

# Client Management Database

## MortgageClientsXP User Guide

<b>Starting for the First Time.....</b>	<b>2</b>
<b>Converting Your Data From a Previous Version.....</b>	<b>4</b>
<b>Main Menu .....</b>	<b>6</b>
<b>Manage Clients .....</b>	<b>8</b>
2nd Mortgage Screen.....	10
Address Screen.....	11
Phone Screen .....	12
Notes Screen .....	13
<b>Find Contacts.....</b>	<b>15</b>
Mail Merge / Letters .....	17
Mail Merge Options .....	17
Letters / Envelopes / Labels .....	18
Writing Letters .....	19
Manage List of Letters .....	19
Create Letter as Word Document.....	20
Adding New Letters .....	22
<b>Open / Create Client Database.....</b>	<b>23</b>
Open Database .....	24
Create Database .....	25
<b>Reports Menu.....</b>	<b>26</b>
<b>Preferences .....</b>	<b>27</b>
<b>Backing Up Your Data .....</b>	<b>28</b>

Contact: [clientdatabase@rogers.com](mailto:clientdatabase@rogers.com)

## Starting for the First Time.

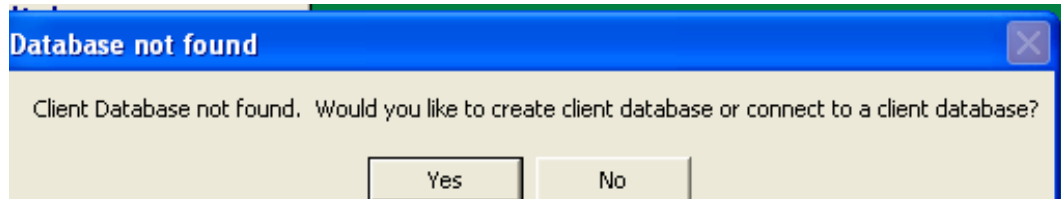
**Important Note:** The steps in this document assume that you have already copied the program to your computer. If you have not already setup the program on your computer, you should go to the support web site <http://clientdb.softmv.com> and look at the Database Initial Setup document.

You can start your program in 2 ways:

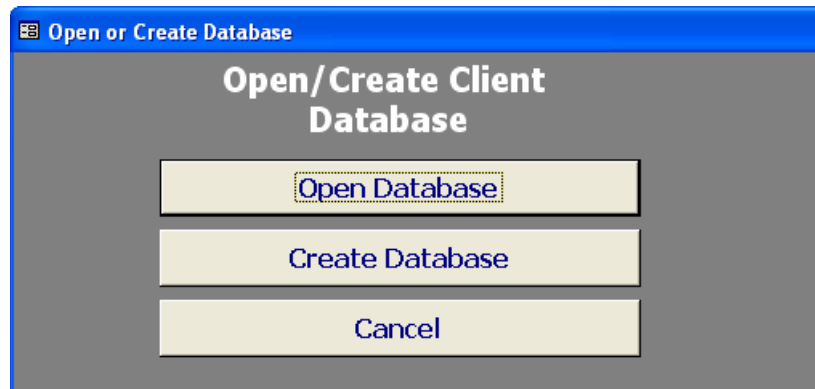
1. **Double-click on the shortcut** that you created during your setup

OR

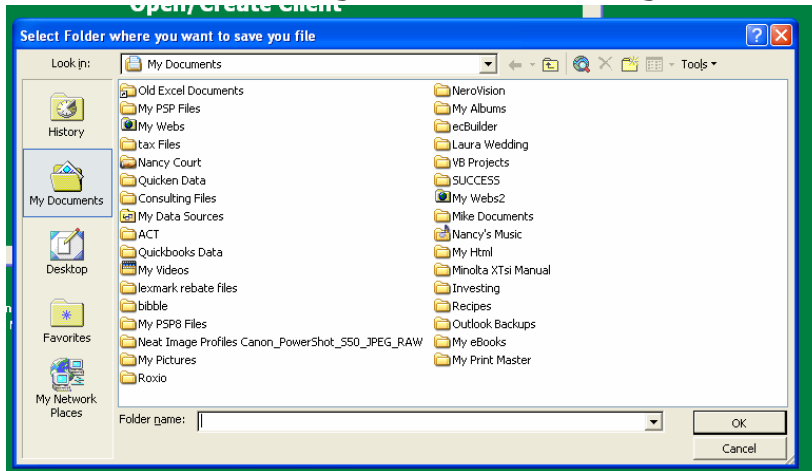
1. Start **Microsoft Access**, or click on the new shortcut that you have just created.
2. In Microsoft Access, choose to **open** the database **ClientProgramXP**, from the folder that you copied it to.
3. When the program starts, it will ask you to create a client database. Click **YES**.



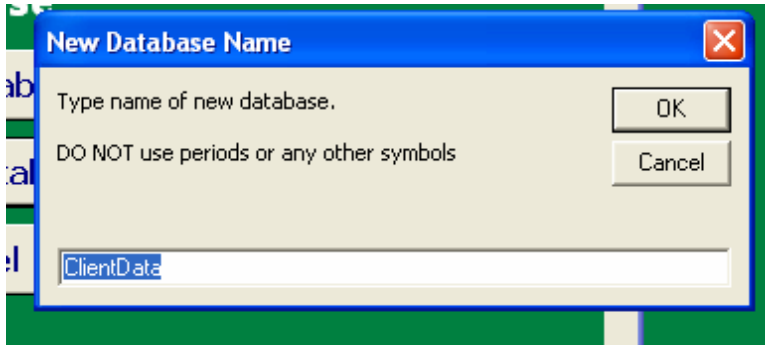
4. Click on **Create Database**



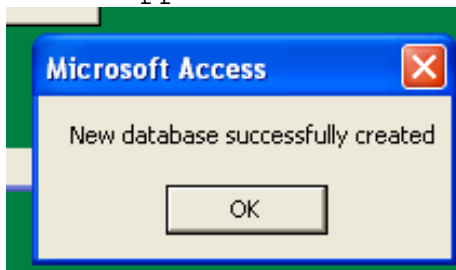
5. Choose folder where you want to create your new client database. Click **OK**. (suggestion: don't change folder name, just click OK immediately)



8. The message below will be displayed. Type a name for your new database. Click **OK**.



9. This message will appear.

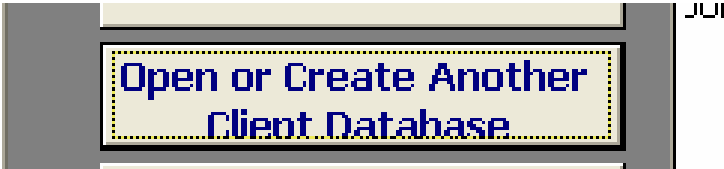


## Converting Your Data From a Previous Version

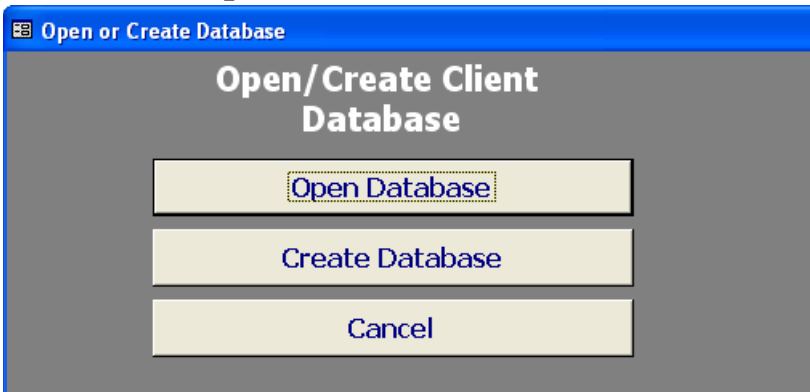
If you are new user to the Client Database, then skip this section.

