ConServe

Client Web Portal®

Your Secure, **24/7** Online Access

ConServe

Accounts Receivable Management

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Your Secure, **24/7** Online Access

Customer Service

(800) 724-7500

Monday – Thursday 8am-7pm EST

Friday: 8am - 5pm EST

Table of Contents

ConServe Client Web Portal®

The ConServe Client Web Portal® provides our Clients with online access to their consumer's account information and ConServe's FICO Debt Manager system database through a secure login. Web portal access and training will be provided to authorized users identified at the initial Scope of Work (SOW) meeting. Clients may contact our Client Care team for additional web portal support by calling (800) 724-7500 (select option #6) or emailing **clientcare@conserve-arm.com**.

Features Include

- **Manage Accounts**
  View, edit, recall, request hold, add/view notes, and transactions
- **Upload Center**
  Securely upload files/documents, placements, adjustments, payments, etc.
- **Reports and Documents**
  Storage center for downloaded consumer information and reports. Access the Self Service Reporting Application to customize reports that are uploaded daily
- **Resource Center**
  Helpful industry resources

Sample Screenshots

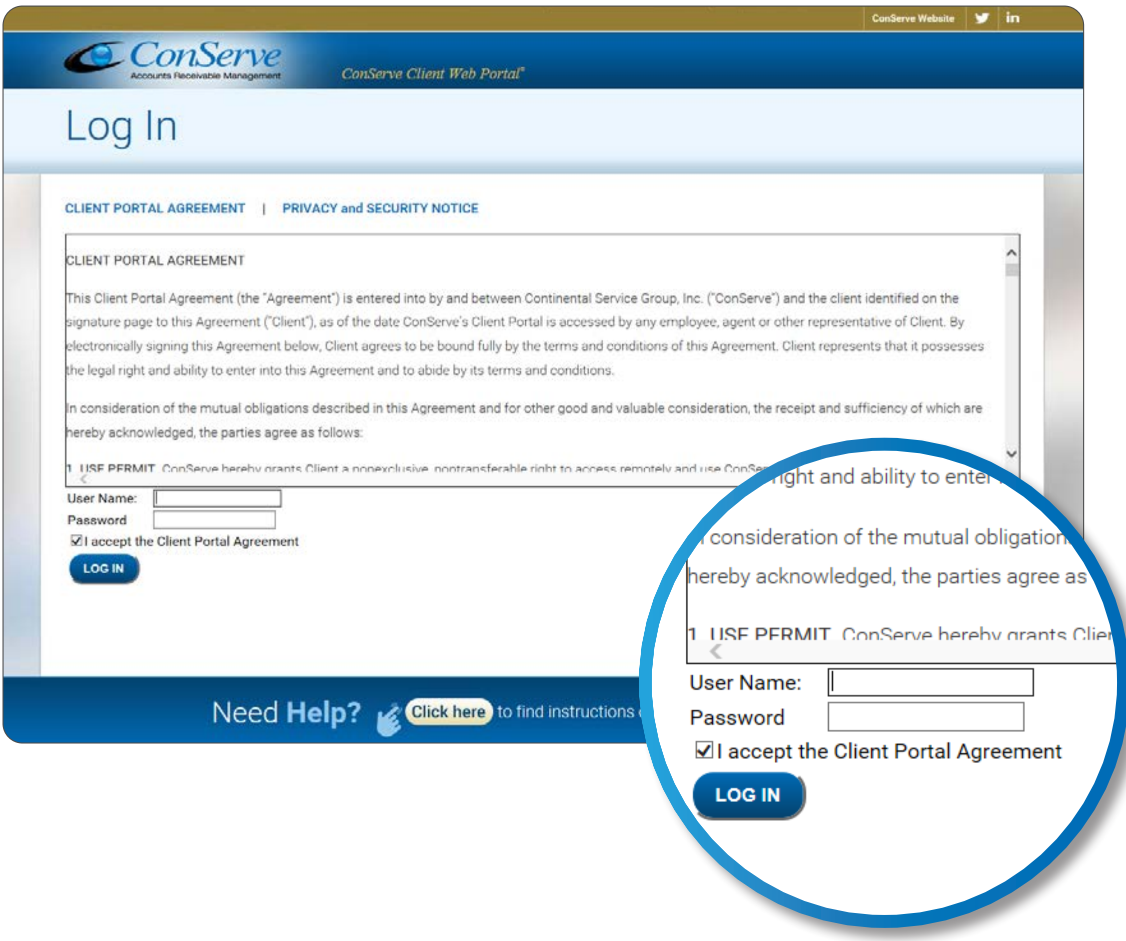
ConServe has included sample screenshots of the ConServe Client Web Portal® in the following pages. The Client Care team is happy to provide navigation assistance upon request.

Please email us at **clientcare@conserve-arm.com** for assistance.

Client Login Screen

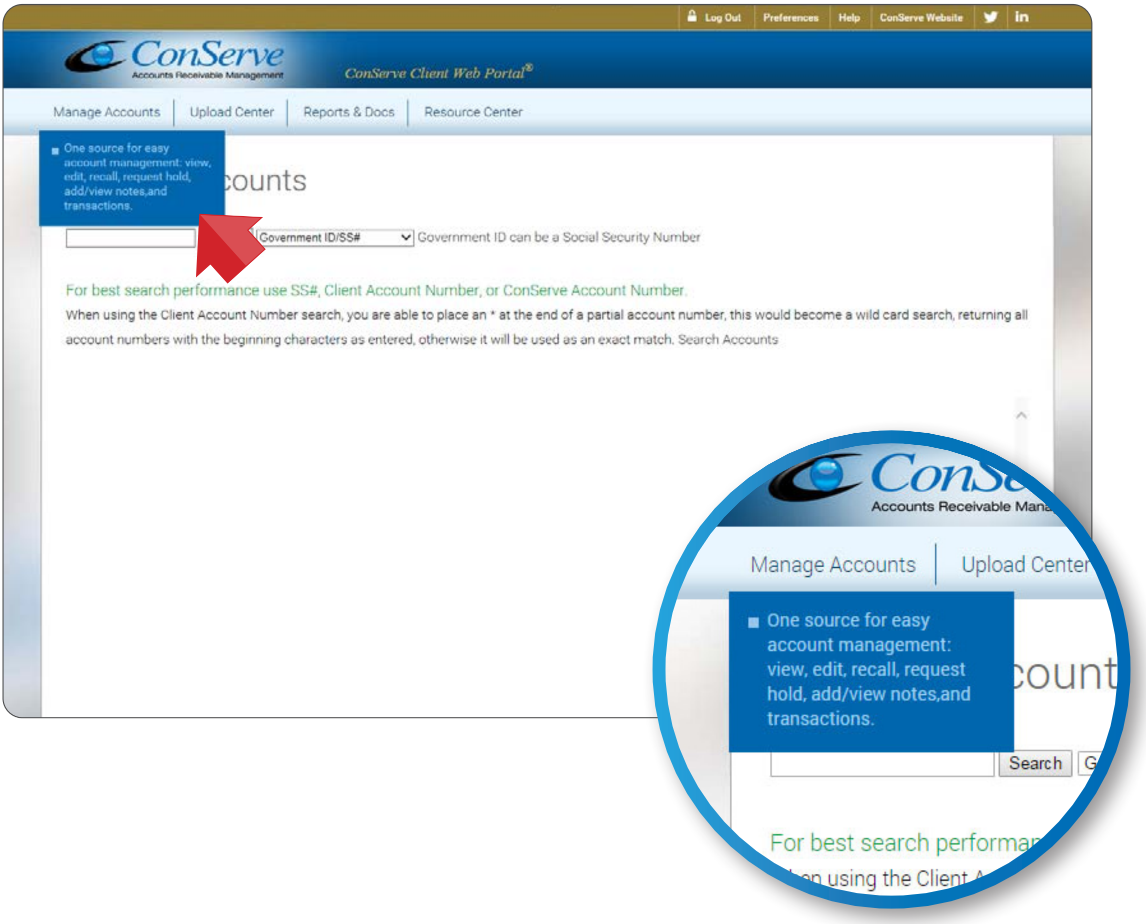
Clients log into the ConServe Client Web Portal® by entering their provided username and password and accepting the Client Portal Agreement.

If you forget your username or password, please contact the Client Care team at **clientcare@conserve-arm.com**.



Manage Accounts Tab

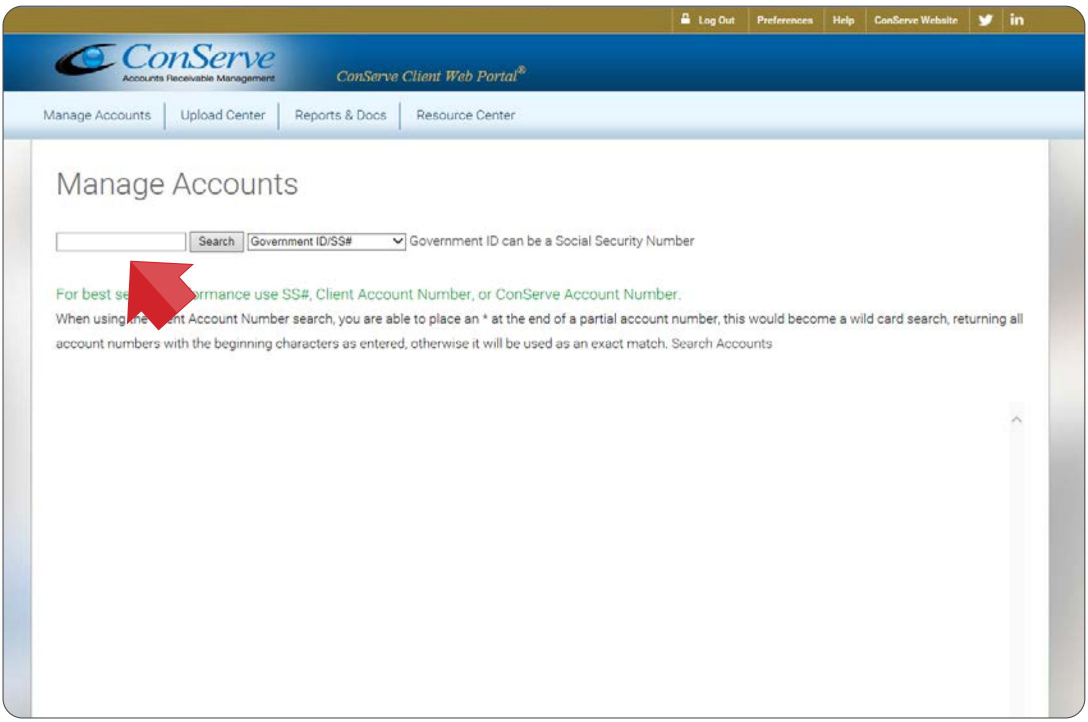
When hovering over the **Manage Accounts tab,** a brief description of the capabilities is provided, allowing for ease of navigation.



Manage Accounts Tab (cont.)

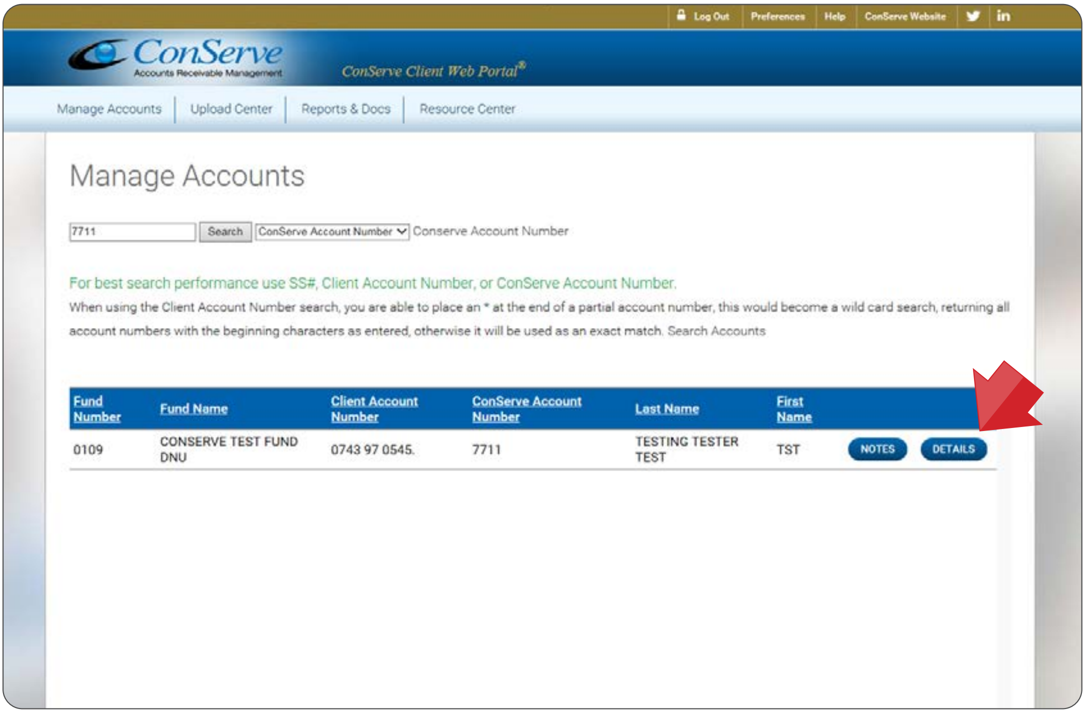
Consumer accounts can be located through the Manage Accounts tab. Clients can search for an account by:

- Consumer Name
- Client Account Number
- ConServe Account Number
- Social Security Number (no dashes)



Manage Accounts Tab (cont.)

