

# Commercial Portal Tutorial



## Index

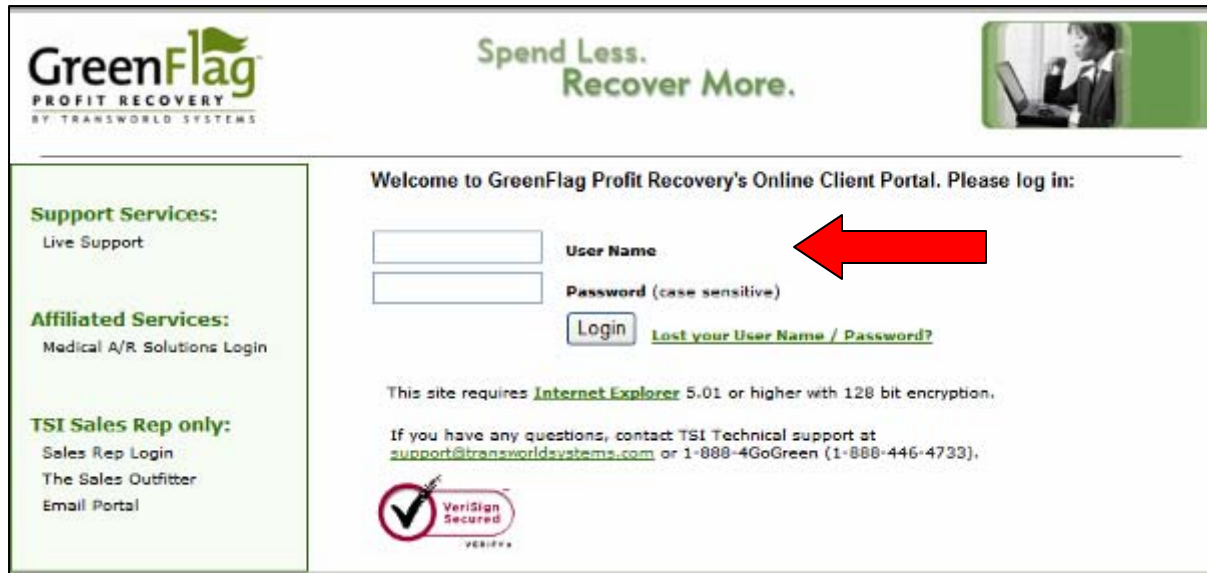
- [Welcome](#)
- [Getting Started](#)
- [Commercial Portal Home Page](#)
- [Client Number Description](#)
- [Site Navigation Bar - Tabs](#)
- [Submit Debtors](#)
- [View/Stop Debtors](#)
- [Client Responsibility](#)
- [Reports](#)
- [Search](#)
- [Account Preferences](#)

## Welcome to Transworld Systems!

- Transworld Systems Commercial Division, formerly NCO Commercial, is happy to have your business and we wish you continued success using our collections services
- We are excited that you will be able to now submit placements online, 24/7 using our Commercial Portal
- Since 1970, Transworld Systems has been providing tools to businesses to improve their cash flow and proudly serves a diverse range of respected, industry-leading clients in a wide variety of industries including healthcare, financial services, and any industry where credit is extended
- If you have questions or need assistance contact your **Transworld Commercial Sales Representative** at any time.

## Getting Started – Commercial Portal

- The Commercial Portal gives you access to your accounts 24/7 from any computer
- Access the site at: <https://service.transworldsystems.com/FormsLogin.asp>
- You will need your username and password to login
  - You should receive this information from [support@transworldsystems.com](mailto:support@transworldsystems.com)
  - If you don't have this information, you can email us at [support@transworldsystems.com](mailto:support@transworldsystems.com) or you can call us at 1-888-446-4733 prompt 4



**GreenFlag**  
PROFIT RECOVERY  
BY TRANSWORLD SYSTEMS

Spend Less.  
Recover More.

