------------------------	-------------------------------------	--------------------------------	------------------------------------

Last Trust Date: Jun 11, 2024 | Interest Rate: 5.00% | Other Due: \$0.00 | Other Received: \$0.00

BUCKET DUE RANGE

<=0	1-30	31-60	61-90	91-120	121-180	181+
-\$214.73	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

DEMOGRAPHICS

Seq No.	Debtor Contact Person	Phone	Email	Address
01	TUCKER AUTO SALES	(863) 211-8401	anthony.buxter@cadex-solutions.com	Matrix Environmental, GRIFFITH, IN, 46319-3014, USA
02	TUCKER AUTO SALES	749380914	2@gmail.com	IND
03	--	(564) 123-1234	--	IND
04	--	(564) 123-1234	--	ITA

- 1 Balance Details:** This section provides a breakdown of key financial figures, including Principal Due, Principal Received, Interest Due, and Interest Received. You'll also find the Last Trust Date, Interest Date, and other relevant financial amounts.
- 2 Buckets:** The Bucket Due Range section displays outstanding balances categorized by aging periods, ranging from current to 181+ days, giving a clear view of how long amounts have been overdue.
- 3 Demographics:** This section contains contact information for the individual associated with the account, including their name, contact details, and physical address.

PAYMENT SUB-MENU

Overview Account Information **Payment** Invoice Communication

Payment [Pause] [Download] **4**

1 **Instruction To Payment**
Example: Credit card payments can be made by transferring the debtor to 1-800-000-0000. Checks should be mailed to PO BOX 500000, HOUSTON, TX 123456

Post Date ↓	Invoice	MOP	Amount	Commission	Remit#	Remit Date	
May 1, 2024	2015013887001	P	\$21.99	\$2.20	15032	Dec 7, 2018	[Note] 3
Aug 24, 2017	2015013669442-15	P	\$78.00	\$7.80	15032	Dec 7, 2018	[Note]
Apr 20, 2016	2015013669442-15	P	\$20.00	\$1.40	10402	May 11, 2016	[Note]
Total:	3		\$119.99	\$11.40			

- 1 Instructions for Payment:** This section allows you to enter instructions on how payments should be made. Use it to provide details such as accepted payment methods, contact information, or any other relevant guidance for processing payments.
- 2 Payment History:** Here, you'll find a comprehensive list of all received payments, including key information like Post Date, Invoice Paid, Payment Method, Amounts, Commission, Remit Number, and Remit Date.
Please note: The Post Date reflects the day the payment was processed in our system, which may differ from the actual payment date recorded in the client's system.
- 3 Payment Note:** By clicking the "Note" button, you can add notes to individual payments for extra context. When you click the note icon, a popup will appear where you can enter your note. Once added, you'll be able to view the note anytime by clicking the same button.
- 4 Customize & Export:** The columns shown in section 2 can be customized using the button in the top-right corner—allowing you to show or hide specific columns based on your preference. Additionally, a download button is available next to it, enabling you to export the data in XLS, CSV, or PDF formats.

INVOICE SUB-MENU

Overview Account Information Payment **Invoice** Communication

Invoice 1 **3**

Invoice	Bucket	Amount	Due	Issue Date ↓	Due Date	Status	Status Date	Promise Date
<input type="checkbox"/> 991188	181+	€999.00	€999.00	Jan 17, 2024	Feb 02, 2024	PTP 2	Apr 14, 2025	--
<input type="checkbox"/> 3664458339	181+	€394.83	€394.83	Jul 17, 2022	Aug 16, 2022	PROMISE TO PAY ARRANGEMENT	Apr 14, 2025	--
<input type="checkbox"/> 3664458343	181+	€99.00	€99.00	Jul 17, 2022	Aug 16, 2022	DRT	Jan 22, 2024	--
<input type="checkbox"/> 3664298793	181+	€74.90	€74.90	Jun 16, 2022	Jul 16, 2022	INR	Dec 07, 2023	--
<input type="checkbox"/> 3664298791	181+	€394.83	€394.83	Jun 16, 2022	Jul 16, 2022	NEW	Dec 06, 2022	--
<input type="checkbox"/> 3664135386	181+	€74.90	€74.90	May 17, 2022	Jun 16, 2022	NEW	Dec 07, 2022	--
<input checked="" type="checkbox"/> 4 3664135382	181+	€394.83	€394.83	May 17, 2022	Jun 16, 2022	PPA	Sep 15, 2023	--
<input type="checkbox"/> 3663991937	181+	€74.90	€74.90	Apr 16, 2022	May 16, 2022	DCH	Dec 15, 2022	--

INVOICE NOTES 5

Previous notes (00)

No notes available for this invoice.

Add note for Selected invoice **6** **1**

Write comment here...

