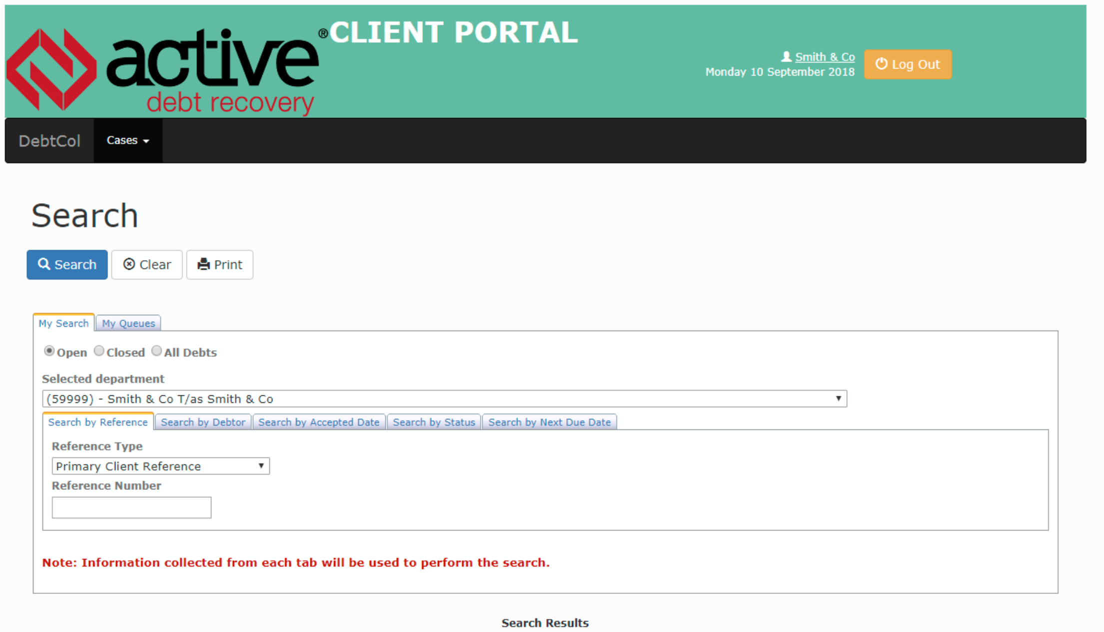
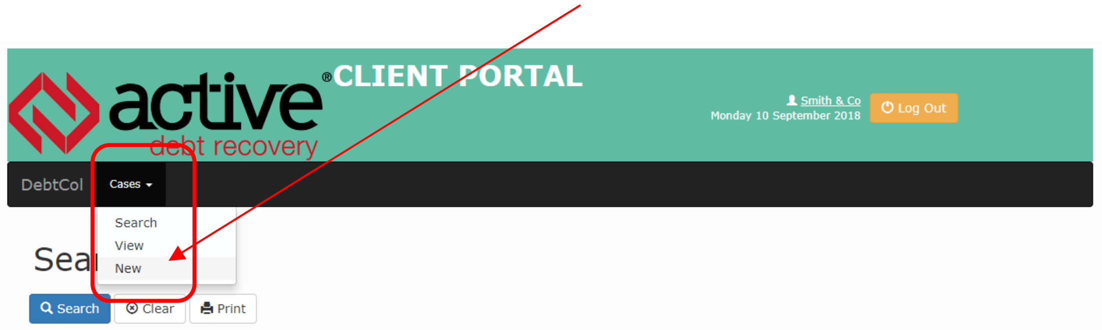
DIY Letter of Demand Process