If you have used a previous version of the Client Database, then you can follow these screens to upgrade your data to the new version.

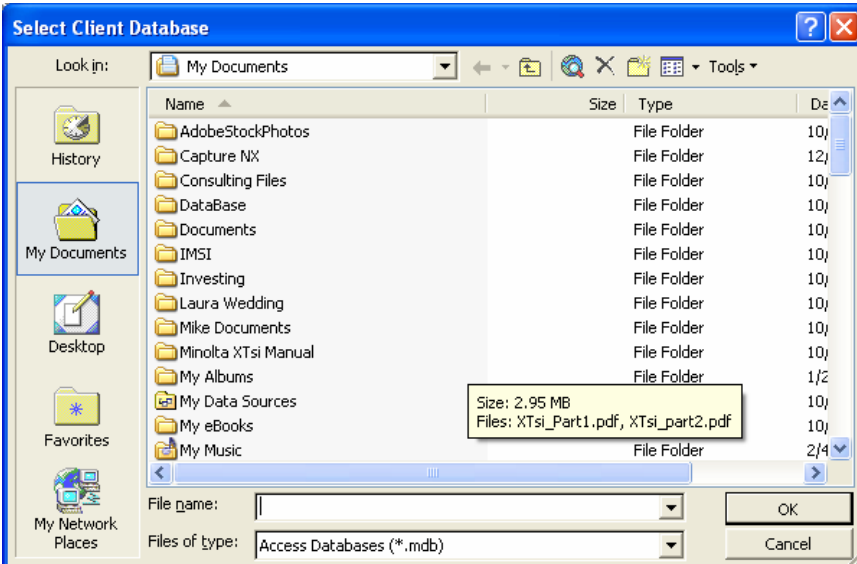
1. You may asked to open a database when you start the program, if you were not asked then click on **"Open or Create Another Client Database"** from the main menu.



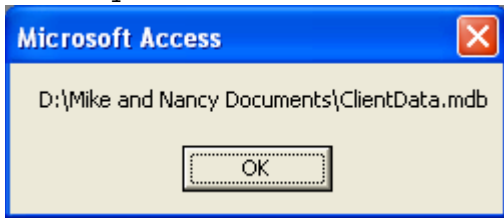
2. Choose **"Open Database"**



3. Find your data database in the normal manner, by go to folder where your data is contained. Then double-clicking on you database.



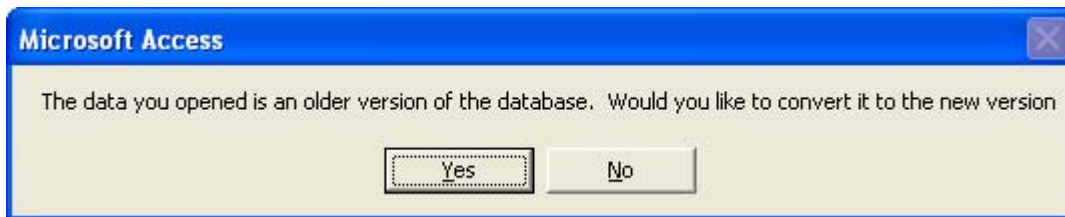
4. If you have opened a valid database then you will be given a message very similar to this message:



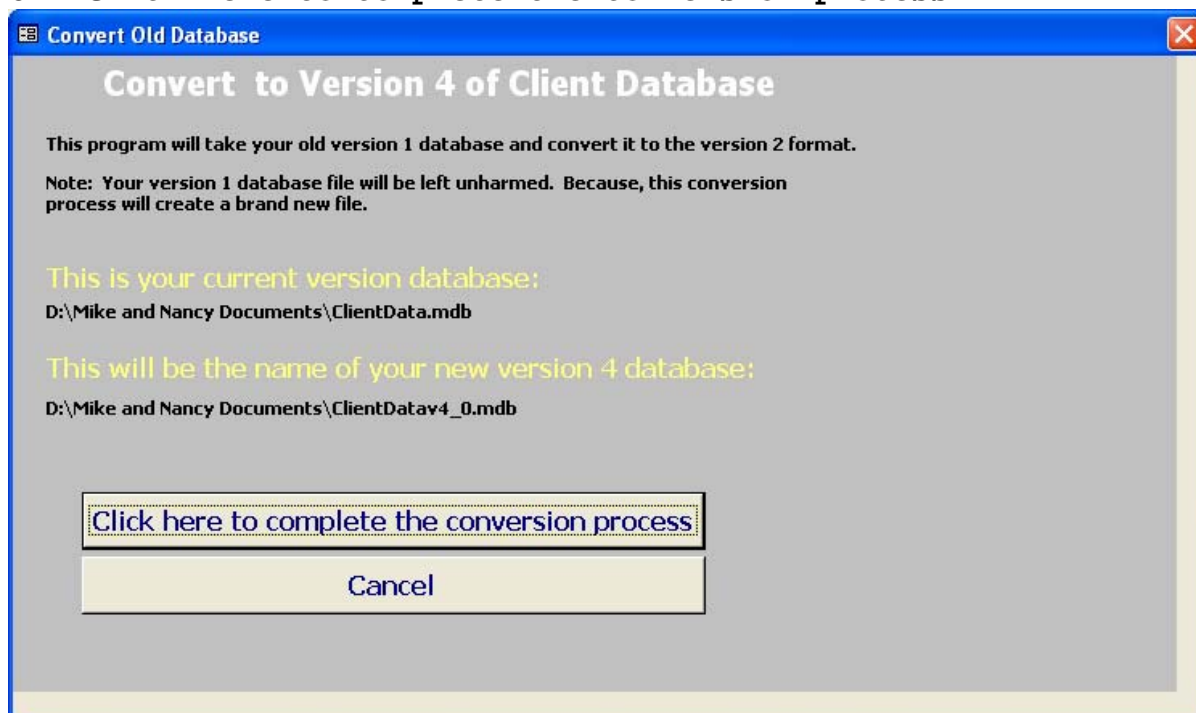
5. You will then be told that the database is from a different version, click "OK":



