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Control Panel

The Control Panel includes company settings for notifications, country, time zone, late payments, accounts receivable, and miscellaneous items.

Configuring the Control Panel

1. In the *Management Section*, click **Control Panel**.
2. Select settings and click **Submit** to save the changes.

800-234-8727 

Welcome **George!** | Orders Remaining:664 | Account Expires:06/29/2020 | Files:29 (7.6 MB) | Session expires in:01:29:50 | [Logout](#)

HOME **ORDERS** **REPORTS** **MARKETING** **MANAGE** **HELP** **QUICK START**

Control Panel

Notification Settings

- Automatically notify my employees (appraisers) via email when a new appraisal is assigned to them.
- Have appraisers accept or decline appraisal assignments via the notification email they get when you assign an appraisal.
- Have the system copy emails that our appraisers and employees send to clients regarding Inspection Dates and Comments, also send a copy of the email to our main email account.

Miscellaneous Settings

- I want to specify a coverage area for each of my appraisers.
- Only allow the owner of this account to delete appraisal order records.
- Only allow the owner or managers of this account to deliver appraisal order records.
- Show the name of the person who entered a comment.
- Automatically enter inspection date into auto-notification email subject line.
- Show client history during order creation
- Allow appraisers to view and copy orders assigned to their coworkers
- Restrict client interaction for employees.
- Display quickstart guide on Main Menu

Country

Please select your country:

Time Zone Settings

Please select your time zone:

Late Payment Settings

Enter the number of days from the report **delivery date** (if payment has not been recieved) that you would consider a client late in paying for an appraisal product.

Accounts Receivables Settings

Accounts receivables manager:

Submit

Control Panel Settings

Notification Settings

Automatically notify my employees (appraisers) via email when a new appraisal is assigned to them

When this option is selected, ACI365 automatically delivers an e-mail to assigned parties when a new order arrives.

Have appraisers accept or decline appraisal assignments via the notification email they receive when you assign an appraisal

When this option is selected, the appraiser notification e-mail contains *Accept* and *Decline* voting buttons allowing the recipient to accept or decline the assignment within the e-mail. The order status in the site updates according to the response.

Have the system copy emails that our appraisers and employees send to clients regarding Inspection Dates and Comments, also send a copy of the email to our main email account

When this option is selected, ACI365 saves a copy of client e-mails. The main e-mail account also receives a copy of the e-mail.

Miscellaneous Settings

I want to specify a coverage area for each of my appraisers

When this option is selected, each appraiser can be assigned to portions of the office's coverage area.

Only allow the owner of this account to delete appraisal order records

When this option is selected, only the user designated as the owner can delete order records from the site.

Only allow the owner or managers of this account to deliver appraisal order records

When this option is selected, the user designated as the owner, or users designated as managers, can delete order records from the site.

Show the name of the person who entered a comment

When this option is selected, comments display with the author's name.

Automatically enter inspection date into auto-notification e-mail subject line

When this option is selected, the default subject line of auto-notification emails displays *Inspection Date Set* with the scheduled date and time. For example, *Inspection Date Set: 10/03/08 3:00 PM*.

Show client history during order creation

When this option is selected, the Client History summary page is displayed when adding an order.

Allow appraisers to view and copy orders assigned to their co-workers

When this option is selected, employees can view and copy orders assigned to other employees.

Restrict client interaction for employees

When this option is selected, the employee's view is restricted to client name only. Client contact information is not displayed. Appraisers with employee-level access are restricted from sending comment, inspection date, and delivery date notices to the lender.

Display Quick Start guide on the main menu

When this option is selected, the ACI365 Quick Start Guide opens in a pop-up window when a user logs in to the site.

Country

Country

The select the company's country of domicile. Country selection affects some ACI365 content and website layout.

Time Zone Settings

Time Zone

Select the local time zone from the drop-down list.

Late Payment Settings

Late by date

Enter the number of days, from report delivery date, that a payment is considered late.

Accounts Receivable Settings

Accounts Receivable Manager

Select the accounts receivable manager from the employee list. This name is included on printed voices.