

AMERICAN FINANCIAL MANAGEMENT CLIENT WEB ACCESS INSTRUCTIONAL MANUAL

Table of Contents:

1. Introduction	Page 1
2. Login Instructions	Page 1
3. Navigation	Page 2
a. Home Screen Tabs	Page 3
b. Account Inquiry	Page 4
4. Reports	Page 6
a. Standard History	Page 7
b. Active and Total Client Inventory	Page 7
c. Status Descriptions	Page 7
5. Settings	Page 7
6. Logout	Page 8
7. Help	Page 8

1. Introduction:

Welcome to AFM's Client Web Access portal. Client Web Access has been crafted to provide you with convenient and secure access to your accounts whenever you need it. The features available within Client Web Access allow you to stay up to date on the progress of your accounts and evaluate the recovery efforts being made on your behalf. This instructional manual will take you through the portal's features, including setting up your permanent password, accessing account information, and pulling history and inventory reports.

2. Login Page:

The Login page is the starting point for Client Web Access. This page will prompt you for your ClientID, Username and Password (See Figure 1). This information will be provided to you by AFM's Client Services Team. Please be mindful that the login information is case sensitive and should be entered exactly as it provided to you.

Figure 1: Login Screen

American
Financial
Management

Client ID

Username

Password

Remember Me

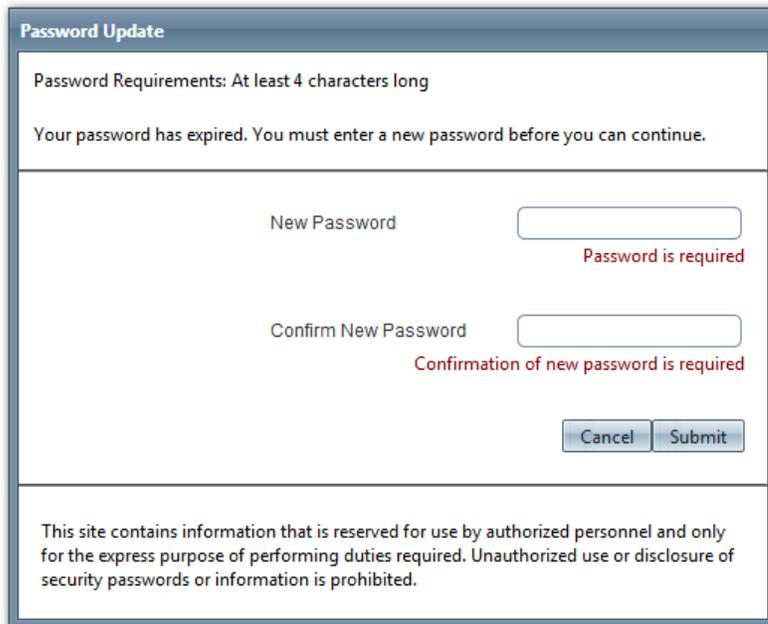
Did you forget your password?

Log Me In

Secured by thawte
2019-08-07

Once you log in to the portal for the first time, or when your password has expired (every 90 days), you will be prompted to change your password on the Password Update page (See Figure 2).

Figure 2: Password Update



Password Update

Password Requirements: At least 4 characters long

Your password has expired. You must enter a new password before you can continue.

New Password Password is required

Confirm New Password Confirmation of new password is required

Cancel Submit

This site contains information that is reserved for use by authorized personnel and only for the express purpose of performing duties required. Unauthorized use or disclosure of security passwords or information is prohibited.

3. Navigation:

Once you have successfully updated your password and logged into the Client Web Access portal, you will be directed to the central Home Screen for your account. (See Figure 3). From here, you can navigate through the different available Tabs, as outlined further below.