Welcome to GreenFlag Profit Recovery's Online Client Portal. Please log in:

User Name

Password (case sensitive)

[Lost your User Name / Password?](#)

This site requires [Internet Explorer](#) 5.01 or higher with 128 bit encryption.

If you have any questions, contact TSI Technical support at [support@transworldsystems.com](mailto:support@transworldsystems.com) or 1-888-4GoGreen (1-888-446-4733).

VeriSign Secured

**Support Services:**  
Live Support

**Affiliated Services:**  
Medical A/R Solutions Login

**TSI Sales Rep only:**  
Sales Rep Login  
The Sales Outfitter  
Email Portal

## Commercial Portal Home Page

- This is the Home Page of the Commercial Portal
- On this page you'll see:
  - Welcome Message
  - Navigation tabs across the top to take you to different areas of the portal
  - Sales Rep information
  - Contact Link
  - Log Out Button

TransworldSystems®  
Commercial Division

Steve Wagner    CLIENT# 51310 | Commercial Demo Client-CBR | SS-8    | HOME | LOG OUT | CONTACT US |

Email your TSI Sales Rep: [HELEEN JASGUR](#)  
(813) 890-2300

Account Overview    Submit New Debtor    View/Stop Debtors    Upload Debtors    Reports    Search    Account Preferences

**Welcome to the Transworld Commercial Online Client Portal (OCP)!**

This fully interactive website is the place for you to upload accounts for collection and check the status of these accounts 24/7. It's an easy to use, fully automated portal to manage your collections program from any computer with no special software required.

We encourage you to place accounts with Transworld Systems early for best resolution. As your collections partner, we will work your accounts thoroughly using industry leading processes and technology paired with the best collections team in the industry.

Use the links above to begin submitting accounts today! Please reference our [quick start guide](#) for a brief overview of each module.

If at anytime you have questions, please contact us for assistance.

For technical questions related to this web site, please contact Tech Support at [support@transworldsystems.com](mailto:support@transworldsystems.com).


For all other questions, please contact your Sales Rep ([HELEEN JASGUR](#)) or our Client Support team at [commercial.cs@ncgroup.com](mailto:commercial.cs@ncgroup.com).

We look forward to serving you and helping you achieve your collection goals.

TransworldSystems    Secure    Copyright © 2001-2007 Transworld Systems, Inc. | [Privacy](#) | [Policy](#) | [Legal](#) | [Information](#)

## Client Number Description

Transworld Systems®  
Commercial Division

Steve Wag  CLIENT# 5131U | Commercial Demo Client-CBR | SS-8 | HOME | LOG OUT | CONTACT US |

5132U | Commercial Demo - Non CBR | SS-8

5131U | Commercial Demo Client-CBR | SS-8

Email your TSI Sales Rep: [HELEEN JASGUR](#)  
(813) 890-2300

Account Overview Submit New Debtor View/Stop Debtors Upload Debtors Reports Search Account Preferences

- Next to client number, there is a drop down box with your applicable client numbers
- The Client number is a 7 digit alphanumeric ID
- It determines what collection approach you want for the placement(s).
- For example:
  - A would be our Audit approach
  - R is retail (consumer)
  - C allows us to report to Experian
- Where placements are centralized for multiple divisions, you would open the appropriate division client ID and proceed with the process

