Debt Manager Portal

Client Navigation Guide

Training Contents

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Find a specific account to view documents

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View or upload documents associated with an account

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1 Debt Manager FitPortal Home Page

Debt Manager FitPortal™

Search

Messages

The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day.

View Reports

ALL

> Reports

> Financials

Generate Reports

Creditor_Receiver_Inventory_Report

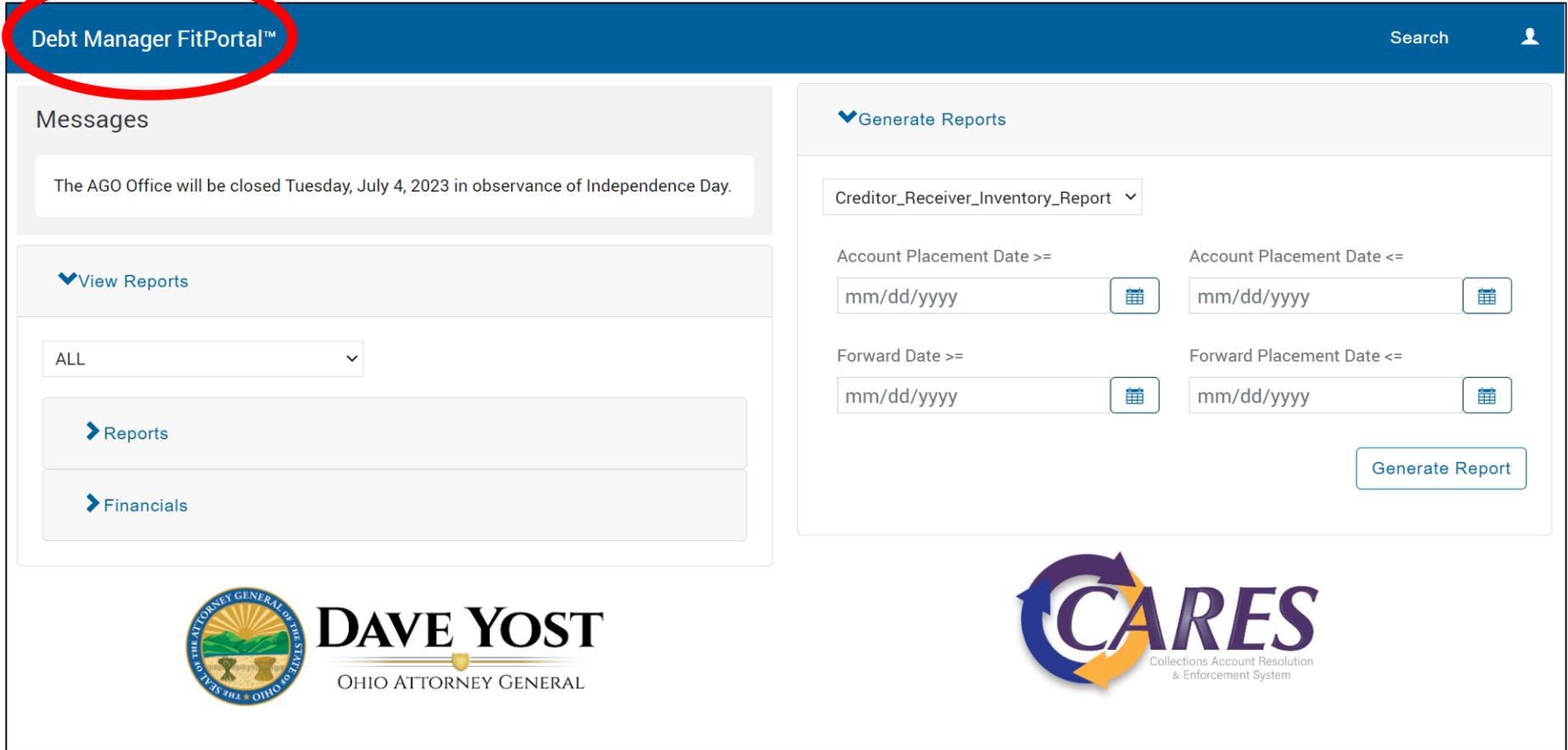| Account Placement Date >=	Account Placement Date <=
mm/dd/yyyy	mm/dd/yyyy

Forward Date >=	Forward Placement Date <=
mm/dd/yyyy	mm/dd/yyyy

Generate Report

DAVE YOST
OHIO ATTORNEY GENERAL

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Debt Manager FitPortal Home Page

- The **Debt Manager FitPortal**™ text can be clicked from anywhere in the portal to navigate back to this home page

Messages

- Custom AGO **Messages** display in the top-left banner.

