Web Access

Printable Help

Version 12.0

Last updated October 24, 2018

Abstract

This document is a printable version of Web Access help.

Table of Contents

Introduction to Web Access

Web Access is an advanced web-based program that complements Latitude. It allows a collection agency's clients to view account information in the collection agency's Latitude system. The collection agency has complete control over the features that are available to clients and report design. With the appropriate permissions, clients can do the following:

- Search for accounts.
- View account detail, such as debtor demographics, notes, payment history, and letter history.
- Send update requests to the administrator.
- Add notes to accounts.
- Transfer files to and from the web server.
- View reports.
- View the audit trail.

What's New in Web Access

The following Service Updates (SU) introduced changes and enhancements to Web Access 12.0.

SU 2

File transfers

Removed the default “upload” and “download” folders when transferring files. For more information, see Upload a File or Download a File.

SU 3

Reports

- Updated the Account Status report to include a link to view account details. For more information, see Account Status Report.
- Added a "where" clause requirement for new reports. To ensure the report runs correctly, specify "where 1=1" in the report writer. If the report doesn't include a where clause, the report returns every record because the report writer doesn't add a customer or Class of Business "where" clause unless a "where" clause is present already. For more information, see Add a Report.

SU 12

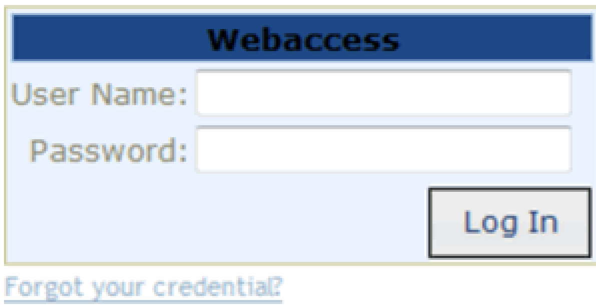
Added Agency Details section to the **Account** page for accounts placed with an outside collection agency or attorney. For more information, see View Account Detail.

Log on to Web Access

Use the **Web Access** dialog box to log on to Web Access.

To log on to Web Access

1. Open Web Access in your browser. The **Web Access Logon** page appears (with the company logo set up for your organization).

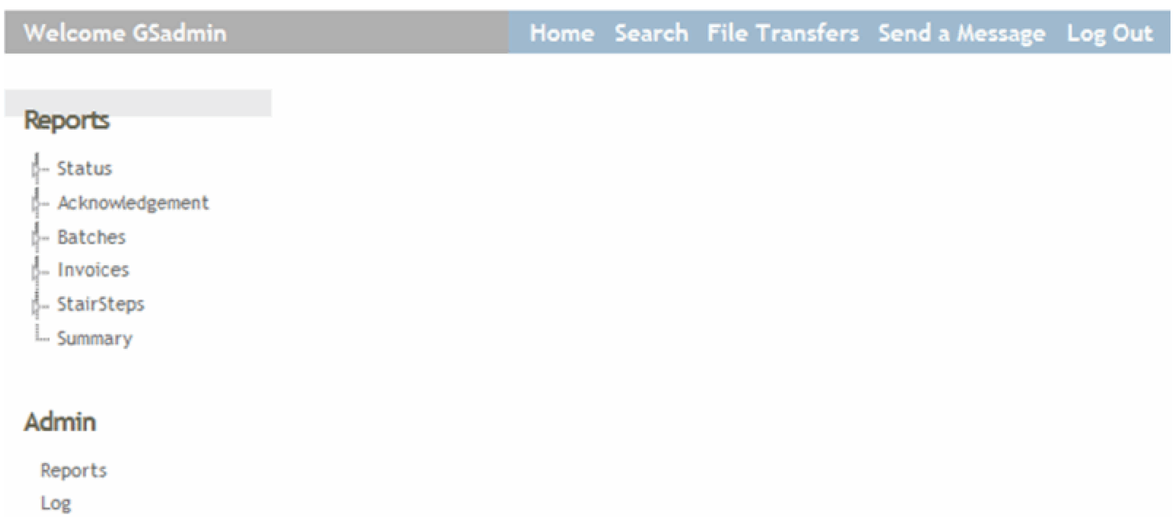


User Name: Your Web Access user name.

Password: Your Web Access password. As you type your password, the system displays periods instead of the typed characters.

Forgot your credential?: Retrieves your Web Access credentials.

2. Complete the information and then click **Log In**. The **Web Access** page appears.

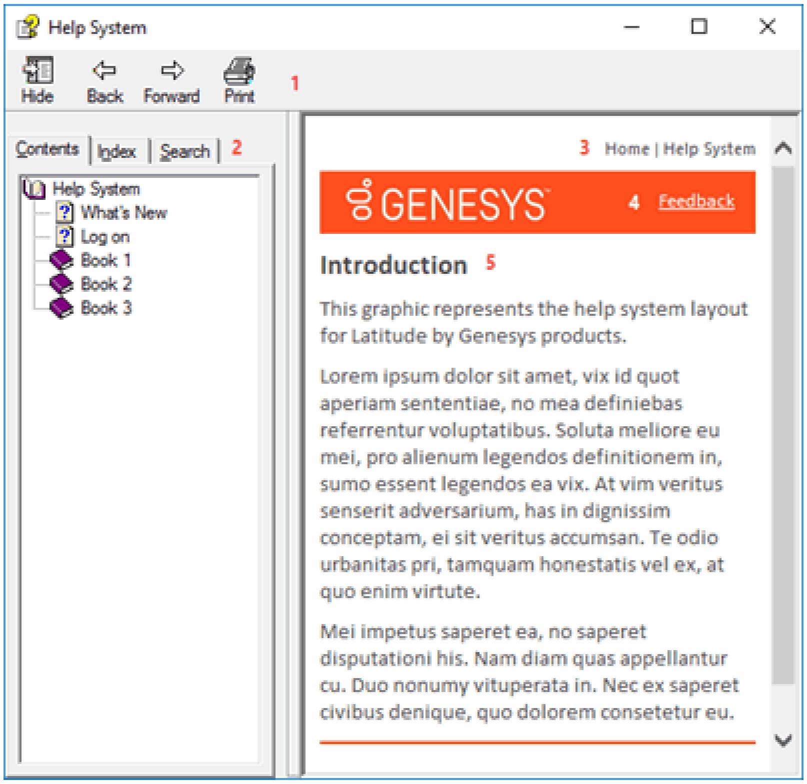


Help Overview

Web Access help provides you with information for using Web Access. To locate and view a topic, use the table of contents, index, and search features.

To open help

Open the "\\Program Files (x86)\Interactive Intelligence\Interaction Collector\Documents" folder and then double-click **WebAccess.chm**.



Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Displays options for the help window.
2. **Tabs:** Displays the following:

   Contents: Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

   Index: Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

   Search: Displays the search feature. To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.
3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.
5. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific set of rules. You can include wildcard expressions, Boolean operators, and nested expressions in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

Search syntax

The basic rules for formulating search queries are:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- The search engine ignores punctuation marks and special characters such as @#$%^&()=+[]\.
- Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for...	**Example**	**Result**
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed the question mark (for example, 32?57 returns 32257, 32457, and 32857).
Topics that contain all the words specified, in any order or placement within the topic	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
Topics that contain the specified phrase	"account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status..." but not "the status of the account..."

