



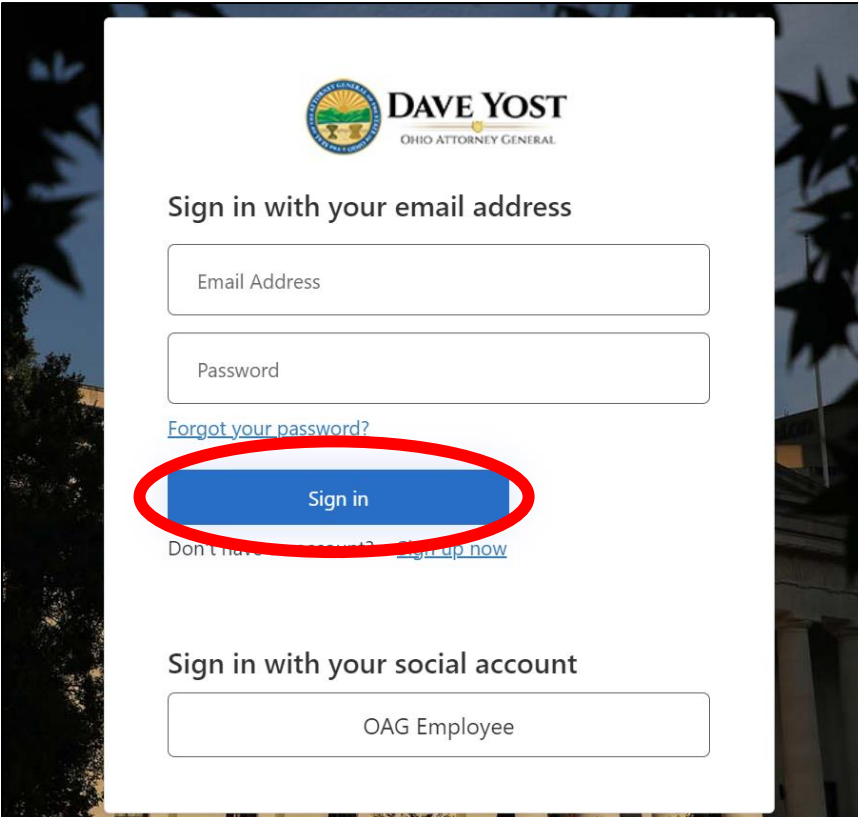
Using the Debt Manager FitPortal

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Logging In

Step 1: Using **Microsoft Edge**, access the Debt Manager FitPortal login page. Enter your email and password credentials and select **Sign In**.



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Sign in with your email address

Email Address

Password

[Forgot your password?](#)

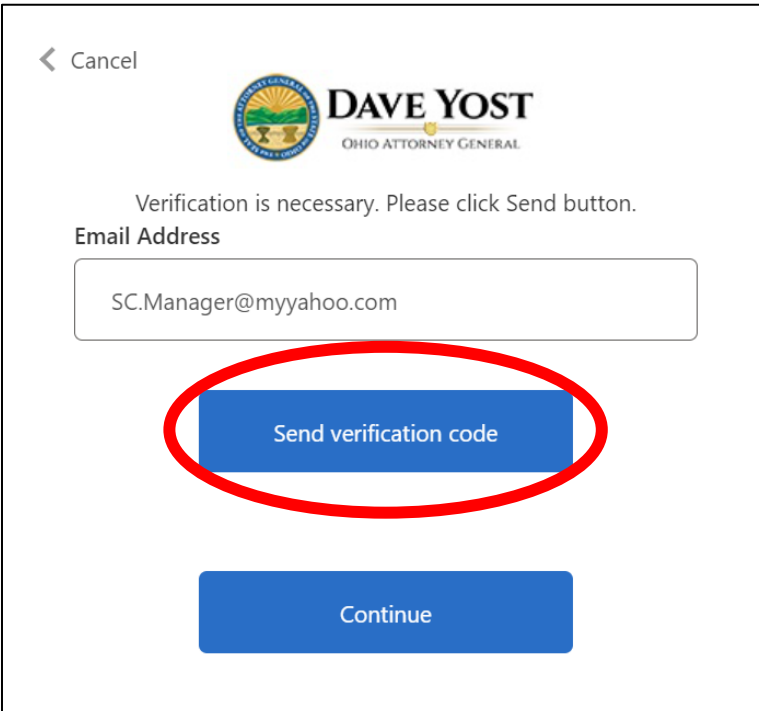
Sign in

[Don't have an account? Sign up now](#)

Sign in with your social account

OAG Employee

Step 2: Select **Send verification code** and retrieve code from email.



< Cancel

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Verification is necessary. Please click Send button.