Figure 3: Home Screen



3.a Home Screen Tabs:

The following is a list of basic functions for each Tab in the Menu Bar of the Home Screen:

- Search Tab:** This allows for a basic account lookup and review. You can search for an account placed with AFM via several criteria, including but not limited to the AFM Account Number, the Debtor Name, and Debtor Phone Number.
- Reports Tab:** Here you can find useful reports including a Standard Performance History, Active Client Inventory, Full Client Inventory, Statistics by Assigned Amount or Age at Assignment, and a List of all Status Code Descriptions.
- Settings Button:** This feature enables you to view and change your personal settings including your password, email address, time zone and locale.
- Log Me Out Button:** This allows you to quickly and securely exit Client Web Access.



(Help Button): Client Web Access features a built-in Help System that can assist you with commonly used features and frequently asked questions.

3.b Search Tab and Account Inquiry:

The Account Inquiry screen within the Search Tab is an easy way to quickly search for details of a specific account placed for collection. The 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 data field within the AFM database (See Figure 4).

Figure 4: Account Inquiry Screen

Agency ID	Account ID	Name	Address
1200761	356268	Fairfield Organics LLC dka Heavenly Organics	attn: Amit Hooda 14300 E 125 Frontage R Longmont, CO 80504
1211493	370874	2nd Gen Productions Inc Maik V. Products-Robit Marrhosa	400 El Sobrante Road Corona, CA 92879
1176616	355382	Green Dragon Brewing LLC Andrew Wasts	55 Airview Dr Greenville, SC 29607
1165613	349909	Midwest American Petroleum Co. Darius Sabanis	3841 W. 66th Street Bedford Park, IL 60638
1173415	5363668	Euro Beauty Group Ltd Brandi Leifsa	224 King St W Unit 240 2 #2401 Toronto, Ontario Cana
1209599	306102	Anthony Brands USA Inc Steve Deutsch	209 E 11TH AVE Roselle, NJ 07203
1160991	354021	Bio Core Nutrition Anthony Mora	949 N Cataract Ave San Dimas, CA 91773
11339833	5720131	Jungle Juice Travon Byrd	MR-5721 Dorian Ct Lithonia, GA 30038-568
1079021	345422	Westbrook's Creamery LLC Kristina Clark	MR-206 Dueser Ave SW Canton, OH 44706-111

Showing 9 Matches

After entering search criteria on the Account Inquiry Screen and clicking Submit, a listing of accounts matching that criteria is then displayed (See Figure 5). The Debtor Names listed on this screen are links to view the details of each account. The Account Inquiry Screen also shows a list of the most recently viewed accounts.

4. Report Tabs:

The Reports Tab displays all of the AFM Client Web Access reports available to you, including a Standard History Report, Active Client Inventory Report, and a Total Client Inventory Report (See Figure 7).

Figure 7: Report Screen



4.a Standard History Report:

By clicking the Standard History Report tab on the screen, you will be able to view AFM’s recovery 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 (See Figure 8). This report can be downloaded into either a tab-delimited text file or an Excel spreadsheet.