Boolean operators

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for...	**Example**	**Result**
AND	account AND status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status..." or "the status of the account..."
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

Nested expressions

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

Reports

Reports

Web Access releases with a set of standard reports, grouped by report type. If you have the appropriate permissions, you can add custom reports that you created outside Web Access to the reports list in Web Access.

Generate a Report

Generate a Report

The reports you have access to are based on your permissions. Some standard reports require you to specify a date range.

To generate a report

1. In the **Navigation** tree under **Reports**, click the report type.
2. Click the report. If the report does not require a date range, the system displays the report immediately.
3. If the report requires a date range, do the following:

a. In the **Start Date** box, type or select the start date for the report.

b. In the **End Date** box, type or select the end date for the report.

c. Click **View Report**.

Report Options

The following table lists the options that are available when viewing a report.

Option	Description
	Displays the first page of the report.
	Displays the previous page of the report.
	Displays the next page of the report.
	Displays the last page of the report
N of 1	Current page number and the total number of pages. To display a specific page of the report, type the page number in the box and press **Enter**.
Zoom	Increases or decreases the text size when viewing the report on your monitor. Changing the text size here does not change the size of the text when you print the report.
Find/Next	Searches for all occurrences of the specified text. To search, type the text in the box and click **Find**. If there's more than one occurrence, click **Next** to display the next match.
Format	File format to which to export the report.
Export	Exports the report to the specified file format. To export the report, select the file format and then click **Export**.
	Refreshes the report data.
	Prints the report.

Account Status Report

This report displays summary and detail information for accounts in your custom customer groups. The system groups the information on account status.

- To display status details, click the plus sign (+) next to the status.
- To view account details, in the Account ID or ID column, click the account number.

1 of 7 100% Find | Next Select a format Export

Account Status

0000000 - DEFAULT CUSTOMER

Status	Account ID	Original Amount	Current Amount	Total Paid	ID	Name	Date Placed	Last Pay Date
⊟ ACT	13 Accounts	$26,100.73	$26,100.73	$0.00				
	20336015400987	$5,000.00	$5,000.00	$0.00	1210	Smith, Jackie	04/05/2011	
	451021360245	$6,000.00	$6,000.00	$0.00	1211	Rutherford, Sally	04/05/2011	
	039870022154	$500.00	$500.00	$0.00	1213	Adams, Cory	04/05/2011	
	3655203188452	$3,905.23	$3,905.23	$0.00	1214	Legere, Lauren	04/05/2011	
	9888712101545	$2,500.50	$2,500.50	$0.00	1215	Smith, Landon	04/05/2011	
	0221546451555	$350.00	$350.00	$0.00	1216	Frank, William	04/05/2011	
	1889003265424	$700.00	$700.00	$0.00	1217	Berard, Angela	04/05/2011	
	024845522122	$875.00	$875.00	$0.00	1218	Thompson, Brandon	04/05/2011	
	69864515101032	$450.00	$450.00	$0.00	1219	Limon, Nancy	04/05/2011	
	20336015404588	$500.00	$500.00	$0.00	1220	Smith, Jackie	04/05/2011	
	965451545201	$3,690.00	$3,690.00	$0.00	1221	Smith, Jackie	04/05/2011	
	6986455669801	$650.00	$650.00	$0.00	1222	Limon, Nancy	04/05/2011	
	3232510125101032	$980.00	$980.00	$0.00	1223	Limon, Nancy	04/05/2011	
⊞ HOT	1 Accounts	$3,500.00	$3,500.00	$0.00				
	14 Accounts	$29,600.73	$29,600.73	$0.00				

Acknowledgment Report

This report displays a list of the accounts and dollar amounts that the client placed with the collection agency during the specified date range.

Parameters

Start Date 04/01/2011

End Date 04/30/2011

1 of 1 100% Find | Next Select a format Export

Acknowledgement Report

4/1/2011 - 4/30/2011

DEFAULT CUSTOMER
Attn:JOE
123 MAIN STREET
JACKSONVILLE, FL 32246

0000000	DEFAULT CUSTOMER			
Our Number	Name	Your Number	Date Rcvd	Amount Placed
1210	Smith, Jackie	20336015400987	4/5/2011	5,000.00
1211	Rutherford, Sally	451021360245	4/5/2011	6,000.00
1212	Lincoln, James	362025852365201	4/5/2011	3,500.00
1213	Adams, Cory	039870022154	4/5/2011	500.00
1214	Legere, Lauren	3655203188452	4/5/2011	3,905.23
1215	Smith, Landon	9888712101545	4/5/2011	2,500.50
1216	Frank, William	0221546451555	4/5/2011	350.00
1217	Berard, Angela	1889003265424	4/5/2011	700.00
1218	Thompson, Brandon	024845522122	4/5/2011	875.00
1219	Limon, Nancy	69864515101032	4/5/2011	450.00
1220	Smith, Jackie	20336015404588	4/5/2011	500.00
1221	Smith, Jackie	965451545201	4/5/2011	3,690.00
1222	Limon, Nancy	6986455669801	4/5/2011	650.00
1223	Limon, Nancy	3232510125101032	4/5/2011	980.00
		Total Items	14	$29,600.73

Batches Reports

Batches Reports

This section provides information about batch reports.

Batch Performance Report

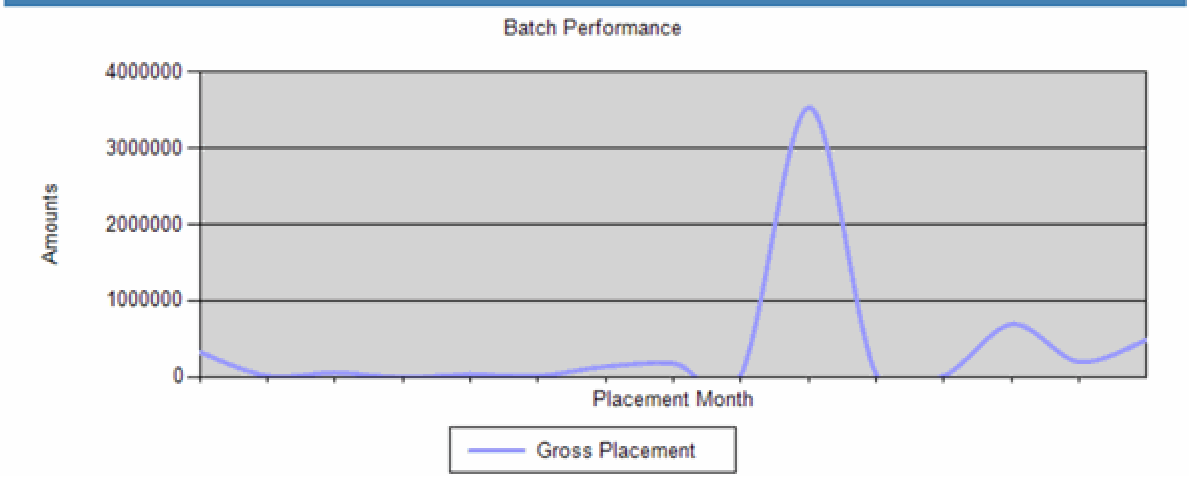
This report displays batch performance by placement month for the specified date range.