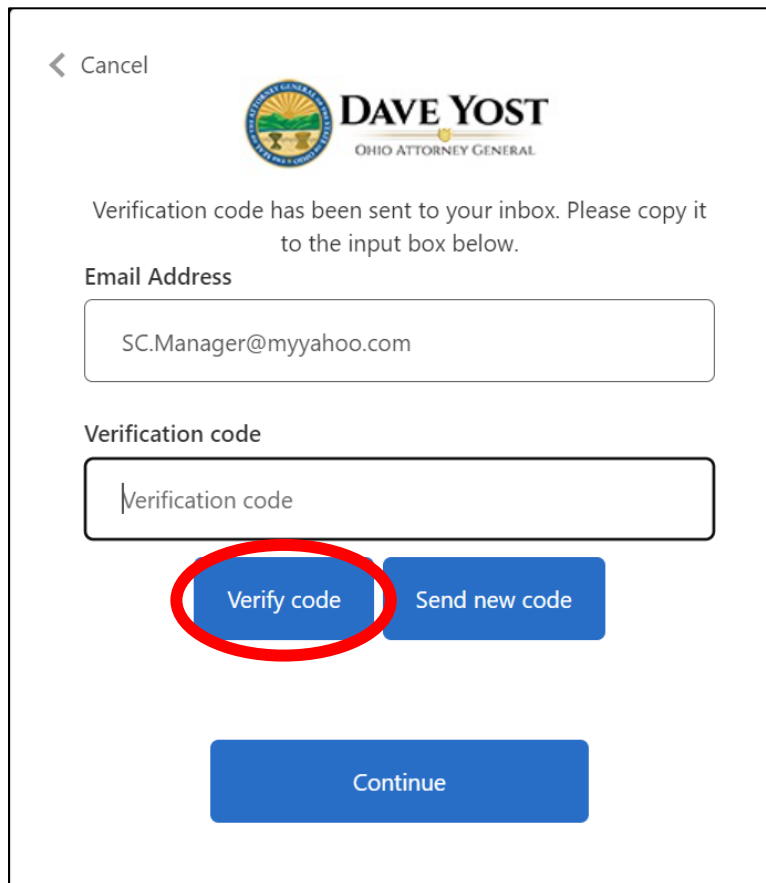
Email Address

SC.Manager@myyahoo.com


Send verification code

Continue

Step 3: Type in verification code received and select **Verify code**.



< Cancel



Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

SC.Manager@myyahoo.com

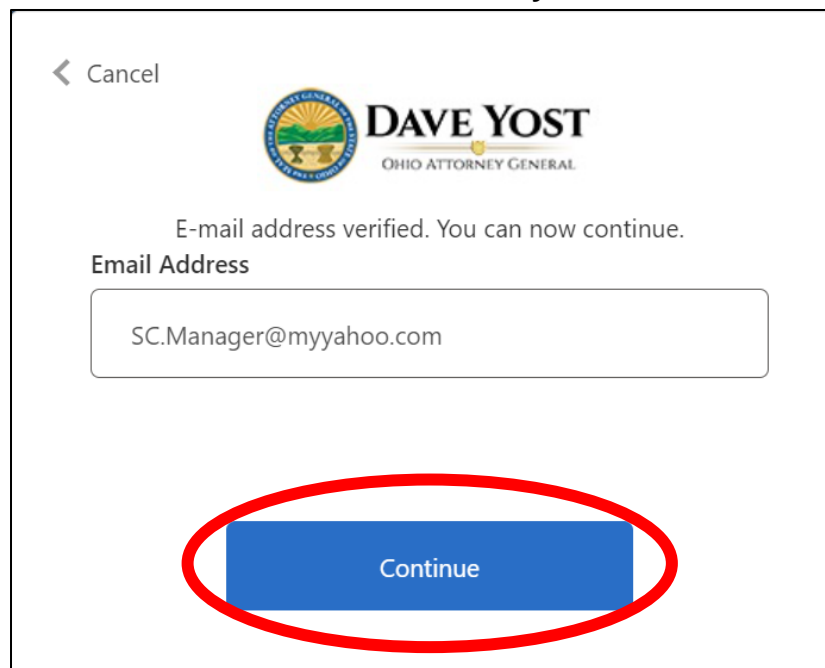
Verification code

Verification code


Verify code Send new code

Continue

Step 4: Type in verification code received and select **Verify code**.



< Cancel



E-mail address verified. You can now continue.