Add Note

- 1 Invoice List:** This section displays a list of outstanding invoices, each containing essential details such as: Invoice Number, Bucket (age of the invoice), Total Amount, Due Amount, Issue Date, Due Date, Current Status, Status Date, and Promise Date (if applicable).
- 2 Invoice Status:** The status of each invoice is shown as a 3-letter code. Hovering your mouse over the status reveals its full meaning.
- 3 Search Box:** Use the search icon at the top to quickly find invoices in the list, by number, amount, or other criteria.
- 4 Invoice Selection:** To get started, select one or more invoices by checking the boxes.
- 5 Invoice Notes:** After selecting your desired invoices, you can view any existing notes linked to them. You'll also see how many notes have already been added to each invoice at a glance.
- 6 Comment:** You can leave a comment on one or multiple selected invoices to provide additional context or relevant details.

When selecting multiple invoices, you can view existing notes or add comments to all selected invoices at once. See the image below for details.

Invoice	Bucket	Amount	Due	Issue Date ↓	Due Date	Status	Status Date	Promise Date	
<input type="checkbox"/>	12508	<=0	\$123,390.94	\$123,390.94	Apr 25, 2019	--	PTB	Apr 18, 2024	--
<input checked="" type="checkbox"/>	12507	<=0	\$123,389.94	\$123,389.94	Apr 24, 2019	--	--	--	--
<input checked="" type="checkbox"/>	12506	<=0	\$123,388.94	\$123,388.94	Apr 23, 2019	--	--	--	--
<input checked="" type="checkbox"/>	12505	<=0	\$123,387.94	\$123,387.94	Apr 22, 2019	--	--	--	--
<input type="checkbox"/>	12504	<=0	\$123,386.94	\$123,386.94	Apr 21, 2019	--	--	--	--

INVOICE NOTES

Previous notes (02)

Apr 29, 2025 | 10:48

Client responded on invoice number(s) 12506,12507,12505: T for all 3 selected invoices

User : Rani Sharda

Invoices : 12506 +2

12506 | 12507 | 12505

Add note for Selected invoice

Write comment here...

- 1 Multiple Invoice Selection:** Select all the invoices you want to add notes to by checking each individual box.
- 2 Previous Notes:** Quickly see how many notes have already been left on the account.
- 3 View Notes:** Scroll through the available list to read previously added notes.
- 4 Noted Invoices:** Review which invoices already contain notes and see the total number noted.
- 5 Add Comment:** Type your new comment in this field, for the selected invoices. You can also confirm the number of invoices being updated by checking the count displayed on the right, which should match your selection.

COMMUNICATION SUB-MENU

Overview Account Information Payment Invoice Communication

Communication

CALLS **1** **2** [^ Hide All](#)

Date ↓	Time	Duration	Phone
Apr 22, 2025	16:54:52 to 16:55:08	00:00:15	9098456463
Apr 22, 2025	16:41:43 to 16:42:44	00:01:01	7702559000
Apr 22, 2025	16:40:17 to 16:40:46	00:00:28	7702559000
Apr 22, 2025	16:39:09 to 16:40:02	00:00:52	7702559000
Apr 22, 2025	16:33:34 to 16:34:07	00:00:33	9098456463
Apr 22, 2025	16:09:22 to 16:09:36	00:00:13	9098456463

EMAILS [View All](#)

PHYSICAL LETTERS [View All](#)

Overview Account Information Payment Invoice Communication

Communication

CALLS [View All](#)

3 **4** [^ Hide All](#)

Time ↓	Email	
Apr 03, 2025 13:31	qcadex@gmail.com	View Details
Mar 29, 2025 14:47	ankit.chauhan@cadex-solutions.com	View Details
Mar 24, 2025 19:00	qcadex@gmail.com	View Details
Mar 20, 2025 13:30	qcadex@gmail.com	View Details
Mar 18, 2025 00:00	qcadex@gmail.com	View Details
Mar 17, 2025 15:42	qcadex@gmail.com	View Details

PHYSICAL LETTERS [View All](#)

COMMUNICATION SUB-MENU

The screenshot displays an email client interface. At the top, a green header contains the text "COMMUNICATION SUB-MENU". Below this, an email window is shown with a red border. The email header includes a "Subject" line: "PRODUCTION_ TEST EMAIL: Document Request – TEST vs. Test Name Account 汉字 | 0001916_CDX# | Principal Balance: €13,267.11". The "From" field is "cadex-support@cadex-solutions.com" and the "To" field is "qcadex@gmail.com". The body of the email starts with "Good evening," followed by a paragraph: "Third-party collection efforts have been fully exhausted. This account is now being moved to our legal team for further handling. However, supporting documentation is needed." Below this, it says "Please provide the following documents:" followed by a bulleted list: "• Debtor Correspondence with Client". The email concludes with "Please include any other documentation that you may have on file but that we have not specifically requested." Below the email window, a navigation bar shows "Overview", "Account Information", "Payment", "Invoice", and "Communication" (which is highlighted). Under "Communication", there are three sections: "CALLS" with a "View All" button, "EMAILS" with a "View All" button, and "PHYSICAL LETTERS" with a "Hide All" button. A red box highlights the "PHYSICAL LETTERS" section, which contains a table with two columns: "Time" and "Note". The table has two rows: one for "Oct 20, 2015 | 16:16" with the note "Sent letter PDC - PDC LETTER", and another for "Apr 16, 2007 | 16:28" with the note "Sent letter 001 - PLACEMENT LETTER- NEW 2006".

