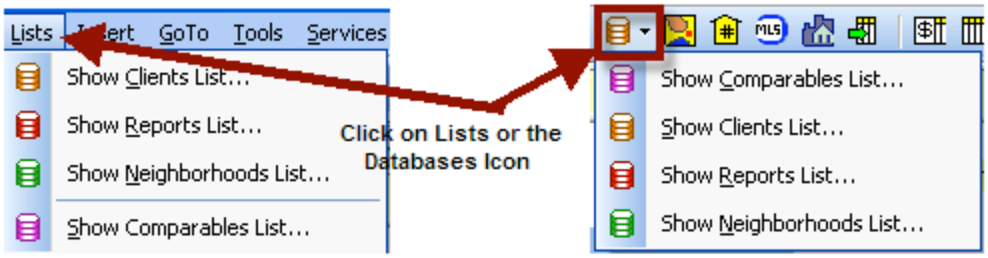
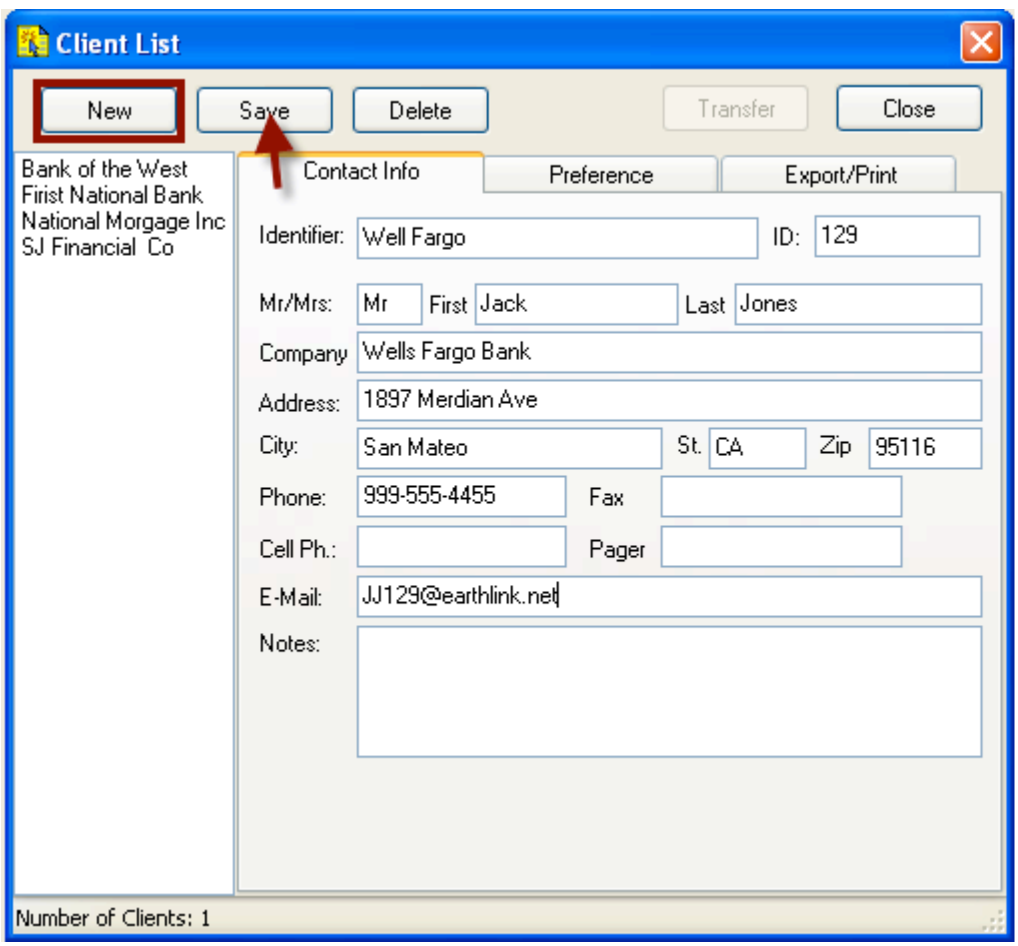
Client Lists Instructions

To add a new Client to the Client Database:

1. In ClickFORMS, Click on Lists, Show Clients List or click on the Database icons on the Task Bar and select Show Clients List…

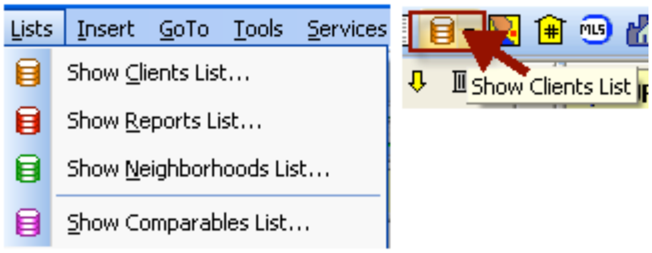


2. To add a new Client, Click on [New] and then enter the Clients information and enter a Quick Lookup Identifier, Click on [Save].

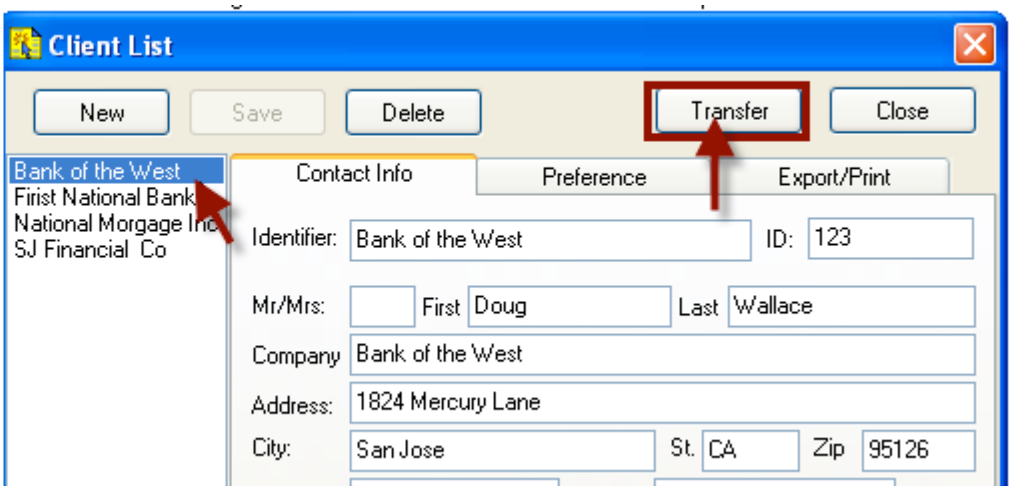


To transfer a Client to your report:

1. In ClickFORMS, Click on Lists, Clients List or the Clients Database Icon



2. In the Clients Quick Look-up List, Click on the Client or type the first letter or two of the Client/Lender Name on the Keyboard you wish to Transfer to your Report then Click on [Transfer].



3. The data is transferred to the appropriate cells in the Report.