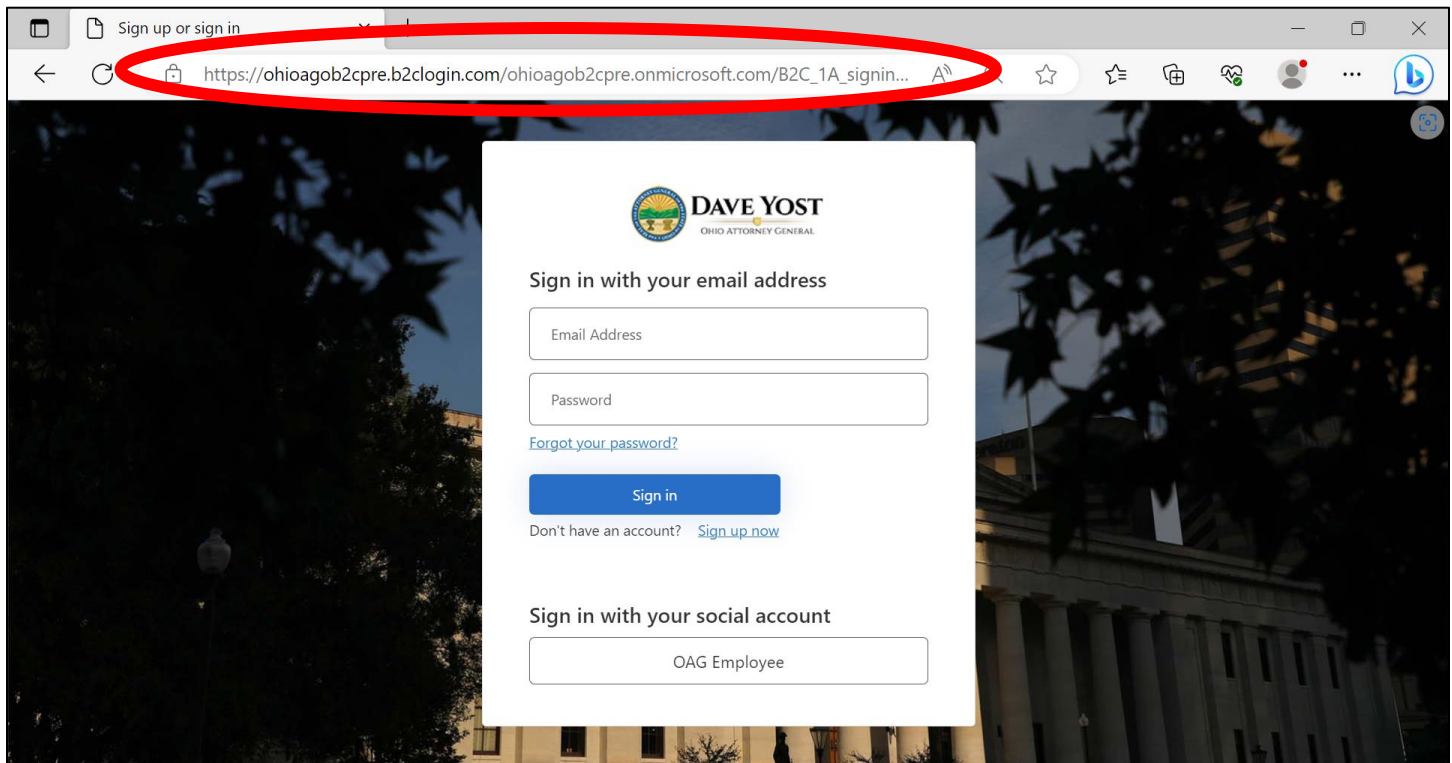
Email Address

SC.Manager@myyahoo.com

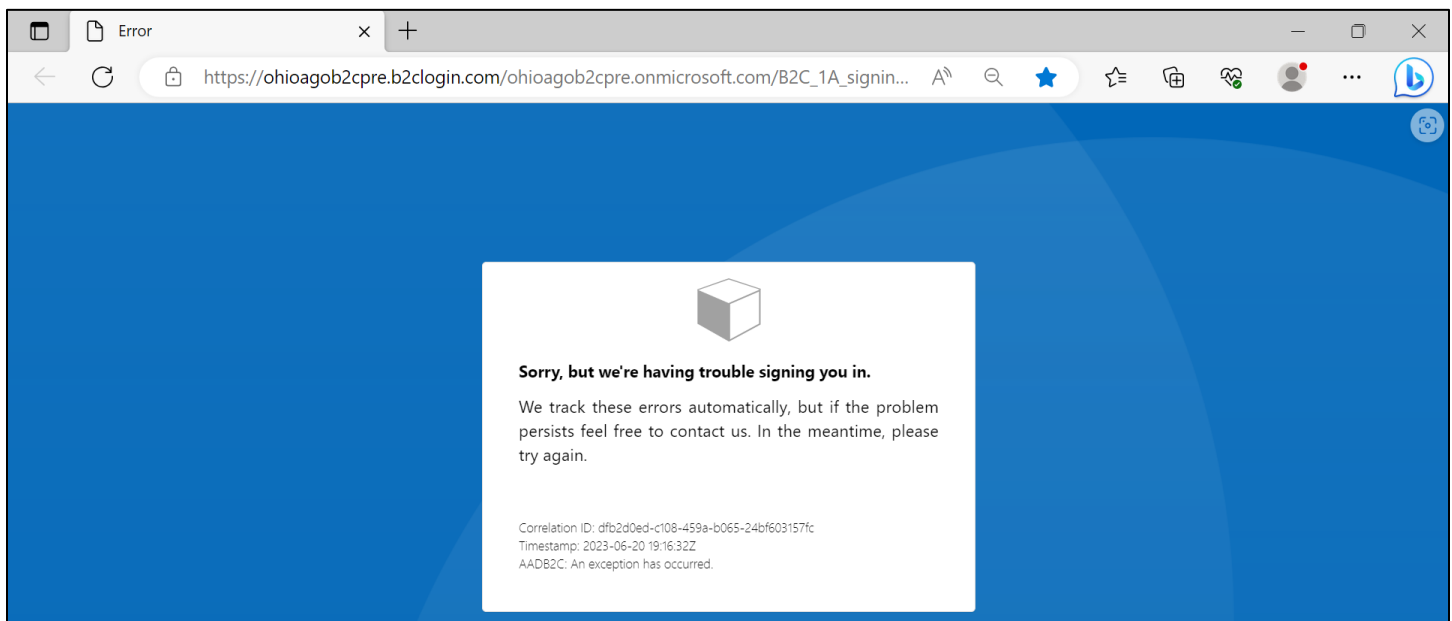
Continue

How to Favorite the Portal Link

The portal URL redirects to our authentication login.

