

## AMERICAN FINANCIAL MANAGEMENT CLIENT WEB ACCESS INSTRUCTIONAL MANUAL

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## 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

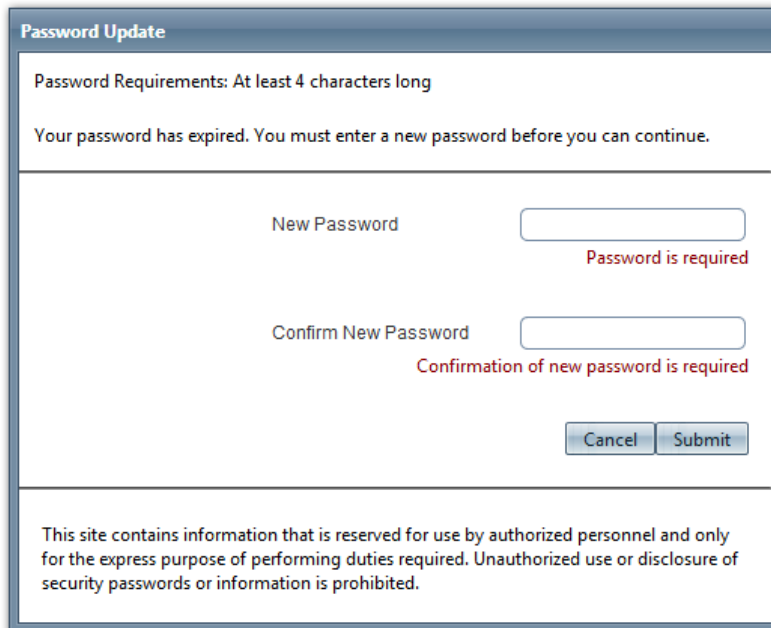
Did you forget your password?

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

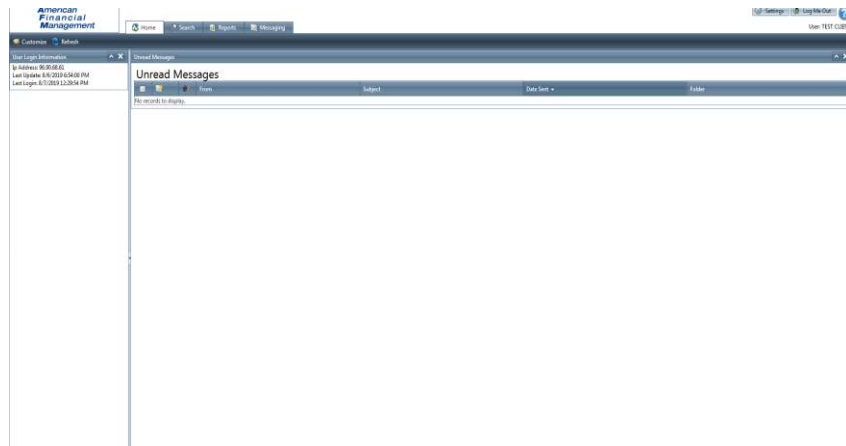
Cancel Submit

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

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.

Figure 5: Example of an Account Inquiry Result for Debtor Contact Name

The screenshot displays the American Financial Management web interface. On the left, there is a navigation menu with sections like 'Inquiry Options', 'Recently Viewed Accounts', and 'Online Activity Reports'. The main content area is titled 'Inquiry results' and contains a table with the following data:

Agency ID	Account ID	Name	Address
1088669	311256	Industrial Lubricants LLC Bandy Lisermann	5745 F Duane Cave Creek, AZ
1027095	314210	Precision Formulations LLC Monty Lloyd	800 West Sari Coppell, TX 7
1195745	5672043	Syntek Global Curt Frnce	3259 E 9425 S Sandy, UT 84
1163331	6124739	Tin Star Foods Hina Pandya	7801 N Lama Austin, TX 78

Below the table, it indicates 'Showing 4 Matches'.

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, as well as a textual description of that status is displayed along with the current balance and various other debtor information (See Figure 6).