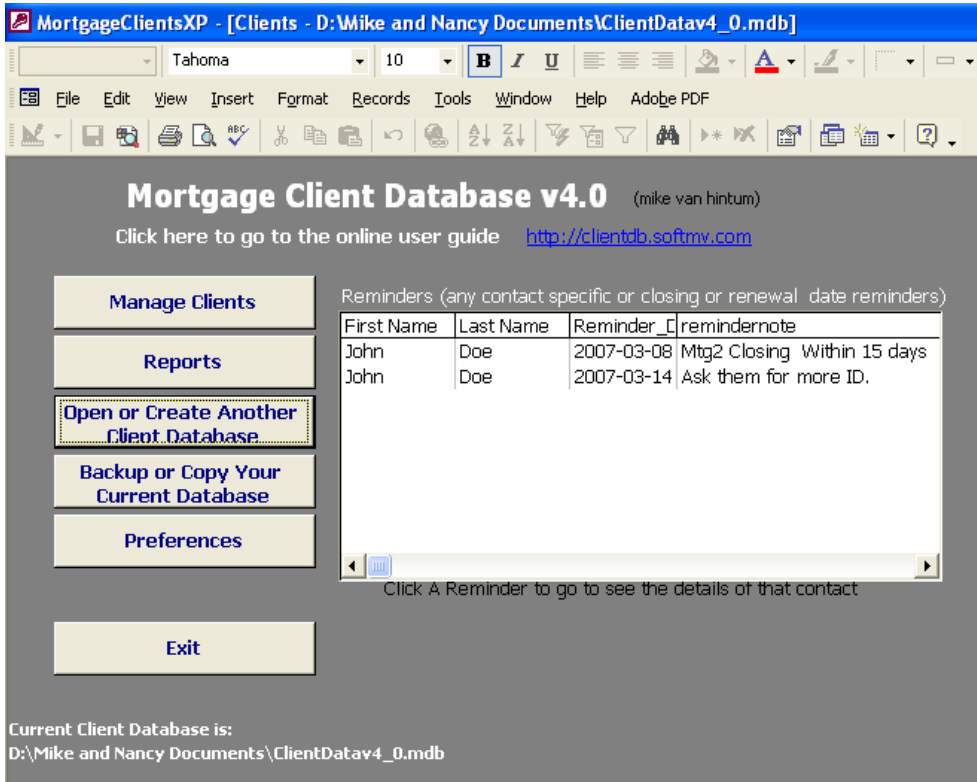
6. Then you will be asked to confirm the conversion to the new version of the database:



7. You will now be told what the new name of your database will be. Click on "Click Here to complete the conversion process":



# Main Menu



- **Manage Clients**
  - Choose this option to:
    - Add/Update clients
    - Email Clients
    - Create Mail Merges
    - Create Letters/Labels (through mail merge function)
    - Create Excel Spreadsheet of your clients (through mail merge function)
- **Reports**
  - Choose this option to print reports by various methods
- **Open or Create Another Client Database**
  - Choose this option to create a different database of clients, or to open a client database that you have already created
- **Backup or Copy Your Current Database**
  - This is an easy way to make a copy of your data to another location
- **Preferences**
  - Choose this option to change your database preferences
- **Helpful Weblinks**
  - A list of helpful websites that might help with your day to day processing

- **Reminders**

- If you have your preferences setup to show you closing and renewal reminders, then they will show up here.
- This reminders list will also show any custom reminders that you have setup for a client. (see the reminders setup screen further in this document)

## Manage Clients

This screen is your main working screen.

Choose a client from the list on the left, and their information will show on the right.

You have a choice of showing both '1<sup>st</sup> Person' and '2<sup>nd</sup> Person' in your list. You can turn this on and off from your Preferences, in the main menu.

- **Reset List / Show All**
  - This will reset the list so that it shows every client in your database
- **Find Contacts**
  - This will bring show you a 'Contact List Criteria' screen, which will allow you to find contacts by date, name, birth date, etc,...
- **Mail Merge / Letters**
  - Choose this option to create the mail merge database, and then go through the process of creating letters/envelopes or labels

- **New Contact**
  - Creates a new contact
  
- **Send eMail**
  - Choose this option to send an email to your clients, you have the option of sending to all contacts in your list or just one contact
  
- **Delete Contact**
  - Delete the currently selected contact
  
- **Print Contact**
  - Print the currently selected contact

## 2nd Mortgage Screen

The screenshot shows the 'MortgageClientsXP - [Contacts]' application window. The main area displays the '2nd Mortgage' screen for a client named John Doe. The form includes fields for personal information, mortgage details, and a notes section.

Prefix	First Name	Last Name	Date of Birth:	
1st Person	Mr.	John	Doe	2000-01-01
2nd Person	Miss	Jane	Doe	1999-01-01

Status: Active

**Mortgage 2**

Underwriter	The Underwriter	Underwriter Logon	xxxxx	WAPP #	4563
Project/Agent	Ron Jones	Builder/Office	Main Office		
Bank	Bank of Mon	Mtg. Amount	\$45,689.00	Closing Date	2007-03-08
Transit	4568	Orig Purch. Price	\$100,000.00	Renewal Date	2007-07-01
Mtg. #	66996699	Term	2 Years	Approval Date	2006-12-31
Mtg Type	HELOC	Rate	5	Referral Source	client referral
Mtg. Buyer Type	1st Time	LTV	45.69%	Insurance Sold	No
Mtg. Reason	Refinance				

Mortgage Notes

The 'Mortgage 2' makes it easy to associate a second mortgage with a client.

## Address Screen

The screenshot shows the 'Address Screen' in the MortgageClientsXP application. The window title is 'MortgageClientsXP - [Contacts]'. The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help, Adobe PDF) and a toolbar. On the left, a contact list shows 'Doe, Jane' selected. The main form area is divided into two columns for 'Doe, John' and 'Doe, Jane'. The form includes fields for Prefix, First Name, Last Name, Date of Birth, Status, and Address (Street Address, City, Province, Postal Code). The 'Address' tab is active, showing the address details for the selected contact.

Prefix	First Name	Last Name	Date of Birth:
Mr.	John	Doe	2000-01-01
Miss	Jane	Doe	1999-01-01

Status: Active

Mortgage 1	Mortgage 2	Address	Phone	Notes	Reminders	Summary
		<p><b>Doe, John</b></p> <p>Street Address: 123 Anywhere Street</p> <p>City: Barrie</p> <p>Province: ON</p> <p>Postal Code: L0M 1S0</p>				
		<p><b>Doe, Jane</b></p> <p>Street Address: 123 Other Street</p> <p>City: Toronto</p> <p>Province: ON</p> <p>Postal Code: X0X 0X0</p>				

Form View FLTR NUM

The 'address' screen allows you to enter multiple addresses for a client.

## Phone Screen

The screenshot shows the 'MortgageClientsXP - [Contacts]' application window. The main form is titled 'Doe, Jane' and is currently on the 'Phone' tab. The form contains the following fields and sections:

- Personal Information:**
  - Prefix: Mr. (dropdown)
  - 1st Person First Name: John (dropdown)
  - 1st Person Last Name: Doe (dropdown)
  - 1st Person Date of Birth: 2000-01-01 (text)
  - 2nd Person Prefix: Miss (dropdown)
  - 2nd Person First Name: Jane (dropdown)
  - 2nd Person Last Name: Doe (dropdown)
  - 2nd Person Date of Birth: 1999-01-01 (text)
  - Status: Active (dropdown)
- Mortgage Information:**
  - Mortgage 1: (dropdown)
  - Mortgage 2: (dropdown)
- Address and Phone:**
  - Address: (dropdown)
  - Phone: (dropdown)
- Notes and Reminders:**
  - Notes: (dropdown)
  - Reminders: (dropdown)
  - Summary: (dropdown)
- Call Log:**
  - Date Last Called: 2000-01-01 (text)
- Contact Details:**
  - Doe, John:**
    - Home Phone: 555-555-1212
    - Work Phone: (555) 555-1212 (area code) 1234 (number)
    - Cell Phone: (555) 555-1212
    - Fax: (555) 555-1212
    - Email: me@home.com
    - Other Phone: (text)
  - Doe, Jane:**
    - Home Phone: (666) 121-2122
    - Work Phone: (text)
    - Cell Phone: (text)
    - Fax: (text)
    - Other Phone: (text)
- Contact Notes:**
  - Contact me (text)

At the bottom of the window, there is a status bar with 'Form View', 'FLTR', and 'NUM' indicators.

The 'phone' screen allows you to keep various types of contact method for your clients.

You may also keep additional contact notes here.