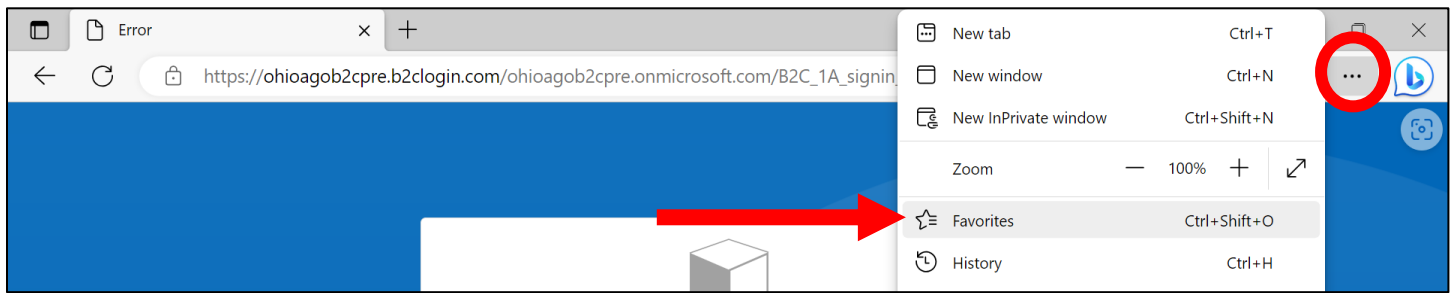


If you add this link to your favorites using the star icon ☆, you may be redirected to an error page when accessing later on.

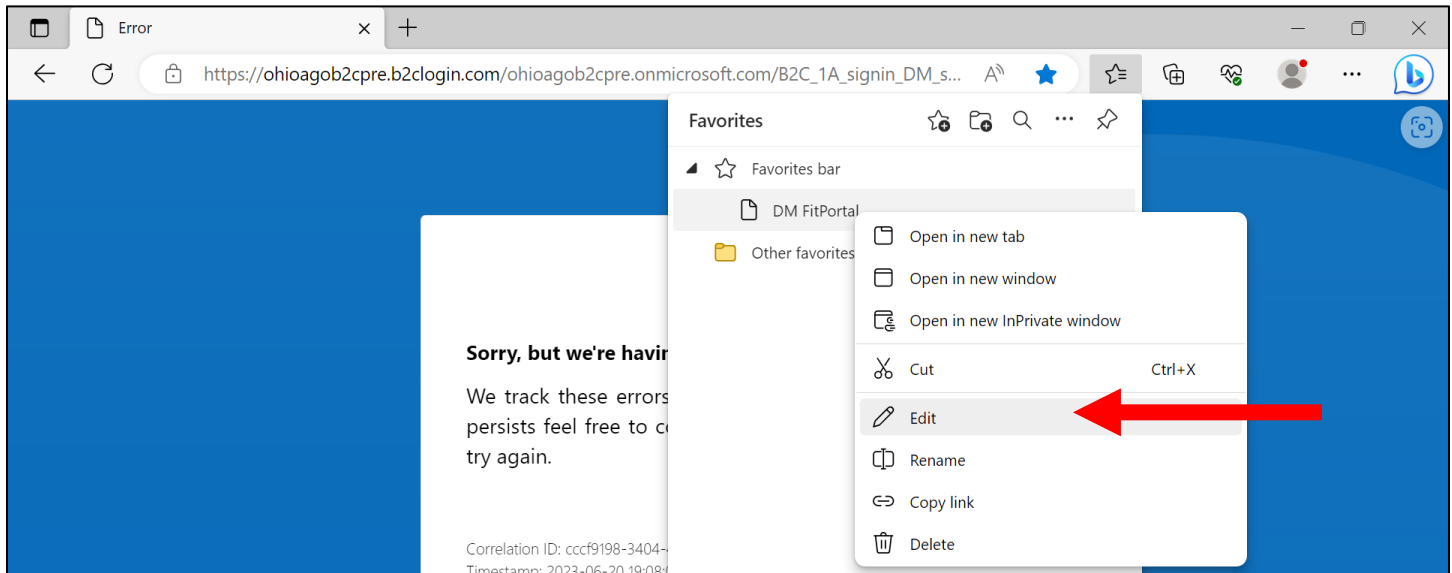


Follow the steps below to add the correct URL to your **Microsoft Edge** Favorites.