Parameters

1 of 1 Select a format Export

Batch Performance by Placement Month

Placement Month	# of Accts	Placement Total	Total Collections	Total Fees	Total Liquidation
February 2011	207	$322,359.87	$.00	$.00	0
March 2011	3	$4,450.00	$.00	$.00	0
April 2011	23	$46,810.73	$.00	$.00	0
May 2011	2	$400.00	$.00	$.00	0
July 2011	20	$34,215.57	$250.00	$62.50	0.73
August 2011	2	$7,000.00	$.00	$.00	0
September 2011	93	$124,462.76	$454.89	$113.72	0.37
October 2011	174	$167,846.48	$120.00	$30.00	0.07
November 2011	1	$1,500.00	$.00	$.00	0
January 2012	434	$3,532,110.55	$.00	$.00	0
February 2012	26	$40,450.00	$.00	$.00	0
March 2012	1	$5,000.00	$.00	$.00	0
May 2012	149	$685,712.11	$.00	$.00	0
January 2016	29	$203,177.68	$.00	$.00	0
June 2017	258	$474,680.70	$.00	$.00	0
	1422	$5,650,176.45	$824.89	$206.22	0.01



Placements and Collections Report

This report displays a summary of account placements by month and year for the specified date range.

Parameters

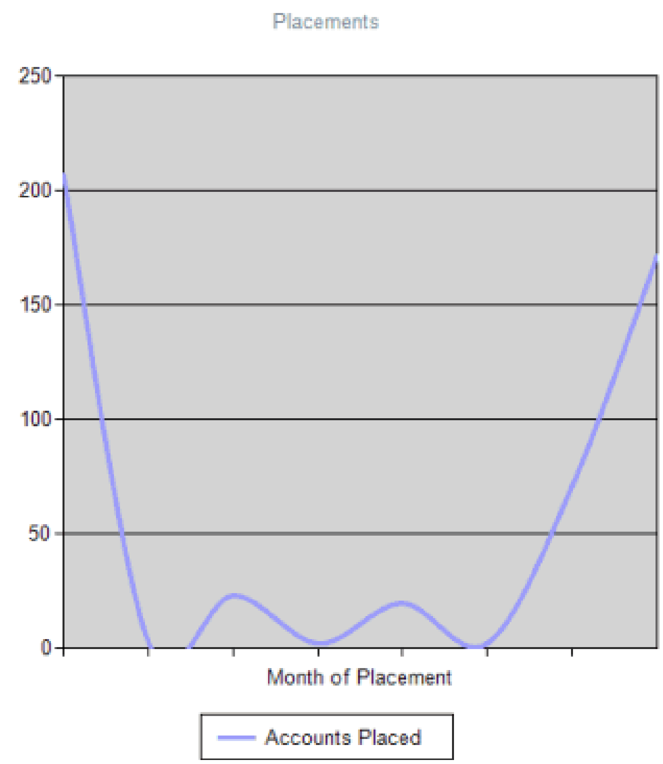
Start Date 01/01/2011

End Date 12/31/2011

1 of 1 | 100% | Find | Next | Select a format | Export

Placements

Month	#	$
February 2011	1	$8,127.19
	2	$2,700.00
	204	$311,532.68
March 2011	3	$4,450.00
April 2011	1	$550.00
	1	$600.00
	7	$16,060.00
	14	$29,600.73
May 2011	2	$400.00
July 2011	1	$4,620.00
	19	$29,595.57
August 2011	2	$7,000.00
September 2011	1	$1,250.00
	70	$101,902.76
October 2011	2	$1,292.50
	2	$3,500.00
	43	$19,040.92
	44	$18,951.06
	81	$122,132.00
	500	$683,305.41



Invoice Summary Report

This report displays a list of invoices for the specified date range.

Parameters

Enter the Start Date 01/01/2013

Enter the End Date 12/31/2013

1 of 3 | 100% | Find | Next | Select a format | Export

Invoice Summary

CUSTOMER ONE

CUSTOMER ONE							
Invoice ID	Date	Paid Us	Paid You	Total	Fees	Due Us	Due You
10001	10/15/2013	$472.89	$0.00	$472.89	$133.22	$0.00	$339.67
10009	12/16/2013	$10,958.83	$0.00	$10,958.83	$5,479.41	$0.00	$5,479.42
		$11,431.72	$0.00	$11,431.72	$5,612.63	$0.00	$5,819.09

Stair Step Reports

Stair Step Reports

This section provides information about stair step reports.

Stair Step S Report

This report displays gross collections by month for all accounts. The data is based on the pre-built numbers generated in Statistics Console.

Collection StairStep [Gross Collections]

Placement Month	Placement Total	Total Collections	Current Month	Month 1	Month 2	Month 3	Mo
Feb - 2011	$322,359.87	$9,781.48	$4,519.25	$.00	$.00	$.00	
Mar - 2011	$4,450.00	$.00	$.00	$.00	$.00	$.00	
Apr - 2011	$46,810.73	$130.00	$.00	$.00	$.00	$.00	
May - 2011	$400.00	$.00	$.00	$.00	$.00	$.00	
Jul - 2011	$34,215.57	$4,763.60	$4,463.60	$250.00	$.00	$.00	
Aug - 2011	$7,000.00	$.00	$.00	$.00	$.00	$.00	
Sep - 2011	$103,152.76	$400.89	$100.00	$.00	$.00	$.00	
Oct - 2011	$164,916.48	$450.00	$210.00	$120.00	$.00	$.00	
Jan - 2012	$29,470.55	$.00	$.00	$.00	$.00	$.00	
Feb - 2012	$40,450.00	$.00	$.00	$.00	$.00	$.00	
Mar - 2012	$5,000.00	$.00	$.00	$.00	$.00	$.00	
May - 2012	$145,712.11	$695.00	$.00	$.00	$.00	$.00	
Oct - 2013	$108,925.00	$.00	$.00	$.00	$.00	$.00	
Nov - 2013	$9,000.00	$.00	$.00	$.00	$.00	$.00	
	$1,021,863.07	$16,220.97	$9,292.85	$370.00	$.00	$.00	$.00

Stair Step S (Prebuilt) Report

This report displays gross collections by month for newly placed accounts only. The data is based on the pre-built numbers generated in Statistics Console.

1 of 1 100% Find | Next Select a format Export

Collection StairStep [Gross Collections]

Placement Month	Placement Total	Total Collections	Current Month	Month 1	Month 2	Month 3	Mon
Feb - 2011	$29,600.73	$.00	$.00	$.00	$.00	$.00	
Apr - 2011	$17,210.00	$140.00	$.00	$.00	$.00	$.00	
May - 2011	$2,900.00	$250.00	$.00	$.00	$.00	$250.00	
Jul - 2011	$40,715.57	$4,652.21	$4,597.21	$.00	$.00	$.00	
Sep - 2011	$238,469.24	$535.89	$100.00	$120.00	$.00	$.00	
Oct - 2011	$30,850.00	$305.00	$200.00	$.00	$.00	$.00	
Jan - 2012	$216,132.66	$.00	$.00	$.00	$.00	$.00	
Oct - 2013	$108,925.00	$.00	$.00	$.00	$.00	$.00	
Nov - 2013	$9,000.00	$.00	$.00	$.00	$.00	$.00	
	$693,803.20	$5,883.10	$4,897.21	$120.00	$.00	$250.00	$.00

Stair Step % Report

This report displays Liquidation (recovery) percentages by month for all accounts. The data is based on the pre-built numbers generated in Statistics Console.

