

Client Portal

How to monitor work with your accounts

Through the online portal you can quickly and easily monitor your placements in real time. The portal enables you to see an overview of progress, pull reports, check notes, and much more. This guide walks you through the basics of using our portal. Let's get started!

Logging in

To access the portal use the website and username/password information provided to you. You will use this information each time to login:



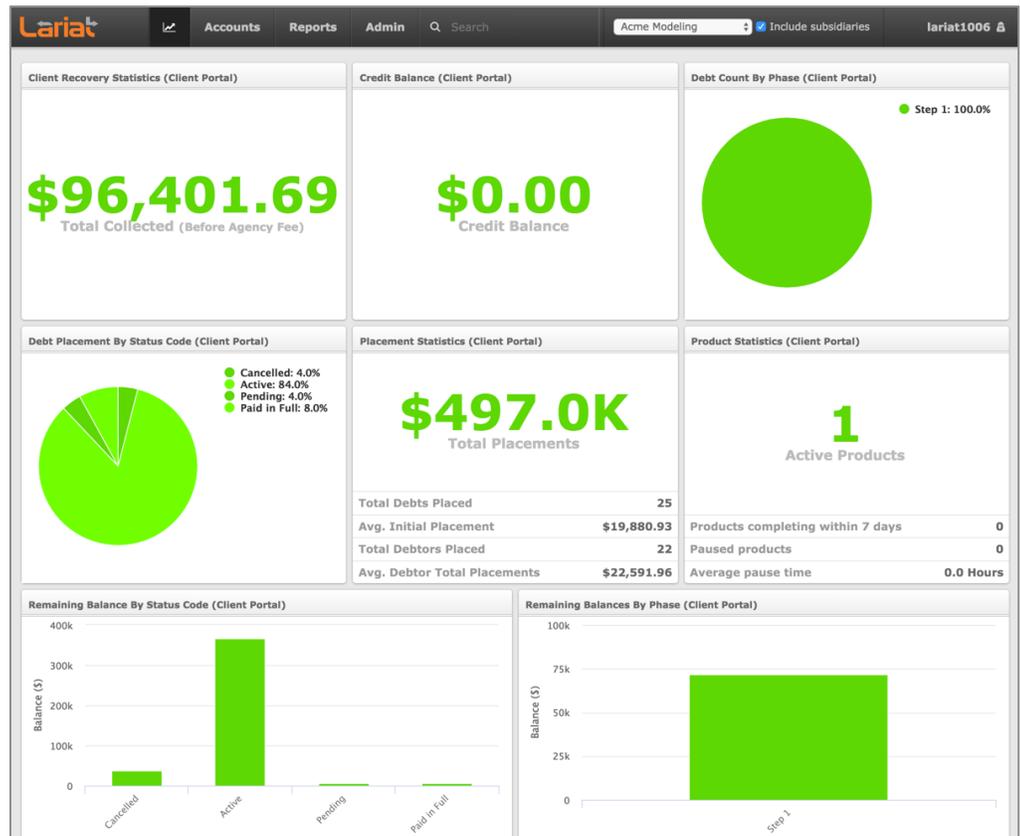
While we don't anticipate that you'll have any problems, if you do experience any issues logging in, please contact us immediately so we can help you.

See an overview—the portal dashboard

The dashboard is the first thing you see when you login.

It provides you with an overview of your placements in a variety of ways, to keep an eye on what matters most.

NOTE: Depending on what you place with us, this screen might look slightly different for you—as some of the graphs may not be relevant in your situation.



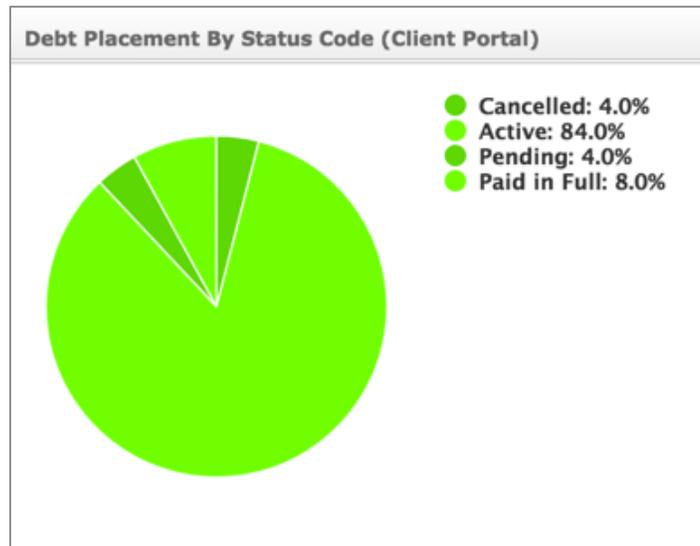
The dashboard contains many useful metrics, and so we'll discuss a couple of the most common in more detail.

Debt Placement by Status Code

This widget tells you what statuses (active, paid, bankrupt, etc.) your debts have, as shown in a pie chart with percentages.

For example, here we see that 84% of the debts are in an active status, meaning they are being actively worked.