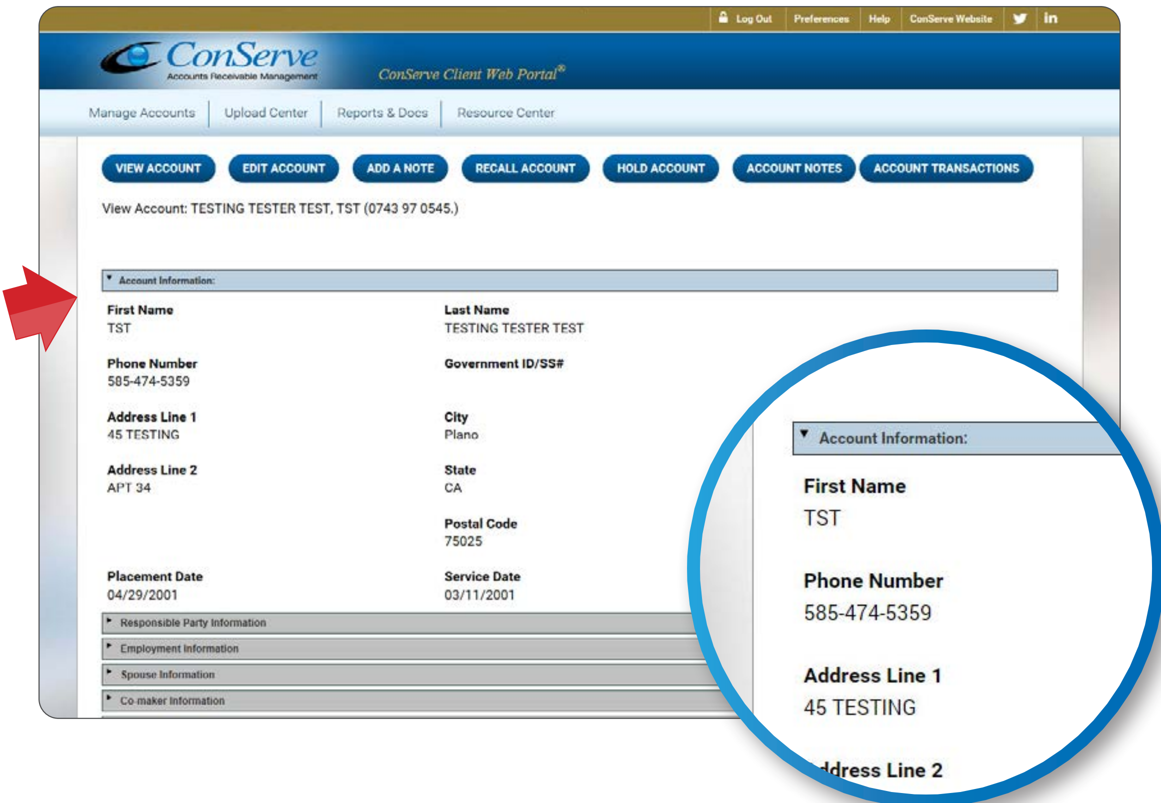
Accounts can be sorted by clicking on the individual headers. To access the details of a specific account, click on the ”Details” button.



View Account Screen

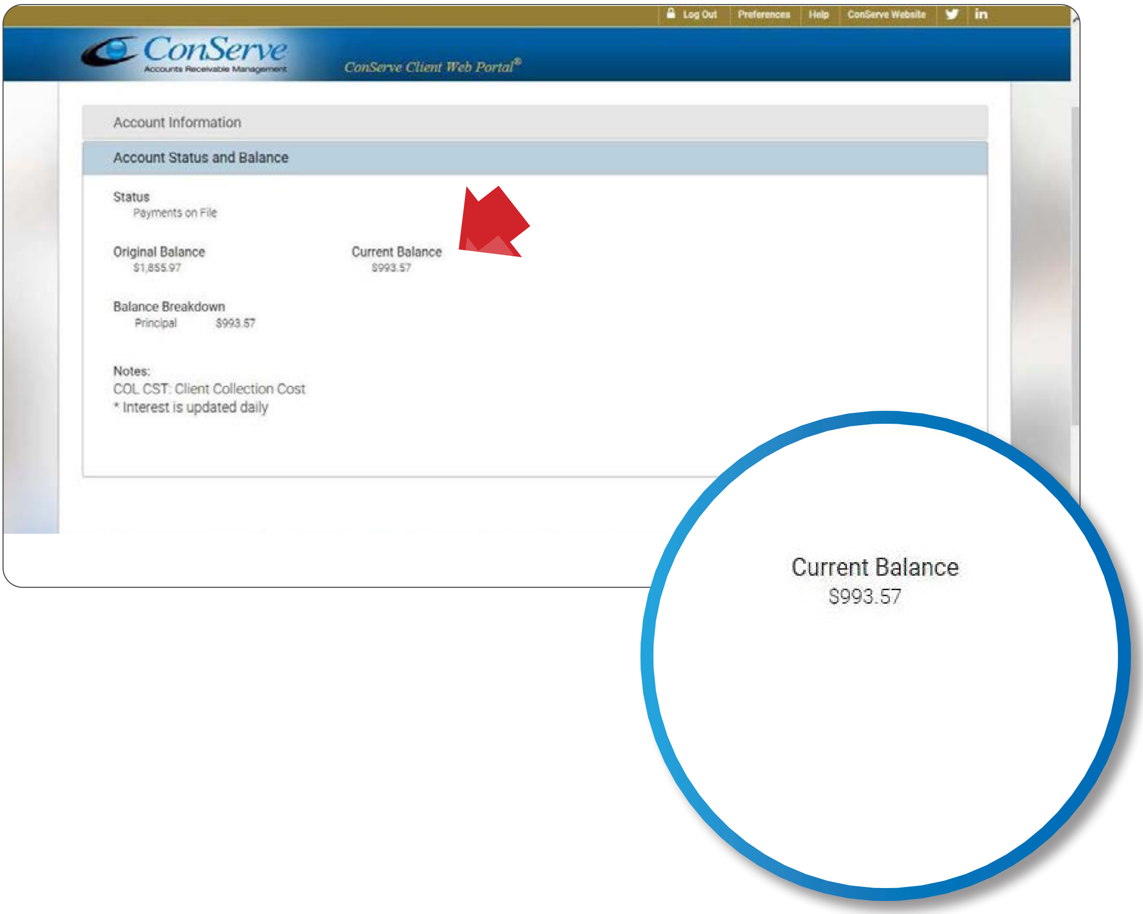
Clients are able to view detailed account information including:

- Account Information
- Responsible Party Information
- Employment Information
- Spouse Information
- Co-maker Information
- Account Status and Balance



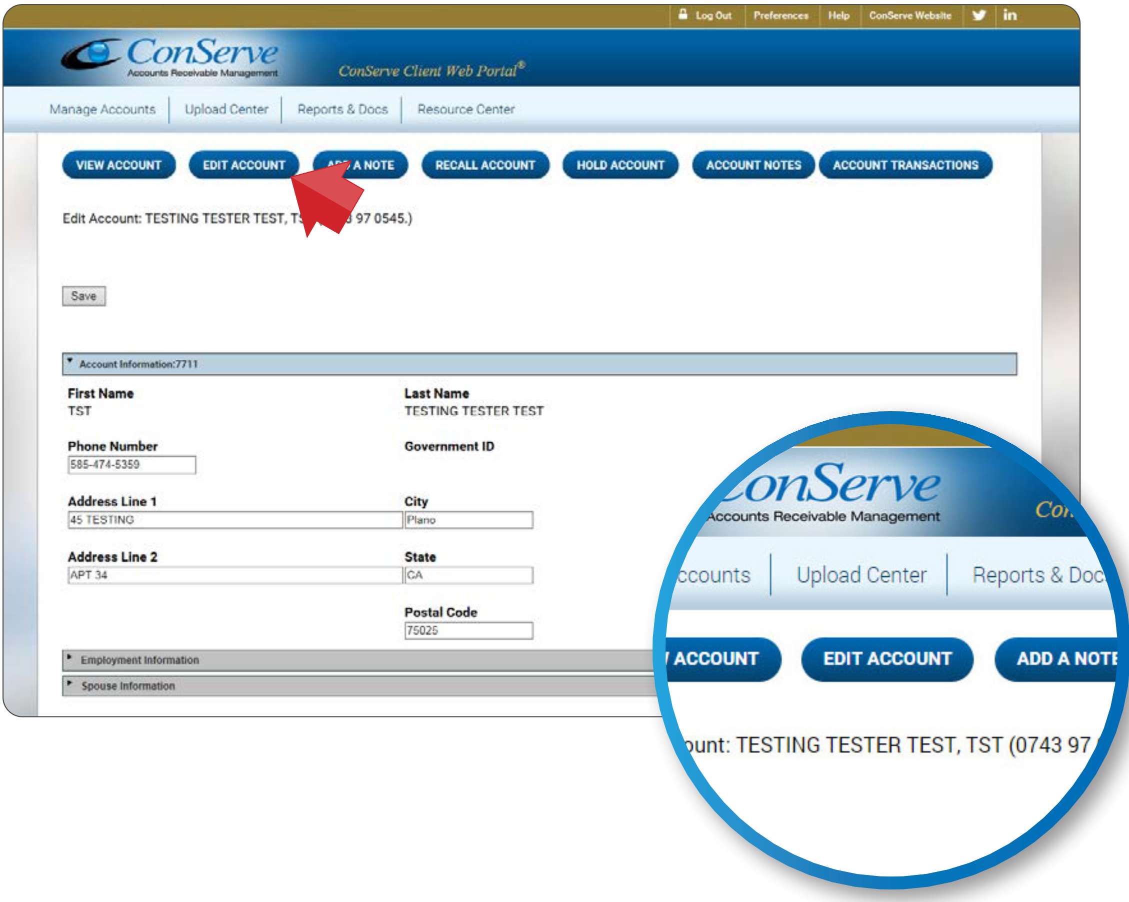
View Account Screen (cont.)

While in the View Account screen, the current account status and balance breakdown is provided.



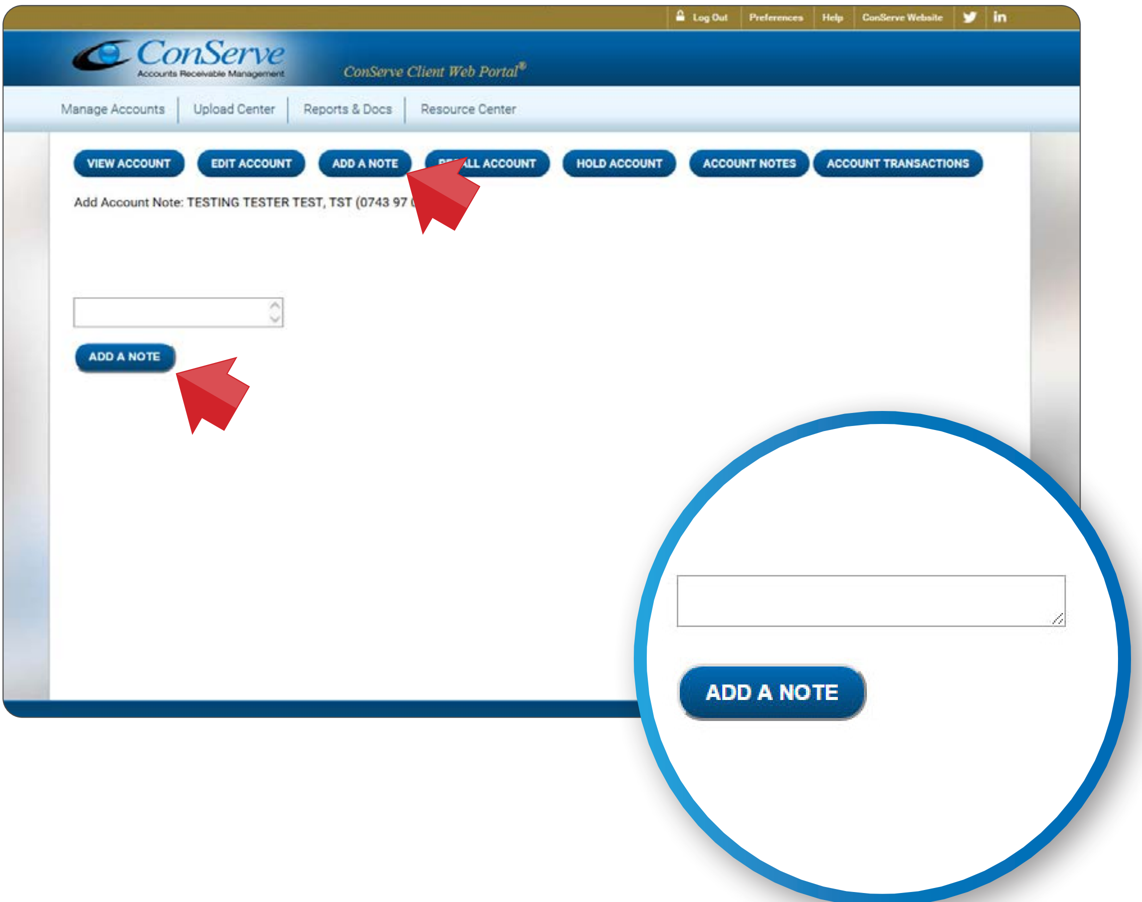
Edit Account Screen

Clients are able to edit demographic information on consumer accounts. ConServe will review each account update that is submitted, and accept or deny the change.