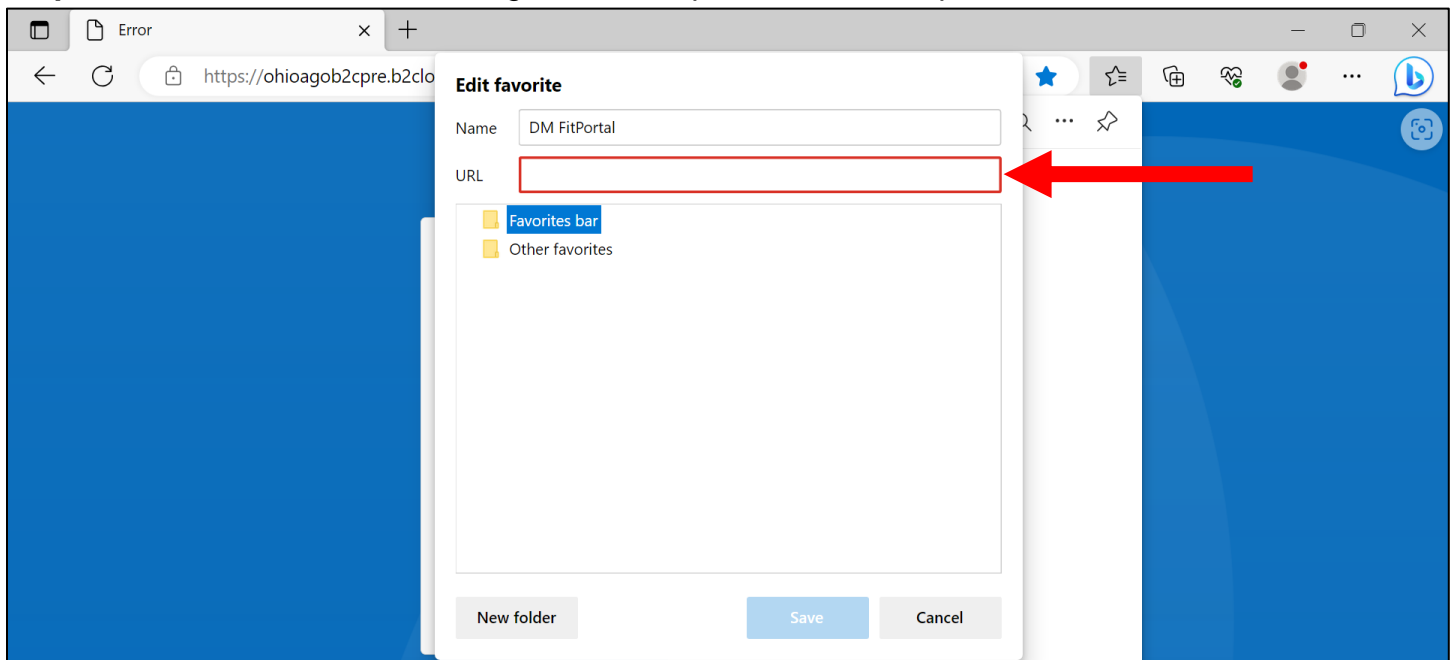
Step 1: Use the ellipses **...** in the toolbar to open the browser menu. Select **Favorites**.



Step 2: Right-click on the saved URL and select **Edit**.

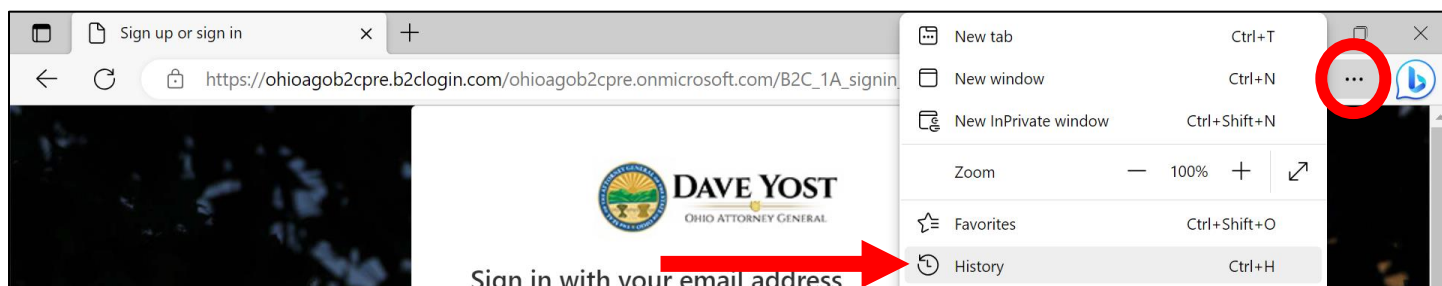


Step 3: Delete the authentication login URL and paste the correct portal link in the field. Click **Save**.

