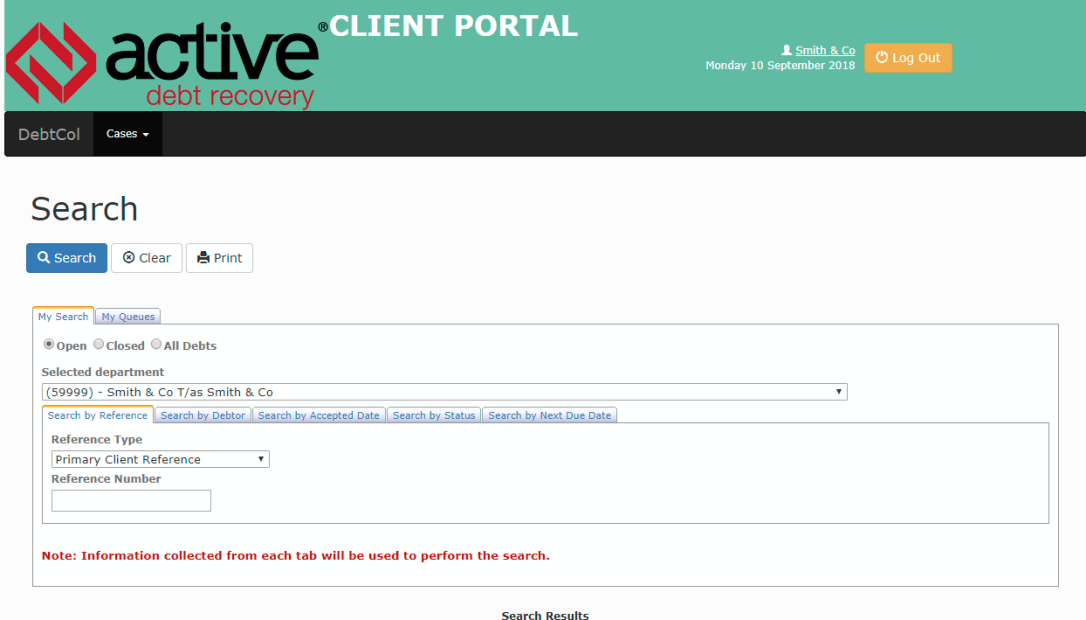


DIY Letter of Demand Process

1. Home screen of your client portal



active[®] CLIENT PORTAL
debt recovery

Smith & Co
Monday 10 September 2018 Log Out

DebtCol Cases ▾

Search

Search Clear Print

My Search My Queues

Open Closed All Debts

Selected department
(59999) - Smith & Co T/as Smith & Co

Search by Reference Search by Debtor Search by Accepted Date Search by Status Search by Next Due Date

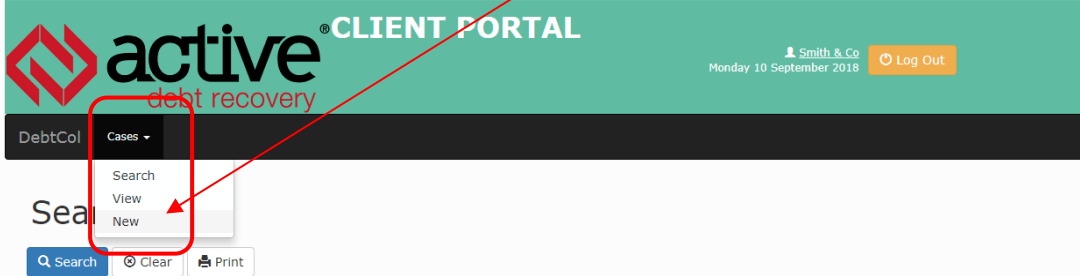
Reference Type
Primary Client Reference

Reference Number

Note: Information collected from each tab will be used to perform the search.

Search Results

2. Click on 'Cases' and select 'New'



active[®] CLIENT PORTAL
debt recovery

Smith & Co
Monday 10 September 2018 Log Out

DebtCol Cases ▾

Search View New

Search Clear Print

3. Select your 'Client Name' and then click 'Next'



Create A New Case

Next

Select the client

Smith & Co T/as Smith & Co - (59999) 🔍

4. Enter your EFT 'Primary Reference' and 'Start Date Of Debt' and then click 'Next'

Please note: Only the start date of debt is required – Generally this means the date of the final invoice.