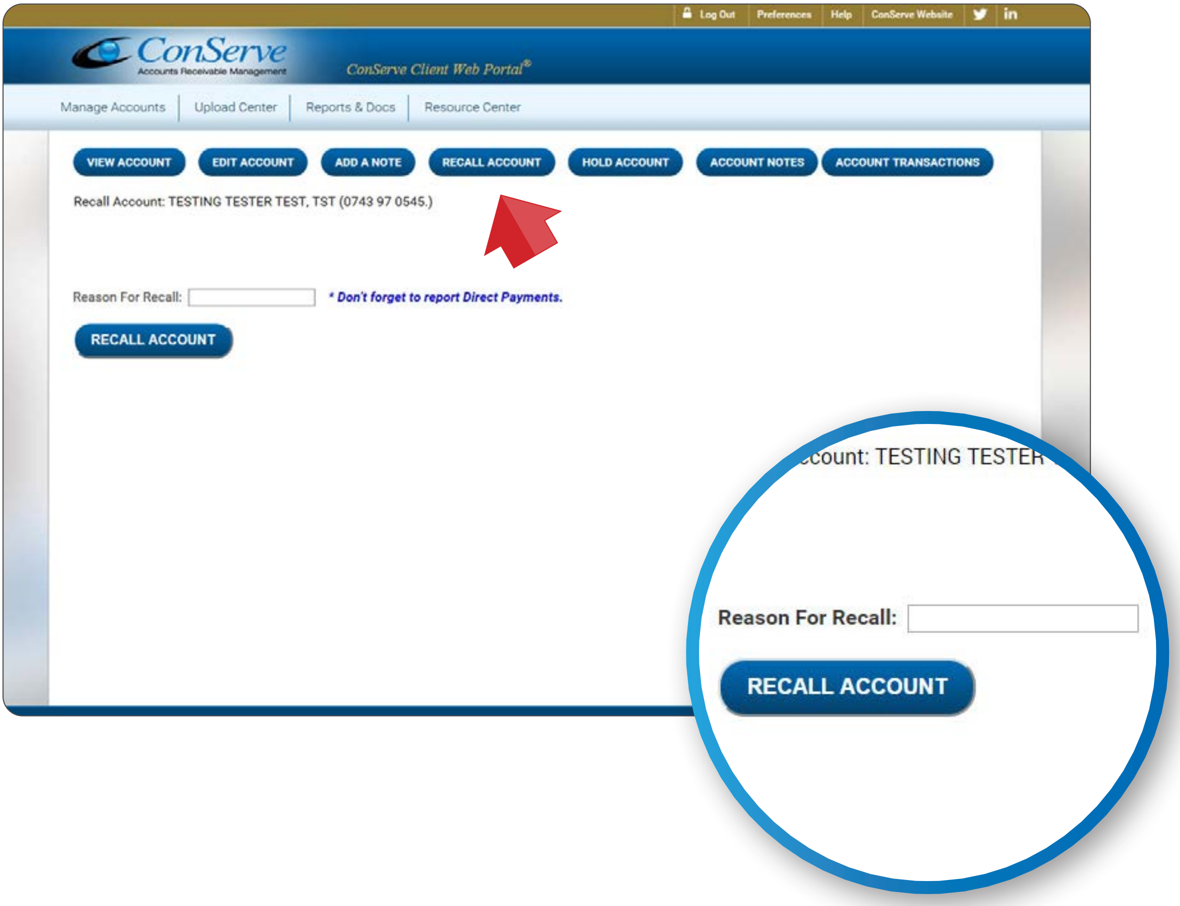
Add a Note Screen

Clients can add account related notes and information (up to 99 characters) in the "Add a Note" text box. ConServe's Client Care team reviews all submitted notes.



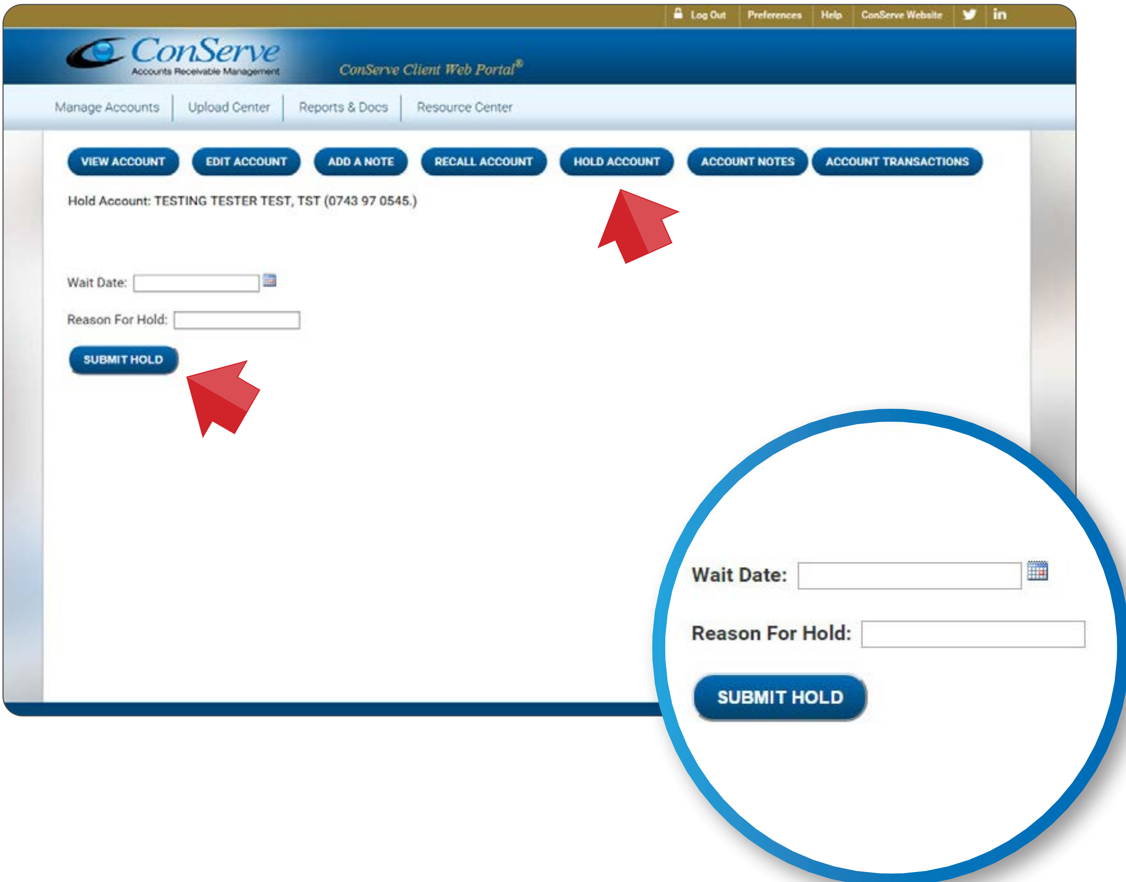
Recall Account Screen

Account recalls can be requested by providing a detailed explanation in the "Reason for Recall" text box. We will reach out to the Client with any questions.



Hold Account Screen

Account holds can be requested by providing a detailed explanation in the "Reason for Hold" text box. We will reach out to the Client with any questions.



Account Notes

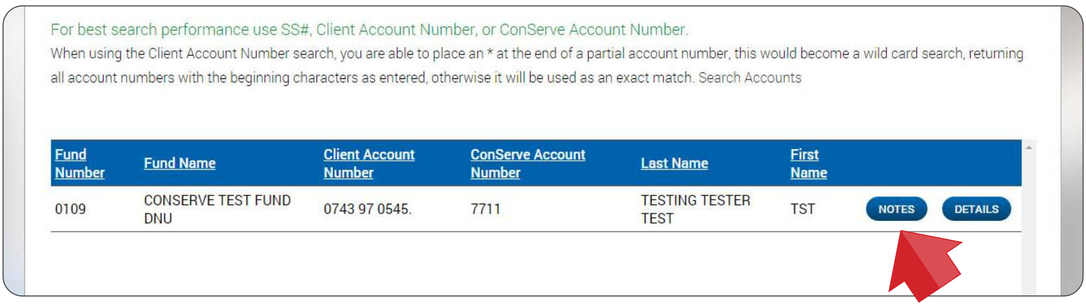
From the Manage Account tab, there are two ways in which Clients can view account notes:

OPTION 1: Select the “Notes” button.

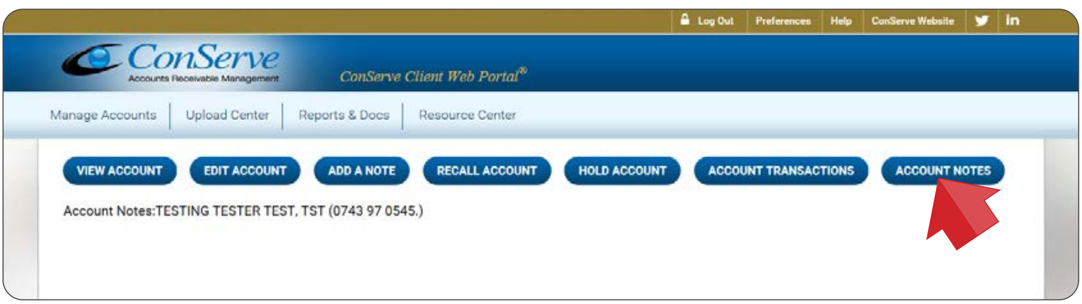
OPTION 2: Select the “Account Notes” screen.

Notes are updated in real-time and displayed in chronological order. Clients are able to access conversation notes between ConServe staff and the consumer.

OPTION 1: Select the “Notes” button.

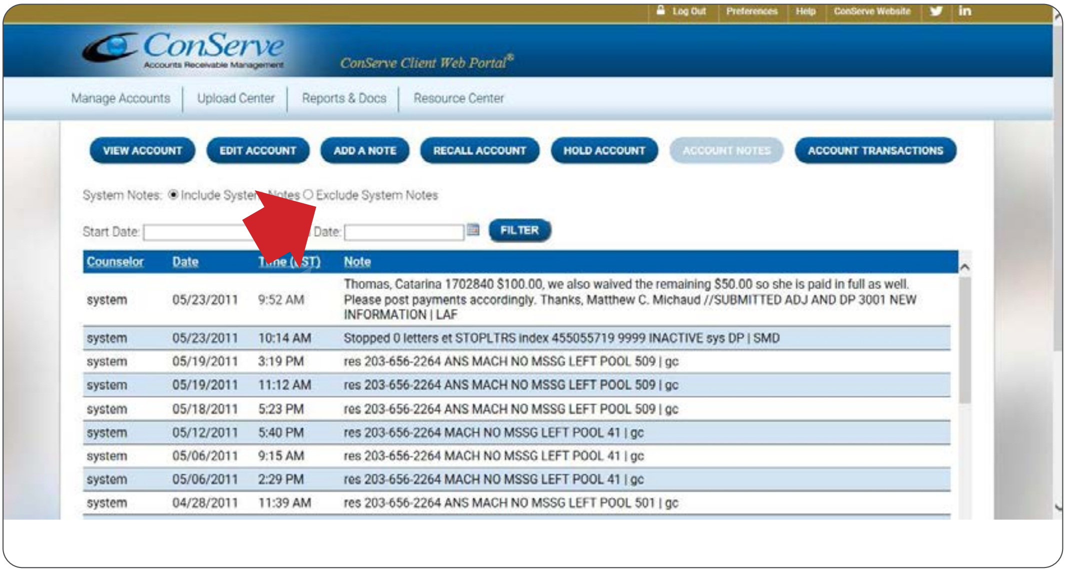


OPTION 2: Select the “Account Notes” screen.



