BIBBY
FINANCIAL SERVICES

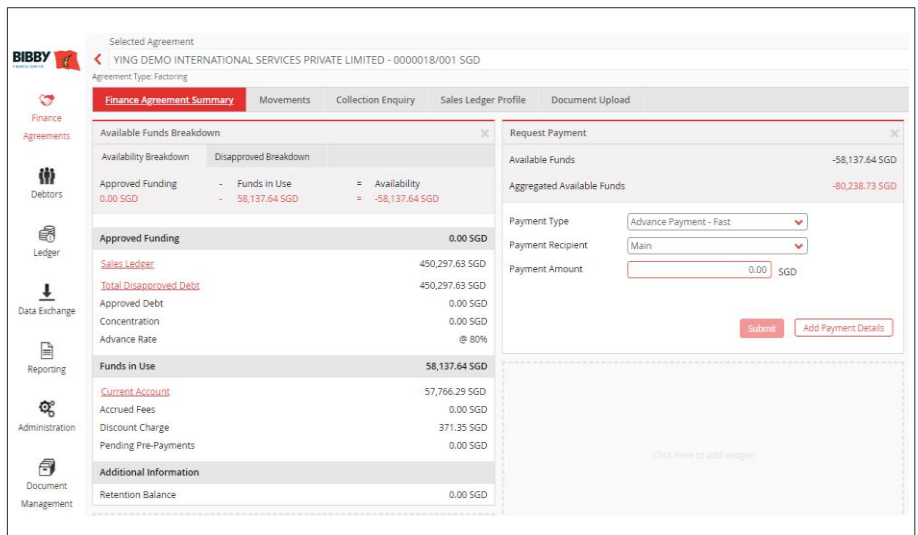

CLIENT ONLINE QUICK START GUIDE

This guide has been designed for previous users of the Client Online portal and gives a summary of the key functionality improvements that have been made to the system.

WIDGETS

The Finance Agreement and Debtor screen now have inter-changeable sections (widgets). The default screen for the Finance Agreement is shown opposite.
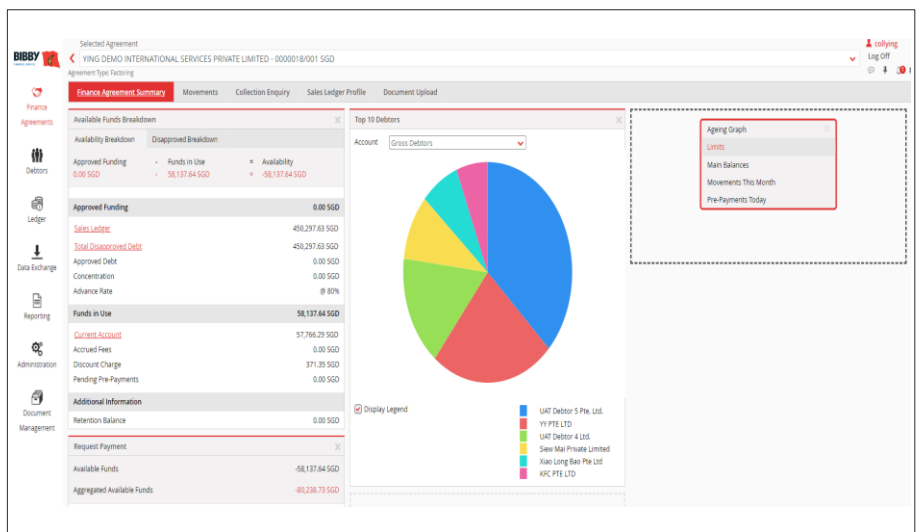
'Click' on an empty box for the option to add widgets from the available list. Similarly, you can remove an item by pressing the 'X' in the top right corner of the box.

Once widgets are selected, they will remain in place for future logins.

DEBTOR SEARCHES

You are now able to see all debtors from a drop down menu as shown opposite:

Alternatively, you can enter the details of the debtor in the search field.

VIEWS

You now have the ability to customise grid views. Remove or add the columns you want to see by selecting the 'tick' button. To remove the tick just 'click' on the line.

EXPORT

The drop down button indicates the data you are viewing can be downloaded.

You can set the format and column data you wish to download.

FILE UPLOADS

To send a file upload for either a new debtor or schedules, navigate to 'Data Exchange' and select 'Upload Files'. You can either search and select the required file, or drag and drop the file as required.

There is a change in the File upload formats.

Step by step learning is available on the Client area of our website: www.bibbyfinancialservices.sg
If you have any further questions or need additional support please contact a member of your Relationship Team.