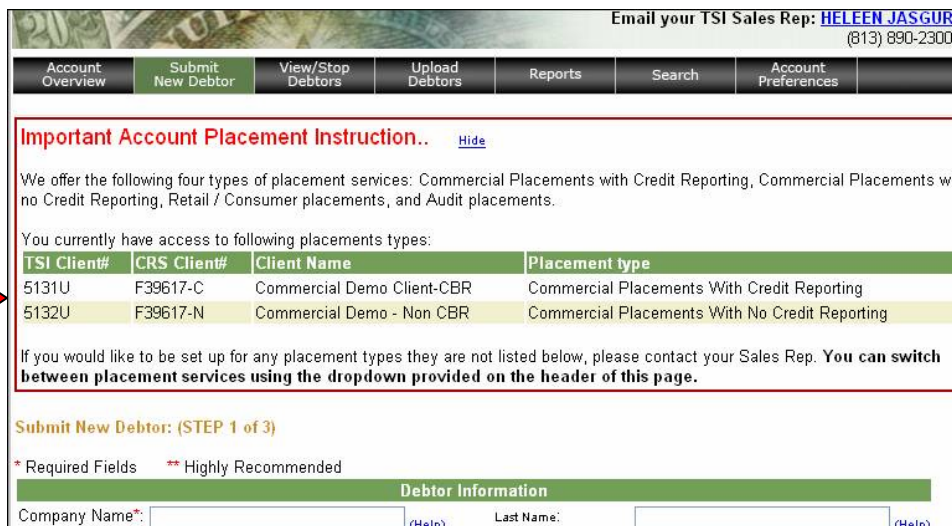
## Site Navigation Bar - Tabs



- **Account Overview** – This is the home page of the Commercial Portal
- **Submit New Debtor** – You can submit debtors here individually
- **View/Stop Debtors** – You can report payments, balance adjustments and send us updated notes or demographic information
- **Upload Debtors** – You can upload a larger quantity of debtors here via various file types (ie: Excel, comma delimited, Access, etc.)
- **Reports** – Pull reports that give you the latest updates on the money we've recovered and the performance of our services for your business
- **Search** – This page allows you to search for debtors that are in collections
- **Account Preferences** – This page allows you to add new users, deactivate users, update your business information and/or preferences for using the Commercial Portal

## How to Submit Debtors-Manual Entry

- When you click on the “Submit New Debtor” tab, you’ll see a message that shows you the various types of placements that you can submit
  - Commercial with Credit Reporting
  - Commercial without Credit Reporting
  - Retail/Consumer
  - Audit
- If you are missing a placement category, please contact your sales representative to ensure the set up of the missing placement category



Email your TSI Sales Rep: [HELEEN JASGUR](#)  
(813) 890-2300

Account Overview | **Submit New Debtor** | View/Stop Debtors | Upload Debtors | Reports | Search | Account Preferences

**Important Account Placement Instruction..** [Hide](#)

We offer the following four types of placement services: Commercial Placements with Credit Reporting, Commercial Placements with no Credit Reporting, Retail / Consumer placements, and Audit placements.

You currently have access to following placements types:

TSI Client#	CRS Client#	Client Name	Placement type
5131U	F39617-C	Commercial Demo Client-CBR	Commercial Placements With Credit Reporting
5132U	F39617-N	Commercial Demo - Non CBR	Commercial Placements With No Credit Reporting

If you would like to be set up for any placement types they are not listed below, please contact your Sales Rep. **You can switch between placement services using the dropdown provided on the header of this page.**

Submit New Debtor: (STEP 1 of 3)

\* Required Fields \*\* Highly Recommended

**Debtor Information**

Company Name\*:  (Help) Last Name:  (Help)

*Tip: Click the “Hide” button to hide the placement box. If you want to see the box again, click “Show”*

## How to Submit Debtors-Manual Entry

- To submit debtors one at a time, simply click on the Submit New Debtor tab located at the top of the page on the Commercial Portal
- Please note that All Required fields are marked with a \*
- If you are placing a debt as a second placement (one that has been with another agency), please indicate that in the additional data 1 comment box

Submit New Debtor: (STEP 1 of 3)

\* Required Fields \*\* Highly Recommended

Debtor Information	
Company Name*: <input type="text"/> (Help)	Last Name: <input type="text"/> (Help)
or Debtor First Name	
Address 1*: <input type="text"/>	Address 2: <input type="text"/>
City*: <input type="text"/>	State*: Alabama <input type="text"/> Zip*: <input type="text"/>
Country*: United States <input type="text"/>	Account#*: <input type="text"/>
Office Phone**: <input type="text"/>	
Other Phone**: <input type="text"/>	Tax ID**: <input type="text"/>
Total Amount Due (\$)*: <input type="text"/> (ex: 999.99) (Help)	Date of Last Sale*: <input type="text"/> (mm/dd/yyyy)
Regarding: <input type="text"/>	Contact Name: <input type="text"/>