Account Notes (cont.)

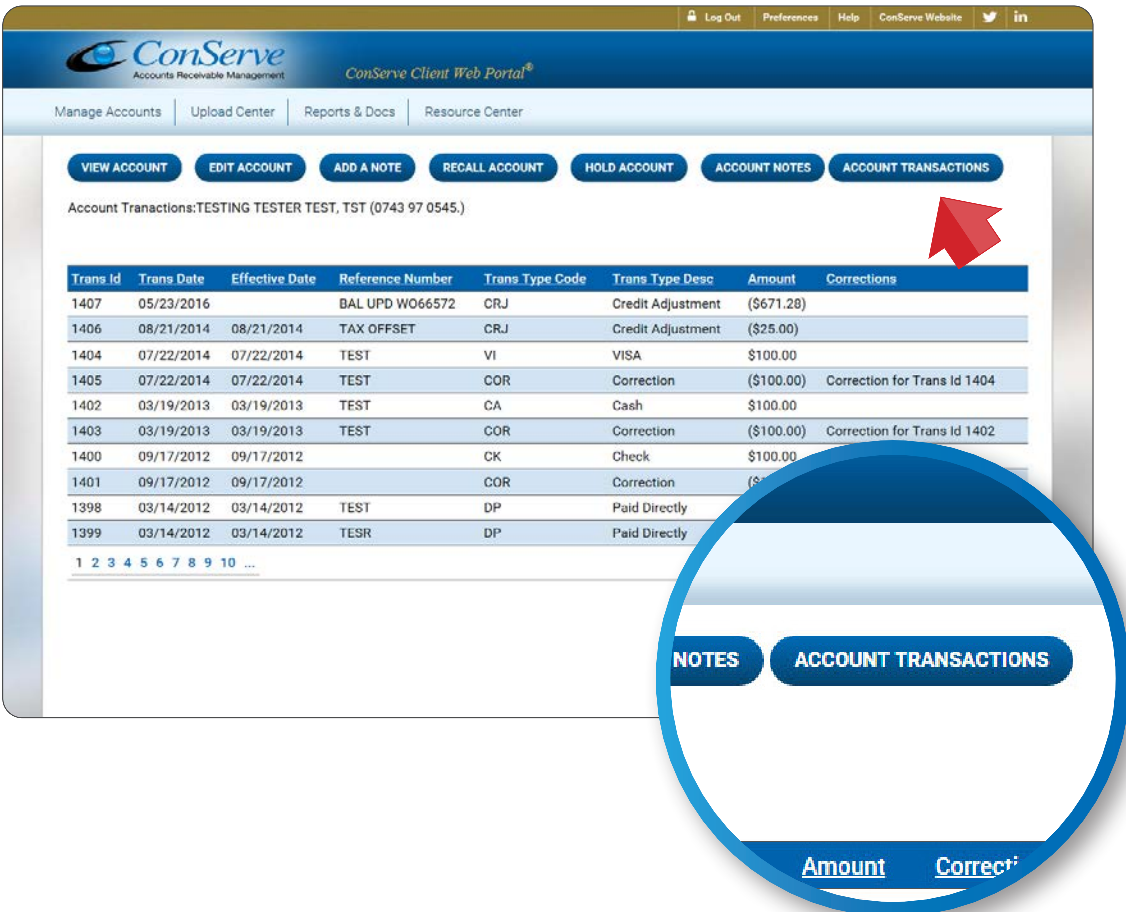
Clients are able to search through Account Notes using the date range field. The "Exclude System Notes" option allows you to only view notes entered by ConServe staff.



Account Transactions Screen

The Account Transactions screen displays all transactions including:

- Payments
- Corrections
- Non Sufficient Funds (NSFs)
- Adjustments

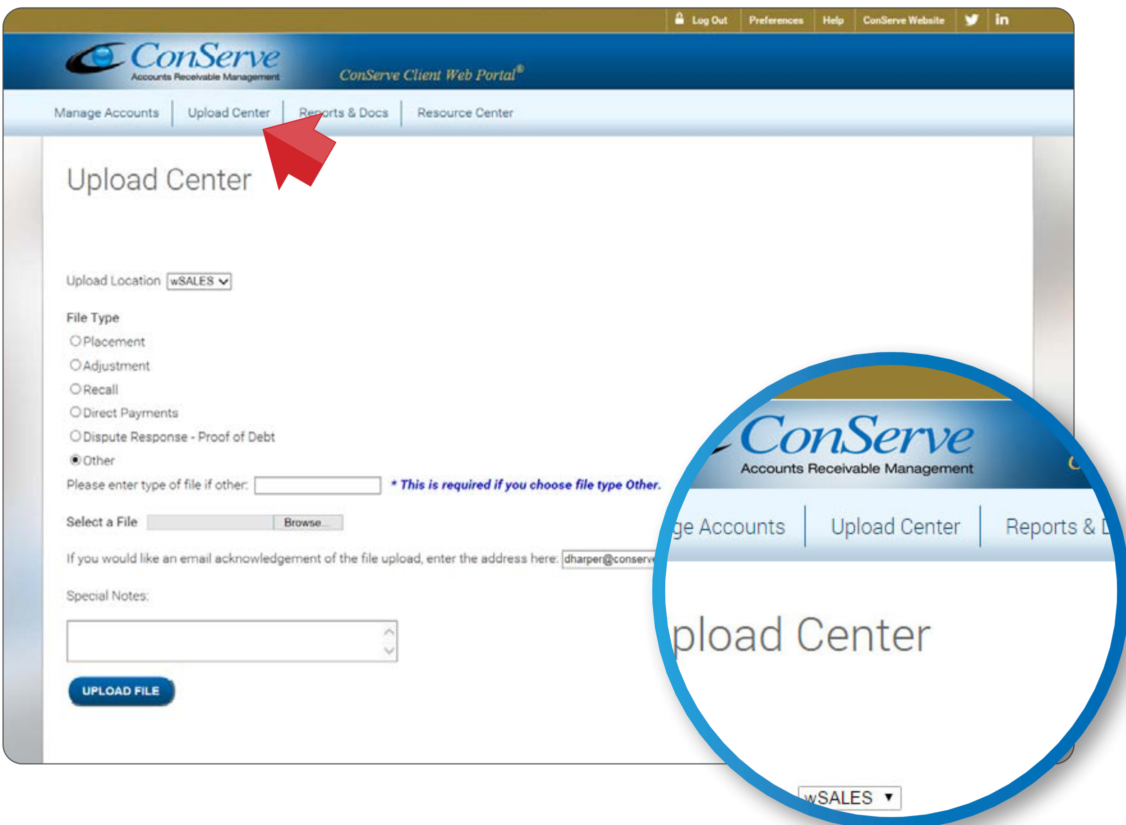


Upload Center Tab

The Upload Center tab allows Clients to securely upload:

- Placement Files
- Payment Files
- Reconciliations
- Account Adjustment Files
- Close Request Files
- Consumer Documentation (proof of debt)

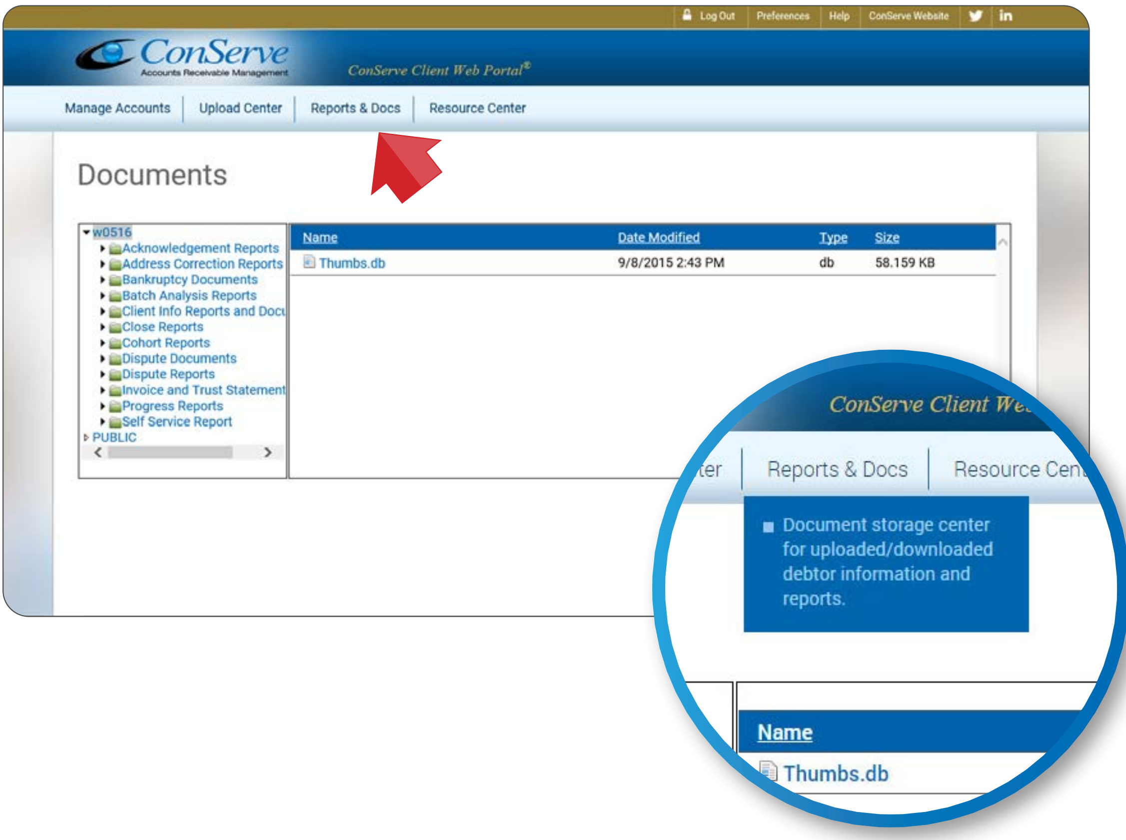
Clients can select the appropriate web portal folder (if associated with more than one).



Reports & Docs Tab

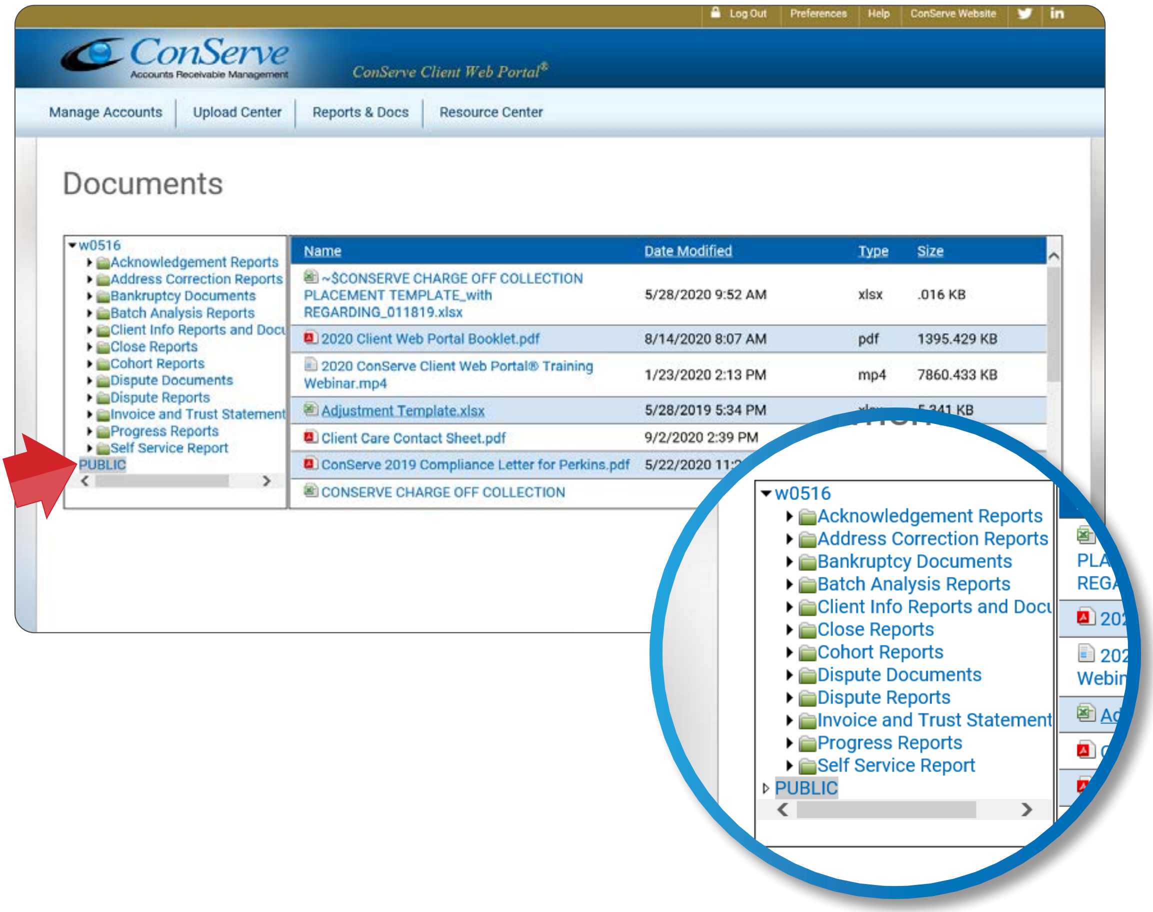
The Reports & Docs tab is the document storage center for downloaded consumer information, documents and reports. Clients can view the "Public Folder" as well as specifically assigned private folders.