1. Home screen of your client portal



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



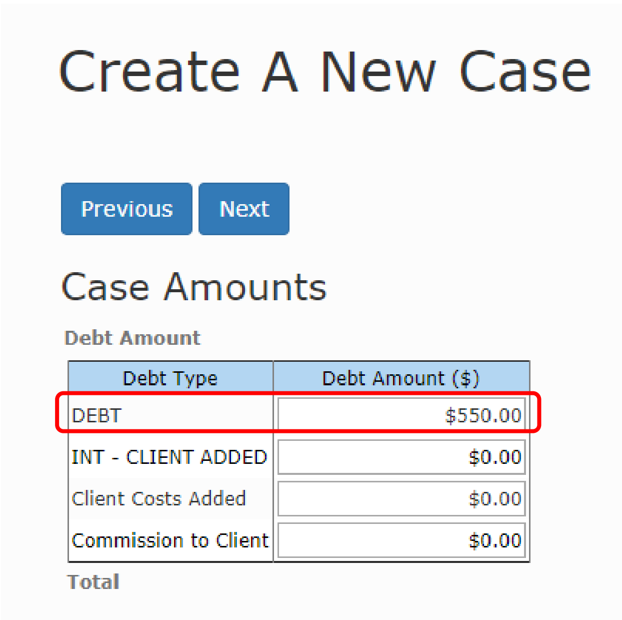
3. Select your *'Client Name'* and then click *'Next'*

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.*

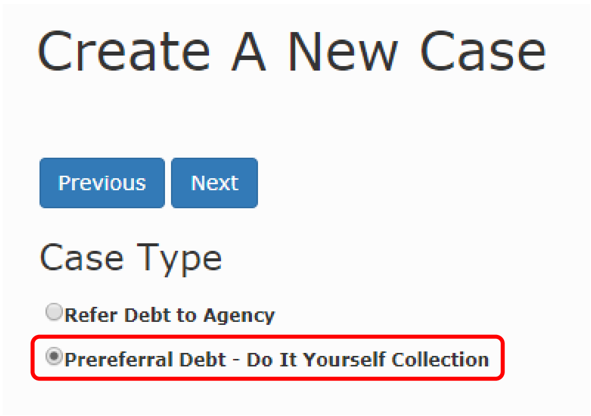
Please enter the invoice number or customer reference (e.g Debtor's name)

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

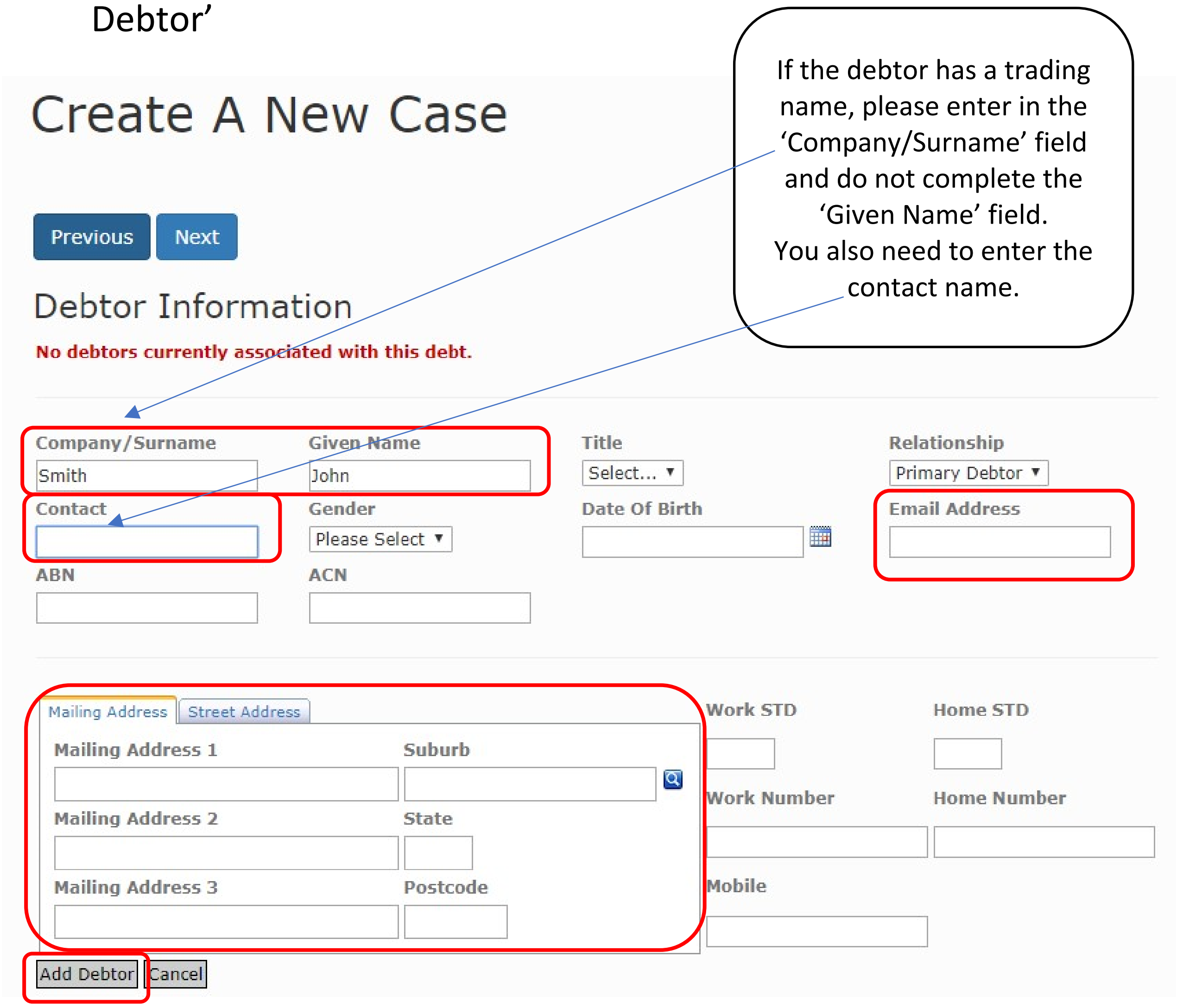
5. Enter the *'Debt'* amount and then click *'Next'*
   Please note: *only the debt amount is required at this stage.*