Personal Guarantor - If Applicable	
First Name: <input type="text"/>	Last Name: <input type="text"/>
Phone #: <input type="text"/>	SSN**: <input type="text"/>
Address: <input type="text"/>	
City: <input type="text"/>	State: <input type="text"/> Zip: <input type="text"/>

Additional Information	
Co-Maker: <input type="text"/>	Website: <input type="text"/>
Date Of Last Pay: <input type="text"/>	Email Address: <input type="text"/>
Last Payment (\$): <input type="text"/>	CkChg/Fee (\$): <input type="text"/>

# How to Submit Debtors-Manual Entry Cont.

- As you go through this form, please be sure to enter as much additional information as possible, the more information we have, the better the chances of contacting your debtor and collecting
- Once you've entered debtor information, it is stored in our system

Submit New Debtor: (STEP 1 of 3)

\* Required Fields    \*\* Highly Recommended

Debtor Information	
Company Name*: <input type="text"/> (Help)	Last Name: <input type="text"/> (Help)
Address 1*: <input type="text"/>	Address 2: <input type="text"/>
City*: <input type="text"/>	State*: Alabama <input type="text"/> Zip*: <input type="text"/>
Country*: United States <input type="text"/>	Account#*: <input type="text"/>
Office Phone**: <input type="text"/>	Tax ID**: <input type="text"/>
Other Phone**: <input type="text"/>	Date of Last Sale*: <input type="text"/> (mm/dd/yyyy)
Total Amount Due (\$)?: <input type="text"/> (ex: 999.99) (Help)	Contact Name: <input type="text"/>
Regarding: <input type="text"/>	

Personal Guarantor - If Applicable	
First Name: <input type="text"/>	Last Name: <input type="text"/>
Phone #: <input type="text"/>	SSN**: <input type="text"/>
Address: <input type="text"/>	
City: <input type="text"/>	State: <input type="text"/> Zip: <input type="text"/>

Additional Information	
Co-Maker: <input type="text"/>	Website: <input type="text"/>
Date Of Last Pay: <input type="text"/>	Email Address: <input type="text"/>
Last Payment (\$): <input type="text"/>	CkChg/Fee (\$): <input type="text"/>

## How to Submit-Bulk Upload

- Uploading debtors in bulk can save time. This is a simple upload process that can save the time of manually keying in the data. If this is your first time submitting debtors in bulk upload, we recommend you call the Transworld Systems help desk at 1-888-446-4733 so that they can walk you through the correct process for submitting a debtors
- If you have a need to upload a list of debtors, we support data in the following formats: [MS Access](#), [MS Excel](#), [dBase](#), and [Comma Separated Value files](#)

The screenshot displays the Transworld Systems Commercial Division web interface. At the top, the user is logged in as Steve Wagner, with a client ID of 5131U. The navigation menu includes options like Account Overview, Submit New Debtor, View/Stop Debtors, Upload Debtors, Reports, Search, and Account Preferences. The main content area shows a progress bar with five steps: Step 1 (UPLOAD), Step 2 (PROFILES), Step 3 (IMPORT), Step 4 (VALIDATE), and Step 5 (SUBMIT). The current step is Step 1, titled 'Upload your file'. Below this, there is a message: 'IF THIS IS YOUR FIRST UPLOAD ATTEMPT, we recommend you contact Helpdesk before sending; they can review your file with to make sure the data is formatted to transfer successfully.' A prompt asks the user to select a file format and upload a file. The interface includes a dropdown menu for 'Please select your File format', a text input field, and 'Browse...' and 'Upload' buttons. At the bottom, there are buttons for 'Upload History' and 'Upload Errors'. The footer contains the Transworld Systems logo, a 'Secure' icon, and copyright information for 2001-2007.