Detailed steps on how to navigate the Self Service Reporting Application, which allows Clients to customize reports that are updated daily, can be found on page 23.



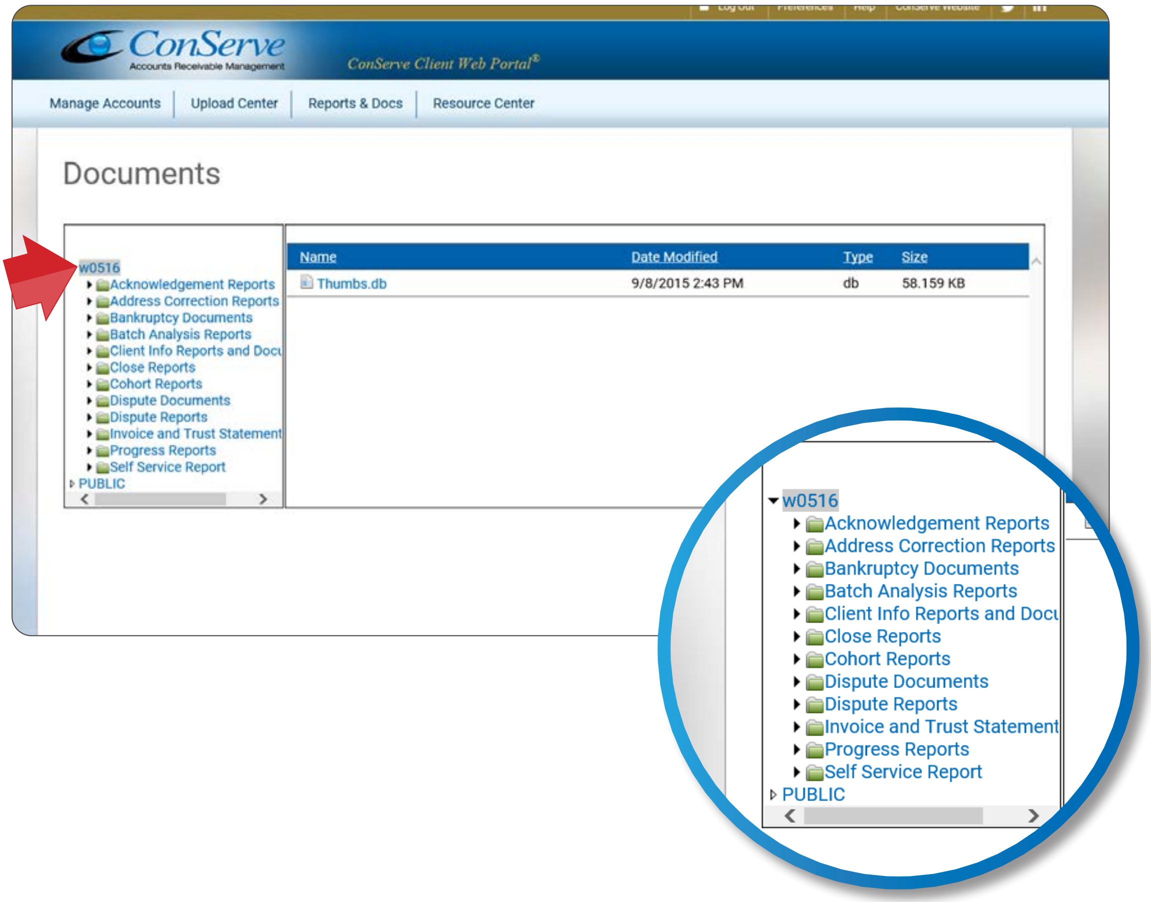
Public Folder View

The Public Folder contains web navigation documents and public announcements. This folder cannot be modified in any way by the Client as it is provided as a resource tool.



Client Web Folder View

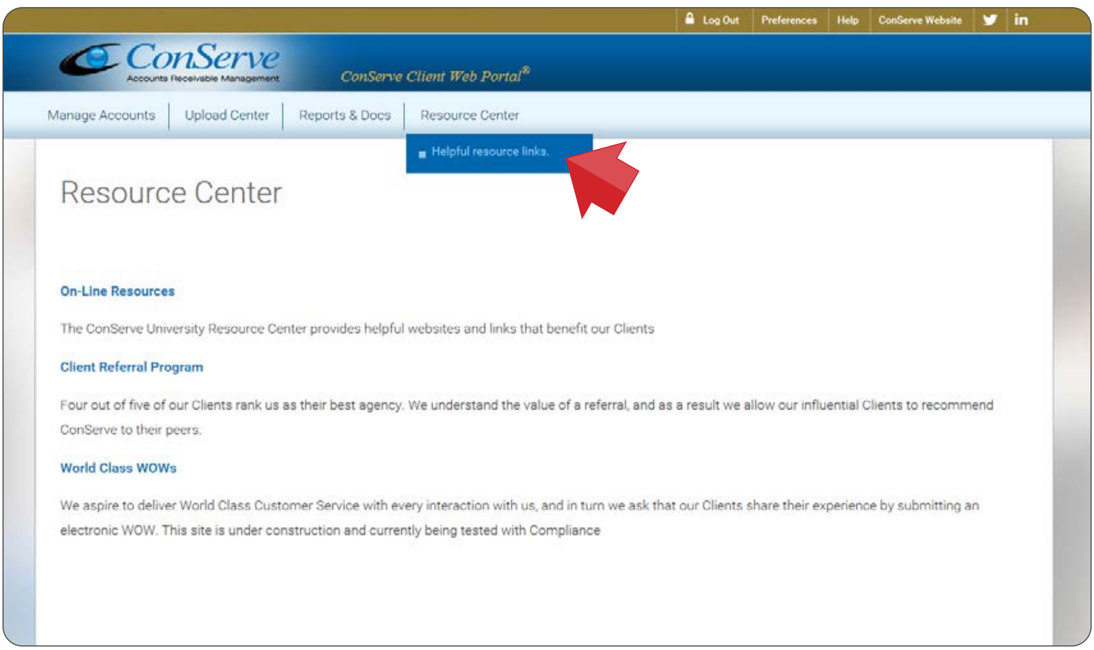
Web Folders store Client specific consumer documentation and reports.



Resource Center Tab

ConServe University® Resource Center: provides helpful links to websites that benefit our Clients

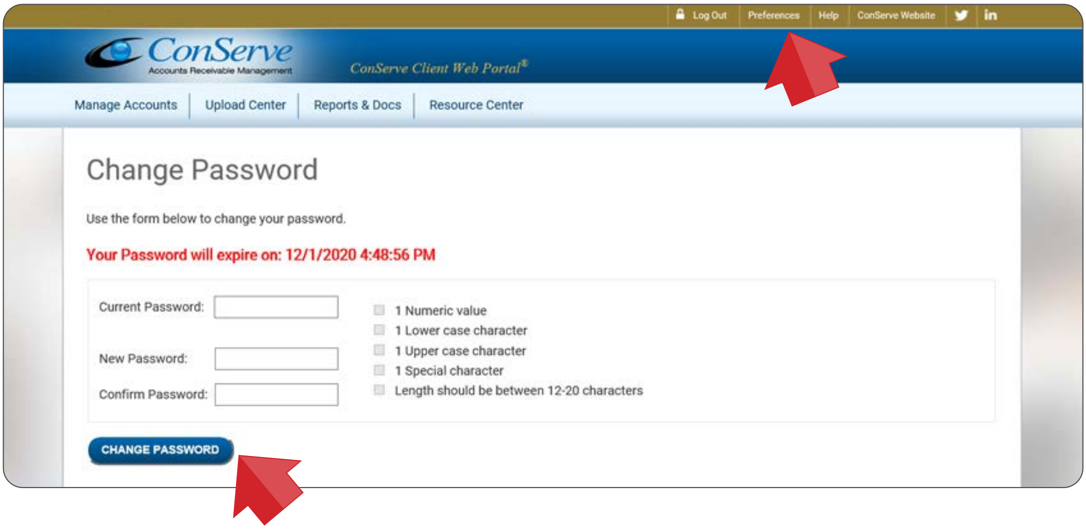
- Compliance and Regulations
- Higher Education Federal Loans
- Financial Literacy Resources
- Tools & Resources
- National Administrations
- National Education, Training, Webinars, Events & Conferences
- National Associations
- State Associations
- National Credit Bureaus
- Servicers
- Client Referral Program: submit your referrals
- World Class WOWs: submit your experience with ConServe staff



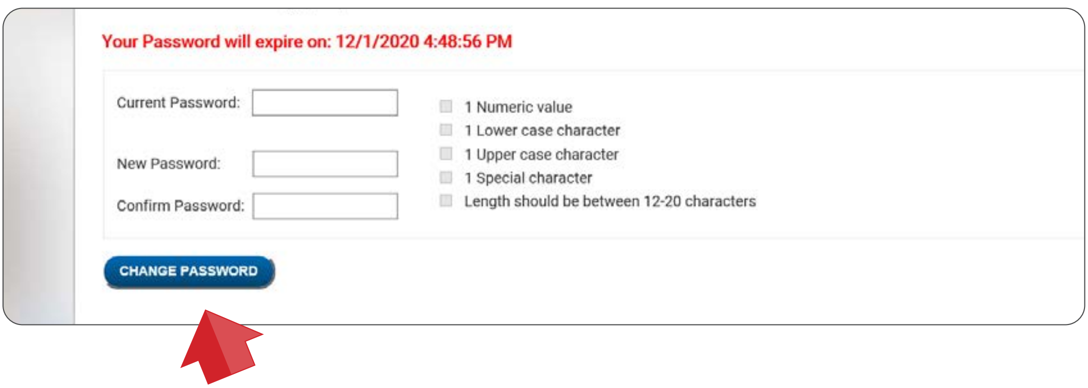
Preferences - Change a Password

Changing a password is easy and can be managed in the Preferences tab at the top of the screen.

