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American Financial Management (AFM) Client Web Access Instruction Manual

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1.0 Introduction:

Welcome to AFM's Client Web Access.   Our Client Web Access has been crafted so that you can have convenient and secure access to your accounts when you need it.   Providing you with the best service and excellent performance is our number one goal.   Thus, the features available within our Client Access have been designed to provide you with a number of ways to evaluate the recovery efforts being made on the business you provide us.   Within AFM's Client Web Access, you can also find a Help Menu that is there to assist you with any quick questions you may have.

2.0 Login Page:

The Login page is the starting point for our Client Web Access.   This page will prompt for your ClientID, UserName and Password (See Figure 1.1).   This information will be provided to you by AFM. The login information is case sensitive.

After your first time logging in to your Account or your password has expired (See Figure 1.1 above) you will be prompted to change your password on the Password Update Page (See Figure 1.2).

3.0 AFM Home Screen:

The Home Screen will appear (See Figure 1.3). This menu will be consistent on each page, making navigation easy.

3.1 Summary of Home Screen Tabs:

The following is a list of the basic functionality of each link within the Menu Bar:

Inquiry   Basic account lookup screen.   This allows you to search for an account placed with AFM by the AFM Account Number, the Debtor Name, the Debtor Phone Number, etc.

Reports   Useful reports including: Statistics of Accounts placed with AFM by the Amount Assigned and by the Age of the Accounts at the date of Assignment, an Active and Full Client Inventory Report, History Performance Reports and a List of Status Descriptions.

Messages   Allows you to send and receive messages to and from the employees at your company that use AFM's Client Web Access.

Settings   Enables you to view and change your personal settings such as your password, email address, time zone and locale.

Log Me Out   A button that allows you to exit AFM's Client Web Access.

          Help system that can assist you on commonly used features.

3.2 Account Inquiry:

The Account Inquiry screen is an easy way to quickly search for, and review details of, a specific account placed for collection through four primary search options.   These four primary search options are: the AFM Account Number, the Company or Contact Name, the Telephone Number, and a Custom Search Field.   Specifically, the custom search field allows you to search by any field within the AFM database (See Figure 1.4).

Figure 1.4:   Account Inquiry Screen.

After entering information on the Account Inquiry Screen and clicking Submit, a listing of accounts is then displayed (See Figure 1.5). The Debtor names listed on this screen are links to view the details of each account.   It also shows the most recently viewed accounts.

Figure 1.5: Example of an Account Inquiry Result for Debtor Names.

After clicking on a Debtor Name, the Account Detail Screen will appear and will display all of the information necessary to know exactly what is happening on a specific account placed with AFM. The current status of the account, and a textual description of that status, is displayed along with the current balance and various other debtor information (See Figure 1.6).

Figure 1.6: Account Detail Screen.

3.3 Reports:

The Report Screen displays all of the AFM Client Web Access reports available to you (See Figure 1.7).
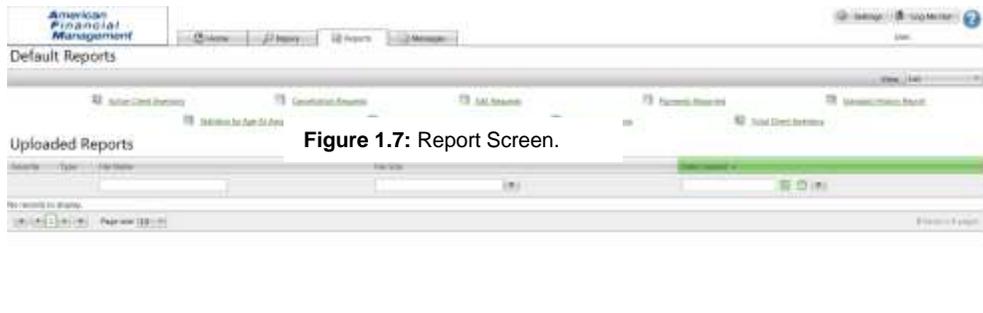

Figure 1.7: Report Screen.

3.3 A Statistics by Amount Assigned:

The Statistics by Amount Assigned report summarizes the collection efforts of accounts placed with AFM based on the dollar amount of each account when assigned to AFM.   After clicking the Statistics by Amount Assigned link on the Report Screen (See Figure 1.7 above), you input a series of dollar caps (See Figure 1.8).   After you click the generate report button, the report will return totals, such as the total amount collected and the current balance, for each group based on the dollar range inputted (See Figure 1.9).