## How to Submit-Bulk Upload

- Once you have your input file ready to go, there are 5 simple steps to submit your accounts to Transworld Systems:
  - Upload** – sends your input file to Transworld Systems for processing
  - Profiles** – map columns in your input file to Transworld Systems' standard format
  - Import** – we convert your data from your format to Transworld Systems' standard format
  - Validate** – during this step, Transworld Systems does some basic validation for you
  - Submit** – ends your validated information to Transworld Systems for processing
- For more details on each step [https://service.transworldsystems.com/tab/Upload/TSI\\_UploadDebtors\\_Help.doc](https://service.transworldsystems.com/tab/Upload/TSI_UploadDebtors_Help.doc)

TransworldSystems®  
Commercial Division

Steve Wagner CLIENTE 5131U | Commercial Demo Client-CBR | SS-8 | HOME | LOG OUT | CONTACT US |

Email your TSI Sales Rep: [HELEEN JASGUR](mailto:HELEEN.JASGUR@transworldsystems.com)  
(813) 890-2300

Account Overview	Submit New Debtor	View/Stop Debtors	Upload Debtors	Reports	Search	Account Preferences
Step 1 UPLOAD	Step 2 PROFILES	Step 3 IMPORT	Step 4 VALIDATE	Step 5 SUBMIT		

Version 2.0

**Step 1: Upload your file**

IF THIS IS YOUR FIRST UPLOAD ATTEMPT, we recommend you contact [Helpdesk](#) before sending; they can review your file with to make sure the data is formatted to transfer successfully.

Please first select your 'File format' and then a file to upload using 'Browse' and click 'Upload' .

Please select your File format

'Upload History' contains the status of previously uploaded files.

## View/Stop Debtors

- When you receive a payment from a debtor, it is your legal responsibility to notify Transworld. With this information we will update payments
- To submit a payment all you need to do is click on the View/Stop debtor tab
  - Find the debtor name and click on Update Account
  - This will take you to a screen where you can Update the Debtor Status

Transworld Systems® Commercial Division

Steve Wagner CLIENT# 51310 | Commercial Demo Client-CDR | SS-8 | HOME | LOG OUT | CONTACT US

Email your TSI Sales Rep: HELEEN JASGUR (813) 890-2300

Account Overview | Submit New Debtor | **View/Stop Debtors** | Upload Debtors | Reports | Search | Account Preferences

View/Update Accounts in Verbal Demands:

View: All Find Name:  99 Max records per page

Select a debtor to view: (Data is refreshed nightly)

Debtor Name	Account#	CDR#	Assign Date	Update Date	Original Balance	Current Balance	Branch	Status	
<a href="#">TEST DEBTOR 1</a>	63369	0001340520	06/20/2001	09/11/2001	1617.30	1617.30	79	Collection Efforts Continuing	<a href="#">Update Account</a>
<a href="#">TEST DEBTOR 2</a>	37830	0001340522	06/20/2001	09/21/2001	501.96	501.96	80	Collection Efforts Continuing	<a href="#">Update Account</a>
<a href="#">TEST DEBTOR 3</a>	84078	0001340560	06/20/2001	02/12/2002	1147.90	1147.90	80	Collection Efforts Continuing	<a href="#">Update Account</a>
<a href="#">TEST DEBTOR 4</a>	27290	0001340562	06/20/2001	10/23/2001	430.50	430.50	80	Cancelled collect efforts exhausted	<a href="#">Update Account</a>
<a href="#">TEST DEBTOR 7</a>	75800	0001382312	10/10/2001	12/27/2001	1003.50	1003.50	80	Cancelled cancelled account placed in error	<a href="#">Update Account</a>
<a href="#">TEST DEBTOR 8</a>	66916	0001382314	10/10/2001	12/27/2001	1012.41	1012.41	80	Cancelled skip-cannot locate	<a href="#">Update Account</a>
<a href="#">TEST DEBTOR 9</a>	24515	0001382315	10/10/2001	05/20/2002	1118.97	1118.97	80	Legal	<a href="#">Update Account</a>