Screen 1: Preferences Tab, Change Password

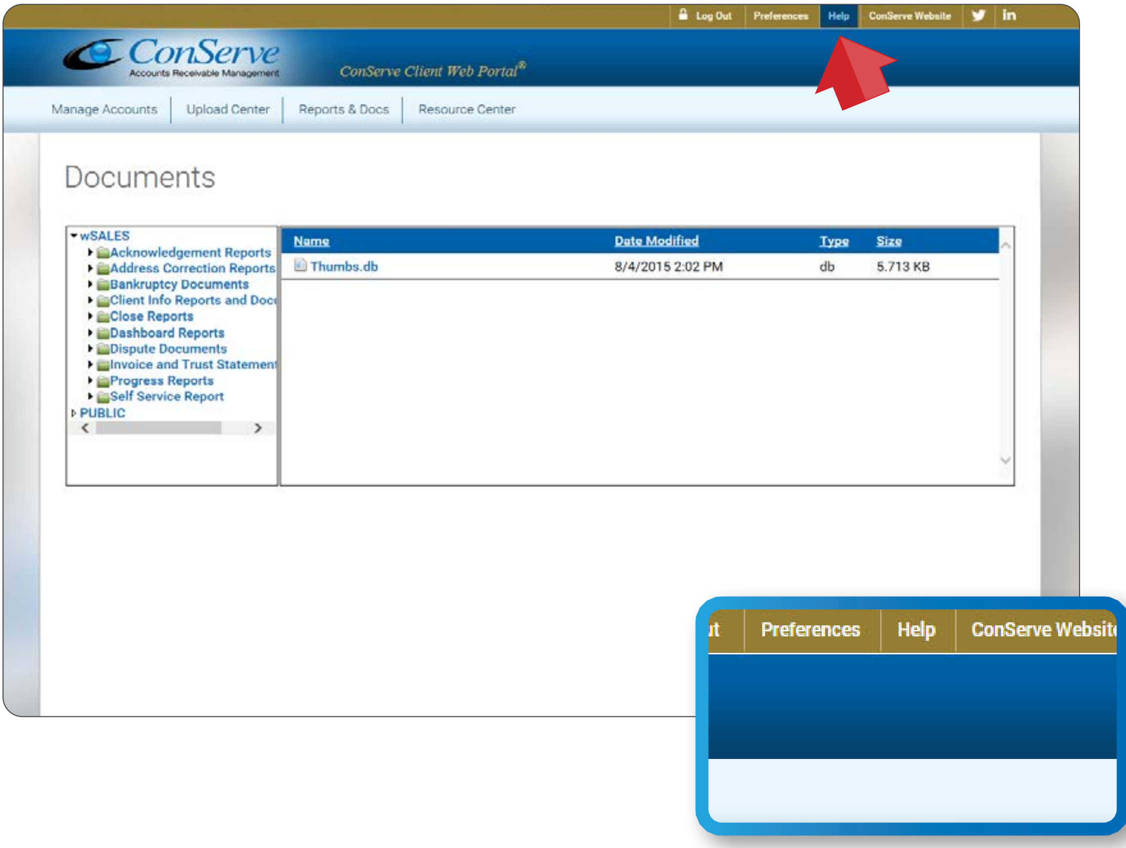


Screen 2: Confirm Change Password



Help Tab

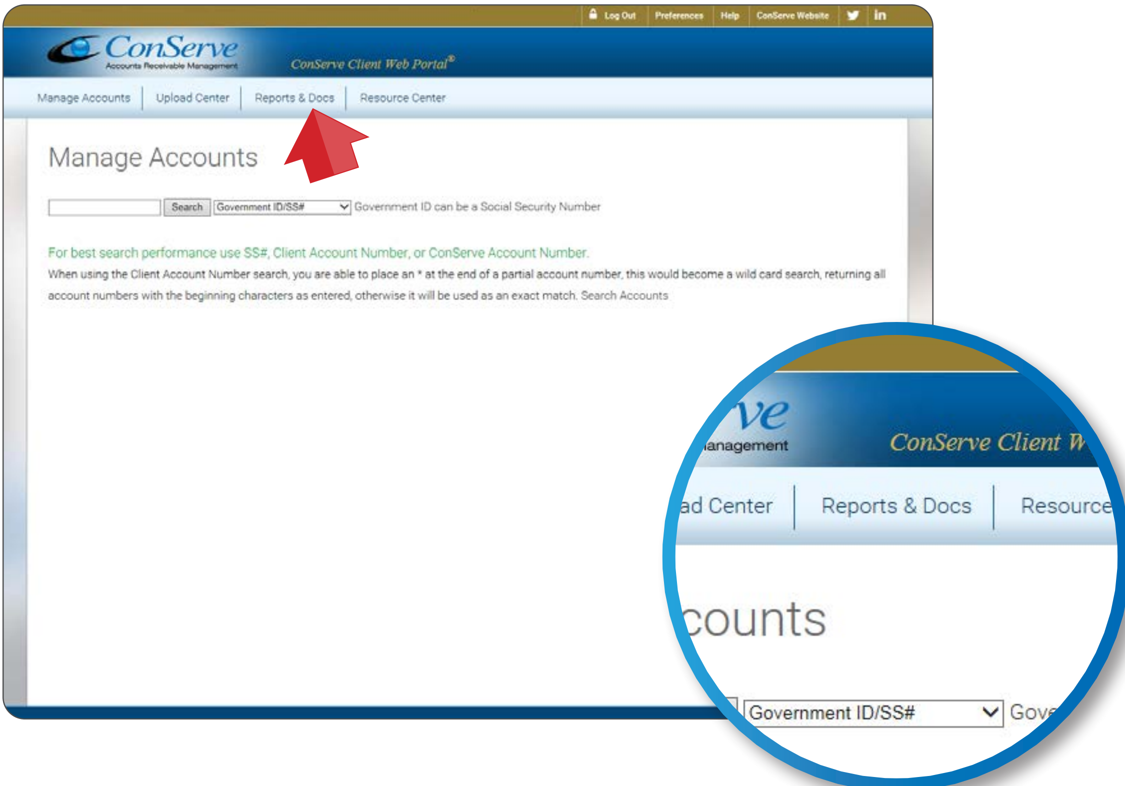
The Help tab is a convenient way to access helpful tools for navigation.



Self Service Reporting Application

The Self Service Reporting Application (app) allows Clients to customize reports that are updated daily. The following pages outline detailed steps on how to navigate the app.

Step One: Click on the "Reports & Docs" tab.



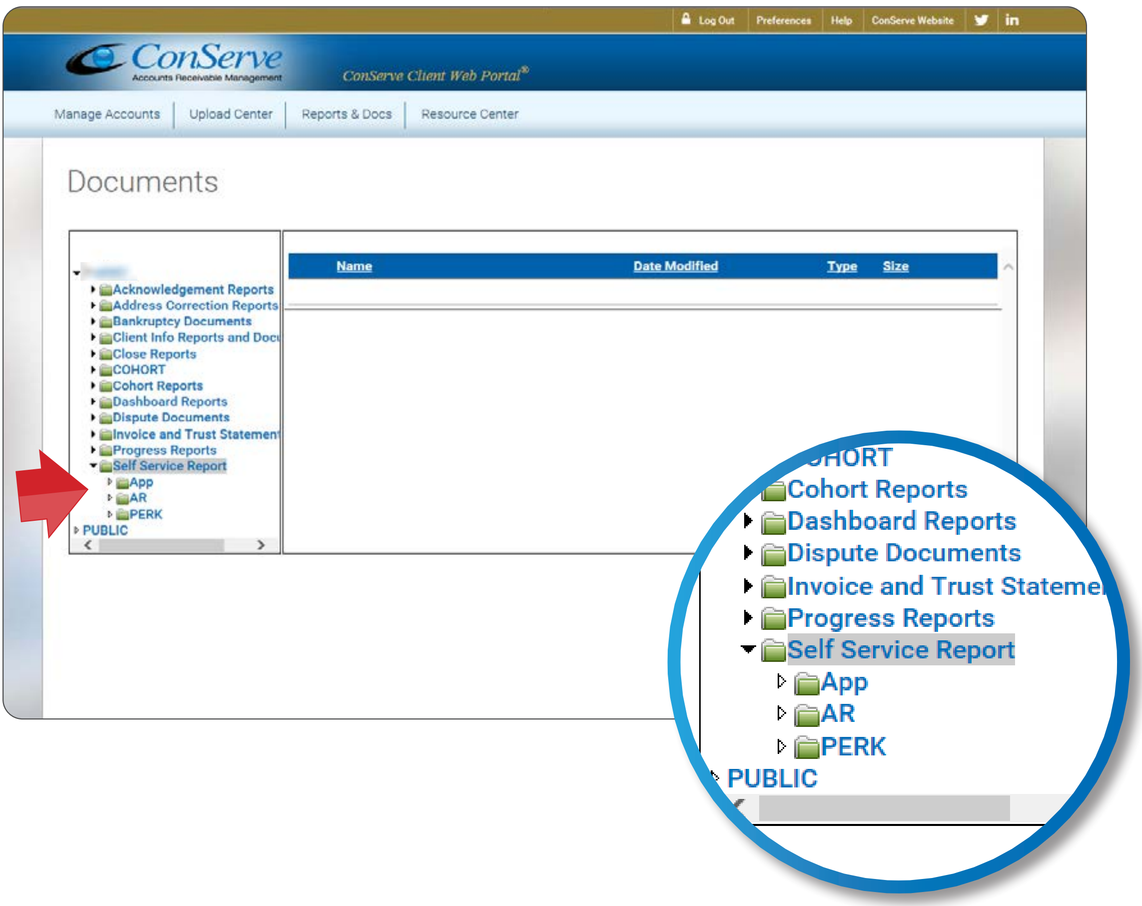
App (cont.)

Step Two: Click on the black triangle (4) next to "Self Service Report" to expand the options.

App (cont.)

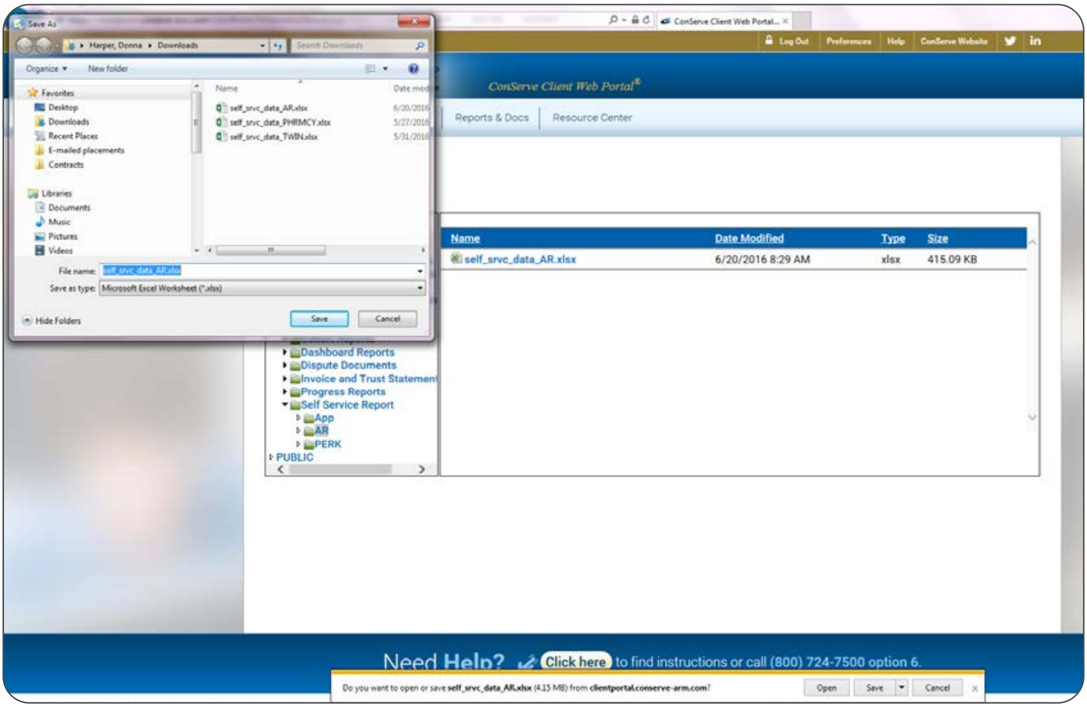
Step Three: Click on your preferred instance.

Note - the instance name will be specific to how your Standard Monthly Reports run for you. This report is created daily, and is reflective of the prior day's activities. Each time you want to review your inventory, you will need to save the newest report to your computer and follow the instructions outlined below.



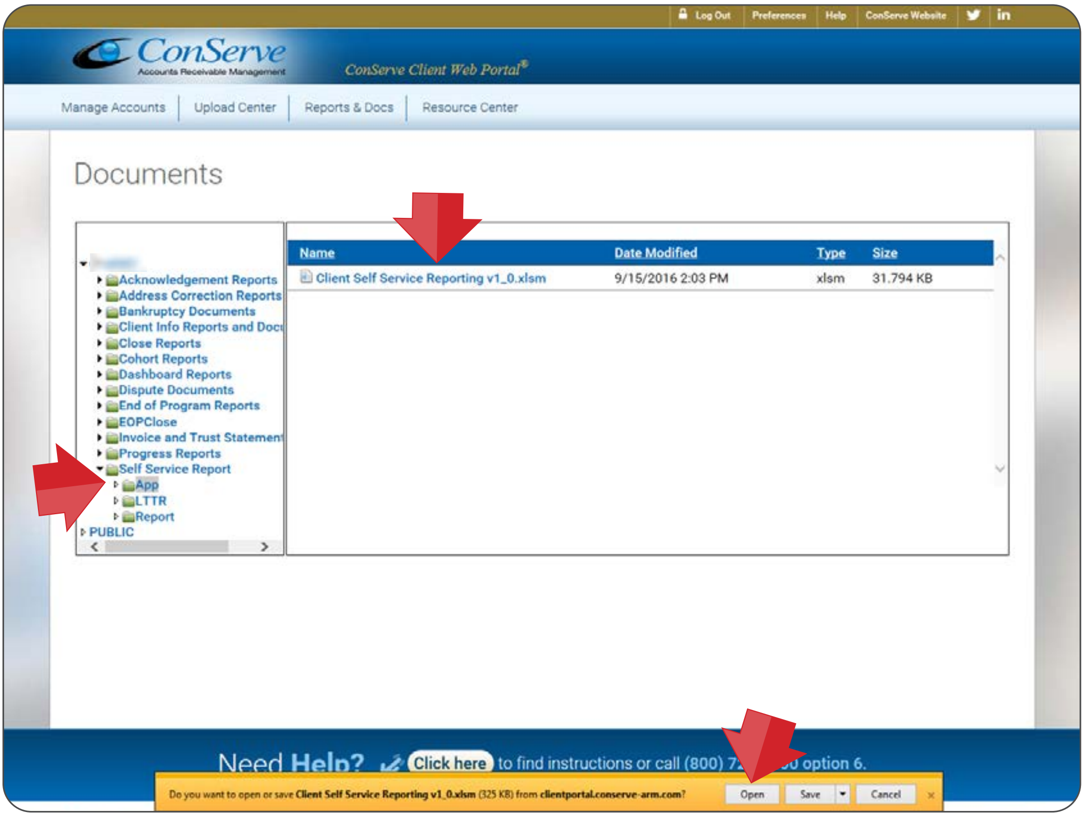
App (cont.)