- 1 **Calls:** The Calls section displays a complete history of calls made on the account, including key details such as the call date, duration, and phone number used.
- 2 **Expandable Sections:** Each section can be expanded or collapsed by clicking the button on the right side, allowing you to focus only on the information you need.
- 3 **Email History:** This section shows a record of emails sent and received, along with the dates and email addresses involved.
- 4 **View Full Emails:** To view the full content of an email sent to a debtor, simply click “View Details”.
- 4.1 **Email Correspondence:** Once you click the “View Details” button in step #4, the full email thread will be displayed.
- 5 **Physical Letters:** Any physical letters sent are also stored here. You’ll see the date the letter was sent along with a brief note or description.

Navigation Menus, Sub-Menus and Buttons

Reports

Accounts

Reports

Placements

Resources

The **Reports menu** gives you access to a variety of powerful reporting tools that provide key insights into your account activity. You can generate reports on-demand or schedule them to be automatically delivered to your email at your preferred frequency.

These reports help you track what's been achieved, how much has been collected, what remains outstanding, and give you a real-time snapshot of your financial performance. This makes it easier to estimate revenue, monitor progress, and stay organized across your company. Let's take a closer look!

The screenshot shows the 'Reports' section of a web application. At the top left, the word 'Reports' is displayed. To its right is a navigation bar with buttons for 'Accounts', 'Reports' (highlighted in green), 'Placements', and 'Resources'. Below this, a 'View Schedules' button is highlighted with a red box and labeled '5.1'. A horizontal row of report type buttons is highlighted with a red box and labeled '1': 'Collection Summary' (selected with a green dot), 'Status', 'Payment', 'Paid File', 'Awaiting Client Response', and 'Client Dashboard'. Below this row, there are two input fields: 'Project' with a dropdown menu labeled 'Select Project' (highlighted with a red box and labeled '2') and 'Time Interval' with a dropdown menu labeled 'Last 6 months' (highlighted with a red box and labeled '3'). To the right of these fields are two buttons: a green 'View Collection Summary Report' button (highlighted with a red box and labeled '4') and a white 'Schedule Report' button (highlighted with a red box and labeled '5').

1

Choose a Report Type: At the top of the screen, you'll find options for various report types. You can select from:

- Collection Summary
- Status-Based Reports
- Payment Reports
- Paid Files
- Awaiting Client Response
- Client Dashboard

2

Select a Project: Use the drop-down menu to select the project you want to view. If your business operates across regions or segments (e.g., North America, Europe, or different business lines), you may see multiple options — select the one that applies.

3

Set a Time Interval: Choose the reporting period: 6, 12, 18, or 24 months.

4

Generate the Report: Click the green button to view your selected report directly in your browser.

5

Schedule Automated Reports: You can schedule reports to be automatically generated and sent to your email address.

5.1

View Schedules: Go to View Schedules to view and edit your report schedules.

Schedule Report

5.2

Report Name and User Email
Collection_Summary_Report_benjamin.price@cadex-

5.3

Send To Email*
benjamin.price@cadex-solutions.com

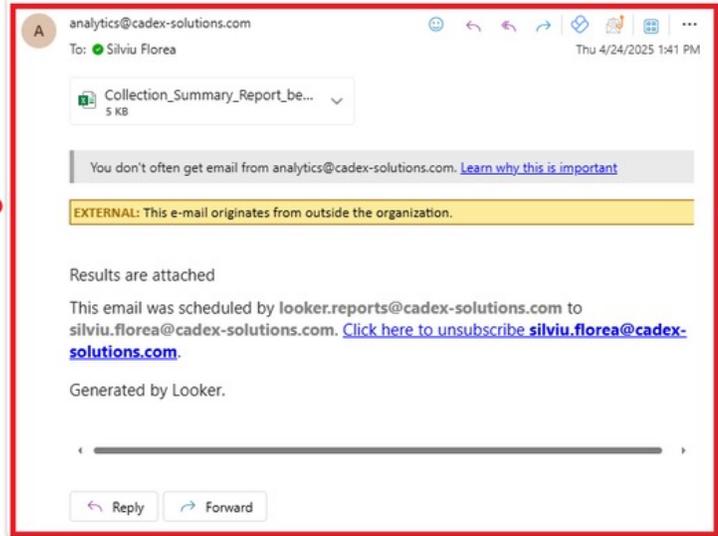
5.4

Timezone is CST
 Daily Weekly Monthly
On:
Day
Monday
At:
Hour: 1 Minute: 01

Cancel

Schedule Report

5.5



5.6

Reports > Scheduled Reports

Scheduled Reports 5.7

5.8

Report Name	Start Date ↑	End Date ↑	Email Send To	Delete
Collection_Summary_Report_benjamin.price@cadex-solutions.com	Oct 23, 2024	Apr 23, 2025	silviu.florea@cadex-solutions.com	