Figure 8: Standard History Report

Standard History Report - July 2019

Month/Year	#	Assignments			Collections			Net %	Gross %	Commissions		Cancelled		Open Accounts		# PP	Avg Age	
		Net Amount	Gross Amount	Avg	Curr	%	To Date			To Date	%	#	Amount	#	Amount			
07-2019	9	\$31,793	\$39,540	\$3,531	\$6,742	21 %	\$6,742	21 %	21 %	\$861	13 %	0	\$0	0 %	8	\$25,941	1	174
06-2019	3	\$38,454	\$36,630	\$19,691	\$0	0 %	\$0	0 %	0 %	\$0	0 %	0	\$0	0 %	5	\$38,454	0	208
05-2019	5	\$49,463	\$49,463	\$9,893	\$0	0 %	\$9,896	20 %	20 %	\$2,129	22 %	0	\$0	0 %	4	\$39,566	1	130
04-2019	11	\$113,340	\$113,340	\$10,204	\$1,758	2 %	\$14,150	12 %	12 %	\$3,272	23 %	0	\$0	0 %	8	\$99,190	3	215
03-2019	4	\$42,118	\$42,118	\$10,529	\$0	0 %	\$4,944	12 %	12 %	\$1,139	23 %	0	\$0	0 %	3	\$37,174	1	197
02-2019	6	\$146,809	\$146,809	\$24,468	\$760	1 %	\$90,945	62 %	62 %	\$9,888	11 %	0	\$0	0 %	4	\$56,364	2	132
01-2019	6	\$85,732	\$85,732	\$14,299	\$2,461	4 %	\$30,342	12 %	12 %	\$1,344	15 %	0	\$0	0 %	5	\$75,490	1	143
12-2018	9	\$98,165	\$98,165	\$10,907	\$1,896	2 %	\$14,661	15 %	15 %	\$3,187	22 %	1	\$2,696	3 %	6	\$80,838	2	162
11-2018	8	\$105,752	\$105,752	\$13,219	\$0	0 %	\$8,282	8 %	8 %	\$1,749	21 %	0	\$0	0 %	6	\$97,469	2	174
10-2018	4	\$21,299	\$21,299	\$5,325	\$0	0 %	\$0	0 %	0 %	\$0	0 %	2	\$15,706	74 %	2	\$5,593	0	169
09-2018	3	\$15,761	\$15,761	\$5,234	\$0	0 %	\$1,000	6 %	6 %	\$290	25 %	0	\$0	0 %	3	\$14,761	0	154
08-2018	14	\$57,087	\$57,087	\$4,078	\$0	0 %	\$14,146	25 %	25 %	\$2,081	15 %	1	\$459	1 %	9	\$42,482	4	158
07-2018	8	\$53,737	\$53,737	\$6,717	\$0	0 %	\$12,148	23 %	23 %	\$3,123	26 %	0	\$0	0 %	6	\$41,599	2	241
06-2018	7	\$62,314	\$62,321	\$9,902	\$0	0 %	\$16,461	26 %	26 %	\$3,705	23 %	0	\$0	0 %	5	\$45,852	2	196
05-2018	15	\$96,915	\$97,204	\$4,461	\$0	0 %	\$41,573	62 %	62 %	\$8,272	20 %	0	\$0	0 %	9	\$25,342	6	301
04-2018	7	\$47,371	\$47,371	\$6,767	\$0	0 %	\$22,986	60 %	49 %	\$3,374	15 %	1	\$9,210	19 %	4	\$15,175	2	149
03-2018	11	\$77,007	\$76,800	\$7,001	\$6,000	8 %	\$43,438	57 %	56 %	\$6,120	14 %	1	\$385	0 %	6	\$33,204	4	153
02-2018	15	\$53,092	\$53,092	\$3,593	\$0	0 %	\$5,260	11 %	10 %	\$1,241	23 %	2	\$4,271	8 %	10	\$44,261	3	196
01-2018	11	\$94,032	\$94,032	\$9,548	\$0	0 %	\$7,007	81 %	76 %	\$5,062	7 %	1	\$5,356	6 %	6	\$16,869	4	207
12-2017	6	\$19,848	\$19,848	\$3,908	\$0	0 %	\$15,379	79 %	77 %	\$3,117	20 %	0	\$306	2 %	3	\$4,163	3	275
11-2017	7	\$65,639	\$65,639	\$9,377	\$0	0 %	\$18,147	60 %	28 %	\$4,345	18 %	1	\$45,401	54 %	2	\$12,192	4	127
10-2017	6	\$38,844	\$38,844	\$6,474	\$0	0 %	\$3,572	9 %	9 %	\$752	21 %	0	\$0	0 %	3	\$35,271	3	126
09-2017	6	\$47,110	\$49,225	\$7,832	\$0	0 %	\$22,772	54 %	40 %	\$4,658	20 %	1	\$5,251	11 %	2	\$19,097	3	240
08-2017	6	\$45,513	\$44,613	\$7,385	\$0	0 %	\$35,104	77 %	77 %	\$9,392	27 %	0	\$0	0 %	1	\$10,409	3	231
07-2017	11	\$36,035	\$36,035	\$7,438	\$0	0 %	\$25,092	74 %	74 %	\$6,724	29 %	0	\$0	0 %	7	\$17,606	6	181