## Notes Screen

The screenshot shows the 'MortgageClientsXP - [Contacts]' application window. The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help, Adobe PDF), a toolbar, and a main content area. On the left, a list of contacts is shown: 'Doe, Jane', 'Doe, John', and 'Smith, John'. The main area displays the details for 'Doe, John'. The 'Notes' tab is selected, showing a text area with the placeholder 'Put notes here'. Other tabs include 'Mortgage 1', 'Mortgage 2', 'Address', 'Phone', 'Reminders', and 'Summary'. The status is 'Active'. A bottom status bar shows 'Form View', 'FLTR', and 'NUM'.

	Prefix	First Name	Last Name	Date of Birth:
1st Person	Mr.	John	Doe	2000-01-01
2nd Person	Miss	Jane	Doe	1999-01-01

Status: Active

Mortgage 1 | Mortgage 2 | Address | Phone | **Notes** | Reminders | Summary

Put any additional notes here that pertain to this contact or mortgage

Put notes here

Form View FLTR NUM

Use the 'Notes' screen to add any additional notes that you might have.

## Reminders Screen

The screenshot shows a web application window titled "MortgageClientsXP - [Contacts]". The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help, Adobe PDF) and a toolbar with various icons. On the left, a contact list shows "Doe, Jane" selected. The main area displays the contact details for Jane Doe, including fields for Prefix (Mr.), First Name (John), Last Name (Doe), and Date of Birth (2000-01-01). Below this, there are tabs for Mortgage 1, Mortgage 2, Address, Phone, Notes, Reminders, and Summary. The Reminders tab is active, showing a table with columns for Reminder Date, Reminder Text, and Cancel Reminder. The first row has a date of 2007-03-14 and the text "Ask them for more ID.". Below the table, there are instructions: "You can enter up to three reminders. Reminders will begin appearing in the reminder list 15 days before the reminder date. The reminder will remain in your reminder list until you explicitly click the cancel check box." At the bottom, there are status indicators for "Form View", "FLTR", and "NUM".

Reminder Date:	Reminder Text:	Cancel Reminder
2007-03-14	Ask them for more ID.	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

**You can enter up to three reminders.**  
**Reminders will begin appearing in the reminder list 15 days before the reminder date.**  
**The reminder will remain in your reminder list until you explicitly click the cancel check box.**

Use the 'Reminders' screen to remind yourself of anything related to your contact.

# Find Contacts

This screen is called from various places. It helps you find contacts, and then returns the list to your Contacts screen or your reports screen.

**Contact List Criteria**

**Contact Status**

Includes

Excludes

**Searching Contacts and Mortgages**

Choose all your criteria, any combination of any item. Then click on 'Refresh Preview'. When you are finished, click 'Finish and Return', which finishes your search and returns you back to your contacts.

Help

**Contact Specific**

**Contact Search Scope**

Both 1st and 2nd Contact

1st Contact Only

2nd Contact Only

**Name Search**

Last

First

**Address Search**

Address

City

**Birthday Search**

Birthday Month

Birthday Year

**Date Of Birth Range**

Begin Date

End Date

**Age Range**

Min. Current Age

Max. Current Age

**eMail Search**

Email

Click this just to find contacts with blank emails or emails missing.

**Other Fields**

**Date Last Called Range**

Begin Date

End Date

**Date Added Range**

Begin Date

End Date

**Mortgage Specific**

**Mortgage Search Scope**

Both 1st and Second Mortgage

1st Mortgage Only

2nd Mortgage Only

Click Here For Search Hints

**Renewal Date Range**

Begin Date

End Date

**Renewal Search**

Renewal Month

Renewal Year

Renews in this many days

**Closing Date Range**

Begin Date

End Date

**Closing Search**

Closing Month

Closing Year

Closes in this many days

**Approval Date Range**

Begin Date

End Date

**Mortgage Amount Range**

Min. Amt.

Max. Amt.

**Mortgage Orig. Price Range**

Min. Amt.

Max. Amt.

**LTV. Range**

Min. LTV

Max. LTV

Refresh Preview

Finish and Return

Cancel

Showing 3 names, from 2 of 2 contacts.

Doe, Jane

Doe, John

Smith, John

Preview of Contacts

Underwriter

Wapp #

Project/Agent

Builder/Office

Bank

Transit

Rate

Term

Mortgage Type

Mtg. Buyer Type

Mtg. Reason

Referral Source

Insurance Sold

1. Choose the information you want to find. For example, for everyone with a Birthday Month in March, **choose '3' in Birthday Month.**
2. Click on **Refresh Preview** to see who matches what you want to find.
3. Click **Apply**, to apply this search.

*Note: You don't have to click on **Refresh Preview**. You could go directly from step 1 to step 3.*

*Below are some additional search hints:*

The screenshot shows a help window titled "frmNameSearchHelp : Form" with a blue title bar and a close button in the top right corner. The window content is organized into sections with bold headers and text boxes:

- Search Results**: A text box stating, "Your search preview/results list will always show both of the names for any contact."
- Name Search Hints**: A text box explaining that users can type any part of a name or choose from a list. It provides an example for finding 'van Hintum' with the following search terms: 'Van H', 'Hintum', and 'tum'. A note states, "All of them will find a contact named 'van Hintum'".
- Month and Year Search Hints**: A text box instructing users to use month and year for anniversary searches. Example: "For example, find all closings in Feb of 2007. Or, find a people born in March."
- Email Search Hints**: A text box explaining that users can search for all or part of an email address (e.g., 'rogers.com') to find anyone at that domain. It also mentions a checkbox for finding contacts without an email address.

At the bottom center of the window is a button labeled "Close".

## Mail Merge / Letters

The **Mail Merge / Letters** function sends your client database to an Access Database called MailMerge.MDB.

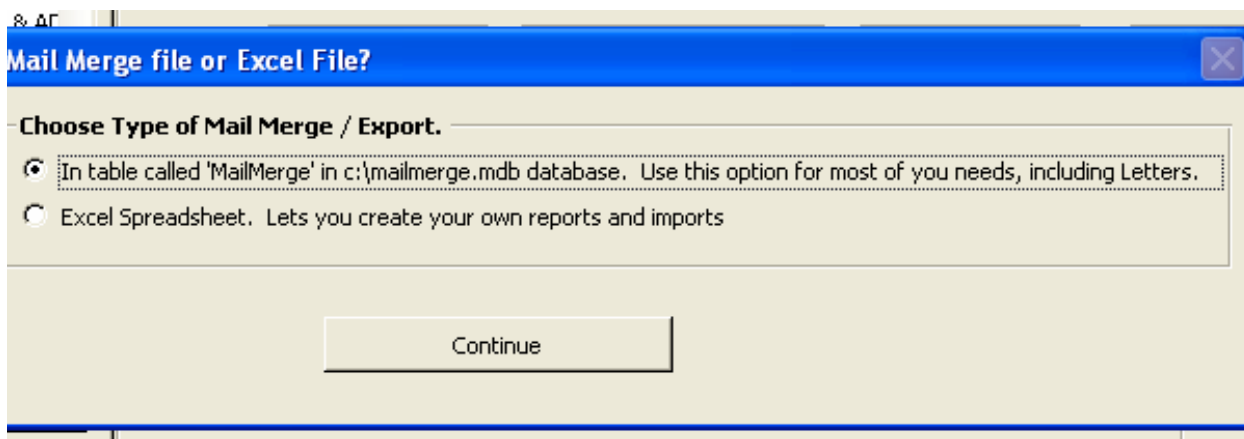
You can also export your client database to an Excel Spreadsheet, to create your own reports.