Figure 6: Account Detail Screen

The screenshot displays the 'Account Detail Screen' for Precision Formulations LLC (1027095). The page is divided into several sections:

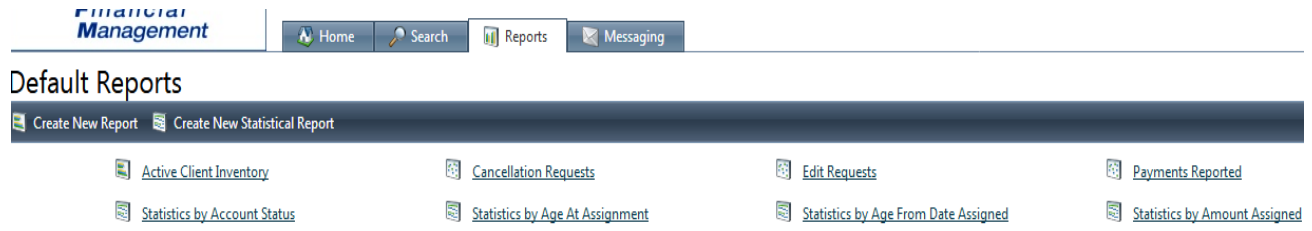
- Client Information:** Client Account ID 314210, AFMID 1027095, Amount Assigned \$39,960.89, Principal Collected \$0.00, Balance Including Interest and Fees \$92,214.43, Date Assigned 1/10/2014, Last Pay Date, Last Pay Amt \$0.00, Status TOR, Status Description: Closed. Debtor out of business. Debtor reported to credit bureaus.
- Client Details:** Client Num 312889VBCA, Client Description Berlin Packaging, Name Precision Formulations LLC, Name2 Monty Lloyd, Address 800 West Sandy Leite Rd #200, City Coppell, State TX, Zip 75019, Telephone 972-393-7170, Client Date 6/28/2013.
- Additional Information:** A table with columns for Date/Time and Text, containing various transaction logs and dates.



## 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			Gross %	Commissions		Cancelled		Open Accounts		# PP	Avg Age	
		Net Amount	Gross Amount	Avg	Curr	%	To Date		Net %	To Date	%	#	Amount	%			#
07-2019	9	\$31,793	\$39,540	\$3,531	\$6,742	21 %	\$6,742	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 %	5	\$38,454	0	208
05-2019	5	\$49,463	\$49,463	\$9,893	\$0	0 %	\$9,896	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 %	\$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 %	\$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 %	\$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 %	\$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 %	\$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 %	\$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 %	2	\$15,706	74 %	2	\$5,593	0	169
09-2018	3	\$15,761	\$15,761	\$5,234	\$0	0 %	\$1,000	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 %	\$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 %	\$3,123	26 %	0	\$0	0 %	6	\$41,599	2	241
06-2018	7	\$62,314	\$62,321	\$8,902	\$0	0 %	\$16,461	26 %	\$3,705	23 %	0	\$0	0 %	5	\$45,852	2	196
05-2018	15	\$66,915	\$67,204	\$4,461	\$0	0 %	\$41,573	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 %	\$4,374	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 %	\$6,120	14 %	1	\$365	0 %	6	\$33,204	4	153
02-2018	15	\$53,092	\$53,092	\$3,593	\$0	0 %	\$5,260	11 %	\$1,241	23 %	2	\$4,271	8 %	10	\$44,261	2	196
01-2018	11	\$94,032	\$94,032	\$8,548	\$0	0 %	\$7,007	81 %	\$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 %	\$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 %	\$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 %	\$752	21 %	0	\$0	0 %	3	\$35,271	3	126
09-2017	6	\$47,110	\$49,225	\$7,832	\$0	0 %	\$22,772	54 %	\$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 %	\$9,392	27 %	0	\$0	0 %	1	\$10,409	3	231
07-2017	13	\$36,033	\$36,033	\$7,438	\$0	0 %	\$25,092	73 %	\$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	Reason: Including Interest and Fees	Last PDY Date	Status	Status Description
170425	123471	Capco Custom Packaging	8/4/2019	\$5,648.90	\$360.00		8/11/2019	AAA	Active: Debtor digitally sent payment to client. Awaiting confirmation from client.
308288	123475	Buena Vista Brewing Company	7/12/2019	\$6,600.00	\$0.00			AAA	Active: Debtor returned attorney. Additional communications necessary to resolve.
348215	123447	Louis Reed & Saw LLC	5/11/2019	\$1,485.77	\$0.00			AKK	Active: Contacted debtor and demanded payment in full. Additional communications necessary to
308593	123233	Edwards Ridge LLC	7/18/2019	\$1,883.20	\$0.00			ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
441202	122292	Full Print Shaving Company	7/17/2019	\$8,227.00	\$0.00			ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
831808	122936	Vauxley Fine Liquor	7/17/2019	\$3,260.89	\$0.00			ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
609935	122775	BAKE ROO'S K&K	7/16/2019	1882.73	\$0.00			ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
691529	122798	IDEAL IDEAL	7/16/2019	1511.71	\$0.00			ALD	Active: Debtor continues evasive actions to avoid payment/resolution. Continuing recovery efforts.
101897	122294	Broadly Fine Ovenware LLC	7/12/2019	\$2,742.99	\$2,742.99		7/28/2019	NSP	Closed: Paid in full.
312827	122282	Hand Craft Dist. Inc.	7/9/2019	\$6,000.00	\$4,000.00		7/22/2019	ATN	Active: Temporarily on hold. Awaiting instruction from client.
300487	120950	Bovonator Brewing LLC	6/24/2019	\$15,941.96	\$0.00			ASP	Active: Smbol. Awaiting payment from debtor.
371420	121826	GL Industries LLC	6/22/2019	\$56,984.77	\$0.00			AAA	Active: Debtor retained attorney. Additional communications necessary to resolve.
377389	121516	Osawanda Glass & Tile	6/17/2019	\$7,358.11	\$0.00			ALD	Active: Debtor not responding to demands for payment. Continuing recovery efforts.
301229	122110	Formula Four Beverage Inc.	6/11/2019	\$59,229.43	\$0.00			ANP	Active: Debtor promised payment.
171422	121799	High Talk Marketing LLC	6/5/2019	\$2,723.28	\$0.00			AGL	Active: Debtor continues evasive actions to avoid payment/resolution. Continuing recovery efforts.
301884	121682	Chicago Springs Specialty Stores	5/16/2019	\$18,894.88	\$0.00			ACE	Active: Debtor continues evasive actions to avoid payment/resolution. Continuing recovery efforts.
312882	121521	Obaid Inc.	5/13/2019	\$9,886.40	\$9,886.40		5/20/2019	NSP	Closed: Paid in full.
381898	121102	Shim Shig LLC	5/12/2019	\$12,483.71	\$0.00			AKK	Active: Contacted debtor and demanded payment in full. Additional communications necessary to
280121	121421	The ZF Enterprise Inc.	5/7/2019	\$9,866.00	\$0.00			TKR	Closed: Debtor evaded collection efforts. Court facts do not warrant legal action. Debtor reported to
312822	121400	Dorman Coffee Company LLC	5/6/2019	\$18,283.00	\$0.00			APN	Active: Debtor promised payment not received. Continuing recovery efforts.
				TT					
				\$128,249.46	\$16,987.96		\$111,261.50		
				\$5,794,946.00	\$1,126,191.00		\$4,668,755.00		