4.b Active and Total Client Inventory Reports:

By clicking on the Active Client Inventory, you will automatically generate and display a complete report of all active accounts currently with AFM. Conversely, by clicking on the Total Client Inventory report, you will automatically generate and display a complete report all files ever placed with AFM, whether they are currently active or closed (See Figure 9). Both reports can be downloaded and saved as Tab Delimited files or Excel Spreadsheets.

Figure 9: Total Client Inventory Report

Client Account ID	AFM ID	Name	Date Added	Amount Delinquent	Principal Delinquent	Revs. Including Interest and Fees	Last Pmt Date	Status	Status Description
170425	125471	Capco Custom Packaging	8/4/2015	\$5,545.90	\$180.00	\$17,124.00	6/11/2015	AAA	Active: Debtor digitally sent payment to client. Awaiting confirmation from client.
308288	1228475	Buena Vista Brewing Company	7/12/2015	\$6,600.00	\$0.00	\$9,288.22		AAA	Active: Debtor returned attorney. Additional communications necessary to resolve.
348215	1224470	Louis Reed & Saw LLC	5/11/2015	\$1,485.77	\$0.00	\$2,588.16		AKK	Active: Contacted debtor and demanded payment in full. Additional communications necessary to
308589	1223223	Edwards Ridge LLC	7/18/2015	\$1,883.20	\$0.00	\$2,421.01		ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
441282	1222920	Full Print Shaving Company	7/17/2015	\$8,227.00	\$0.00	\$11,725.48		ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
831808	1222926	Vauxley Fine Liquor	7/17/2015	\$3,260.89	\$0.00	\$4,681.99		ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
609935	1222775	BAKE ROO'S K&K	7/16/2015	1882.73	\$0.00	\$1,688.00		ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
891529	1222798	IDEAL IDEAL	7/16/2015	1511.71	\$0.00	1712.40		ALD	Active: Debtor continues to make attempts to avoid payment/resolution. Continuing recovery efforts.
101897	1222242	Broadly Fine Ovenware LLC	7/12/2015	\$2,742.89	\$2,742.89	\$1,122.19	7/28/2015	NSP	Closed: Pmt in full.
312827	1221822	Hand Craft Dist. Inc.	7/9/2015	\$9,200.00	\$4,200.00	\$4,492.00	7/22/2015	ATN	Active: Temporarily on hold. Awaiting instruction from client.
300407	1220820	Beverton Brewing LLC	6/24/2015	\$15,941.96	\$0.00	\$15,254.94		ASP	Active: Smbor. Awaiting payment from debtor.
371420	1218826	GL Industries LLC	6/22/2015	\$56,984.77	\$0.00	\$50,584.82		AAA	Active: Debtor retained attorney. Additional communications necessary to resolve.
377389	1218116	Osawanda Glass & Tile	6/17/2015	\$7,358.11	\$0.00	\$5,972.82		ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
301229	1218110	Formula Four Beverage Inc.	6/11/2015	\$59,225.43	\$0.00	\$48,214.02		ANP	Active: Debtor promised payment.
171422	1217399	High Talk Marketing LLC	6/5/2015	\$2,723.28	\$0.00	\$2,212.39		AGL	Active: Debtor continues to make attempts to avoid payment/resolution. Continuing recovery efforts.
301884	1216242	Chicago Springs Specialty Stores	5/18/2015	\$18,894.88	\$0.00	\$15,828.81		ACE	Active: Debtor continues to make attempts to avoid payment/resolution. Continuing recovery efforts.
312882	1215121	Obaid Inc.	5/13/2015	\$9,886.10	\$9,886.10	\$0.00	5/22/2015	NSP	Closed: Pmt in full.
381898	1214120	Shim Shig LLC	5/12/2015	\$12,483.71	\$0.00	\$10,288.14		AKK	Active: Contacted debtor and demanded payment in full. Additional communications necessary to
380124	1213421	The ZF Enterprise Inc.	5/7/2015	\$9,866.00	\$0.00	\$1,083.85		NRK	Closed: Debtor enabled collection efforts. Court fees do not warrant legal action. Debtor reported to
312822	1212620	Dorman Coffee Company LLC	5/16/2015	\$18,230.00	\$0.00	\$28,78.94		ANP	Active: Debtor promised payment not received. Continuing recovery efforts.
				TT					
				\$128,249.46	\$16,987.96	\$111,628.52			
				\$5,729,946.00	\$1,126,191.00	\$4,603,755.00			

