On-Line User Guide

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WEB ADDRESS DETAILS

Open a web page and type: www.creditcollect.com.au

This will then display our Home page of Midstate CreditCollect.
At the menu on the left hand side of the page, click your mouse on *Client Login* (as below).

USERNAME AND PASSWORD LOGON

You will be presented with the Creditcollect Login screen

Place the cursor in the **User ID:** field and enter your username (all upper case).

Place the cursor in the **Password** field and enter your password as initially supplied (case sensitive).

Then click on **Submit.**

Do not select the option to save your password if presented to you as you need to reconfigure it in the next step.

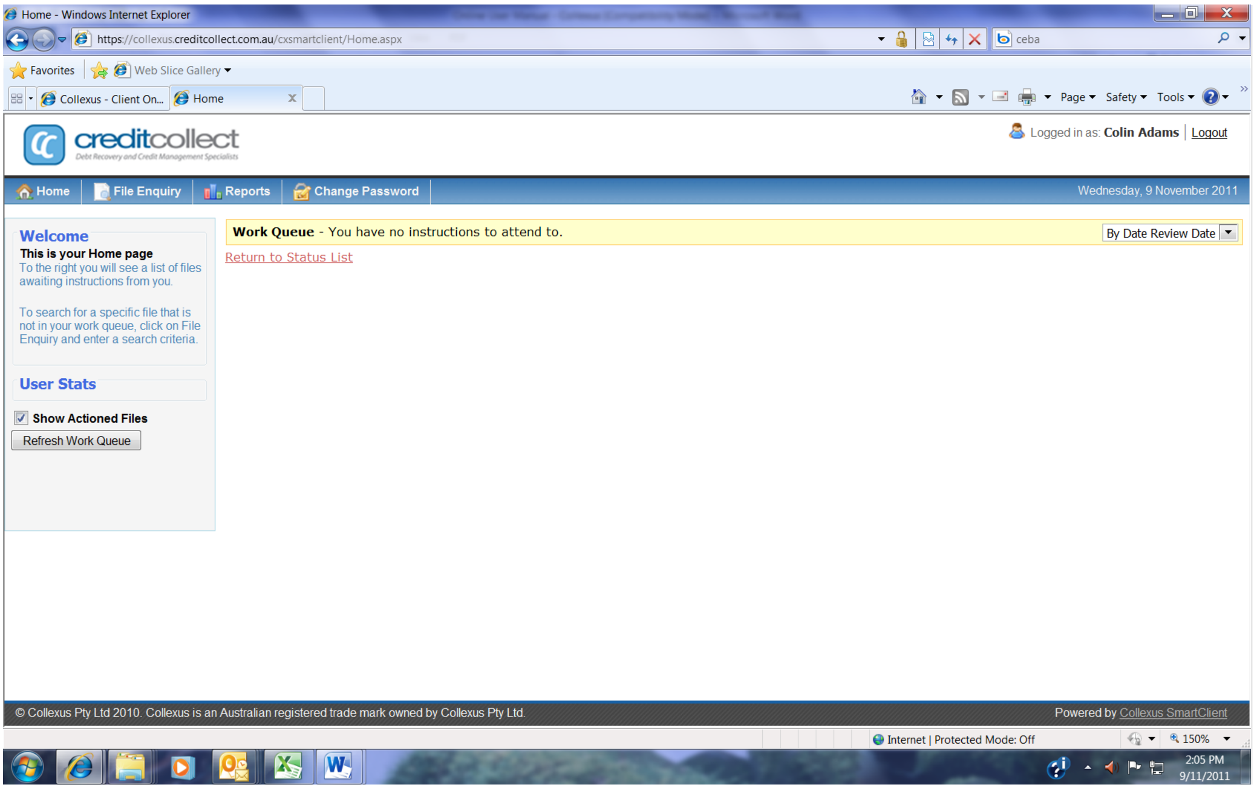
On initial login you will be requested to change your password and to confirm your new password. If all works well you will be presented with the 'Welcome' (initial Summary) screen.

MAIN MENU OPTIONS

You will be presented with a screen similar to that below with four options across the top menu bar being:

Home
File Enquiry
Reports
Change Password.

