

## *How to create manually the Client access*

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17/02/2020

A central graphic featuring a blue, jagged-edged speech bubble containing the text "Welcome to QCC Training!". To the left of the bubble is a cartoon illustration of a man with brown hair, wearing a white polo shirt with a small QCC logo and black pants. To the right is a cartoon illustration of a woman with blonde hair, wearing a dark blue polo shirt with a small QCC logo and black pants. The background is light gray with faint, large circular patterns.

Welcome to  
QCC Training!



*Today we'll teach you  
how to create manually a  
Boomerang access for  
clients.*


**BOOMERANG**




*Log in boomerang with  
your username and  
password.*

The BOOMERANG logo, identical to the one in the top left corner.

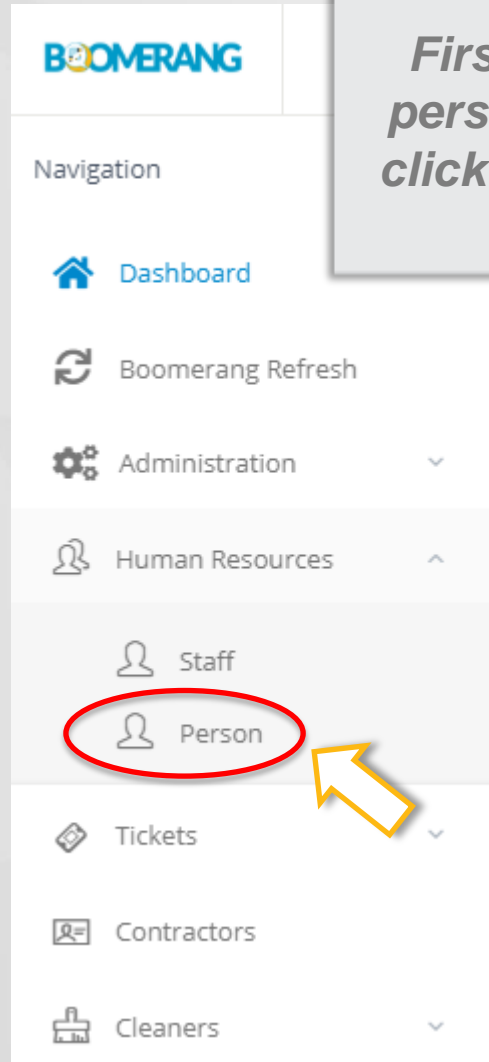
Hello, welcome!