After you create Mailmerge.mdb you can do the following:

- print envelopes
- print mailing labels
- print letters that you have saved in the database

If you are able to use Microsoft Word's Mail Merge functions. You can also go to Microsoft Word and create your own letters and labels.

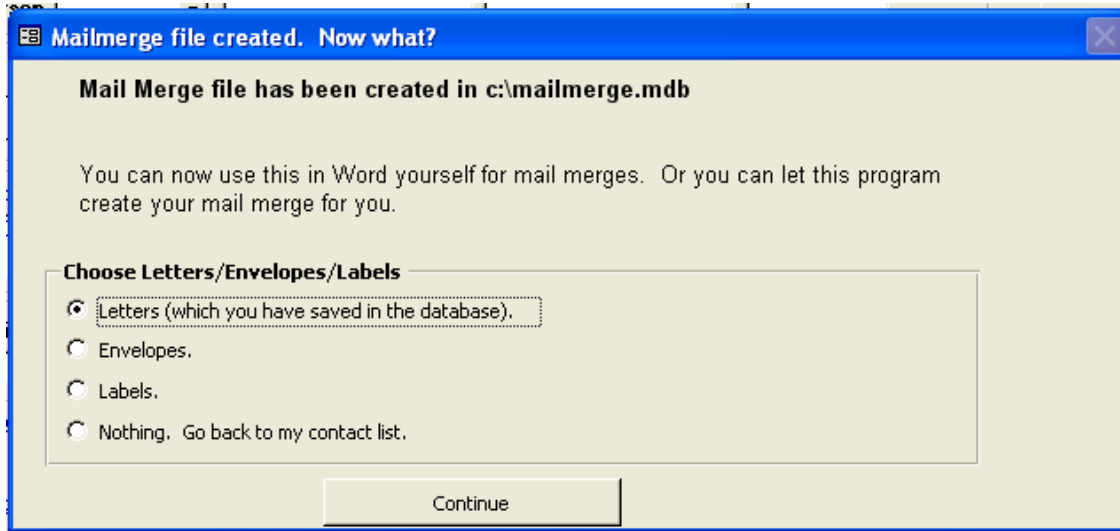
## Mail Merge Options



- You have the choice of creating c:\mailmerge.mdb or a spreadsheet.
- Unless you want a spreadsheet choose the first option.

## Letters / Envelopes / Labels

After your mailmerge.mdb is created, you can choose to go to the letter writer, print labels, or print envelopes.



You also have the option of creating your own mail merge.

To do this:

- close Microsoft Access
- open Microsoft Word
- from the Word menu choose Tools-->Letters and Mailing-->Mail Merge Wizard

The Mail Merge Wizard will guide you through the process of creating a Mail Merge.

### Notes:

- 1) When creating your own mail merge, use c:\mailmerge.mdb as your source.
- 2) Envelopes are formatted to standard 8.5 inch width envelopes.
- 3) Labels are formatted to Avery 5160 or 8160 labels

## Writing Letters

### Manage List of Letters

This screen is called from the Mail Merge button.

With this screen, you can add your own letters that you can use for mass mailing through Microsoft Word's mail merge functionality.

You can create as many letters as you want.

**MortgageClientsXP - [LettersForm]**

MS Sans Serif 10 **B** *I* U [List Icons]

File Edit View Insert Format Records Tools Window Help Adobe PDF Type a question for help

Name: **HELOC Letter** (press F7 to invoke spell checker)

Intro: [Empty Text Box]

Body: **I am happy to see that your Home Equity Line of Credit has now closed. Remember that the float rate portion of your line of credit is fully open and can be repaid at any time. Additionally, you have the option to fix all or part of your line at any time into the fixed rates in effect at the time. Simply contact your branch to take advantage of this feature.**  
**I would like to ask you for your help with a couple of things. First, you will find a questionnaire enclosed regarding the products and service you received from TD Canada Trust. I am constantly trying to improve my service and your comments will help me to serve my clients even**

Afterward: [Empty Text Box]

Letter Created: 2005-02-12 Hint: Rather than deleting a letter, simply rename it and type a new body.

**Options (Word Only)**

Double Space Address Block

Print Address Block in same font as Letter Body, otherwise default font will be used

**Intro Font Selections**

Intro Font: MS Sans Seri 18

Intro Just: 2

Intro Bold  Intro Underline

Intro Italics

**Body Font Selections**

Body Font: MS Sans Seri 10

Body Just: 1

Body Bold  Body Underline

Body Italics

**Afterward Font Selections**

Body Font: Times New R 10

Body Just: 3

Body Bold  Body Underline

Body Italics

**New: Change the font, bold, underline, italics, or justification, and it will show up that way in your Word Document.**

**New: eMails will now include the text of your letter. Fonts will not be sent to your email.**

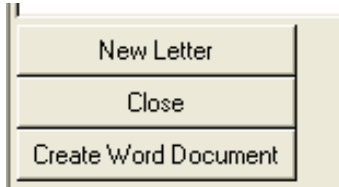
Buttons: New Letter, Close, Create Word Document, e-Mail Clients, e-Mail Underwriters (using logon)

- **New Letter**
  - click here to add a new letter to your database (see instructions later in this guide)
- **Close**
  - close this screen and go back to managing your contacts
- **Create Word Document**
  - create a Microsoft Word mail merge document that you can print and modify

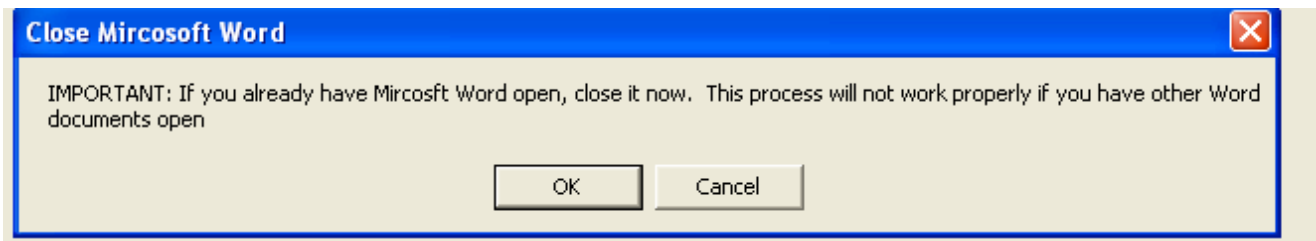
## Create Letter as Word Document

From the the Letters form, you can choose to create a Microsoft Word document from any of the letters that you have saved in your database.