## View/Stop Debtors

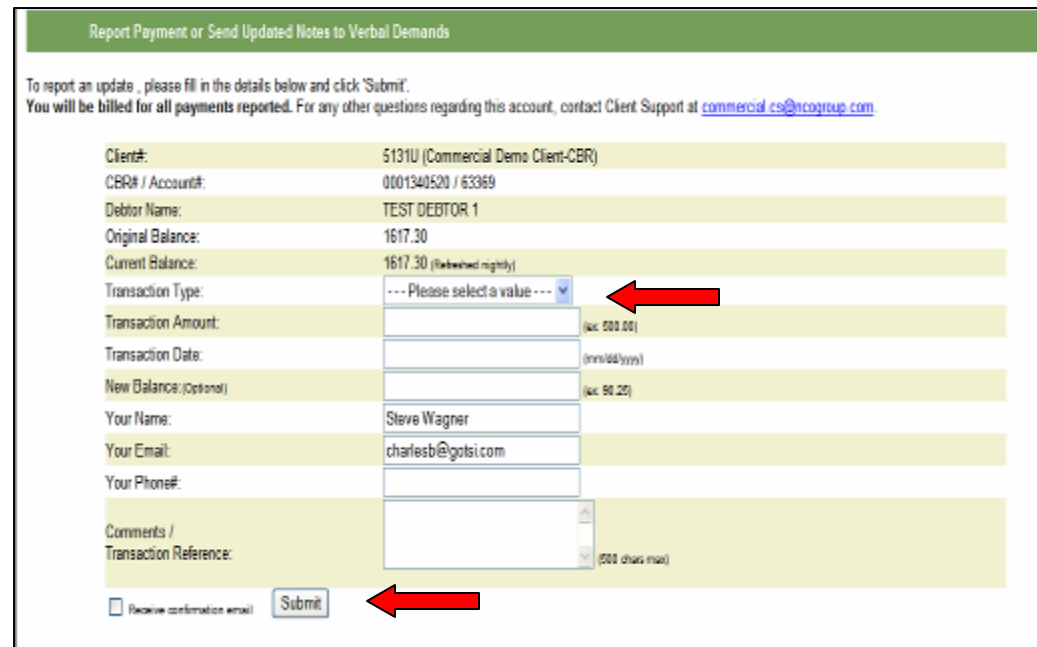
- The Update the Debtor Status Screen, Transaction type drop down box will allow you to:
  - Report a Payment in Full
  - Report a Partial Payment
  - Update Notes
  - Update Returned Merchandise
  - Debit – Balance Decrease
  - Credit – Balance Increase
- After you have updated the information and determined the next action, click submit and our records will be updated

Report Payment or Send Updated Notes to Verbal Demands

To report an update, please fill in the details below and click 'Submit'.  
You will be billed for all payments reported. For any other questions regarding this account, contact Client Support at [commercial.cs@ecogroup.com](mailto:commercial.cs@ecogroup.com)

Client#:	5131U (Commercial Demo Client-CBR)
CBR# / Account#:	0001340520 / 63369
Debtor Name:	TEST DEBTOR 1
Original Balance:	1617.30
Current Balance:	1617.30 (Rebilled rightly)
Transaction Type:	--- Please select a value ---
Transaction Amount:	<input type="text"/> (ex. 500.00)
Transaction Date:	<input type="text"/> (mm/dd/yyyy)
New Balance (Optional):	<input type="text"/> (ex. 50.25)
Your Name:	Steve Wagner
Your Email:	charlesb@gotsi.com
Your Phone#:	<input type="text"/>
Comments / Transaction Reference:	<input type="text"/> (500 char max)

Receive confirmation email



## Client Responsibility

- It is very important that you provide as much detail about your debtors as possible. The more information we have, the better our chances of reaching your debtor and recovering the money owed to you
- It is your legal responsibility to report any type of payment that you accept from your debtor. If you are Paid In Full, you **must** inform Transworld Systems so that Transworld Systems will cease further collection activity
- If you accept a payment arrangement, you must report all payments
- Now that you have submitted debtors to Transworld Systems for recovery, please discontinue contacting them and let us work collecting your past due accounts for you