1 of 1 100% Find | Next Select a format Export

Collection StairStep [Recovery Percentages]

Placement Month	Placement Total	Total Liquidation	Current Month	Month 1	Month 2	Month 3	Mo
Feb - 2011	$322,359.87	3.03	1.40	0	0	0	
Mar - 2011	$4,450.00	0	0	0	0	0	
Apr - 2011	$46,810.73	0.28	0	0	0	0	
May - 2011	$400.00	0	0	0	0	0	
Jul - 2011	$34,215.57	13.92	13.05	0.73	0	0	
Aug - 2011	$7,000.00	0	0	0	0	0	
Sep - 2011	$103,152.76	0.39	0.10	0	0	0	
Oct - 2011	$164,916.48	0.27	0.13	0.07	0	0	
Jan - 2012	$29,470.55	0	0	0	0	0	
Feb - 2012	$40,450.00	0	0	0	0	0	
Mar - 2012	$5,000.00	0	0	0	0	0	
May - 2012	$145,712.11	0.48	0	0	0	0	
Oct - 2013	$108,925.00	0	0	0	0	0	
Nov - 2013	$9,000.00	0	0	0	0	0	
	$1,021,863.07	1.59	0.91	0.04	0	0	

Stair Step % (Prebuilt) Report

This report displays Liquidation (recovery) percentages by month for newly placed accounts only. The data is based on the pre-built numbers generated in Statistics Console.

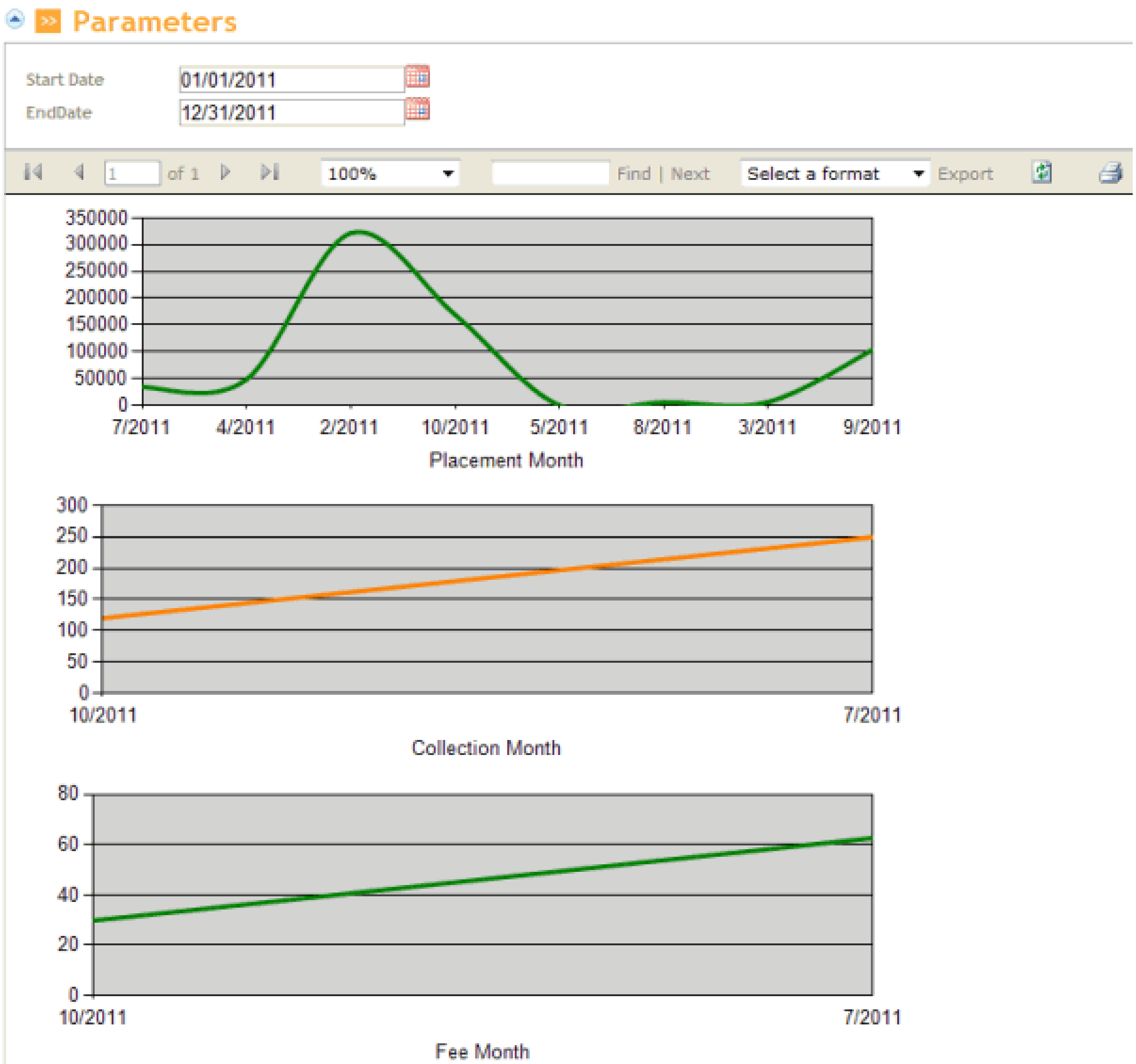
1 of 1 100% Find | Next Select a format Export

Collection StairStep [Recovery Percentages]

Placement Month	Placement Total	Total Liquidation	Current Month	Month 1	Month 2	Month 3	Month 4	Month 5	Mon
Feb - 2011	$29,600.73	0	0	0	0	0	0	0	
Apr - 2011	$17,210.00	0.81	0	0	0	0	0	0	
May - 2011	$2,900.00	8.62	0	0	0	8.62	0	0	
Jul - 2011	$40,715.57	11.43	11.29	0	0	0	0	0	
Sep - 2011	$238,469.24	0.22	0.04	0.05	0	0	0	0.03	
Oct - 2011	$30,850.00	0.99	0.65	0	0	0	0	0	
Jan - 2012	$216,132.66	0	0	0	0	0	0	0	
Oct - 2013	$108,925.00	0	0	0	0	0	0	0	
Nov - 2013	$9,000.00	0	0	0	0	0	0	0	
	$693,803.20	0.85	0.71	0.02	0	0.04	0	0.01	

Summary Report

This report displays line graphs of placement, collection, and fee dollar amounts for the specified date range.



Accounts

Accounts

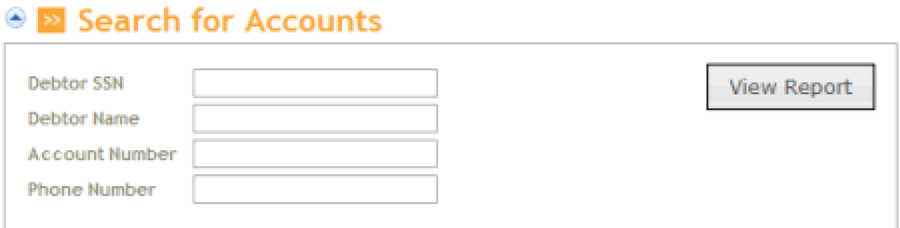
If you have the appropriate permissions, you can use the search feature to search for an account. When the system locates the account, you can view details for the account, add a note to the account, and send an email message regarding the account to the administrator.

Search for an Account

You can provide one or more search criteria to search for an account. If you search using the debtor's name, you can search using the exact name as it appears in the system or using a wildcard. For more information about wildcards, see Wildcard Search.