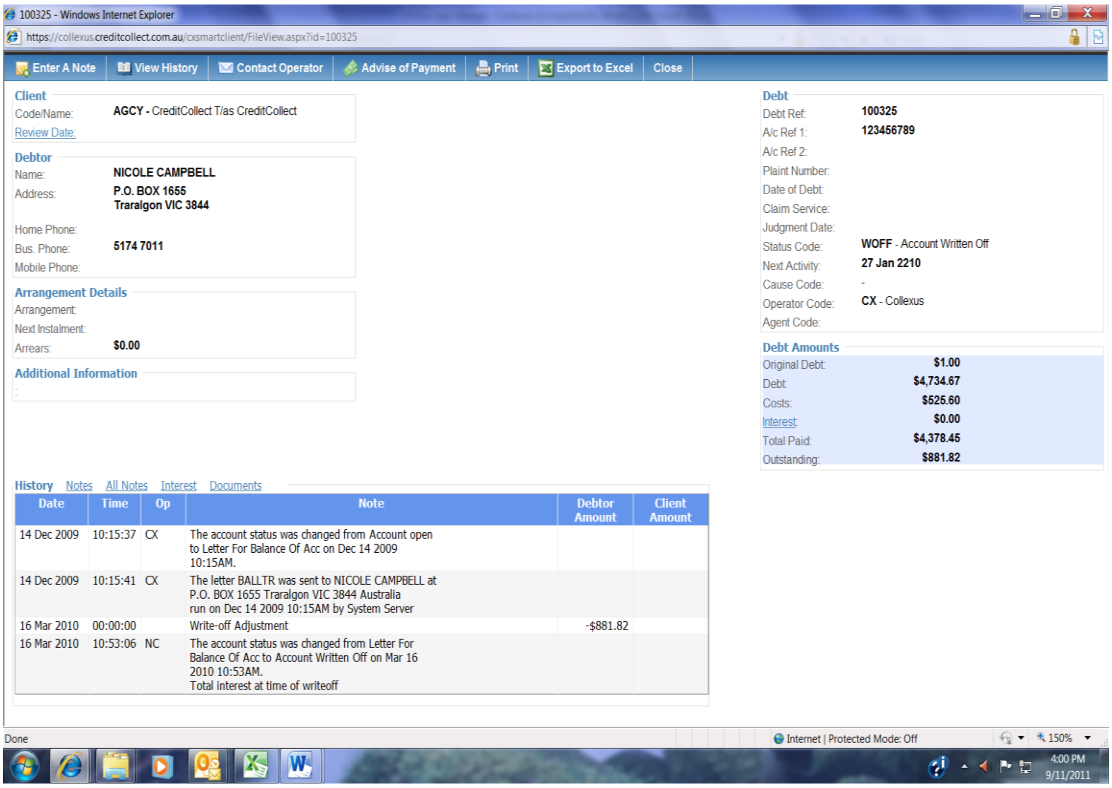
This page presents you with your work queue which consists of the files that your account manager has referred for your action and notation.



If you have any accounts that the account manager requires your instructions on they will be presented on this screen at initial log in.

From the work queue you can action each account that has been referred to you by clicking on the blue file number this will open the account and display the most recent file notes. (see open file on next page)

FILE DISPLAY



You now have the current file open on the screen in front of you and you can view the recent actions on the file and see the actions of the account manager or operator.

The menu across the top now gives you various options including
Enter a Note
- the note is then forwarded to the Account Manager for action on their review list

View History
- shows the history of the file in greater detail

Contact Operator
- sends an email to the account manager however the notes option is preferable

Advise of payment
- to be used to advise creditcollect of payments received directly by you or to your office

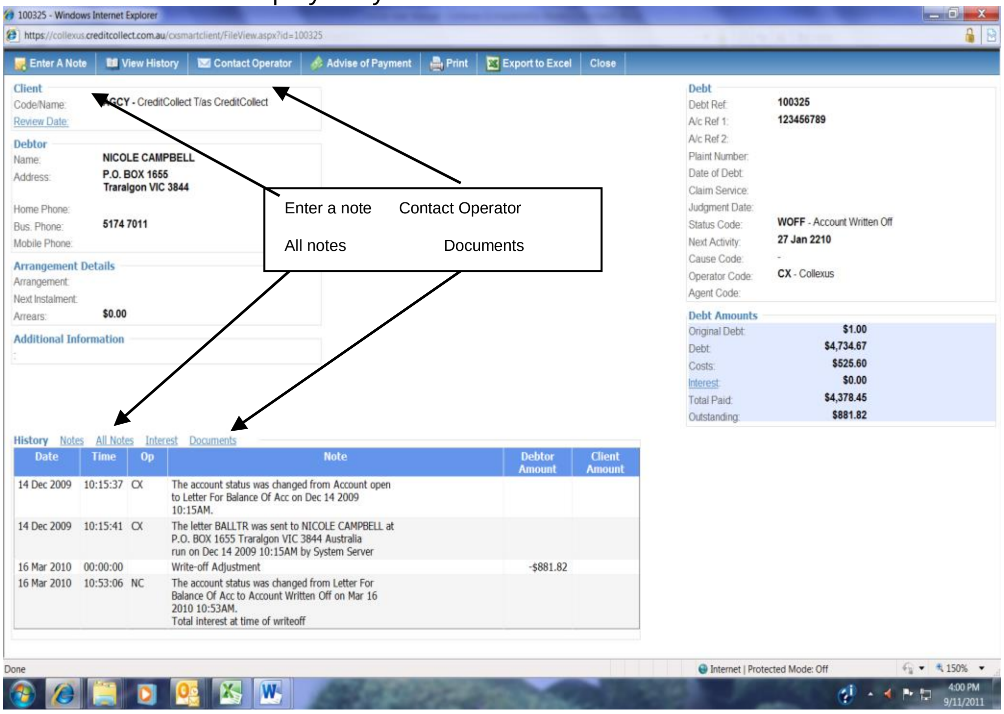
Print , Export to Excel and
- self explanatory