 Username

 Password

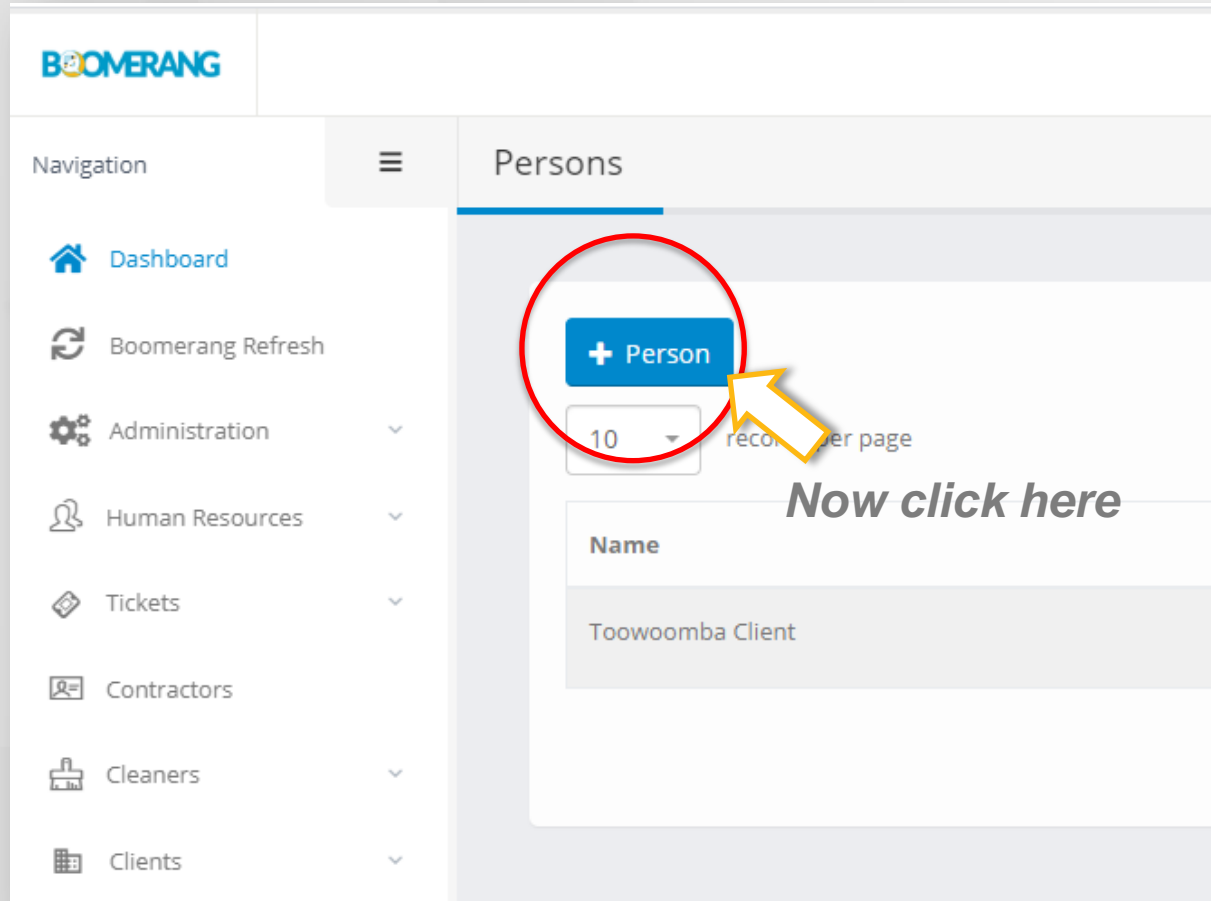
LOGIN

☒ Remember Me [Forgot Password?](#)



*First step is creating the person inside the System:  
click on Human Resources  
> Person*





The screenshot displays the BOOMERANG software interface. On the left is a navigation menu with the following items: Dashboard, Boomerang Refresh, Administration, Human Resources, Tickets, Contractors, Cleaners, and Clients. The main area is titled 'Persons'. A red circle highlights a blue button labeled '+ Person'. A yellow arrow points to this button with the text 'Now click here'. Below the button is a dropdown menu showing '10' records per page. Below that is a table with one row containing the text 'Toowoomba Client'.

Name
Toowoomba Client

*Fill all required fields and click  
“Save”.*

Create Person Home / Persons / Create Person

**Basic Info** | Address

Name *	Surname *
<input type="text"/>	<input type="text"/>
Email *	Date of Birth *
<input type="text"/>	<input type="text"/>
Phone Number *	Second Number
<input type="text"/>	<input type="text"/>



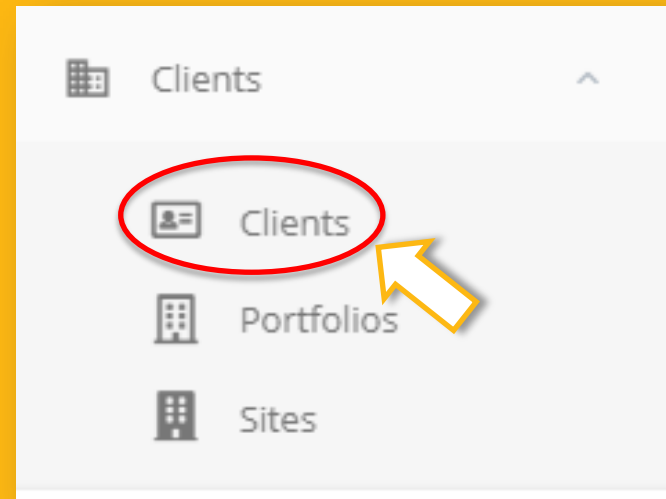
*Done! Now this person  
exists in our System.*





*To do this,  
click on Clients*

Now, let's  
link that  
person with  
a Client.