To search for an account

1. In the menu bar, click **Search**. The **Search for Accounts** page appears.



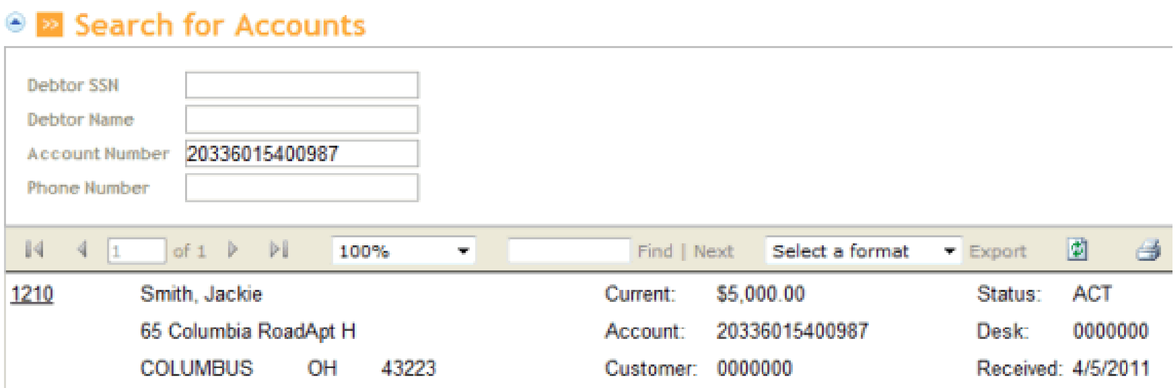
Debtor SSN: Debtor's nine-digit social security number.

Debtor Name: Debtor's name. You can search using a wildcard.

Account Number: Your customer account number. You can search using a wildcard.

Phone Number: Any phone number (for example, work, home, cell) on the account.

2. Type search criteria into one or more boxes and then click **View Report**. The account that matches the search criteria appears.



Wildcard Search

You can use the % (percent sign) wildcard to search for accounts by customer name or account number. The % represents multiple characters.

For example, when searching on name, SM% returns all accounts where the customer name begins with "SM." When searching on account number, 12% returns all accounts with an account number that begins with "12."

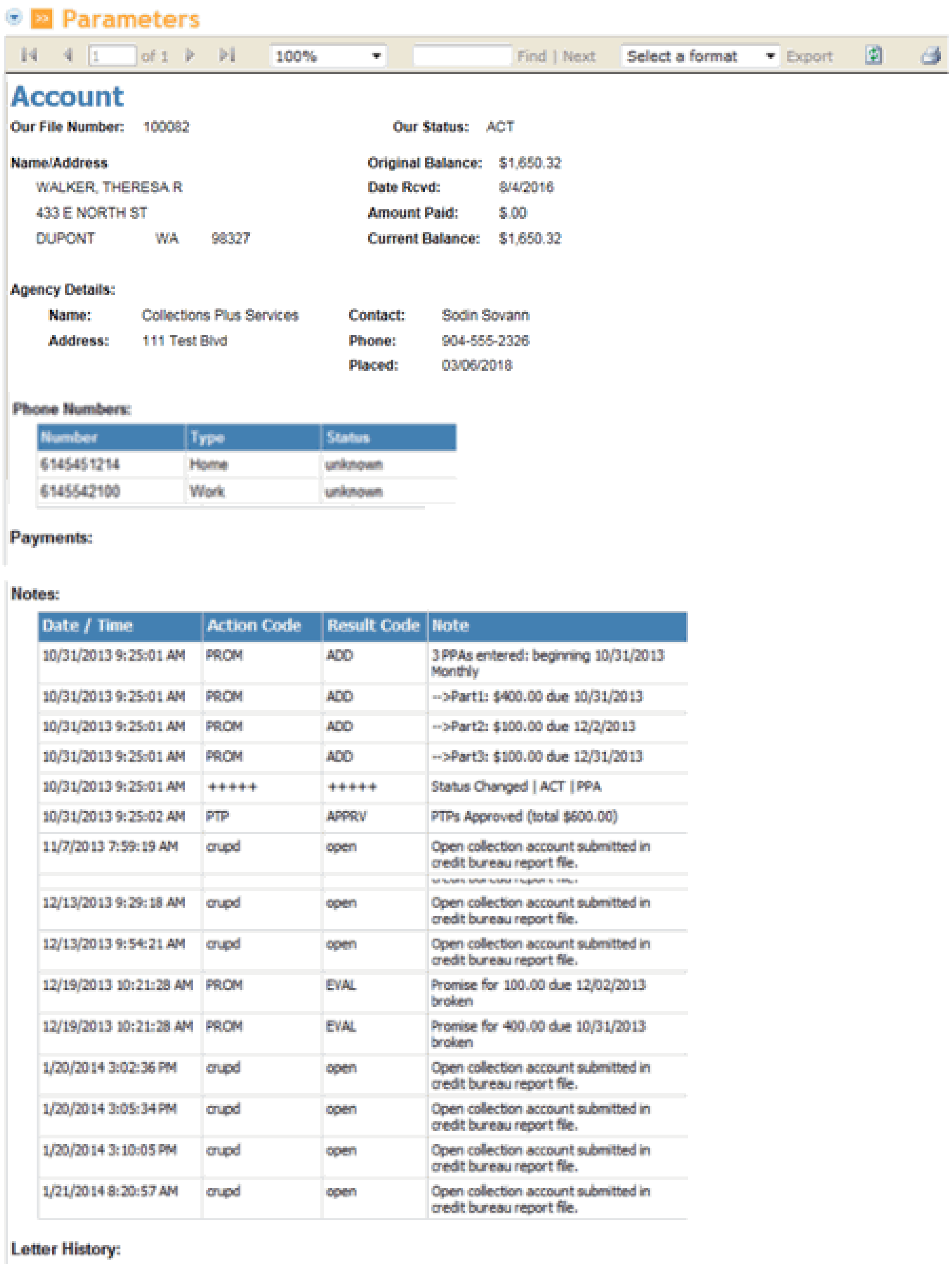
View Account Detail

After locating an account using the search feature, you can view detail information for the account.

To view account detail

With an account displayed on the **Search for Accounts** page, click the collection agency's file number. The **Account** page appears. The Agency Details section only displays for accounts placed with an outside collection agency or attorney.

If you have the appropriate permissions, this page displays options for adding notes to an account and sending messages about the account to the administrator. For more information, see Add a Note to an Account and Send a Message Regarding an Account.



Parameters

1 of 1 | 100% | Find | Next | Select a format | Export

Account

Our File Number: 100082 **Our Status:** ACT

Name/Address
WALKER, THERESA R
433 E NORTH ST
DUPONT WA 98327

Original Balance: $1,650.32
Date Rcvd: 8/4/2016
Amount Paid: $.00
Current Balance: $1,650.32

Agency Details:
Name: Collections Plus Services **Contact:** Sodin Sovann
Address: 111 Test Blvd **Phone:** 904-555-2326
Placed: 03/06/2018

Phone Numbers:

Number	Type	Status
6145451214	Home	unknown
6145542100	Work	unknown

Payments:

Notes:

