BIBBY
FINANCIAL SERVICES

CLIENT ONLINE
QUICK START GUIDE

This guide has been designed for users of our Client Online portal and gives a summary of the key functionality available
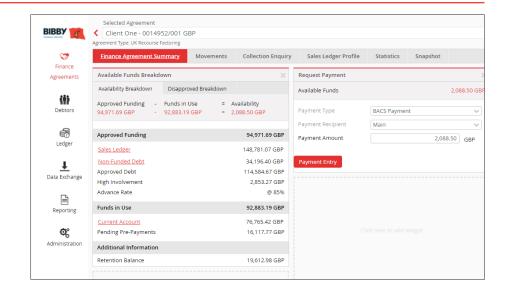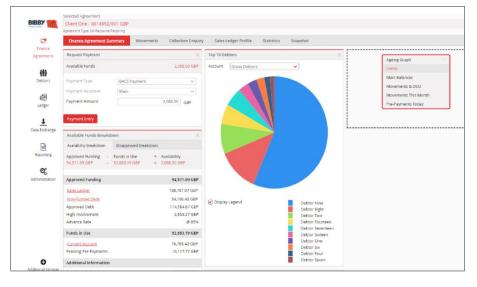
WIDGETS

The Finance Agreement and Debtor screen have inter-changeable sections (widgets). The default screen for the Finance Agreement Summary is shown opposite.

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

'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.

Payment can be requested by selecting the payment type and inputting the amount you want to draw down then click the Payment Entry button
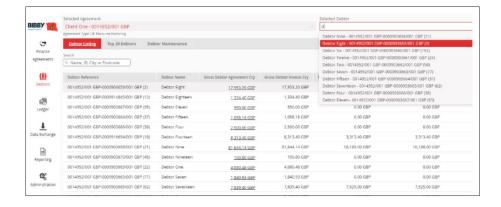
DEBTOR SEARCHES

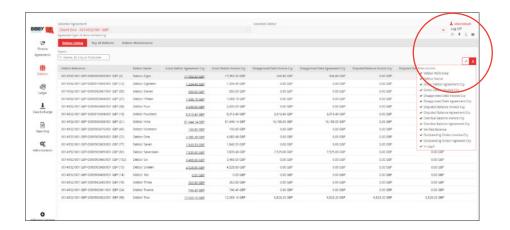You are able to see all debtors from a drop down menu as shown opposite:

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

VIEWS

You 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.
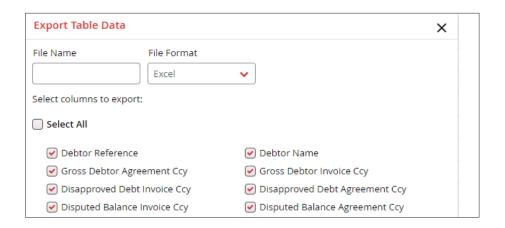

EXPORT

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

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

Export Table Data

File Name

File Format
Excel

Select columns to export:

☐ Select All

☑ Debtor Reference   ☑ Debtor Name
☑ Gross Debtor Agreement Ccy   ☑ Gross Debtor Invoice Ccy
☑ Disapproved Debt Invoice Ccy   ☑ Disapproved Debt Agreement Ccy
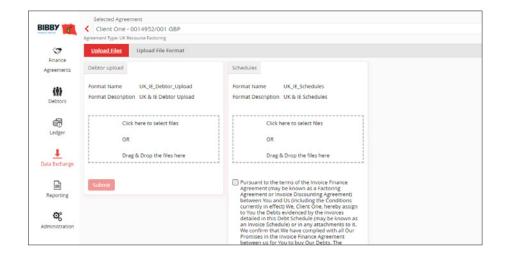☑ Disputed Balance Invoice Ccy   ☑ Disputed Balance Agreement Ccy

FILE UPLOADS

To send a file upload for either a new debtor or assignment, 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.

Your relationship team can help you set up the File upload format.

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