Client Online

Your guide to getting started on the new system

BIBBY
FINANCIAL SERVICES

Your Invoice Finance Experts

CONTENTS

01 WELCOME

Welcome to your introduction and guide to getting started on Bibby Financial Services Ireland's new system – **Client Online**.

This guide has been designed to tell you all you need to know about getting started, detailing the support and training available to you and your colleagues as we move your business to Client Online.

The guide can also be downloaded from **www.bibbyfinancialservices.ie/client-area** and saved to your desktop.

02 SYSTEM OVERVIEW

Client Online is a secure web based system which is being introduced to replace the E3 system you currently use to manage your facility with Bibby Financial Services Ireland.

Client Online is easy to navigate providing you with the information you need quickly and easily. The new system includes added functionality and reporting ability to assist you in running your facility with us.

03 GETTING READY

Please make a note of your **Go Live date** – this is provided to you in the covering letter and also displayed on the desktop reminder card included within this pack. If others in your business need to be aware of the move to **Client Online** please share the date and communication with them.

We recommend you undertake the e-learning training module relevant to the type of facility you have with Bibby Financial Services Ireland. This is covered in more detail as you go through this booklet.

The existing E3 system will be closed as at **12.00pm (midday) on the Friday** of cutover to Client Online. Please be aware and ensure relevant colleagues are aware that you will not be able to access information on your facility after this time. Therefore we recommend that you download any historical reports you may require in the week running up to your scheduled changeover date.

Client Online is scheduled to be available to you from **9.00am on the Monday morning**.

04 WORKING WITH US

At Bibby Financial Services Ireland we pride ourselves on the service we deliver to our clients. Our aim is to support your business growth whilst providing the highest levels of service tailored to your individual business needs.

Maintaining a strong relationship with each and every one of our clients is at the heart of what we do, that is why we continually look to improve the way we work together. Based on the feedback we have received from our clients the move to Client Online is the first stage in the programme to improve the way we serve you now and in the future.

If at any stage you have any questions about your facility with us, your dedicated local contact will be delighted to help.

05 TRAINING & USER GUIDES

We have developed e-learning training modules to assist you in using **Client Online**. These can be accessed via **www.bibbyfinancialservices.ie/client-area** where you will be given the option to select the e-learning module applicable to the type of facility you have with Bibby Financial Services Ireland.

The e-learning will explain:

- What Client Online is
- Why it is being introduced
- The practicalities of how to use it.

We will explain the functionality available to you when the system goes live and cover areas including:

- Submitting invoices
- Requesting payments directly through the system
- The enhanced reporting facility.

The long-term help and support available to you as you move over to Client Online is also included in the e-learning. The training is comprehensive so you may decide to undertake this over a period of time – you can come back to refresh your knowledge at your convenience as often as you need to. In addition to the e-learning you can also access via **www.bibbyfinancialservices.ie/client-area** a downloadable pdf **user guide to Client Online** which can be printed. As with the e-learning you will be able to choose the user guide relevant to the facility you have with us.

06 YOUR QUESTIONS ANSWERED

Using **Client Online** from Bibby Financial Services Ireland is designed to be simple and easy to navigate but we understand that you may have queries and questions regarding the changeover.

Additional Questions and Answers are available on **www.bibbyfinancialservices.ie/client-area**.
If you can't find the answer you are looking for then please call your local contact. If your question is of a technical nature then you can also contact the **Client Online Service Desk** on **+44 1753 218246**

The e-learning and user guides are available to help and support you and of course your local dedicated contacts are on hand to help you but you may be able to find the answer to your question in the following.

Can we continue to use E3?

Please continue to use E3 as you normally do up to 12pm on the Friday of your changeover weekend. Once we move your account over to Client Online you will no longer be able to access the E3 system and reports. **If you require any reports from E3 prior to the changeover date, please ensure you download these in the week running up to your scheduled changeover date. Going forward there will be various reports available on Client Online which will be dealt with later in this guide.**

Will I still have access to E3 to view historic data?

E3 access will be removed over the cutover weekend. Please download any reports you may require in the week running up to your scheduled changeover date. If you require any additional reports please contact your local contact and they will reproduce the report for you.

Will our account be automatically transferred over to Client Online?

Yes, all clients will automatically migrate over to Client Online.

07 YOUR QUESTIONS ANSWERED

What do we need to do to prepare for the changeover to Client Online?

Please make a note of the date of your scheduled changeover and visit **www.bibbyfinancialservices.ie/client-area** to access the e-learning training module and user guide. Don't forget to share the
date and advise any colleagues who will need to be aware of this change. Please also ensure that you download any historical reports you may require prior to the changeover to Client Online.

Will we need to change our month end reconciliation process?

No, there is no need for any change to your month end processes, you can continue as you do today.

Will my day to day contacts at Bibby Financial Services Ireland change?

No not at all. Your local dedicated contacts will remain the same and are available to assist you with any queries you have on **Client Online** or indeed any aspect of your facility with ourselves.

Can I still call my local contact to request payments or do I have to now request payments via the system?

Client Online provides added functionality that enables you to request payments of available funds via the system. However if you prefer you can of course continue to call your local contact to request payment of funds.

Who will be able to help with any queries we may have on Client Online?

In addition to your local day to day contacts the Client Online Service Desk is available to provide any technical support you may require. They can be contacted on **+44 1753 218246** or via email at **support@bibbyclient.com**

08 ACCESS INFORMATION

The current E3 system will close as at **12.00pm (midday) on the Friday of your scheduled Go Live weekend**. We expect that the transition to **Client Online** will go smoothly and will be available to you from **9.00 am on the Monday morning.**

To access Client Online you will need new login and password details. Your login details will be sent to you by letter and your password via email. These will be sent to you the week before you move to Client Online. Please note your current login and password details for E3 will become obsolete once successful changeover to Client Online has taken place.

So that we can move all our customers on to Client Online as quickly as possible with the least disruption to their service we will be undertaking this process over the next few months.

This will mean that Client Online will be unavailable at intervals over the coming months. In order that you can prepare for this system down time we will of course notify you in advance of when the system will be unavailable. Notifications of planned down time will be through Client Online messages.

09 CONTACT & SUPPORT

As always your local dedicated contacts at Financial Services Ireland are available to assist you and answer any questions you may have regarding your facility, the changeover to **Client Online** and indeed once **Client Online** is live.

You can also contact the Client Online Service Desk on **+44 1753 218246** or via email **support@bibbyclient.com** should you require any technical support. The support desk will be available to answer any technical queries you may have including:

- How to use Client Online
- Issues accessing Client Online
- Requesting additional login and password details

User guides, frequently asked questions and the e-learning training on Client Online are all available to you by visiting **www.bibbyfinancialservices.ie/client-area**

The team at Bibby Financial Services Ireland are committed to ensuring that all of our clients have the best possible experience working with us and look forward to continuing to support your business funding needs now and in the future.

Visit www.bibbyfinancialservices.ie/client-area
Client Online Service Desk Tel: +44 1753 218246

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