Date / Time	Action Code	Result Code	Note
10/31/2013 9:25:01 AM	PROM	ADD	3 PPAs entered: beginning 10/31/2013 Monthly
10/31/2013 9:25:01 AM	PROM	ADD	-->Part1: $400.00 due 10/31/2013
10/31/2013 9:25:01 AM	PROM	ADD	-->Part2: $100.00 due 12/2/2013
10/31/2013 9:25:01 AM	PROM	ADD	-->Part3: $100.00 due 12/31/2013
10/31/2013 9:25:01 AM	+++++	+++++	Status Changed | ACT | PPA
10/31/2013 9:25:02 AM	PTP	APPRV	PTPs Approved (total $600.00)
11/7/2013 7:59:19 AM	crupd	open	Open collection account submitted in credit bureau report file.
12/13/2013 9:29:18 AM	crupd	open	Open collection account submitted in credit bureau report file.
12/13/2013 9:54:21 AM	crupd	open	Open collection account submitted in credit bureau report file.
12/19/2013 10:21:28 AM	PROM	EVAL	Promise for 100.00 due 12/02/2013 broken
12/19/2013 10:21:28 AM	PROM	EVAL	Promise for 400.00 due 10/31/2013 broken
1/20/2014 3:02:36 PM	crupd	open	Open collection account submitted in credit bureau report file.
1/20/2014 3:05:34 PM	crupd	open	Open collection account submitted in credit bureau report file.
1/20/2014 3:10:05 PM	crupd	open	Open collection account submitted in credit bureau report file.
1/21/2014 8:20:57 AM	crupd	open	Open collection account submitted in credit bureau report file.

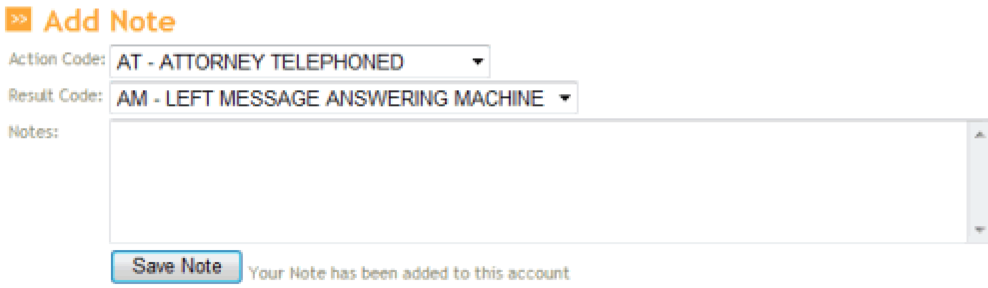
Letter History:

Add a Note to an Account

If you have the appropriate permissions, you can add a note to an account.

To add a note to an account

1. Scroll down to the **Add Note** section of the **Account** page.



Action Code: Code that describes an account activity.

Result Code: Code that describes the result of the activity.

Notes: More information regarding the account activity.

2. Complete the information and then click **Save Note**. The system saves the note to the account.

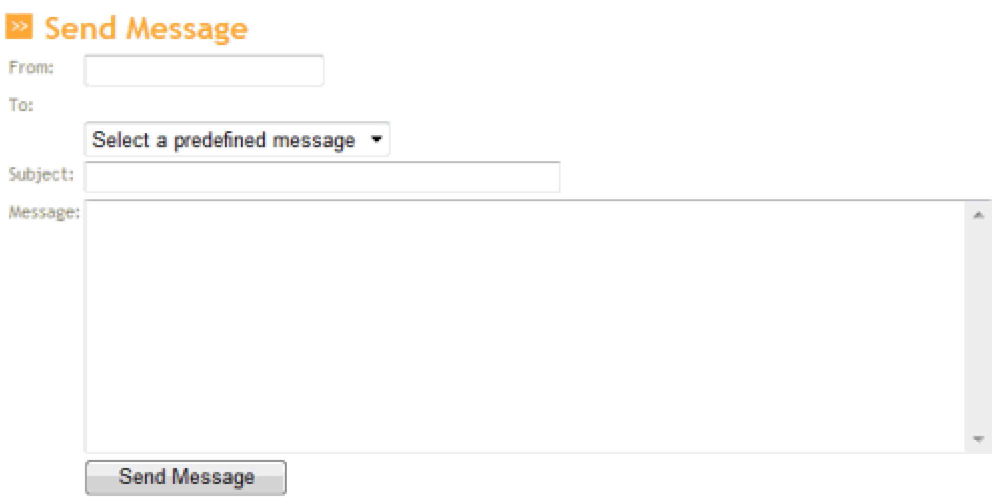
3. Click the refresh icon . The note appears in the **Notes** data grid.

Send a Message Regarding an Account

If you have the appropriate permissions, you can send a message about the account to the administrator.

To send a message regarding an account

1. Scroll down to the **Send Message** section of the **Account** page.



From: Your email address.

To: Administrator's name. The system populates this box.

Predefined Message: Message that contains default text. If you select a predefined message, you can modify it and add text to it for this email only. The system does not save additions and modifications to the predefined message.

Subject: Subject of the email.

Message: Message regarding the account.

2. Complete the information and then click **Send Message**. The system sends the email to the administrator. If you have the appropriate permissions, you can view the message in the audit log.

File Transfers

File Transfers

If you have the appropriate permissions, you can transfer files to and from the web server. The system tracks the date, user, and file name, and displays that information in a data grid. For more information about permissions, see "Website User Policy" in the *Latitude* documentation.

Upload a File

You can transfer a file to the web server. The system supports the following information:

From the client:

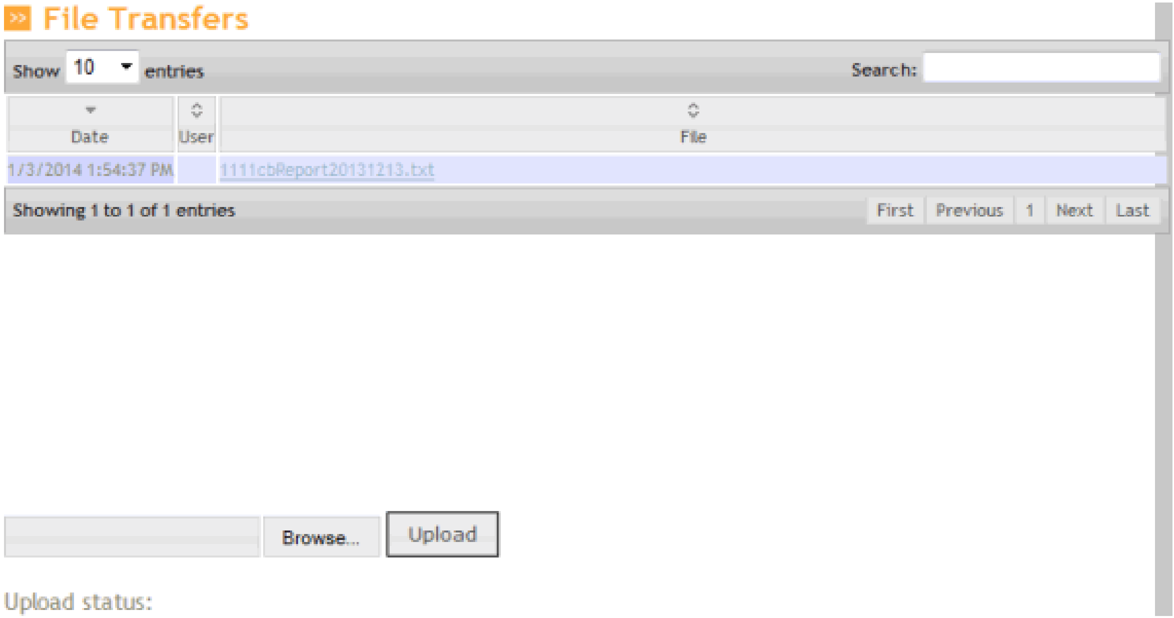
- New business
- Payments
- Account updates
- Account recalls