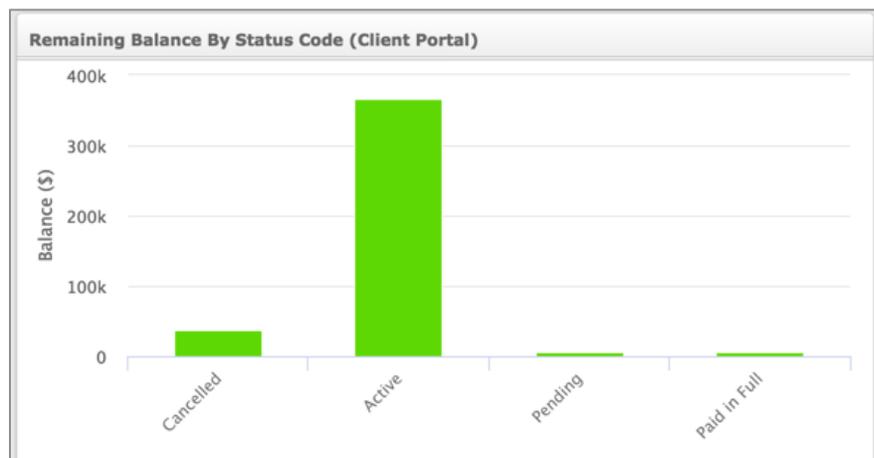
This helps you monitor the progress from a high level view. This will update in real time as the accounts are worked.



Remaining Balance by Status Code

With this graph, you can see your placement by status and balance. This allows you to, at a glance, monetize the statuses and get sense of where your money is.

In this example, the bulk of the placement balance is still being worked.

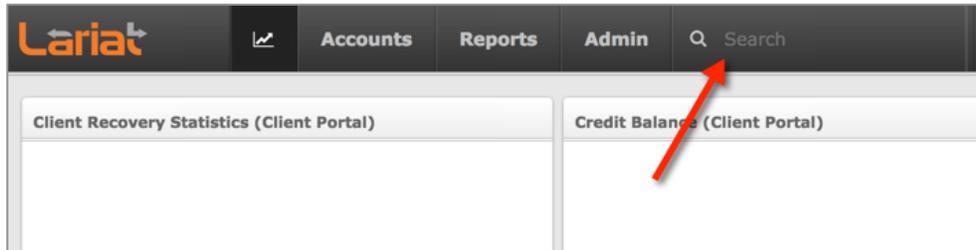


However, if we saw the majority of the value was bankrupt or closed categories, that would paint a different picture and give valuable insight as to what we could expect to see in results.

If you have questions about any of the other graphs, please reach out to us and we can discuss them.

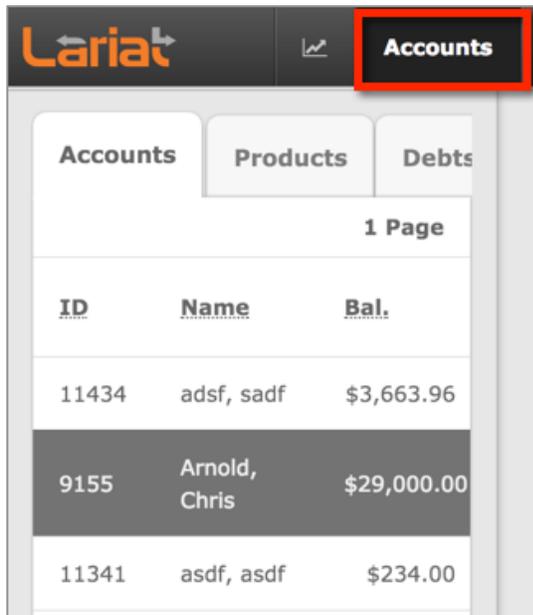
Searching for specific account

If you're looking for a specific debtor, click the "search" field at the top of the portal and enter their name or account number:



Browsing accounts

You can browse through your placement by going to the "accounts" tab and then scroll through the account list and click to move between debtors:



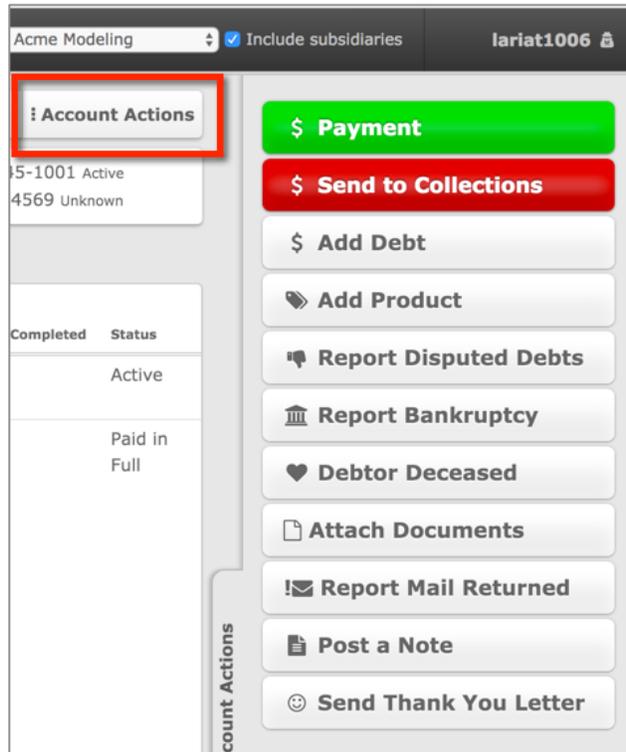
The screenshot shows the "Accounts" tab selected in the Lariat portal. The "Accounts" tab is highlighted with a red box. Below the navigation bar, there are three tabs: "Accounts", "Products", and "Debts". The "Accounts" tab is active, showing a table of account information. The table has three columns: "ID", "Name", and "Bal.". The table contains three rows of data. The second row is highlighted in grey.