## 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.

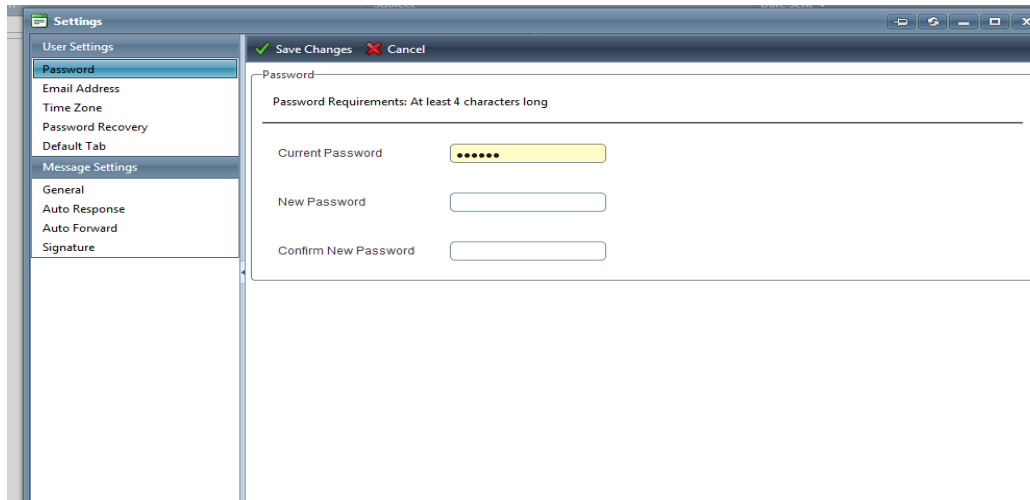
## 5. Settings:

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 is a navigation menu with "User Settings" and "Message Settings" sections. Under "User Settings", "Password" is selected. The main content area shows a "Password" section with a "Save Changes" button and a "Cancel" button. Below the buttons, it says "Password Requirements: At least 4 characters long". There are three input fields: "Current Password" (filled with 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](mailto:clientservices@afm-usa.com).