From the collection agency:

- Payments
- Account updates
- Account closes

To upload a file

1. In the menu bar, click **File Transfers**. The **File Transfers** page appears.



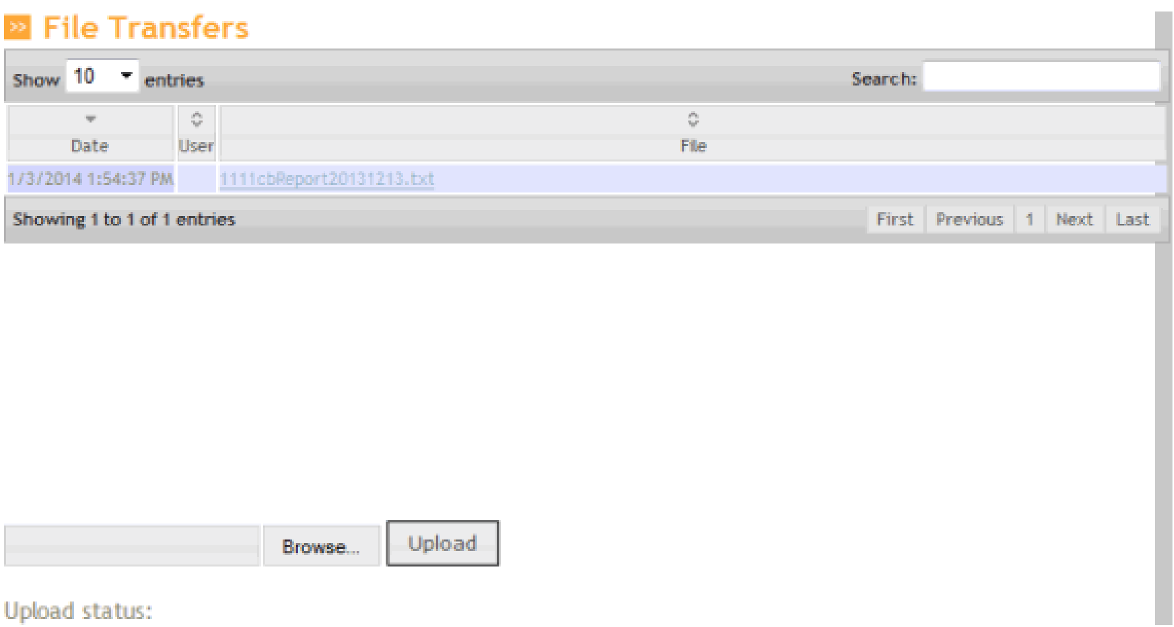
2. In the lower section of the page, click **Browse...**
3. Click the file and then click **Open**.
4. Click **Upload**. A confirmation message appears.

Download a File

You can download a file from the web server to a location you specify.

To download a file

1. In the menu bar, click **File Transfers**. The **File Transfers** page appears.



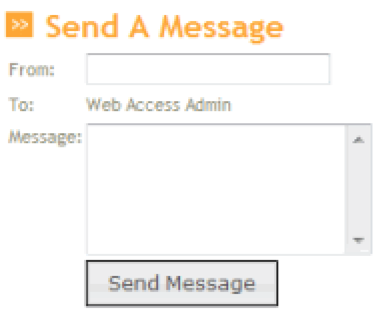
2. In the data grid, click the file to download and then click **Save**.

Send a Message to the Administrator

If you have the appropriate permissions, you can send an email message to the administrator regarding a general topic. To send a message regarding a specific account, use the send message feature on the **Account** page. For more information, see Send a Message Regarding an Account.

To send a message to the Administrator

1. In the menu bar, click **Send a Message**. The **Send a Message** page appears.



   From: Your email address.

   To: Administrator’s name. The system populates this box.

   Predefined Message: Message that contains default text. If you select a predefined message, you can modify it and add text to it for this email only. The system does not save additions and modifications to the predefined message.

   Subject: Subject of the email.

   Message: Message regarding the account.

2. Complete the information and then click **Send Message**. The system sends an email message to the administrator.

Administrative Tasks

Administrative Tasks

This section provides information on administrative tasks for reports and the audit trail.

Add a Report

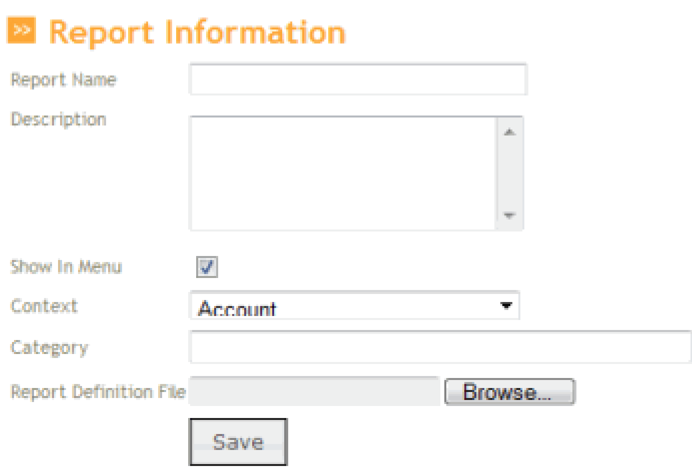
Administrators can add a report that the client or collections agency created as a client report definition (.rdlc) file using Visual Studio. For more information about creating a report, see your Visual Studio documentation.

> **Note:** If the report doesn't include a where clause, the report returns every record because the report writer doesn't add a customer or Class of Business "where" clause unless a "where" clause is present already. To ensure the report runs correctly, specify "where 1=1" in the report writer.

To add a report

1. In the **Navigation** tree under **Admin**, click **Reports**. The **Report List** page appears.

2. At the bottom of the list, click **Add New Report**. The **Report Information** page appears.



Report Name: Name of the report.

Description: Description of the report.

Show in Menu: If selected, the system includes the report in the **Reports** section of the **Navigation** tree so that it is available to users.

Context: Context for the data in the report. Valid values are: Account, Detail, and Summary.

Category: Report category.

Report Definition File: File that defines the report. The file name extension is ".rdlc". Click **Browse…** and then click the file name.

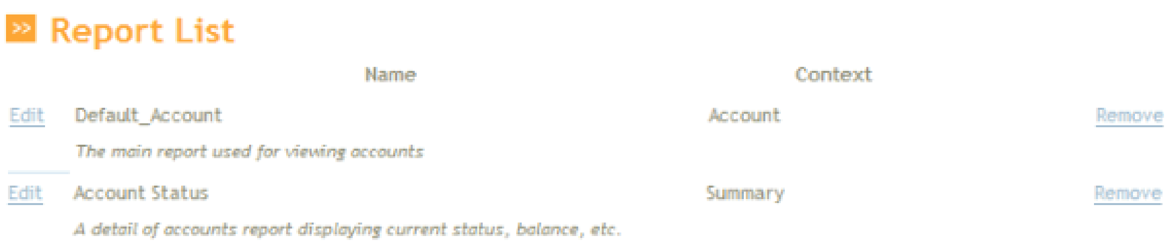
3. Complete the information and then click **Save**. If you selected to show the report in the menu, it appears in the **Reports** section of the **Navigation** tree.