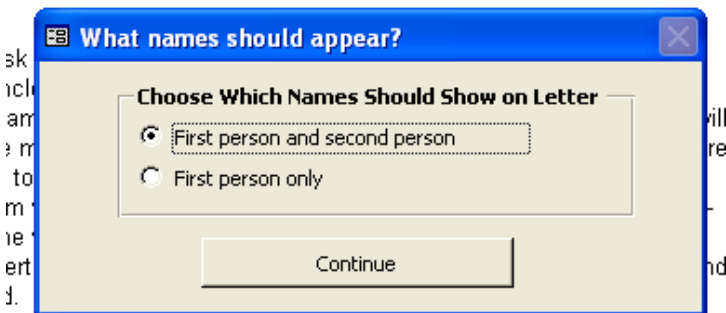
1. Click on the letter that you want to print (or create a new letter)
2. If you wish, make modifications to the text the **body** of the letter
3. Click on **Create Word Document** button



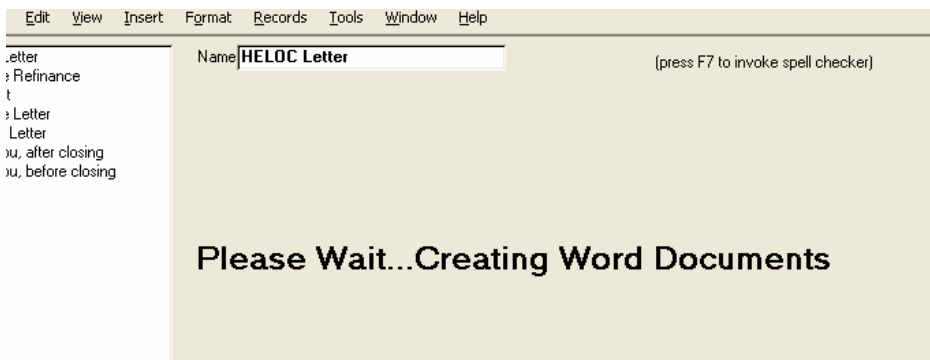
4. Respond to the message below:



5. Choose **Which names should appear.** in the salutation.

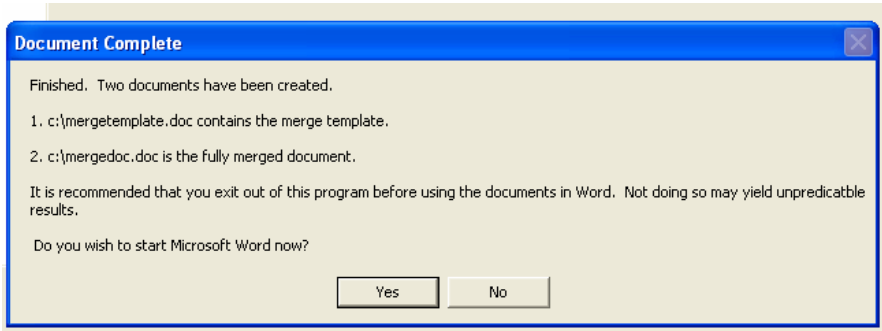


6. Wait for the program to create the documents.



7. When successful the following message will appear. Two Word documents were created. The **mergetemplate** document is a fully functioning mail merge

document. The mergedoc document, will contain the letters that you will want to print.

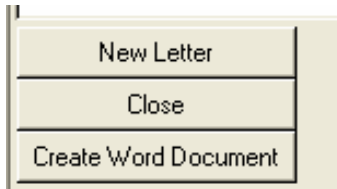


You now can now choose to close the Client Database and open either your **mergetemplate** document or your **mergedoc** fully merged document.

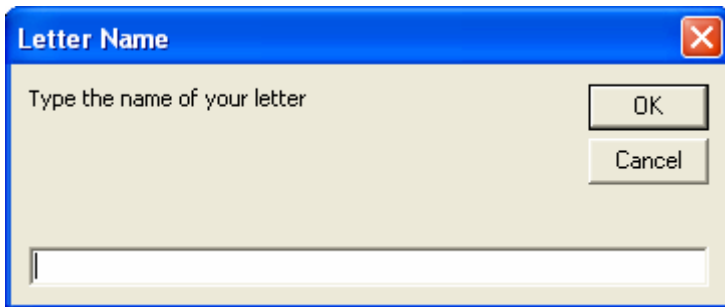
## Adding New Letters

Using the **New Letter** button you can add new letters to your client database.

1. Click on **New Letter** button



2. Type the name of your new letter. Click **OK**



3. Begin typing the **Body** of your letter.

HELOC Letter  
Mortgage Refinance  
My New Letter  
Purchase Letter  
Renewal Letter  
Thank you, after closing  
Thank you, before closing

Name: **My New Letter** (press F7 to invoke spell checker)

Intro

Body: **Type your letter here.**  
**You can put a bolded or underlined attention line in the intro, or put note in another font in the outro.**  
**Sincerely,**  
**-type your name here-**  
**Manager, Residential Mortgages**

Afterward

Letter Created: 2007-03-03 Hint: Rather than deleting a letter, simply rename it and type a new body.

**Options (Word Only)**

Double Space Address Block  
 Print Address Block in same font as Letter Body, otherwise default font will be used

**New: Change the font, bold, underline, italics, or justification, and it will show up that way in your Word Document.**

**New: eMails will now include the text of your letter. Fonts will not be sent to your email.**

Intro Font Selections  
Intro Font: MS Sans Serif 18  
Intro Just: 2  
 Intro Bold  Intro Underline  
 Intro Italics

Body Font Selections  
Body Font: MS Sans Serif 10  
Body Just: 1  
 Body Bold  Body Underline  
 Body Italics

Afterward Font Selections  
Body Font: Times New R 10  
Body Just: 3  
 Body Bold  Body Underline  
 Body Italics

Form View FLTR NUM

## Open / Create Client Database

Open or Create Database

Open/Create Client Database

Open Database

Create Database

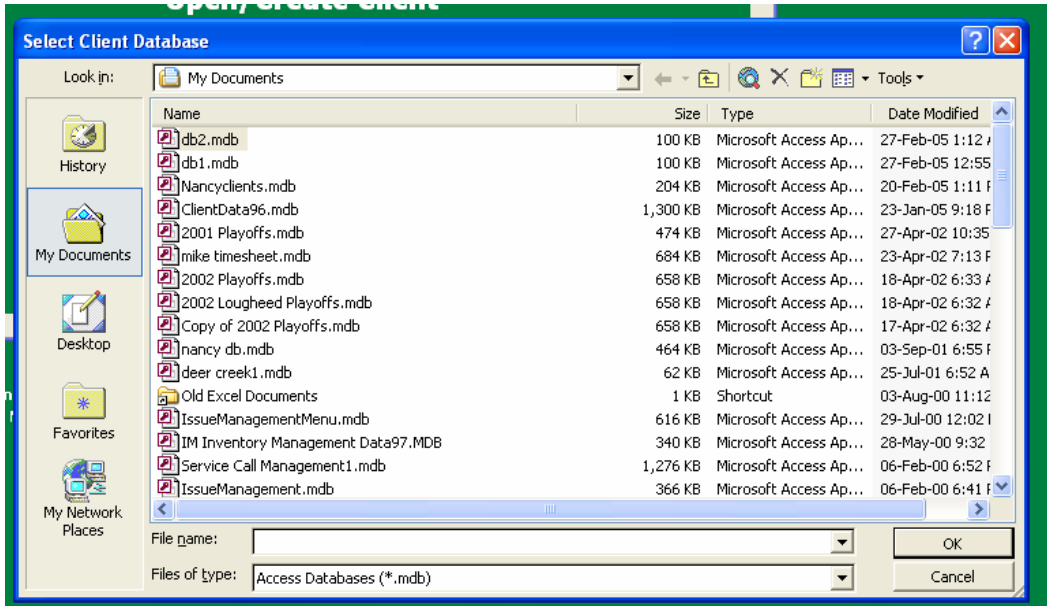
Cancel

- **Open Database**
  - Choose to open a client database that you have already created
- **Create Database**
  - Choose to create a brand new client database