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



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



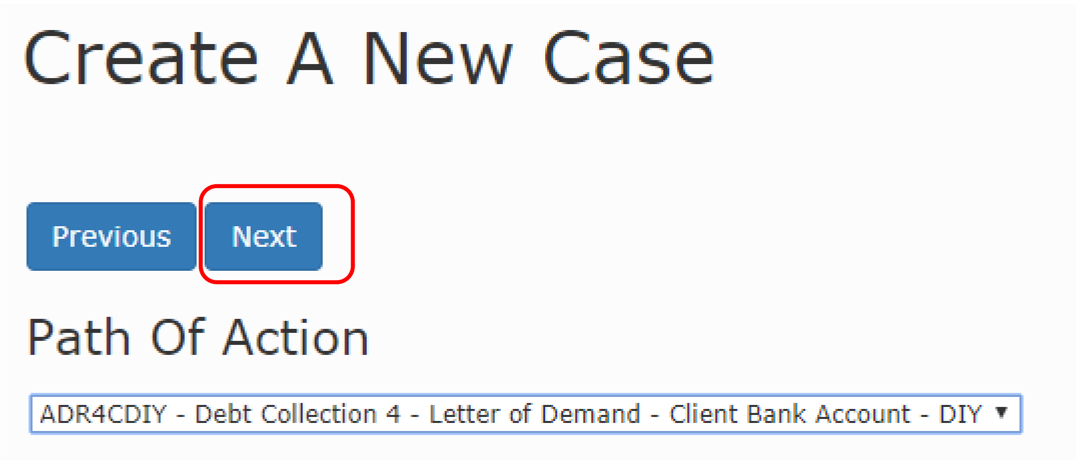
8. You can now either choose to *‘Edit’* or *‘Remove’* the information you have just entered by clicking the appropriate buttons. Click *‘Next’* to continue

9. This following fields are not required – Please click *‘Next’*

10. The following fields are not required. Please click *‘Next’*

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

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



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

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

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.