Step Four: Save the "self_srvc-data" report to your computer. You will need to save the individual report for each instance (group of data) if applicable.



App (cont.)

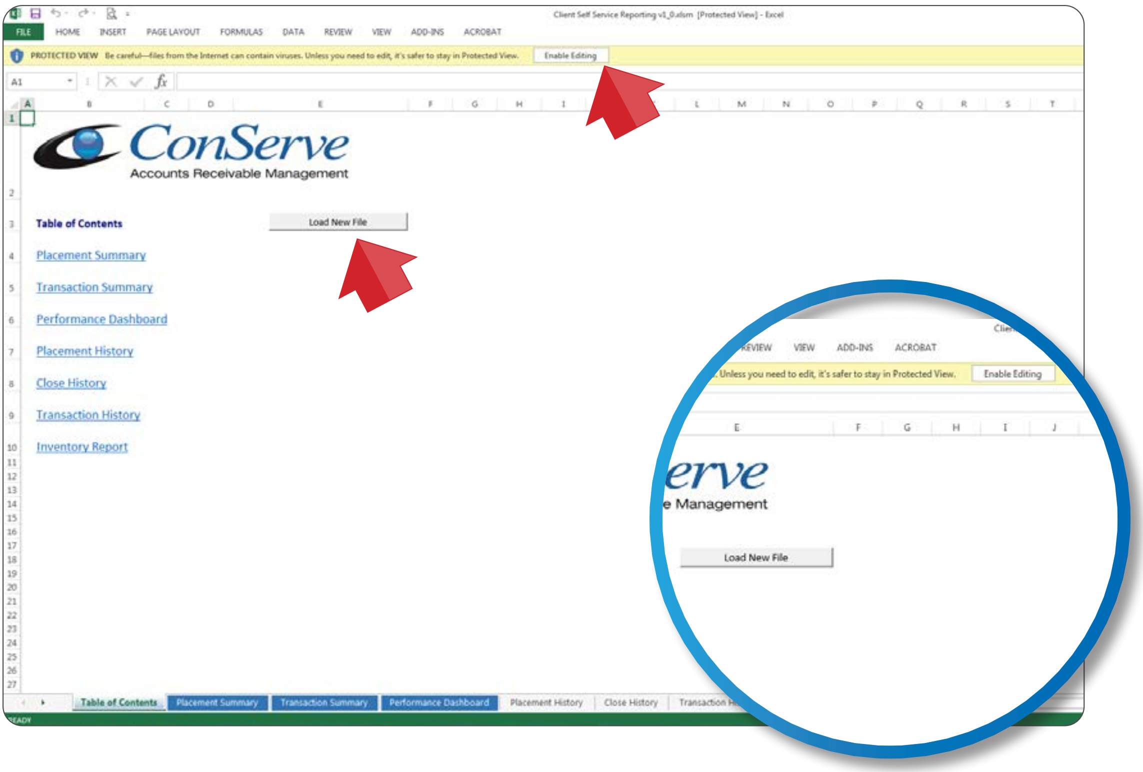
Step Five: Once the report has been saved, click on "app." Click on "Client Self Service Reporting" and then select "open."



App (cont.)

Step Six: Click on “Load New File” and select the applicable “self srvc-data” report that has been saved to your computer. (Once the blue circle disappears, the file has been loaded to the app.)

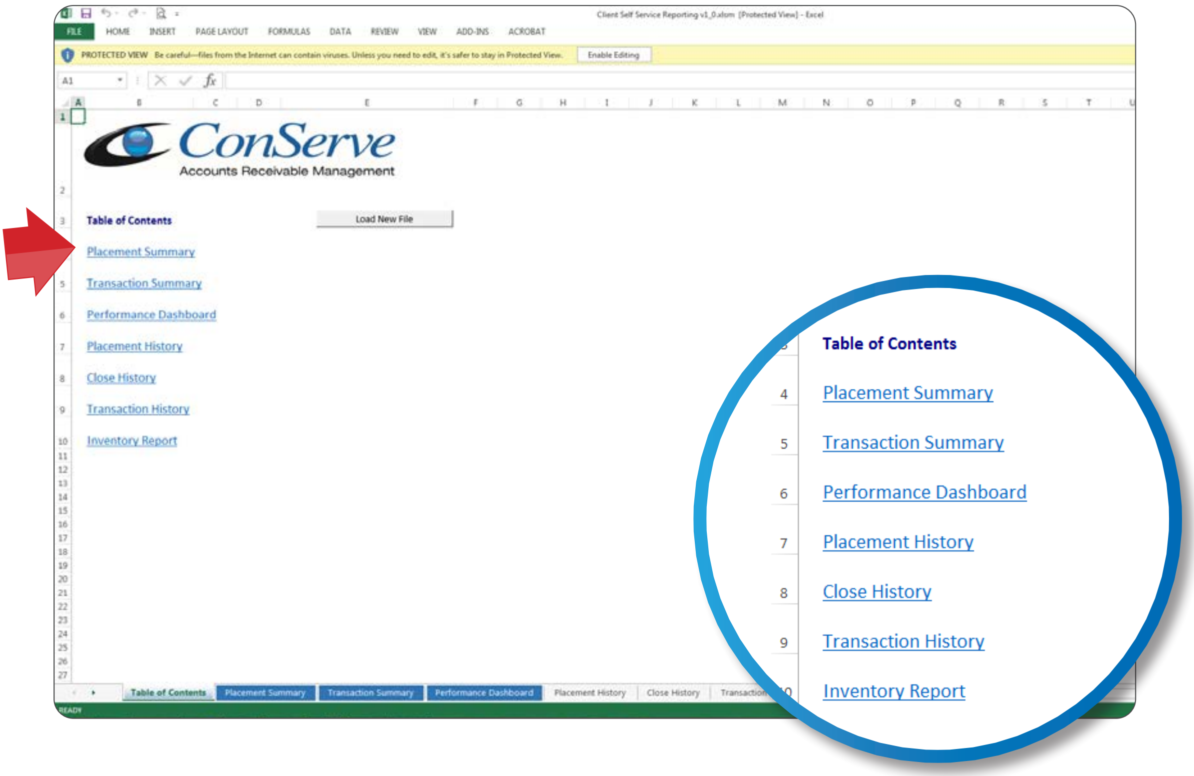
Note - remember to select “Enable Editing” at the top of the screen, if shown.



App (cont.)

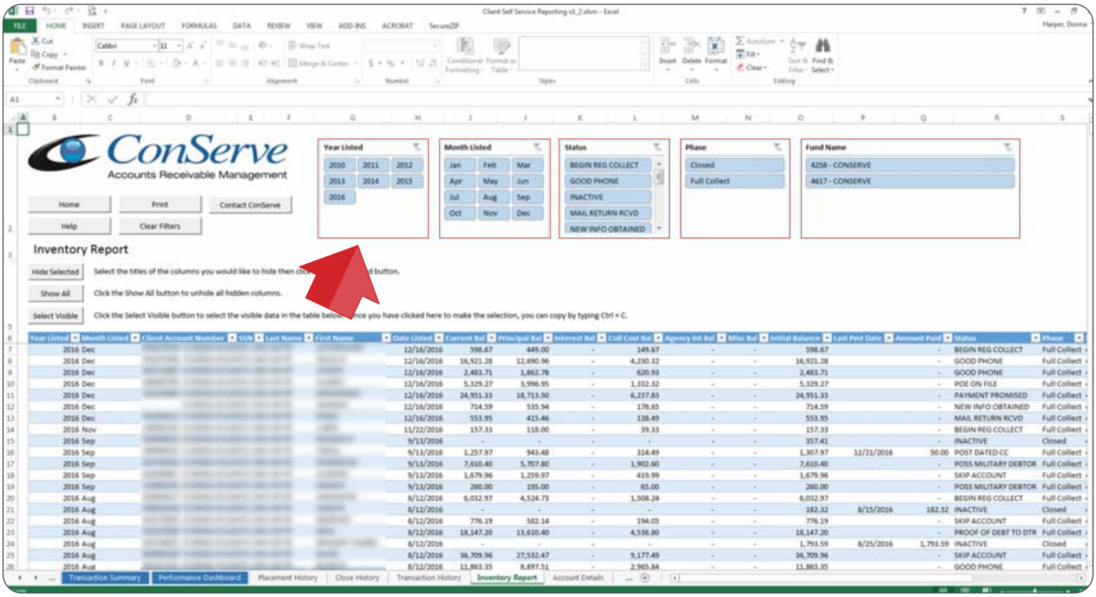
Step Seven: Select the specific link under the Table of Contents for the report you would like to view and filter.

Note - while in the specific report, "home" will take you back to the Table of Contents.



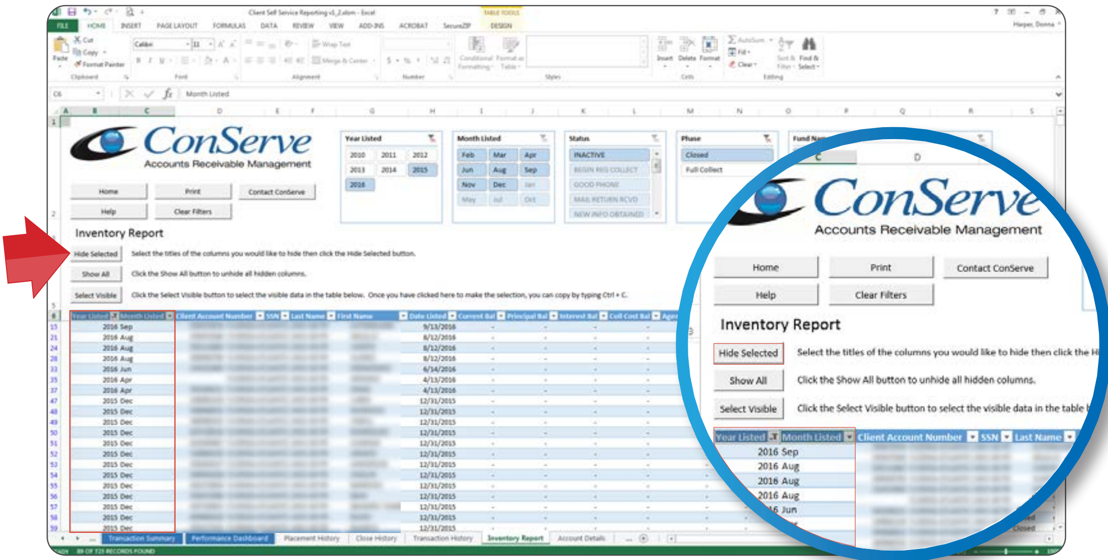
App (cont.)

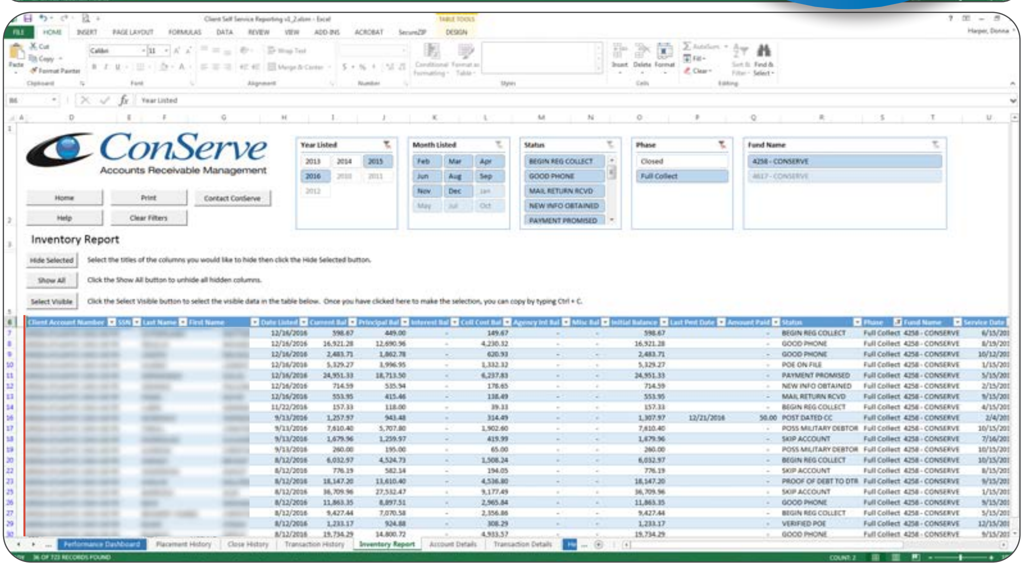
Step Eight: The tabs to the right of the ConServe logo allow you to filter for the specifics of that report type. Just click on the specific data element(s) you want included in your report.