- **Cancel**

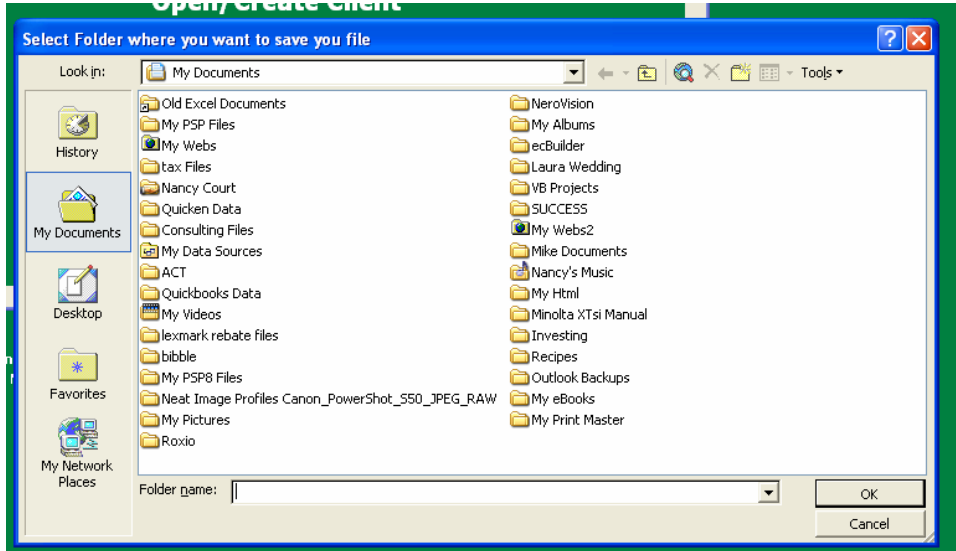
## Open Database

1. Click on **Open Database**
2. Choose **folder** where your database and then **click on the database**. Then click **OK**

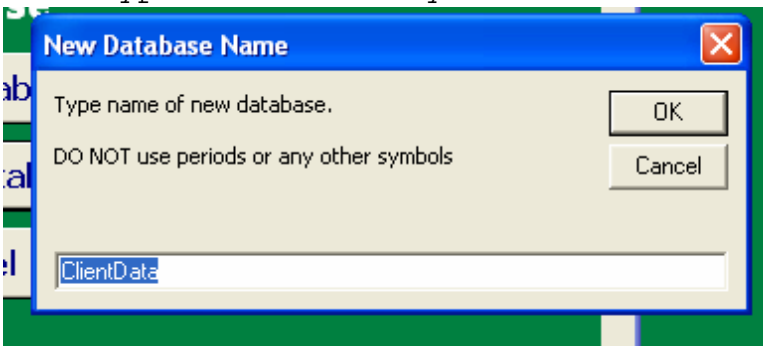


## Create Database

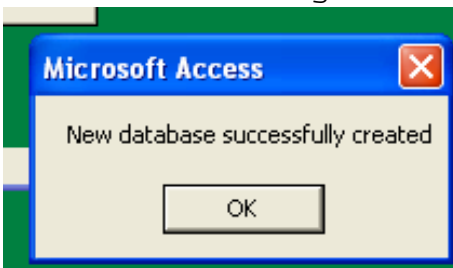
1. Click on **Create Database**
2. Choose **Folder Location** for your database. Then click **OK**. Note: Just the folder, not the name of the database



