

801.364.0777 vww.North-American-Recovery.com

#### NORTH AMERICAN RECOVERY'S SECURE ONLINE PORTAL

UPLOAD ACCOUNTS SECURELY INFORMATION AT YOUR FINGERTIPS INFORMATION WHENEVER YOU NEED IT ANOTHER OPTION TO HELP SAVE TIME

## **Test Client**

CLIENT ID: 100 USER NAME: Test TEMPORARY PASSWORD: Test NEW PASSWORD: OR CLIENT IN THE FUTURE.

#### LOGGING IN

- Visit <u>www.North-American-Recovery.com</u>
- Select **Client Access** at the top right-hand portion of the screen.



- A new window will open. Input the information requested (which has been provided above.) Note: User Names and Passwords are Case Sensitive.
- The system will prompt you to change your password. Create a unique password to access your Secure Account in the future.

#### **UPLOADING YOUR ACCOUNTS**

• To upload new files, click on the **Uploads Tab**.



• From here click **select** and locate your file to be uploaded.

	Select	Select Client:	356 RENTAL	•
/	<b>X</b>			
		Upland files		

• Once located, click **Upload Files**. At this time, you will see the file added to the list below of 'Files Previously Uploaded.' An email has been automatically sent to our Client Service Team and the accounts will be entered into our system, or requested documents will be added to the account.

### **SENDING MESSAGES TO NAR**

• To safely and securely contact a representative at NAR, click on the **Messages Tab**.



• Select Keewer, Use the 'To...' drop down menu and then select the person you would like to contact. Fill in the subject and your message; click **Send** when you're ready.

New Message	-
To nar employee X	
Send Cc Click Here To Select Contacts	
Attachments Subject: Question	Normal Priority 👻
Times New R 3	
B I 型 abs × x A * >> = = = = = = = = □ = □ 3 3 😣 🕏 🤗	<b>3</b> •
Good morning	
3	

• When you are finished looking at your accounts, select Use In the top right hand portion of the screen and this will take you back to the log in screen.

Using the witton at the top right of the screen (next to	🚯 Log Me Out	) should be able to
answer any of your questions.		

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# If you need further assistance in using Client Web Access or you need to change your user name and password, please call our Client Service Department at (801) 364-0777 Ext 101.

### ACCESSING YOUR ACCOUNTS AND ACCOUNT NOTES

• To access and review your existing accounts, click on Inquiry Tab.



• The left-hand side will contain an area for search criteria to be entered.

Inquiry Options	Inqui	ry results		
TEST	Agency	Account ID	Name	
Name (Last, First)	ID	Account to	Name	
SSN	148770	TEST	Dummy Debtor for Nevada	
Telephone 💋				
Custom Search Field	412229	TEST6Client Reference #	Guardian of TEST6DtrLastName, TEST6 TEST6CodtrLastName, TEST6CodtrFirst	

• Select the desired account to view notes and status SAXTON, DAVE (3280089)

ClientAccountID 6331	Additional Accounts For SAXTON, DAVE					
N.A.R., Inc.ID 3280089 No records to display.						
Current Balance \$1 622 65	Additional Information					
AmountAssigned \$1,500.00	Combined	Trans	actions Correspondence	Comments	Online Activity	Attachments
DateAssigned 4/15/2020	Date/Time		Text			
LastPayDate	7/31/2020 12:0	0 AM	- 2157464 - AUTO LINKED			
Status LETROL	5/10/2020 4:07 PM		by DJS - test notes.			
tatusDescription NO ASSET- WILL BE			by DIS - Credit card payment added through automated process: Transaction ID: 2534677101 Date: 05/07/2020 Authorization code:			

## **RUNNING REPORTS**

• You may also review specific reports under the **Reports Tab**. Select this tab and choose the report you would like to view.



• Create your own report - locate the "Create New Tabular Report" button



• Select the information you would like included in your report from the Available Fields

Step 1: Choose your fields to display		
Available Fields	Displayed Fields	
Address1		
Address2		
AmountAssigned		
AppCode		
BankAccount		
BankRouting		
CancelAmount		
CancelDate		
CheckDate		
CheckNo	44	(·)
City		
ClientAccountID		
ClientDescription		
ClientLCDate		
ClientNum		
Contact		
Contact2		
CurrBalance		

• Highlight the item you would like on the report and select the 🔛 button. To add everything



• Filter the report even more by using the other steps below.

	Step 2: Choose your clients and status codes			
	Step 3: Choose your filter options			
	Step 4: Choose your sorting			
	Step 5: Save Report for future use			
•	When you have completed your filtering choose	👂 Run Report	at the top left	
•	when you have completed your intering, choos		at the top left	
•	From here, you can export or "print" the report the top of the report.	by selecting the	🥥 Export 🤹	drop down menu at

• You now have several different options to export ("print") the report.