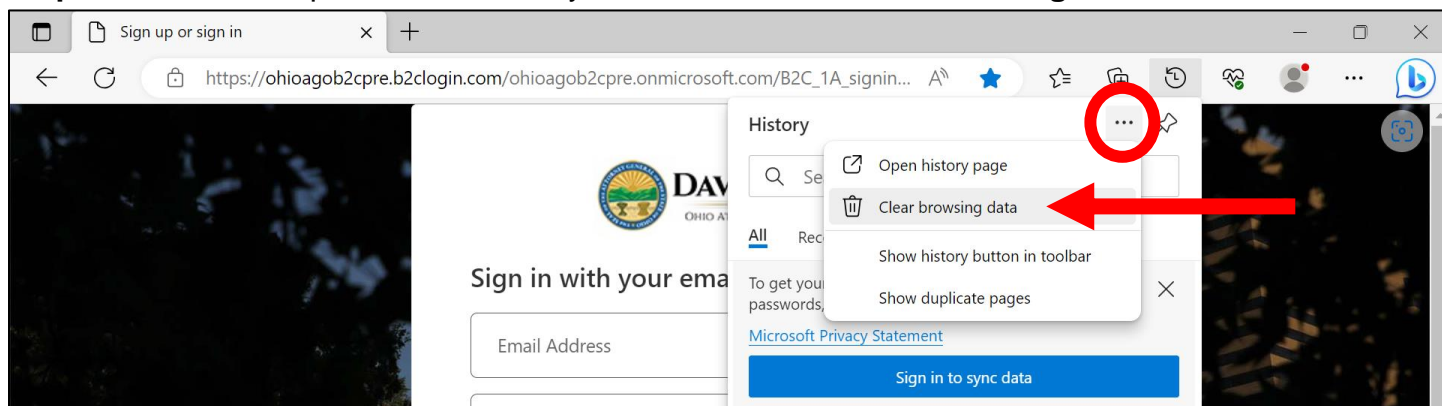


How to Clear History/Cache in Microsoft Edge

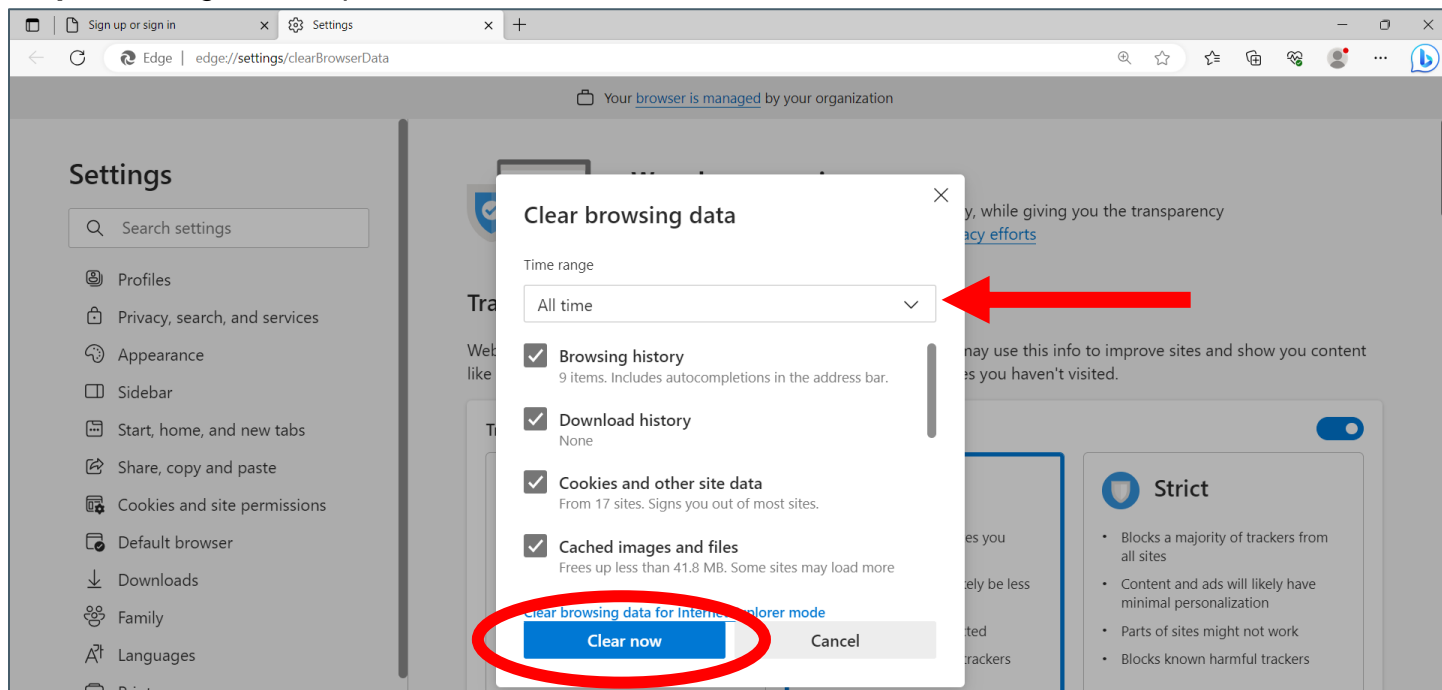
Step 1: Use the ellipses '...' in the toolbar to open the browser menu. Select **History**.



Step 2: Select the ellipses on the History menu and select **Clear browsing data**.



Step 3: Change the drop down to select **All time**. Click **Clear now**.



View Reports

Navigate to the **View Reports** section.

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 >= mm/dd/yyyy

Account Placement Date <= mm/dd/yyyy

Forward Date >= mm/dd/yyyy

Forward Placement Date <= mm/dd/yyyy

Generate Report

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CARES
Collections Account Resolution & Enforcement System

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Filter by Receiver Short-name

If your user role is set up to access multiple short names, reports can be filtered by short name using the drop-down above the Reports and Financials.

▼ View Reports

ALL

► Reports

► Financials

Filter Reports by Date

Expand the **Reports** section.

▼ Reports

From Date: yyyy-mm-dd To Date: yyyy-mm-dd Report Name

Document Name	Generation Date
.Inventory_2023_06_30_111001.xls	06/30/2023
.AccountStatus_2023_07_03_030502.xlsx	07/03/2023
.Inventory_2023_07_06_121002.xlsx	07/06/2023
.MonthlySpindown_2023_07_06_014003.xlsx	07/06/2023
.YearlySpindown_2023_07_06_014003.xlsx	07/06/2023

Items Per Page: 10



Select the calendar icon under the **From Date:** field. Choose a start date, then a finish date. The calendar view will show the included date range highlighted.

▼ Reports



From Date: 2023-05-24 To Date: 2023-05-31 Report Name



May 2023 June 2023

Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7	1	2	3	4			
8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25
29	30	31					26	27	28	29	30		

Use the funnel icon  to apply the date filter and the refresh icon  to remove the date filter.