3. Type the **Name** of your new database. Then click **OK**.

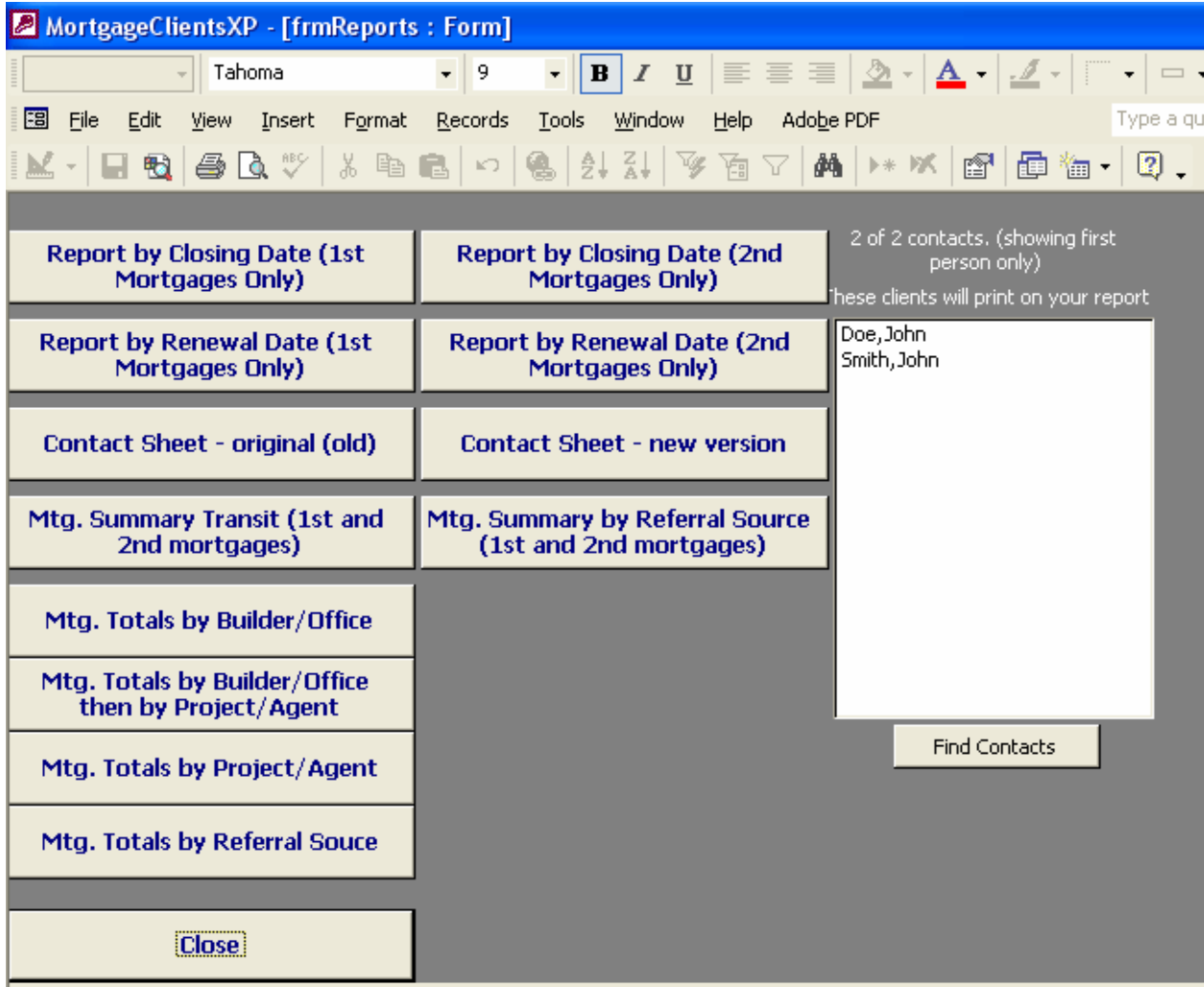


4. This message will appear.



## Reports Menu

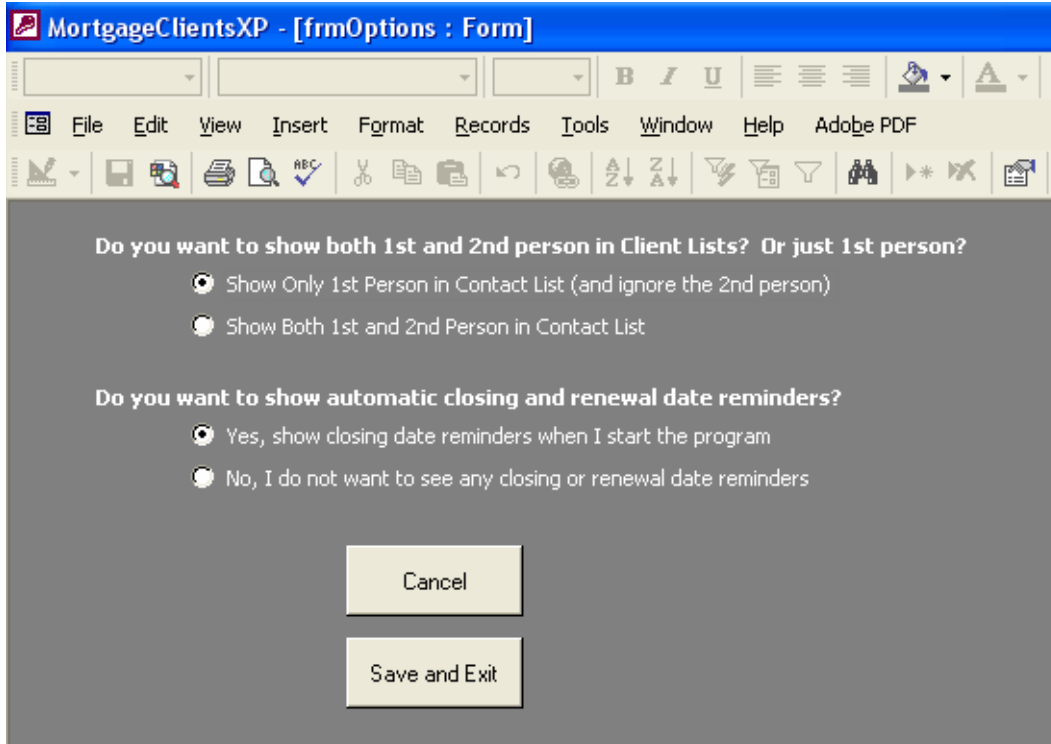
1. Click on find contacts to choose which contacts that you want to include in the report.
2. Click on the report that you want to create.



## Preferences

Choose **Preferences** from the main menu.


1. Choose your option and then click **Save and Exit**.

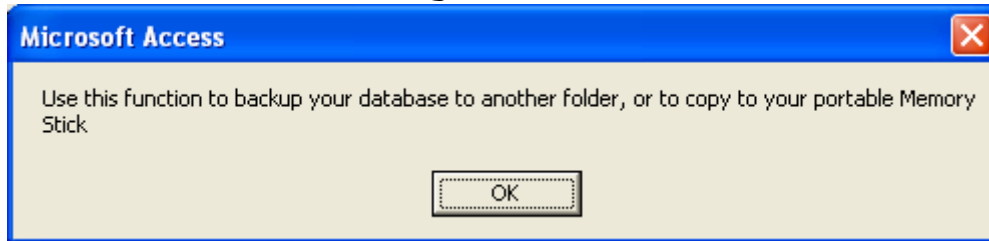


- Show only 1st Person in Contact List
- Show both first and 2nd person in Contact List

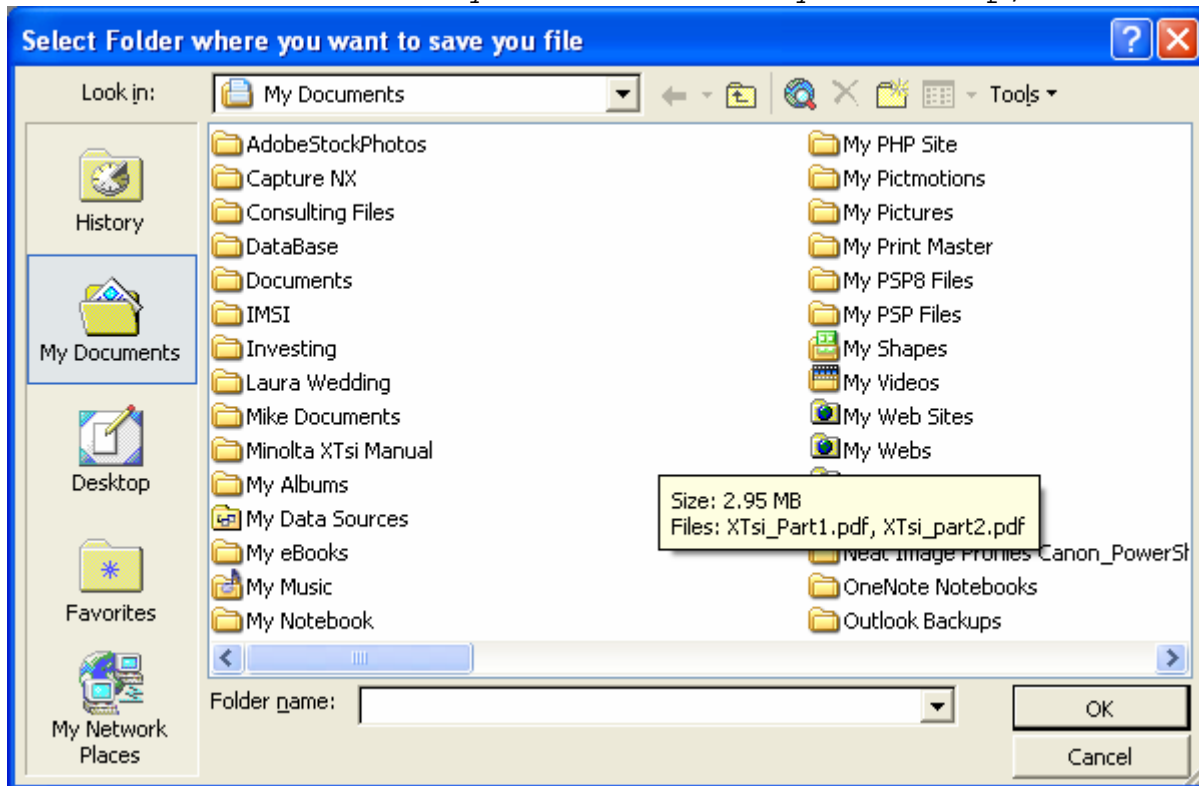
## Backing Up Your Data

To protect yourself from loss of information, it is important to make sure that you, from time to time, copy your data to a backup somewhere other than your computer. Here is how you backup your client database:

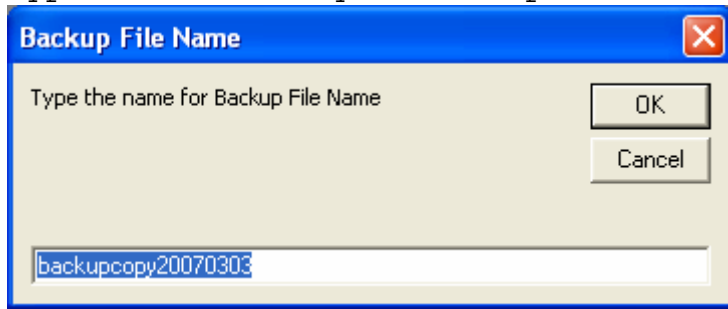
1. Choose  from the main menu.
2. Click OK on this message



3. Choose the folder where you want to save your backup, then click OK:



4. Type the name of your backup file:



5. The program will now copy your data, and when complete you will get this message.