Modify a Report

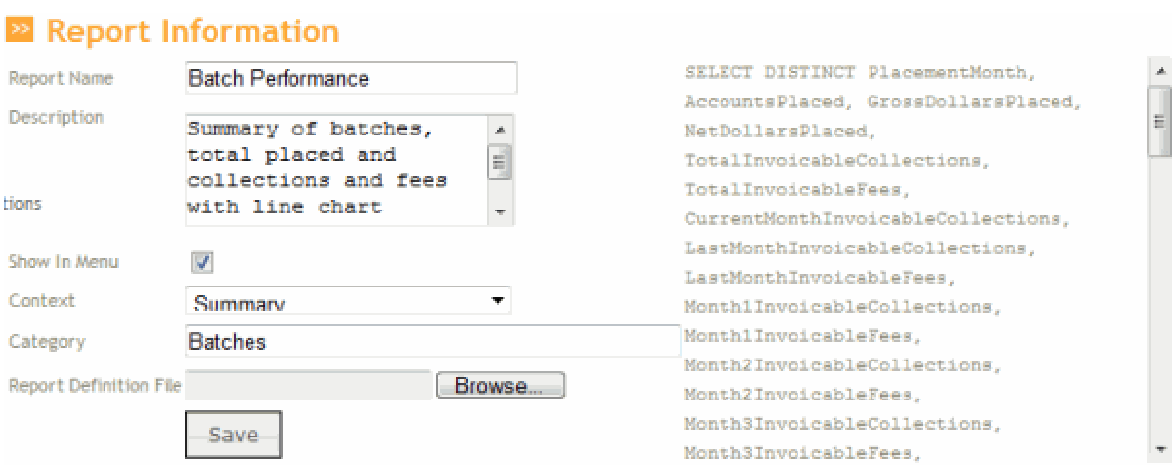
Administrators can modify the information about a report, including whether it appears in the section of the **Navigation** tree.

To modify a report

1. In the **Navigation** tree under **Admin**, click **Reports**. The **Report List** page appears.



2. Next to the report to modify, click **Edit**. The **Report Information** page appears.



Report Name: Name of the report.

Description: Description of the report.

Show in Menu: If selected, the system lists the report in the **Reports** section of the **Navigation** tree so that it is available to users.

Context: Context for the data in the report. Valid values are: Account, Detail, and Summary.

Category: Report category.

Report Definition File: File that defines the report. The file name extension is ".rdlc". Click **Browse…** and then click the file name.

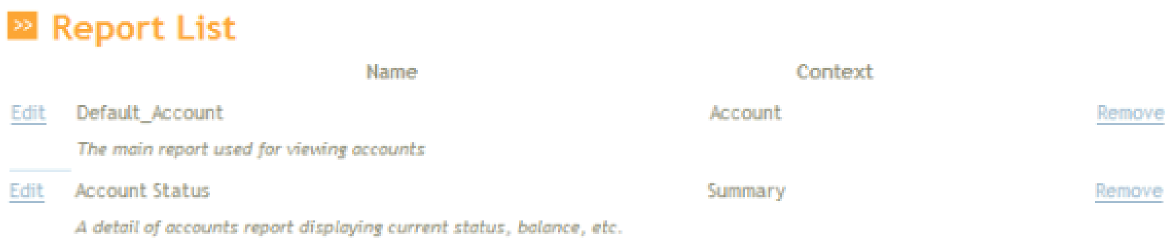
3. Modify the information as necessary and then click **Save**.

Delete a Report

Administrators can delete a report from Web Access.

To delete a report

1. In the **Navigation** tree under **Admin**, click **Reports**. The **Report List** page appears.



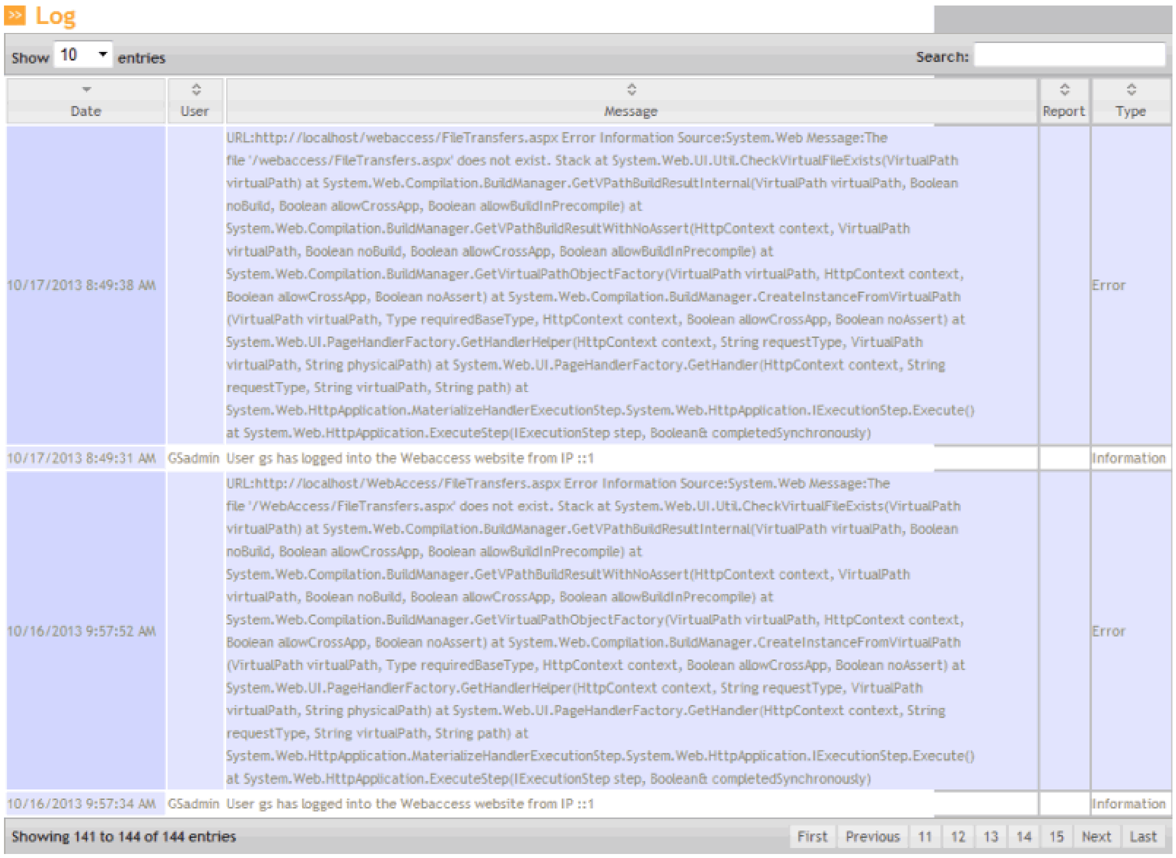
2. Next to the report to delete, click **Remove**. A **Confirmation** dialog box appears.
3. Click **OK**.

View the Audit Trail

If you have the appropriate permissions, you can view the audit trail for your Web Access activities.

To view the audit trail

1. In the **Navigation** tree under **Admin**, click **Log**. The **Log** page appears.



2. To change the number of items that appear on a single page, in the **Show entries** list box, click the number of items.

3. To search the log for specific text such as a word or phrase, in the **Search** box, type the text and then press **Enter**. Only the log entries that contain the specified text appear in the data grid. To clear the filter, delete the text from the **Search** box.

4. To display the first, previous, next, or last page of the log, click the corresponding name in the status bar.

5. To display a specific page of the log, click the corresponding page number in the status bar.