*Select the client  
by clicking edit*













Clients

[+ Insert new client](#)

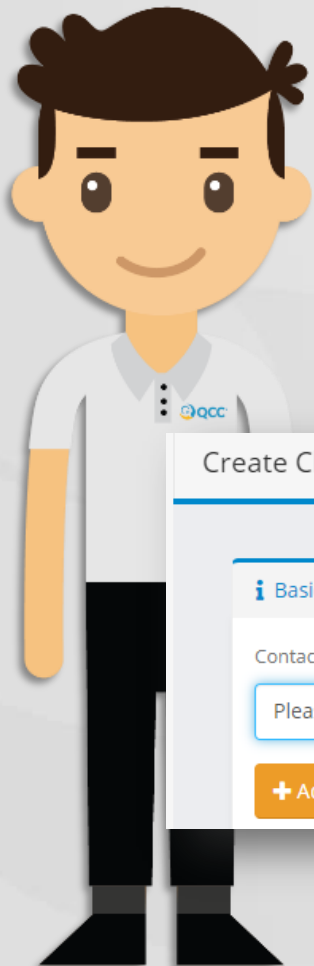
10 records per page

Search...

Business Name	Trading Name	ABN	Phone Number	Active	Action
400 Gradi SA Pty Ltd	400 Gradi SA Pty Ltd	37 621 514 994	0488717008	✓	
About Town Real Estate Pty. Ltd	About Town Real Estate Pty. Ltd	77 071 711 825	(07) 4772 5252	✓	
Ainslie Bullion	Ainslie Bullion	14 737 209 486	07 3221 0500	✓	
ANCHOR BUILDING SERVICES QUEENSLAND PTY LTD	ANCHOR	11 091 251 553	07 3889 8090	✓	
ANYTIME CAIRNS PTY LTD	ANYTIME CAIRNS PTY LTD	11 612 752 244	NO PHONE	✓	
ARA	ARA	60 114 557 514	NO PHONE	✓	
ARIA COMMUNICATIONS PTY LTD	ARIA TECHNOLOGIES	22 090 723 925	+61 3 9213 9777	✓	
Arkadia Fortitude Pty Ltd	Arkadia Fortitude	95 284 286 448	0299080333	✓	
ASC	ASC	10 011 111 000	NO PHONE	✗	
asdf	asdd		asdf	✗	

Previous 1 2 3 4 5 ... 12 Next

*Select CONTACTS*



### Create Client

[i Basic Info](#) [📍 Address](#) [👤 \*\*Contacts\*\*](#) [📁 Portfolio](#) [🌐 Sites](#) [💬 Comments](#)

Contact

Please select one or start typing

Contact Type

Please select one or start typing

[+ Add Contact](#)

[✏️ Reset](#)

*Select the Contact that you created in the first step and the “Contact Type” and click “Add Contact”.*



### Create Client

Basic Info

Address

Contacts

Portfolio

Sites

Comments

Contact

Client Test

Contact Type

Manager

+ Add Contact

Reset

Save

List

*Don't forget to click  
Save*



Create Client

Success  
The Client was successfully updated.

Basic Info Address **Contacts** Portfolio Sites Comments

Contact: Please select one or start typing

Contact Type: Please select one or start typing

+ Add Contact Reset

Name	Phone Number	Email	Contact Type	Action
Client Test	0414556701	rafagusp@gmail.com	Manager	

**Save** List



ANDROID

*Now, click on the blue button to create a user for this contact*



Create Client



Home / Clients / Create Client

Basic Info Address **Contacts** Portfolio Sites Comments

Contact: Please select one or start typing

Contact Type: Please select one or start typing

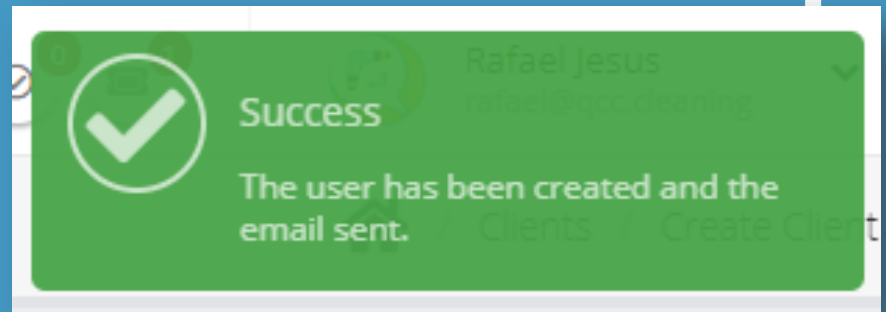
+ Add Contact Reset

Name	Phone Number	Email	Contact Type	Action
Client Test	0414556701	rafagusp@gmail.com	Manager	 

Save List



*Now, an email with the access procedure has been sent to the client user's email.*



Thank you  
for watching the  
How to create  
manually the  
Client access!