Create A New Case

Previous Next

General Information

Your Primary Reference

Your Secondary Reference

Start Date Of Debt

End Date Of Debt

Collection Commencement Date:

Debt Description

Please enter the invoice number or customer reference (e.g Debtor's name)

This field will be shown on your letter of demand as the EFT payment reference

5. Enter the 'Debt' amount and then click 'Next'

Please note: only the debt amount is required at this stage.

Create A New Case

Previous Next

Case Amounts

Debt Amount

Debt Type	Debt Amount (\$)
DEBT	\$550.00
INT - CLIENT ADDED	\$0.00
Client Costs Added	\$0.00
Commission to Client	\$0.00
Total	

6. Select 'Prereferral Debt – Do It Yourself Collection' and then click 'Next'

Create A New Case

[Previous](#) [Next](#)

Case Type

Refer Debt to Agency

Prereferral Debt - Do It Yourself Collection

7. Enter in the debt contact details and then click 'Add Debtor'

Create A New Case

[Previous](#) [Next](#)

Debtor Information

No debtors currently associated with this debt.

Company/Surname **Given Name**

Title

Relationship

Contact

Gender

Date Of Birth

Email Address

ABN **ACN**

Mailing Address **Work STD** **Home STD**

Mailing Address 1 **Suburb**

Mailing Address 2 **State**

Mailing Address 3 **Postcode**

Work Number **Home Number**

Mobile

[Add Debtor](#) [Cancel](#)

If the debtor has a trading name, please enter in the 'Company/Surname' field and do not complete the 'Given Name' field. You also need to enter the contact name.

8. You can now either choose to 'Edit' or 'Remove' the information you have just entered by clicking the appropriate buttons. Click 'Next' to continue

Create A New Case

Debtor Information

Company/Surname	Given Name	Title	Relationship	Contact	
Debtor	Test	Mrs	Primary Debtor		<input type="button" value="Remove"/> <input type="button" value="Edit"/>

9. This following fields are not required – Please click 'Next'

Create A New Case

Loan Arrears

Regular Install Initial Date:

Regular Install Frequency:

Regular Install Amount:

Regular Install Final Payment Date:

Next Install Date:

Next Install Amount:

10. The following fields are not required. Please click 'Next'

Create A New Case

Insurance Information

Vehicle Registration
Make **Model**
Year **Vehicle Colour**
Policy Number

11. This field is not required. Please click 'Next'

Create A New Case

Previous

Next

Notes and Attachments

Notation

Choose Files No file chosen

Attach

12. Please select the below path action and click 'Next'

Create A New Case


Previous

Next

Path Of Action

ADR4CDIY - Debt Collection 4 - Letter of Demand - Client Bank Account - DIY ▼

13. A case summary will now populate. If the following details are correct, please click *'Finish'*



The screenshot shows the 'active CLIENT PORTAL' interface. At the top, there is a navigation bar with the 'active debt recovery' logo on the left, the text 'CLIENT PORTAL' in the center, and user information 'Smith & Co' and a 'Log Out' button on the right. Below the navigation bar, there is a dark header with 'DebtCol' and a 'Cases' dropdown menu. The main content area is titled 'Create A New Case' and contains two buttons: 'Previous' and 'Finish'. The 'Finish' button is highlighted with a red rectangular box. Below the buttons is a 'Case Summary' section with several expandable panels: 'General Information', 'Debt Amounts', 'Debtors', 'Insurance Information', 'Loan Arrears', 'Notes and Files Attachments', and 'Path Of Action'. The 'General Information' panel is expanded, showing the following details:

Client Code:	Smith & Co T/as Smith & Co - (59999)
Case Type:	Prereferral Debt - Do It Yourself Collection
Your Reference:	ABC Bricks
Debt Description:	
Start Date Of Debt:	11/09/2018
End Date Of Debt:	
Commencement Date:	

14. A case number will be generated for the debt you have loaded.



The screenshot shows the 'active CLIENT PORTAL' interface after the case has been created. The navigation bar and header are the same as in the previous screenshot. The main content area is titled 'Create A New Case' and displays the word 'Complete' in a large font. Below this, a message states: 'Your case has been created with the following case number: 6479010192'.

15. Please click 'CASES' and 'SEARCH' (this will bring you back to the home screen where you are able to then Log off.)



16. You will be sent a confirmation email to check the details entered. Please contact us immediately if something is incorrect.
17. When the demand letter is sent you will also be emailed a copy for your records.