

Client Portal Settings

In the client portal we are dealing with 1st party and/or 3rd party debt. So, let's talk about what statuses you might need to set up.

1. **Agency Config > "Client debt status"** is for 1st party debt. It has a real client debt status (not just display) in the client portal.

2. **Agency Config > "Debt Status"** is for 3rd party/agency debt. It has a real debt status (in Lariat) and a display client debt status in the client portal.

Client debt status and debt status need to be mapped to one another.

3. **Admin > Client > search for a client > click on "client portal" at the top >** You determine what the client can see in the portal. This screen lets you set preferences, give access to reports, determine which debtor forms they need to add new debtors and if you allow them to access agency products (use with caution and work with Lariat support to set up).

4. **Agency Config > Globals > drop down - client portal >** sets what a client can and cannot do and CBR default debt statuses. You should NOT change these settings without working with Lariat Support.

5. **Agency Config > Widgets >** allows you to choose which financial information tiles you want the client to see in the portal. You can even set up a personalize message for all clients to see.

6. To mascaeraed into the client's portal: **Admin > Client > search for a client > click on client portal at the top > under General Information just click on the button that says "log into client portal for this client"**.

Supporting Documents:

- To setup a login for the client read Client Portal Account Setup
- To help with training a client to use the portal read Client Portal