Reports

- The **View Reports** section will provide reports that your user role has been scheduled to receive on a recurring basis and those which are generated ad-hoc.
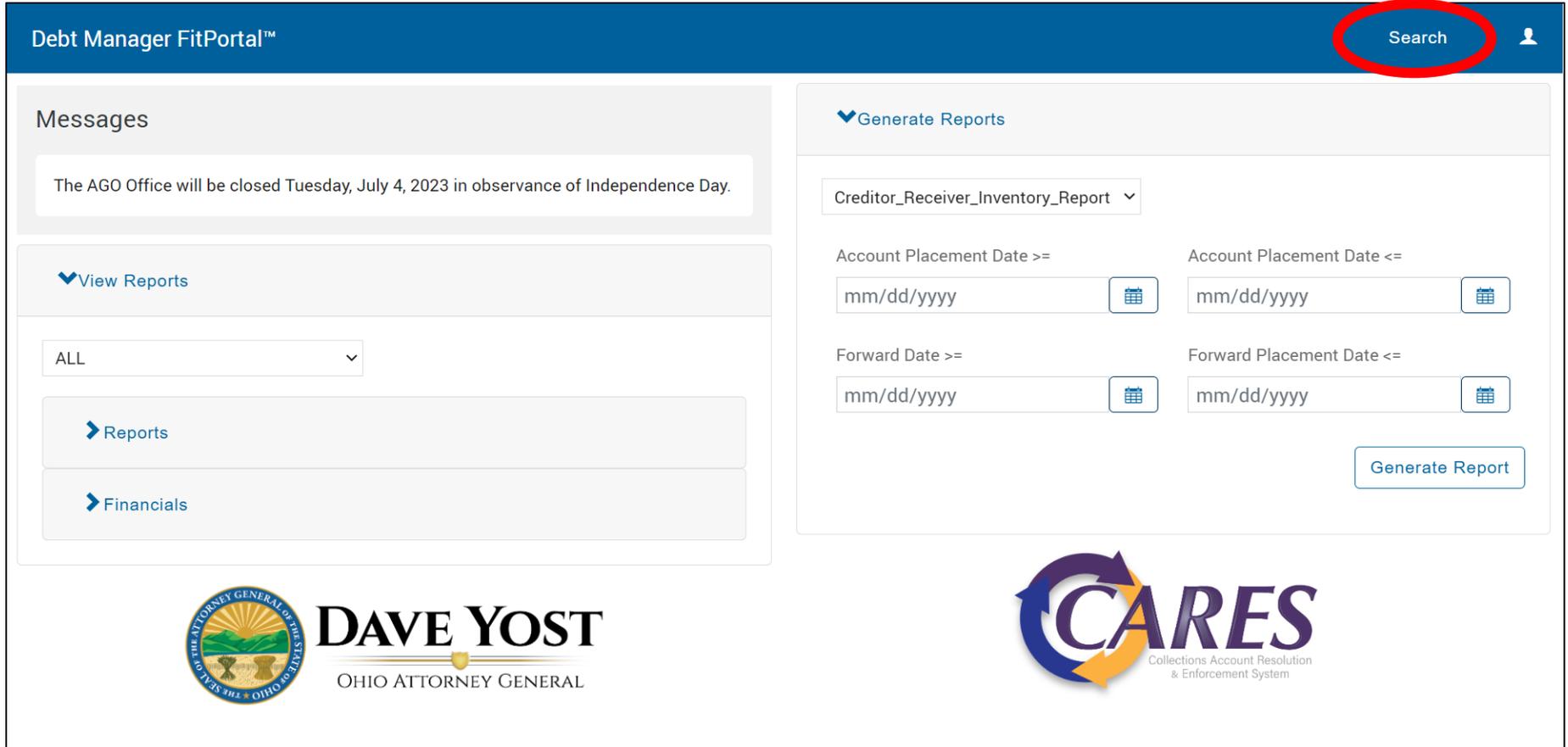
Generate Reports

- The **Generate Reports** section allows you to generate reports as needed with the criteria you select.
- Generated reports will populate in the View Reports section.