▼ Reports

From Date:  To Date:  Report Name

Document Name	Generation Date
x .Inventory_2023_06_30_111001.xls	06/30/2023
02.xlsx _AccountStatus_2023_07_03_0305	07/03/2023
.Inventory_2023_07_06_121002.xlsx	07/06/2023
xIsX MonthlySpindown_2023_07_06_014003.	07/06/2023
sx _YearlySpindown_2023_07_06_014003.xl	07/06/2023



Items Per Page:



« 1 »

Filter Reports by Report Name

All report types are displayed by default. Select the Report Name drop-down to filter by report type.

▼ Reports

From Date:  To Date:  Report Name

Document Name	Generation Date
30_111001.xlsx .Inventory_2023_06_	06/30/2023
1002.xlsx _Inventory_2023_07_06_12	07/06/2023

Items Per Page:

« 1 »

To go back to displaying all report types, select the blank field from the Report Name drop-down.

Running Ad-Hoc Reports

Navigate to the **Generate Reports** section.

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 >=mm/dd/yyyy


Account Placement Date <=mm/dd/yyyy

Forward Date >=mm/dd/yyyy

Forward Placement Date <=mm/dd/yyyy

Generate Report

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CARES
Collections Account Resolution
& Enforcement System

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Step 1: Select the report type from the drop-down list.

Generate Reports

Creditor_Receiver_Inventory_Report

Account Placement Date >=mm/dd/yyyy

Account Placement Date <=mm/dd/yyyy

Forward Date >=mm/dd/yyyy

Forward Placement Date <=mm/dd/yyyy

Generate Report

Step 2: Enter report criteria and select **Generate Report**. See table provided in the next section for a list of available reports and required criteria.



Generate Reports

Creditor_Receiver_Inventory_Report

Your request has been submitted. Your report will be available in the Reports Panel after it has been generated. This process may take approximately 5 minutes.

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

Generate Report

Step 3: Navigate back to the **View Reports** section. The refresh icon  can be used to refresh the reports. The default is to sort ascending dates, click the arrow icon  to sort descending, which will put the most recently generated reports at the top of the list.

Reports

From Date:
To Date:
Report Name

yyyy-mm-dd
yyyy-mm-dd

Document Name
Generation Date

Inventory_2023_07_08_103501.xlsx	07/08/2023
Inventory_2023_07_06_121002.xlsx	07/06/2023
MonthlySpindown_2023_07_06_014003.xlsx	07/06/2023
YearlySpindown_2023_07_06_014003.xlsx	07/06/2023
AccountStatus_2023_07_06_014502.xlsx	07/06/2023
HistoryAnalysis_2023_07_06_024003.xlsx	07/06/2023
AccountStatus_2023_07_03_030502.xlsx	07/03/2023
Inventory_2023_06_30_111001.xlsx	06/30/2023

Items Per Page:
10

« 1 »

Financials

Expand the **Financials** section. This section will house Receiver Statements, which will provide a breakdown of payments received during the invoicing period.

▼ Financials

From Date:

yyyy-mm-dd

To Date:

yyyy-mm-dd

Report Name

Document Name	↑	Generation Date	↑
_3503_2023_02_09.pdf		02/09/2023	
_3503_2023_02_09.pdf		02/09/2023	
_3503_2023_02_09.pdf		02/09/2023	
_3900_2023_05_18.pdf		05/18/2023	
_4012_2023_05_25.pdf		05/25/2023	
_4015_2023_05_25.pdf		05/25/2023	
_4202_2023_05_25.pdf		05/25/2023	
_4157_2023_05_25.pdf		05/25/2023	
_4020_2023_05_25.pdf		05/25/2023	
_4017_2023_05_25.pdf		05/25/2023	

Items Per Page:

10

« 1 2 »

Search

Click on the search button **Search** from the top banner to display all search options.

First name

Last name

Business name

Commercial contact name

Phone

SSN/EIN

Address Line 1

ZIP

Account number

Debtor number

Creditor Reference

Creditor External Account Number

Legacy

Debtor Legacy Id

Creditor Account Legacy Id

Reset

Cancel

Search

Search Field Descriptions

Field	Description or CUBS Equivalent
Account Number	Debt Manager-assigned number for each account
Debtor Number	Debt Manager-assigned number for each debtor
Creditor Reference	CRN – assigned by Creditor
Creditor External Account Number	DRL – assigned by Creditor
Debtor Legacy ID	CUBS lead packet number
Creditor Account Legacy ID	CUBS account number

Wildcard Search

For alpha or alphanumeric fields, an * or % can be used in place of unknown information.


For example, the search below will provide back any debtors your user role has permission to see:

Last name	*
-----------	---

A wildcard symbol can also stand in to fill for incomplete information. The search below will provide any debtors your user role has permission to view whose address includes “Main”. This would help in instances where the street number is unknown or there is a need to eliminate inconsistent abbreviation issues.

Address Line 1	*Main*
----------------	--------

Wildcard searches cannot be performed on numeric fields, like SSN, Account Number, or Debtor Number.

 Error: The Account number is not valid.	
Account number	*

Documents

Viewing Documents

Step 1: Search for a debtor or account.

Step 2: Available documents are displayed. The link in the Document Name column can be clicked to download the document.

Debt Manager FitPortal™

Search

Documents

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

Documents




Select Document Class: All

From Date: yyyy-mm-dd

To Date: yyyy-mm-dd

Document Name	Document Class	UserName	Generation Date
RcvrRcL_IB_20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
SAGE_20220321_1503.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
RcvrRcL_IB_20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/01/2023
RcvrRcL_IB_202301310100708.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/15/2023

Items Per Page: 10

Similar to reports, a date range can be chosen by selecting the **From Date:** calendar icon , selecting the range, and clicking the filter icon  to apply the filter. The refresh icon  that appears can be used to remove the filter.