## Reports

- This tab will allow you to pull reports to show the activity of debtors
- The following reports are available:
  - Inventory/Activity Report
  - Performance Summary
  - Payments/Updates via the Commercial Portal
  - Upload Debtor Error Log

Email your TSI Sales Rep: [HELEEN JASGUR](#)  
(813) 890-2300

Account Overview | Submit New Debtor | View/Stop Debtors | Upload Debtors | **Reports** | Search | Account Preferences

Select a Format:  
 View on Screen  Print Generate Report

Select Report Type:

Reports

Inventory/Activity: All Generate Report  
Report Payments Report By Last Update Date  
 Current month  
 Previous month  
 From  to  (mm/dd/yyyy)  
 All

Performance Summary: Client #: 5131U Generate Report

Payments/Updates via Client Portal:  
(Debtor Payments/Updates reported by you & other users via this website. This report does not include payments collected directly by Transworld.)

Upload Debtor - Error Log:  
From  11/10/2008 to  12/10/2008 (mm/dd/yyyy) Generate Report

Login Management:  
- Online: [Add a New Client Portal Login](#) | or Fax: [Website Client Portal Access Authorization Form](#).  
- Online: [Deactivate a Client Portal Login](#) | or Fax: [Website Client Portal Deactivation Form](#).

Transworld Systems® Secure Site Copyright © 2001-2007 Transworld Systems Inc. | [Privacy Policy](#) | [Legal Information](#)

## Search

- The search screen is a convenient feature that allows you to search for specific debtors, account numbers, start dates or balances

The screenshot displays the Transworld Systems Commercial Division search interface. At the top, the logo and a user profile for Steve Wagner are visible. A navigation bar includes links for HOME, LOG OUT, and CONTACT US. Below this is a banner for HELEEN JASGUR, a TSI Sales Rep, with her contact information. A menu bar contains options: Account Overview, Submit New Debtor, View/Stop Debtors, Upload Debtors, Reports, Search (highlighted), and Account Preferences. The main section is titled 'Enter search criteria:' and includes the instruction 'You may enter information into one or multiple fields.' Below this is a 'Search Debtors' form with the following fields: First name, Last name, CBR#, Account#, Start date (with a date range selector), Amount assigned (with a dropdown set to 'Greater than' and a currency symbol), and Current balance (with a dropdown set to 'Greater than' and a currency symbol). A 'Search' button is located at the bottom of the form. The footer contains the Transworld Systems logo, a 'Secure Site' icon, and copyright information for 2001-2007 Transworld Systems Inc., along with links for Privacy Policy and Legal Information.

## Account Preferences

- If you need to make updates to your account information, you should contact your sales representative
- You can also make some changes on the Account Preferences tab:
  - Activate new users
  - Deactivate users
  - Update your email address
  - Change your password

The screenshot shows the 'Account Preferences' page for Steve Wagner. At the top, the Transworld Systems logo and 'Commercial Division' are displayed. A navigation bar includes links for HOME, LOG OUT, and CONTACT US. Below this, a banner for HELEEN JASGUR, TSI Sales Rep, is shown with her contact information. A menu bar contains options: Account Overview, Submit New Debtor, View/Stop Debtors, Upload Debtors, Reports, Search, and Account Preferences (which is highlighted). The main content area is divided into two columns. The left column has sections for 'Login Management' (Add New Client Portal Login, View/Deactivate Client Portal Login(s)) and 'Update Your Email Address' (with an email field and Update button). The right column has a section for 'Change Password for Username "21554392"' (with Password, New Password, and Confirm New fields, and an Update button). A note at the bottom of the right column states: '(New password should be between 5-10 characters in length)'. The footer includes the Transworld Systems logo, 'Secure Site' with a lock icon, and copyright information: 'Copyright © 2001-2007 Transworld Systems Inc. | Privacy Policy | Legal Information'.

# Commercial Portal Tutorial