Schedule Reports Settings

5.2

Subject Line: The report name (shown in the email subject) and user email will be displayed in this section.

5.3

Email Input: Enter the desired email address in the provided field.

5.4

Schedule Settings: Choose how often you'd like to receive the report—daily, weekly, or monthly—by adjusting the scheduling settings.

5.5

Confirmation: Once you've configured your preferences, click the green Schedule button.

5.6

Delivery: The report will be delivered to your inbox based on the schedule you selected.

5.7

Overview: View the details of all your scheduled reports in this section. You'll arrive at this page after clicking the button shown in section 5.1.

5.8

Remove Report: To stop receiving a specific report, simply click the trash/delete icon to remove it from the schedule.

Navigation Menus, Sub-Menus and Buttons

Placements

Accounts

Reports

Placements

Resources

The screenshot shows the 'Placements' page interface. At the top, there are navigation tabs: 'Placements' (49), 'Invoices' (0), and 'Payments File' (0). To the right are two buttons: 'Submit Invoice/Payment File' (6) and 'Submit Placement' (7). Below the tabs is a table with columns: 'File Name', 'Last Modified', and 'Action'. The table contains five rows of files. A red box highlights the first row, and a red box highlights the download icon in the 'Action' column of that row. The numbers 1 through 7 are placed around the interface to indicate the callout locations.

1	2	3	6	7
File Name			Last Modified ↑	Action
20250227123051-placement_template__5_-_Copy.xlsx 9.3 KB			Feb 27, 2025 07:00	5
20250227123051-rani.sharda@cadex-solutions.com.csv 394.0 B			Feb 27, 2025 07:00	
20250224092818-rani.sharda@cadex-solutions.com.csv 394.0 B			Feb 24, 2025 03:58	
20250224092818-placement_template_Nov13_-_Copy.xlsx 10.5 KB			Feb 24, 2025 03:58	
20250224091819-20250224071037-Testing_Placement.xlsx 9.8 KB			Feb 24, 2025 03:48	

- 1 Placements:** This tab displays all accounts that have been placed within the portal, along with the total number of placements.
- 2 Invoices:** This section contains all invoices that have been uploaded to the portal.
- 3 Payments File:** This tab shows files that include payment information and updates that have been uploaded.
- 4 File List:** View the complete list of files uploaded to the Placement section here.
- 5 Download:** Each individual file can be downloaded by clicking the Download button under the Action column.
- 6 Submit Invoice/Payment File:** To submit invoices or payment files, click the button with the same name. More details below, on section 6.1.
- 7 Submit Placement:** To submit placements, use the Submit Placements menu on the top right corner. More details below, on section 7.1 and 7.2.

6.1

Upload Invoice/ Payment File: After selecting the document type (Invoice or Payment File), drag and drop your files into the designated area and click Submit. Alternatively, you can click Select Files to browse and upload from your computer.

6.1

7.1

Upload Placement: After selecting your placement file, drag and drop it into the upload area and click Submit. Alternatively, click Select Files to upload from your computer. Supported formats include .CSV and .XLS. You can upload multiple files at once.

7.1

7.2

Enter Placement Manually: If you prefer to enter placements manually, a new screen will appear where you can fill in the required fields with the necessary details. once.

7.2

Account Details		
Account Name *	Account No. *	Contact
Enter Account Name	Enter Account No.	Enter Contact Name

Contact Details		
Country	State	City
Select Country	Enter State	Enter City
Address	ZIP	Phone No.
Enter Address	Enter ZIP	Enter Phone No.

Invoice Details		
Last Invoiced	Last Payment	Total Placed
Select Last Invoice	Select Last Payment	Enter Total Placed

Navigation Menus, Sub-Menus and Buttons

Resources

Accounts

Reports

Placements

Resources

The **Resources section** will include a variety of helpful materials for clients, such as training guides, instructional videos, and other relevant documentation and information.

Resources

Click the links below to access the guides



Client Portal Guide

Version V1.0
Last Updated 5/1/25



Clicking on any of the linked resources will open the document or video directly. Just click the red-highlighted area in the image above to access the content. This page will be updated regularly with additional information and helpful guides.



Contact Us!



Website

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