Search

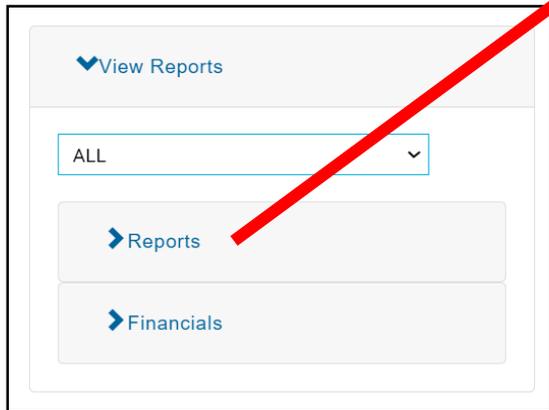- Open details for a debtor or account using the available **Search** fields.
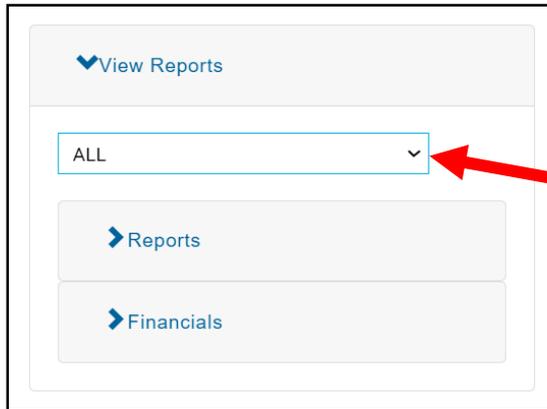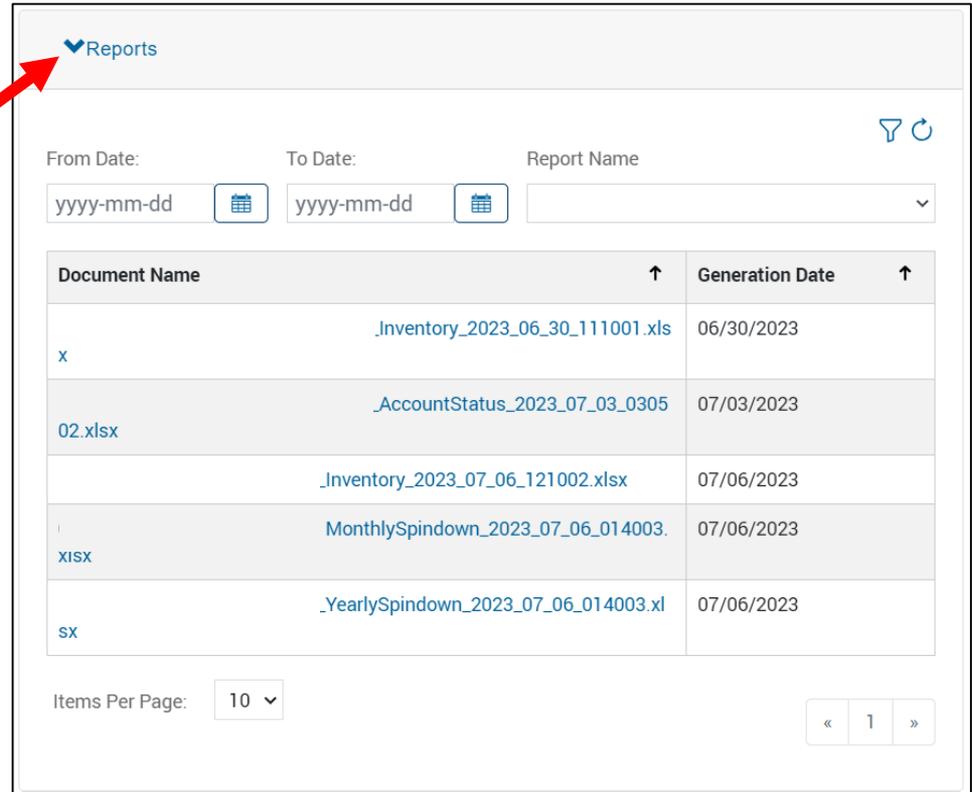
View Reports

If your user role has access to multiple Creditor short names, they will be selectable from this drop-down. The default is to display reports associated with 'ALL' short names.

View Reports

View Reports

- Default filters are null date ranges and blank report type – everything available displays.
- Default date sort is ascending, click the arrow to change the sort to display the most recent reports first.
- Seven report types will display here, whether scheduled or ran ad-hoc: Creditor/Receiver Inventory, Yearly Spindown, Account Status, Account Tag Summary, History Analysis, Monthly Spindown, Paid in Full

View Financials

Debtor/Account Search

Debtor/Account Search

First name	
Last name	
Business name	
Commercial contact name	
Phone	
SSN/EIN	
Address Line 1	
ZIP	
Account number	DM-assigned account number
Debtor number	DM-assigned debtor number
Creditor Reference	CRN – assigned by Creditor
Creditor External Account Number	DRL – assigned by Creditor

Legacy

Debtor Legacy Id	CUBS lead packet number
Creditor Account Legacy Id	CUBS account number

Reset

Cancel   **Search**

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Viewing Documents

Debt Manager FitPortal™   Search 👤

Documents

Debtor 1001206: **FNAME1473 TRAINING146** | Account **1001085** | Creditor Reference: **CRN00949** | Creditor External Account #: **DRL00952**

❤Documents

➕

Select Document Class	From Date:	To Date:
All ▼	yyyy-mm-dd 📅	yyyy-mm-dd 📅 🔽

	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
CSV	RcvrRcl_IB_ .20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
CSV	SAGE_20220321_1503.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
CSV	RcvrRcl_IB_ .20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/01/2023
CSV	RcvrRcl_IB_ .202301310100708.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/15/2023

Items Per Page: 10 ▼   « 1 »

- Click on the document name to download the file

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Uploading Documents

- Click on the plus sign symbol to upload a new document
- Accepted file types: PDF, JPG, TIFF, PNG, CSV
- Accepted characters in file name: hyphens, underscores, periods

Uploading Documents

The debtor and account displayed in the banner will be associated with the uploaded document. Be sure to search for the correct account before uploading any documents.