4.c Status Descriptions:

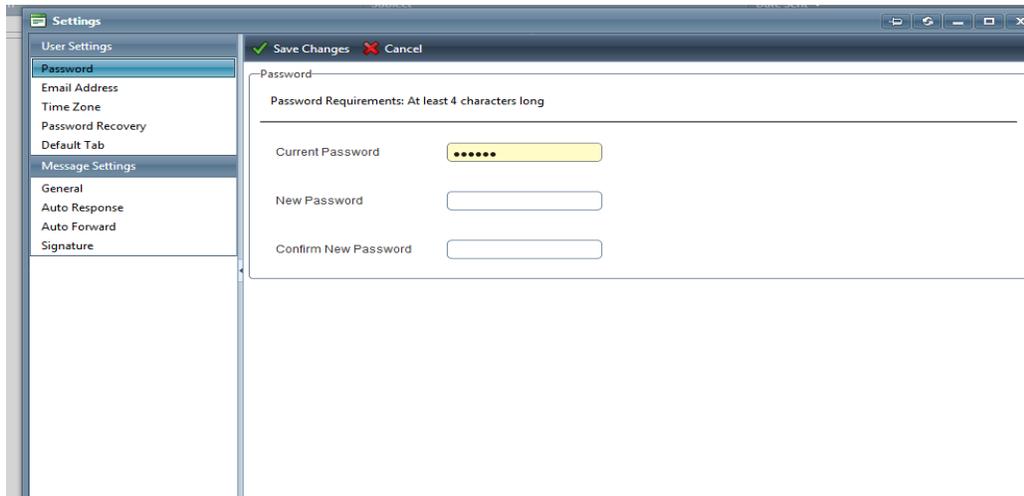
The Status Description report lists all of AFM's status codes and the definition of each code. This report can be downloaded into either a tab-delimited text file or an Excel spreadsheet.

5. Settings:

The Settings button is located on the top right of the screen next to the Log Me Out button. Upon clicking the Settings Button, you will be taken to a page that allows you to view your Username, Full Name and email address and further allows you to change your password, email address, time zone, localization and password challenge questions (See Figure 10).



Figure 10: Settings page



The screenshot shows a web browser window titled "Settings". On the left, there is a navigation menu with "User Settings" expanded, showing options like "Password", "Email Address", "Time Zone", "Password Recovery", and "Default Tab". Below "User Settings" are "Message Settings" and "General" (with sub-options "Auto Response", "Auto Forward", and "Signature"). The main content area is titled "Password" and includes a "Save Changes" button (with a green checkmark) and a "Cancel" button (with a red X). Below this, it states "Password Requirements: At least 4 characters long". There are three input fields: "Current Password" (filled with six dots), "New Password", and "Confirm New Password".

6. Logout:

Once you have finished using the Client Web Access portal, you can exit the system securely by clicking the Log Me Out button on the top right of the screen. You will then be returned to the Client Web Access Login Page.

7. Help:

Client Web Access is equipped with a Help menu which aims to address some of the most common questions users may have. This menu can be accessed by clicking the  button in the top right corner. However, if at any time you are experiencing difficulty or have questions or concerns, please do not hesitate to contact AFM Client Services at (847) 259-7000 ext. 115 or via email at clientservices@afm-usa.com.