Figure 1.8:   Statistics by Amount Assigned Dollar Prompts.

Figure 1.9:   Statistics by Amount Assigned Report Results.

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3.3 B Statistics by Age at Assignment:

The Statistics by Age at Assignment report summarizes the collection efforts of accounts placed with AFM based on how old the account was before it was assigned to AFM.   After clicking the Statistics by Age at Assignment on the Report Screen (See Figure 1.7 above), you input a series of aging caps by number of days (See Figure 1.10).   After you click the generate report button, the report will return totals, such as the amount assigned, amount collected and recovery rates, for each group based on the day's range inputted (Figure 1.11).

Figure 1.10:   Aging Prompts For The Statistics By Age At Assignment Report.

Figure 1.11:   Statistics By Age At Assignment Report Results.

3.3 C Active Client Inventory:

By clicking on Active Client Inventory, an active inventory report of accounts placed with AFM will automatically be created and displayed.

3.3 D Full Client Inventory:

By clicking on Full Client Inventory, a complete inventory report of accounts placed with AFM will automatically be created and displayed.

You can download and save these reports to your computer as an Excel spreadsheet.

3.3 E Status Descriptions:
The Status Descriptions report lists all of AFM's status codes and the definition of each code.   This report can be downloaded into either a tab-delimited text file or an Excel spreadsheet.

3.3 F Standard History Report:
By clicking Standard History Report tab on the screen a page will appear that allows you to input the amount of months (from 1 – 36), that you would like to view AFM's collection statistics for the accounts that you placed for collection with AFM.   This Standard Analysis Report allows you to view your Net/Gross Assignments, Cancelled Accounts, Open Accounts, Collected Monies, and the Amount of Days the Accounts have been with AFM. This report can be downloaded into either a tab-delimited text file or an Excel spreadsheet.

3.4 Message Center:

After successfully logging in to the AFM Client Web Access, you are taken to the Message Center (also serves as the AFM Client Web Access Homepage). The Message Center allows you to send and receive messages to and from the employees at your company that use AFM's Client Web Access. However, you are not able to message AFM directly through the Message Center. Rather, please call us with any questions at (847) 259-7000 ext. 115 or email at clientservices@afm-usa.com.

3.5 Settings:

The settings tab is located on the top right of the screen next to the Log Me Out Tab. Upon clicking the Settings Tab you will be taken to a page that allows you to view your Username, Full Name and Email Address, and allows you to change your Password, Email Address, Time Zone/Localization and Password Challenge Questions for the AFM Client Access Web.
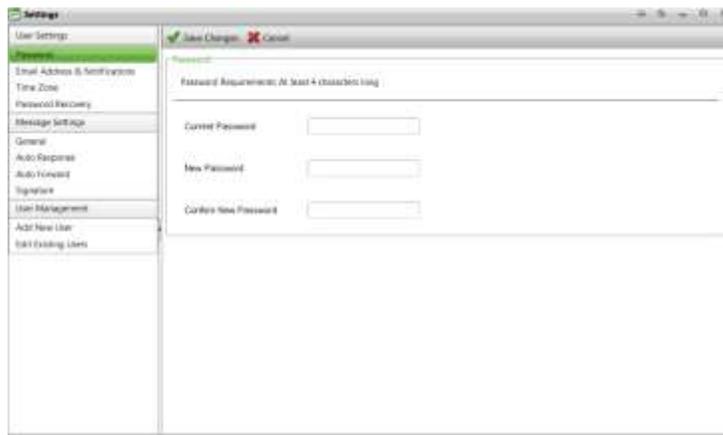
3.6 Logout:

When you have finished using the Client Access Portal you can exit the system by clicking the LogMeOut Tab on the top right of the screen. You will then be returned to the Client Access Web Home Page.

3.7 Help:

If you have any further questions when on the AFM Client Web Access, you can click the ⓘ Help Link in the Menu Bar.   The Help section can assist you with further questions you might have.   In addition, please feel free to call or email us with any questions at (847) 259-7000 ext. 115 or clientservices@afm-usa.com.