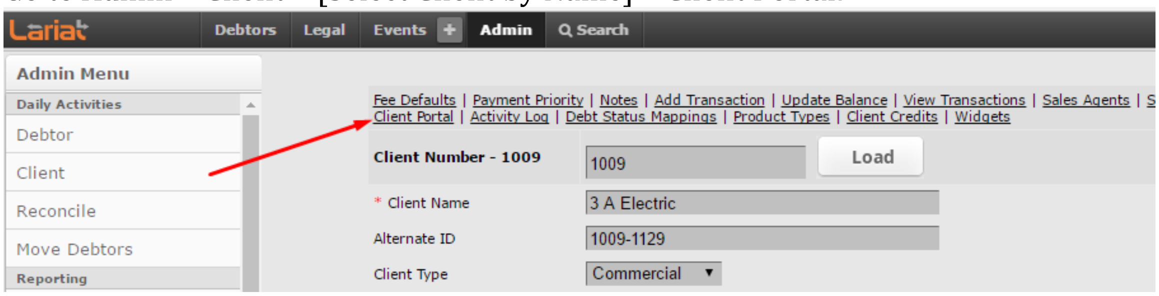
Client Portal Accounts

How to give a client access to their portal

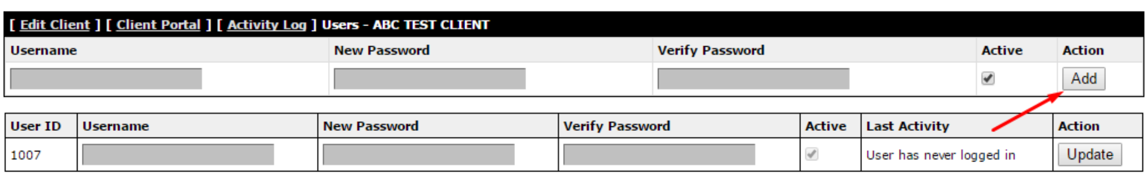
Help! What do I do if a client wants access to the Lariat portal? Don't worry - this guide walks you through what you need to do. You'll need to follow these steps for each client when you first give them access to the portal.

For your very first client access - Complete the one time call with Lariat Customer Service. In this call we'll walk you through some basic, one time, configuration for the portal as well as train you on how to use it. Once this is done, you won't need to contact us prior to giving a client access.

1. Go to Admin > Client > [Select Client by Name] > Client Portal:



2. **Create login.** On the "Users" tab, create a username and password for your client to use when they login. You can create logins for individuals or one login for the whole office.



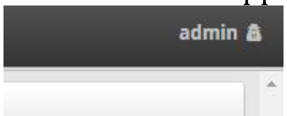
If a client forgets their password, you can reset it here by entering a new password for their username and click "update."

Creating valid usernames & passwords:

Usernames – must be all lowercase.
Passwords:

- Forbidden words: temp, temporary, or password.
- Must be at least 8 characters in length

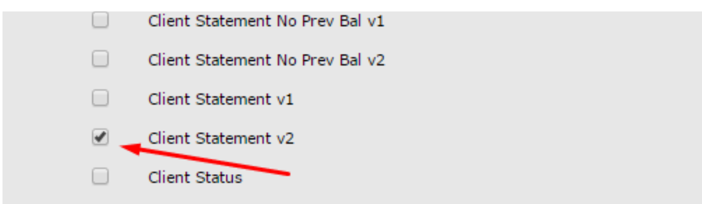
You set the client's initial password and they can change it after they login using the menu in the upper-right:



You can use the link under "Portal" to login as the client and preview the portal as they will see it—use this to make sure everything looks good to go.

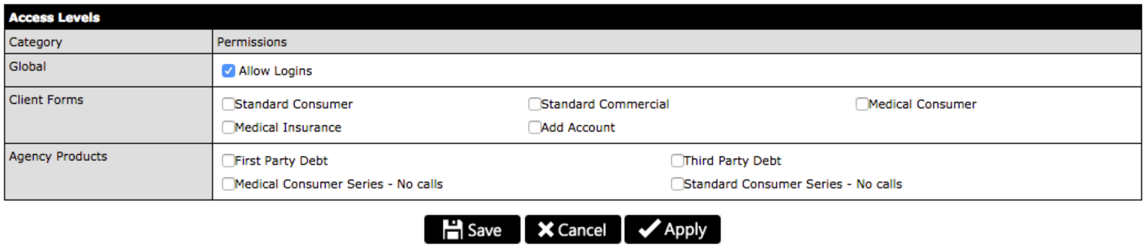
3. **Preferences settings.** In this section you specify default settings and preferences. You can:
   a. Set what queue or agent will the new account be added to? Set which of your agents is assigned to this client's accounts
   b. The debt status assigned by default to accounts added by the client
   c. The commission schedule assigned by default to accounts entered by this client
   d. Do you want someone notified when the client adds an account, if so specify what agent(s) will be notified (hold down CTRL on your keyboard to multi-select)
   e. Add the client product credit minimum balance allowed. (You don't need this unless you're using the Products feature in the portal.)

4. **Reports.** Any report you want the client to be able to run within the portal, check the box next to the report and click "save" at the bottom of the screen.



Make sure you're comfortable with the client having access to the report(s) you check, since they can run them at any time.

5. **Security access (what they can see or do).** The access levels section allows you to turn on/off different features for the client's login:



If you're not letting the client enter accounts as first party prior to placing it with you, we highly recommend unchecking "first party debt" under "agency products" and save your change. If a client adds an account as first party by mistake, you will see the debtor in Lariat but the debt will not be visible for you to work until they convert it to third party debt (i.e. place it for collections.)

6. Once you're done, click "Save" to finish and save the client account settings.

7. *Congratulations!* The client can now login to the Lariat Client Portal with the login credentials you just created for them by going to your Lariat address (the same web address you use to access Lariat):

   YOURNAME.lariatcentral.net.

   You can link to this page from your website, if desired.

Still have questions? Contact us at support@lariat.co

or call 877.268.6667.