ID	Name	Bal.
11434	asdf, sadf	\$3,663.96
9155	Arnold, Chris	\$29,000.00
11341	asdf, asdf	\$234.00

The default view lists the accounts, however, you can also view the list by products or by debts by clicking the tabs to the right.

Basic account actions

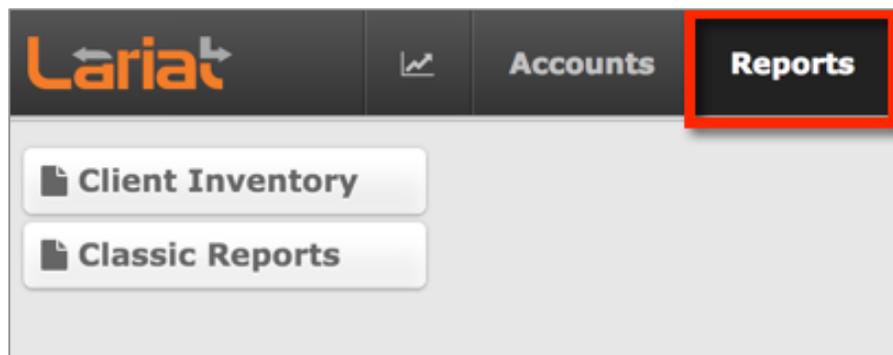
Depending on your needs, the portal allows you to complete actions like report a payment, write a note, report a disputed or bankrupt debt, and much more. You'll find these common tasks on the Account Action panel:



NOTE: The list of account actions may look different when you log in depending on what you place with us, as not all options may be relevant to your situation.

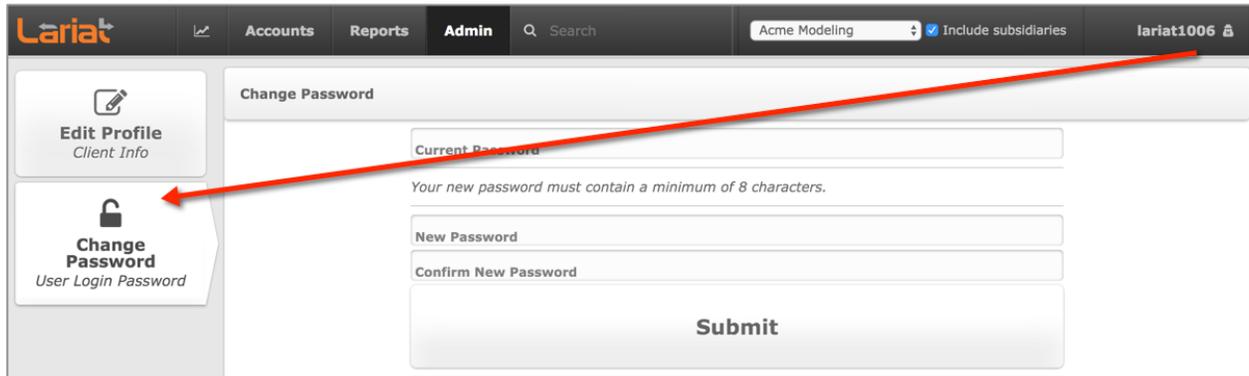
Reports

To access any reports that are available to you, go to the "reports" tab where you can view some of the basic (classic) reports or export an inventory of your placement to Excel at any time:



Your profile—change your password

We issue you a default password when we create your login, however, you can change your password at any time by clicking on your username in the upper-right hand corner of the portal:



The screenshot shows the Lariat portal interface. At the top, there is a navigation bar with the Lariat logo, menu items (Accounts, Reports, Admin), a search bar, a dropdown menu (Acme Modeling), a checkbox (Include subsidiaries), and a user profile (lariat1006). The main content area is titled 'Change Password'. On the left sidebar, there are two buttons: 'Edit Profile Client Info' and 'Change Password User Login Password'. A red arrow points from the 'lariat1006' username in the top right corner to the 'Change Password' button in the sidebar. The 'Change Password' form contains the following elements:

- Current Password**: A text input field.
- Your new password must contain a minimum of 8 characters.**: A validation message.
- New Password**: A text input field.
- Confirm New Password**: A text input field.
- Submit**: A large button at the bottom of the form.

You can also update your company address and contact information by going to “edit profile” and entering the information into the form.

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

or call 877.268.6667.