Documents

Select Document Class: All

From Date: 2023-05-18

To Date: 2023-05-26

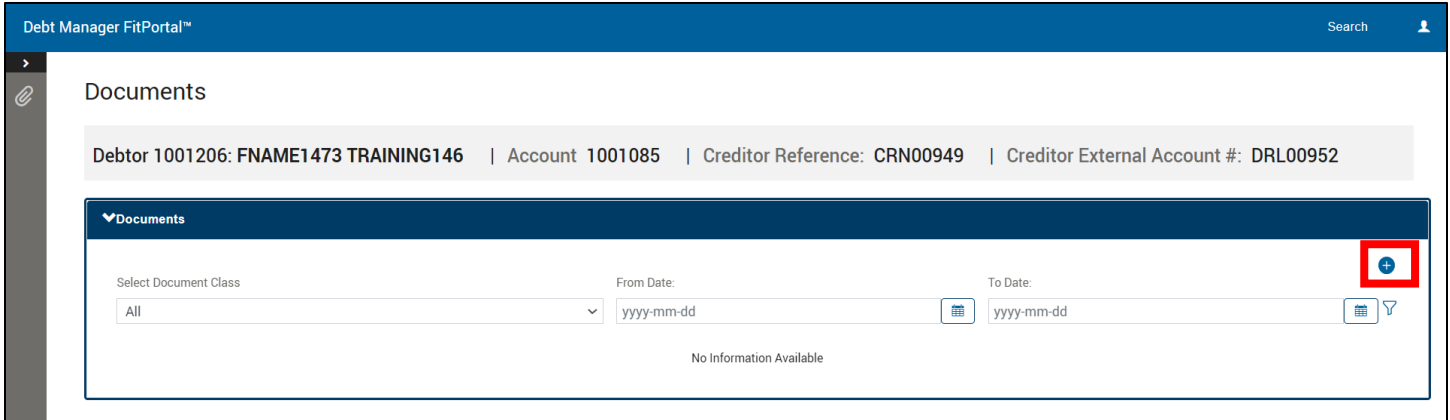
Items Per Page: 10

Uploading Documents

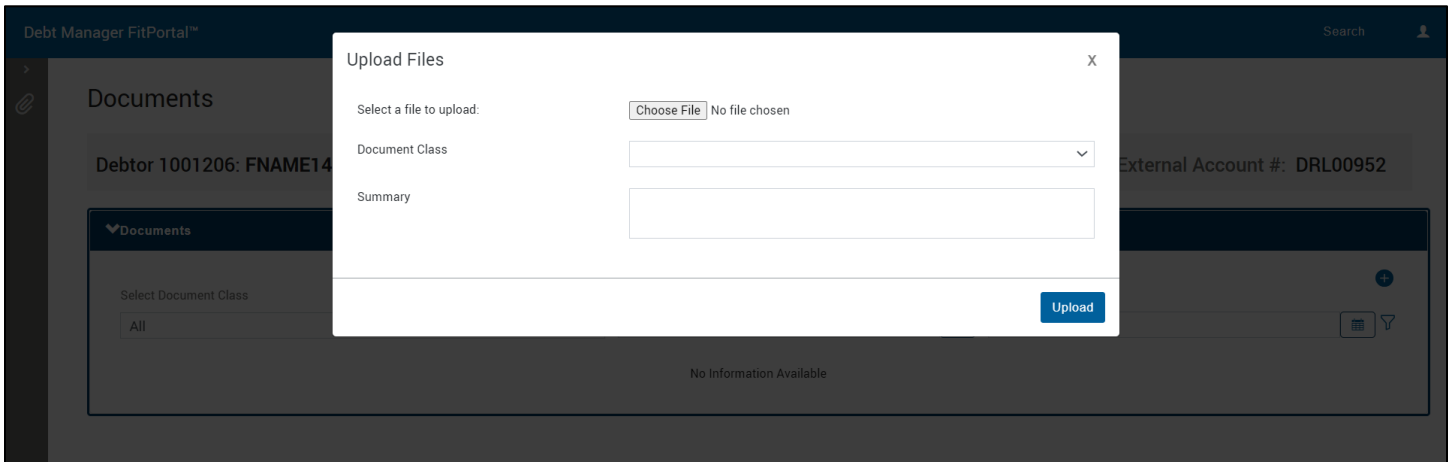
Step 1: Select the plus icon  from the Documents page.



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.



Step 2: Choose the file, select a document class, and provide a summary of the document being uploaded. Click **Upload**.



Acceptable File Types to Upload

PDF, JPG, TIFF, PNG, and CSV

Acceptable File Names to Upload

The following special characters are allowed in file names: hyphens, underscores, and periods

When uploading files, remove any other special characters. Characters in the table below should **not** be included in the file name.

# pound	% percent	& ampersand	{ left curly bracket	} right curly bracket
\ back slash	< left angle bracket	> right angle bracket	* asterisk	? question mark
/ forward slash	 blank spaces	\$ dollar sign	! exclamation point	' single quotes
" double quotes	: colon	@ at sign	+ plus sign	` back tick
 pipe	= equal sign			