



## Directions for New Placements Electronically

- Go to New placement drop down menu, click view placements for FCN

Client View New Account Inquiry Reports New Placements History File Messages

Client View Account Inquiry View Placements For: FCN

- Click drop down arrow for Client Number
- Choose the client code you would like to use for the new accounts you are adding

Client Number Search

Please select a client number to search for or process pending placements

Client Number:

Client Number

- TEST - TEST CLIENT
- TESTCL - TEST CLIENT
- TESTCL2 - TEST CLIENTS
- TESTSC - TEST SCHOOL

Placements

Pending Id	Name (Last, First)	Record	Remove Record
No items to show.			

- Click Add Record

Client Number Search

Please select a client number to search for or process pending placements

Client Number:

Placements

Pending Id	Name (Last, First)	CLI REF#	Print Assigned	<input type="button" value="Add Record"/>	<input type="button" value="Edit Record"/>	<input type="button" value="Remove Record"/>
No items to show.						

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- You will see an electronic assignment sheet – Please complete as much information as possible.
- In the name field please add
  - Last name, First Name
- If the label is **BOLD** it is a mandatory field and will not let you proceed until it is complete.
- Once sheet is complete click SAVE

Client Number : TESTCL - TEST CLIENT

Pending Id :

Borrower Information	Account Information
<b>Name (Last, First) :</b> Test,Test	<b>CLI REF# :</b> 123456
Name2 (Last, First) :	<b>Prin Assigned \$ :</b> 245.00
<b>ADDRESS :</b> 1300 W Main Street	Asgn Interest \$ :
ADDRESS2 :	<b>LST CHG DT :</b> 01-01-2015
<b>CITY :</b> Visalia	LST PAY DT :
<b>ST :</b> CA	
<b>ZIP :</b> 93291	
<b>PHONE :</b> 000-000-0000	
SSN : 000-00-0000	
DOB :	
DRL# :	

Employer Information	Comments
<b>EMP NAME :</b> We want to know	This is a test account
<b>EMP ADDR :</b>	
<b>EMP CSZ :</b>	
<b>EMP PHN :</b>	

- Once you have clicked save
- Use the drop down arrow to choose the Client Code you used
- click SEARCH
- You will see the account you just entered pop in the bottom window

Please select a client number to search for or process pending placements

Client Number : TESTCL - TEST CLIENT




Placements for TESTCL			
Pending Id	Name (Last, First)	CLI REF#	Prin Assigned
1020	TEST,TEST	123456	245.00

- Once you are happy with the account you just added
- Click Process Pending

Client Number Search

Please select a client number to search for or process pending placements

Client Number:

Placements for TEST  Add Record  Edit Record  Remove Record

Pending Id	Name (Last, First)	CLI REF#	Prin Assigned
1023	TEST	123	124.00