App (cont.)

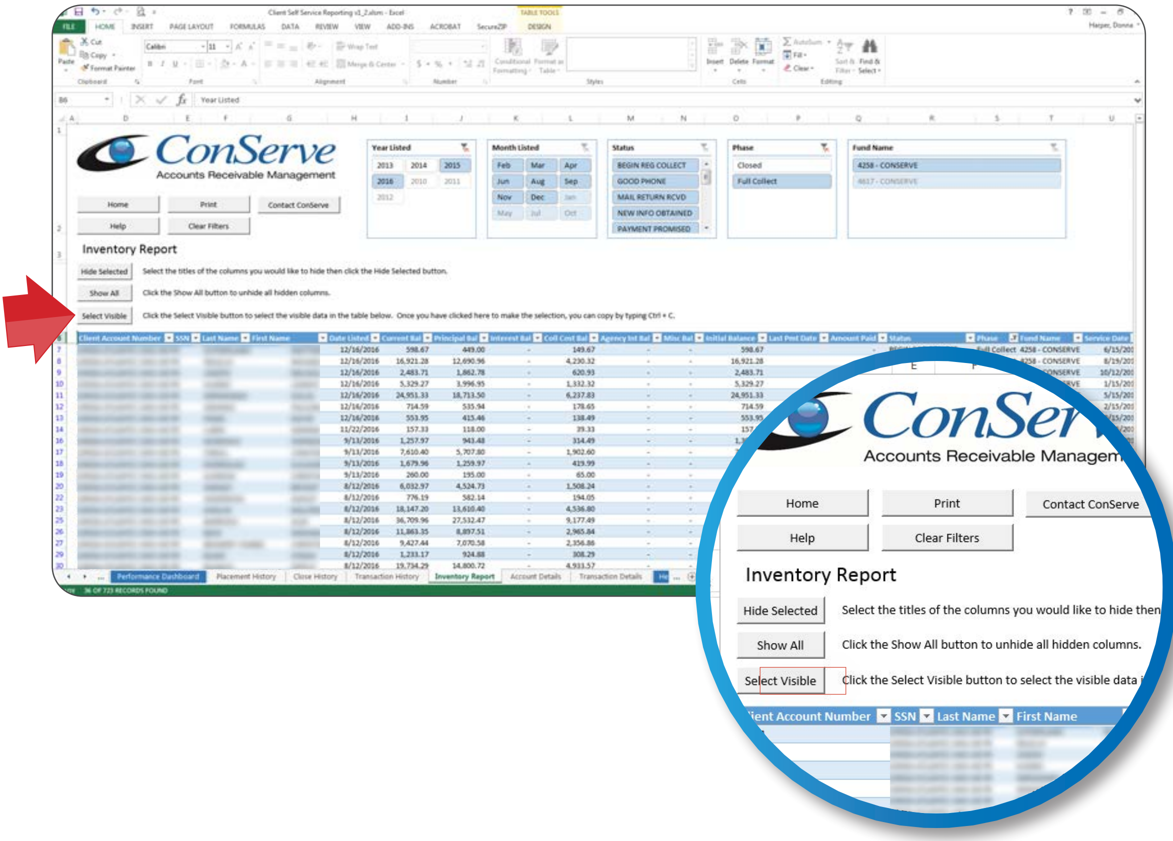
Step Nine: If you want to hide specific columns, press the control key on your keyboard, then click on each column with your mouse. Once all of the columns you want to hide are selected, click "Hide Selected."





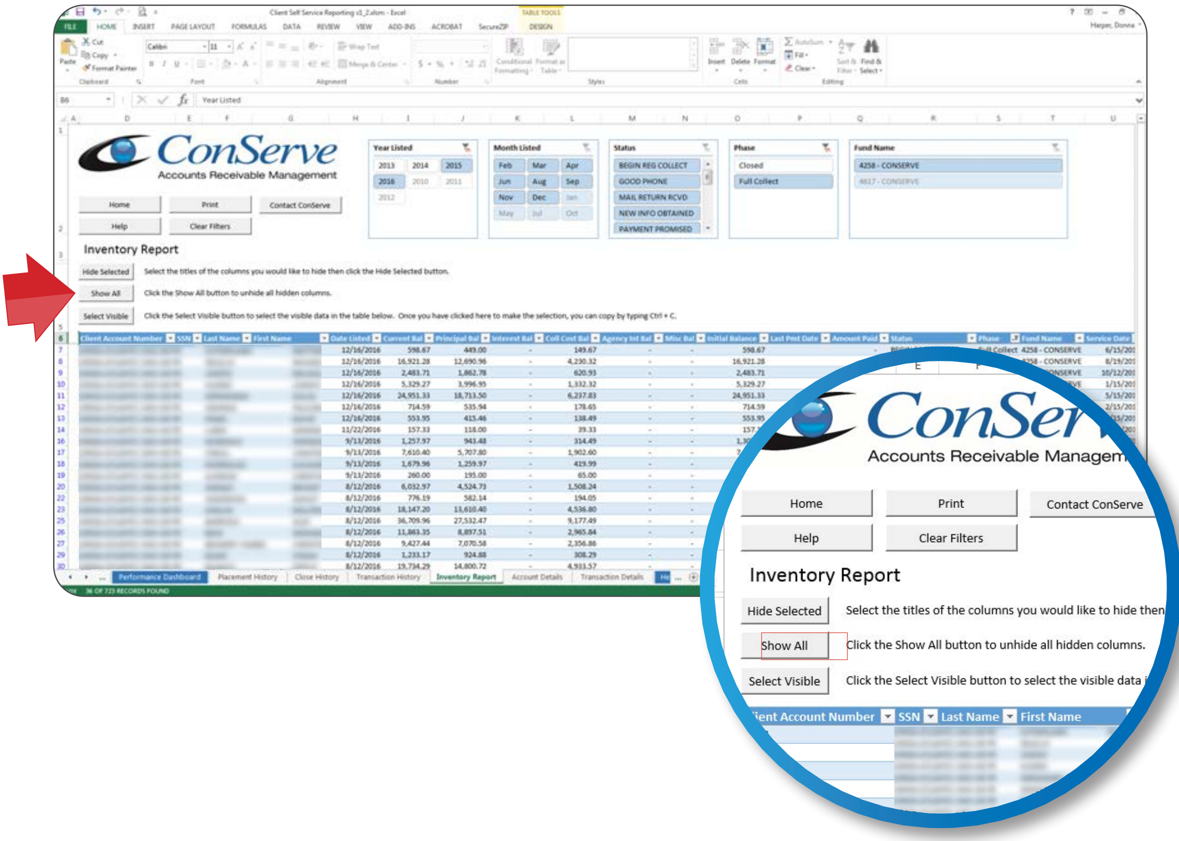
App (cont.)

Step Ten: If you would like to take the report and save it on a new Microsoft Excel sheet, you can click on “Select Visible” and then “Control + C.”



App (cont.)

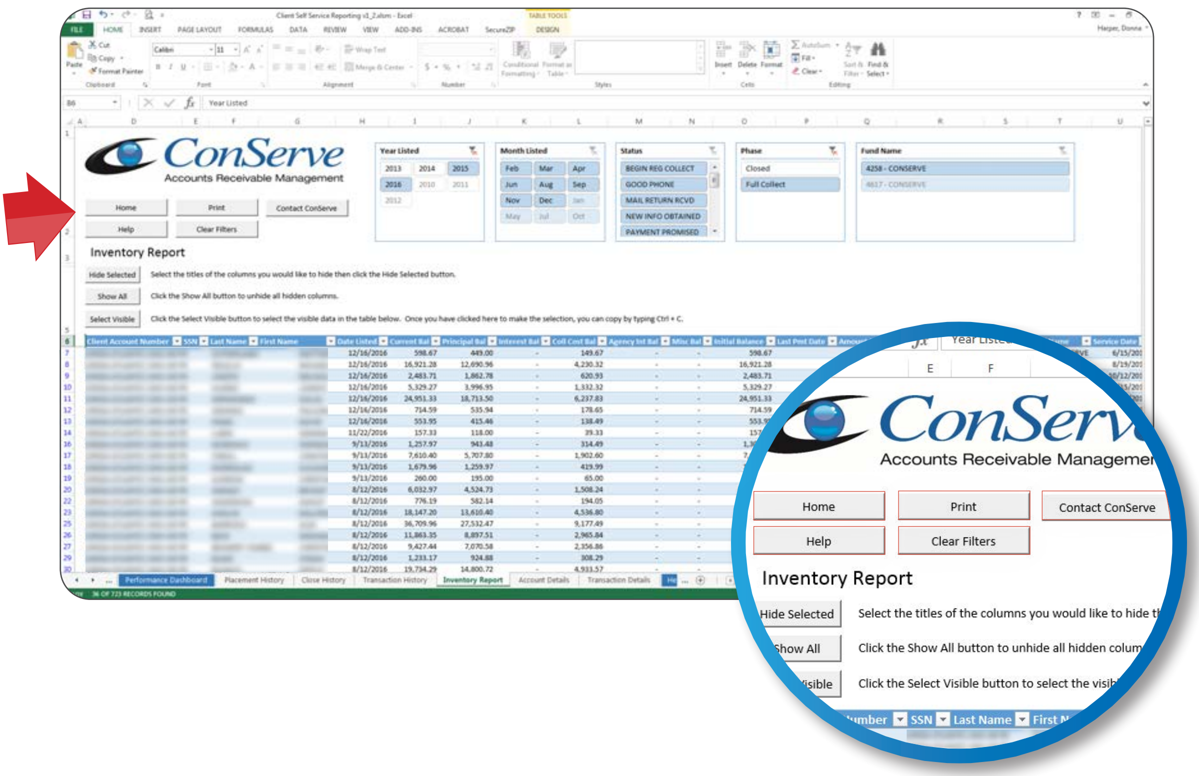
Step Eleven: To bring all of the hidden columns back, click on "Show All."



App (cont.)

Step Twelve: The radio buttons under the ConServe logo will allow you to go back to the Table of Contents (home).

- Print - Print the report you just created
- Contact ConServe - Contact ConServe's Client Care team for assistance
- Help - Go directly to the work instructions
- Clear Filters - Clear all of the filters you may have selected



Abbreviations Used on the Client Web Portal

AKA	Also Known As
ATTY	Attorney
AWG	Wage Garnishment
BIF	Balance in Full
BKY	Bankruptcy
BRW	Borrower
BRO	Brother
BUS	Business
BZ	Busy
CB	Call Back
CBR	Credit Report
CC	Credit Card
CHK	Check
COMP	Compromise
CONS	Consolidation
CORR	Correspondence
DAD	Father
DEA	Death
DBTR	Debtor
DIS	Disability
DISP	Dispute
DISCO	Disconnected
DWP	Down Payment
ED	Department of Education
FED EX	Federal Express
FNC	Financial Statement
FT	Full Time
FU	Follow Up
FWD	Forward
INCAR	Incarcerated
LM	Left Message
LMTCB	Left Message to Call Back
LMOVM	Left Message on Voice Mail
LTR	Letter
MI	Mail In
MM/GMM	Mini Miranda
MO	Money Order
MOM	Mother
NA	No Answer
PD	Paid
PIF	Paid in Full
POA	Power of Attorney
POE	Place of Employment
POSS	Possible
PT	Part Time
PYMNT	Payment
PROM NOTE	Promissory Note
RES	Residence
REL	Relative
REQ	Requested
RTP	Refuse to Pay
SD	Said
SIF	Settlement in Full
SIS	Sister
SP	Spouse
SW	Spoke With
TO	Telephoned Other
TPOE	Telephoned POE
TR/TRES	Telephoned Residence
TLD	Told
TC	Turn Call
TT	Talked To
WN	Wrong Number
WU	Western Union
LMOM	Left Message on Machine
PROM NOTE	Promissory Note
CI	Called In
ADDY	Address
ACCR	Accurint
CLD	Called

Our **Mission**

ConServe is dedicated to satisfying the needs of our Clients in a manner consistent with improving the human condition, and that will foster the development of long term mutually beneficial relationships with our Clients, our Employees, our Suppliers and Business Partners and the Community as a whole.

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