Close
- Close will close that window and return you to the previous page.-

FILE NOTES

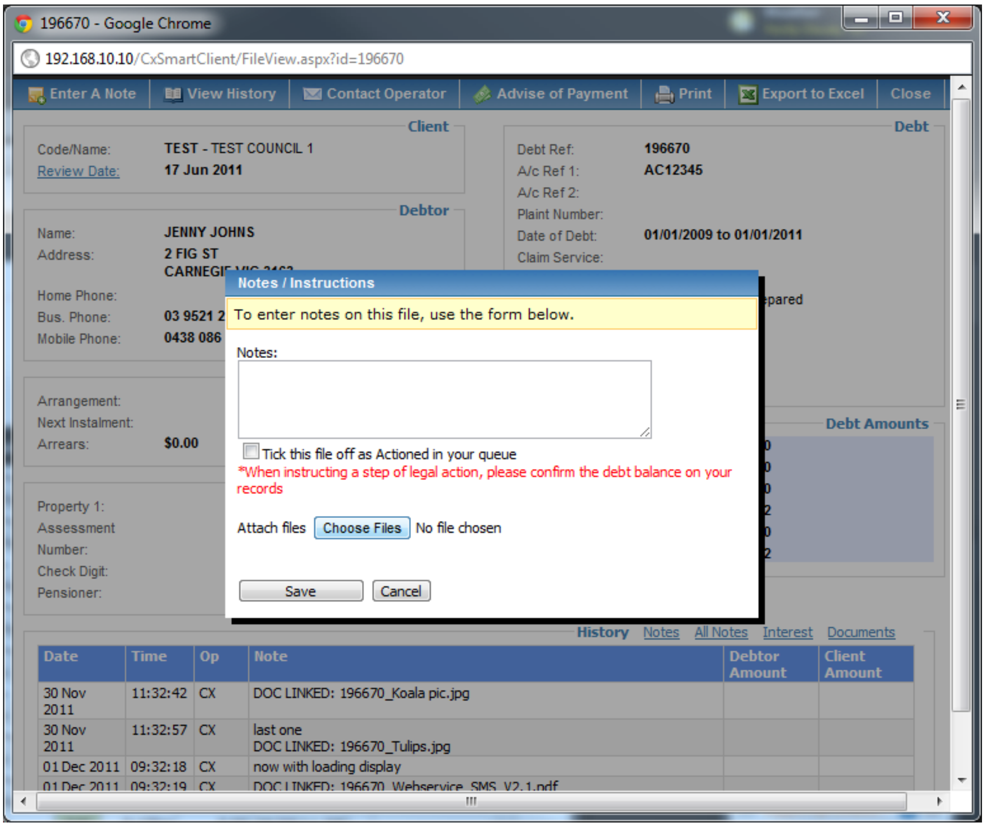
The notes on display can be expanded to display all notes by clicking on the all notes tab or the view history tab at the top (see example below)

The documents tab displays any documents that have been attached to the file.



To enter a note in response to a file you click on the “Enter A Note” tab at the top left and an input box appears where you can type a note to the account manager (see below).

The note that you place on file will be automatically sent to the account manager and will update on their review list.
When they next work their review list your file and notes will appear for their action.
Client notes left by you appear on the account manager’s screen in pink and are clearly visible to them when they open the file.



Ensure you tick the box as actioned so as to remove this account from your queue.
Note to refresh queue click on Refresh work queue on the left of the log in page

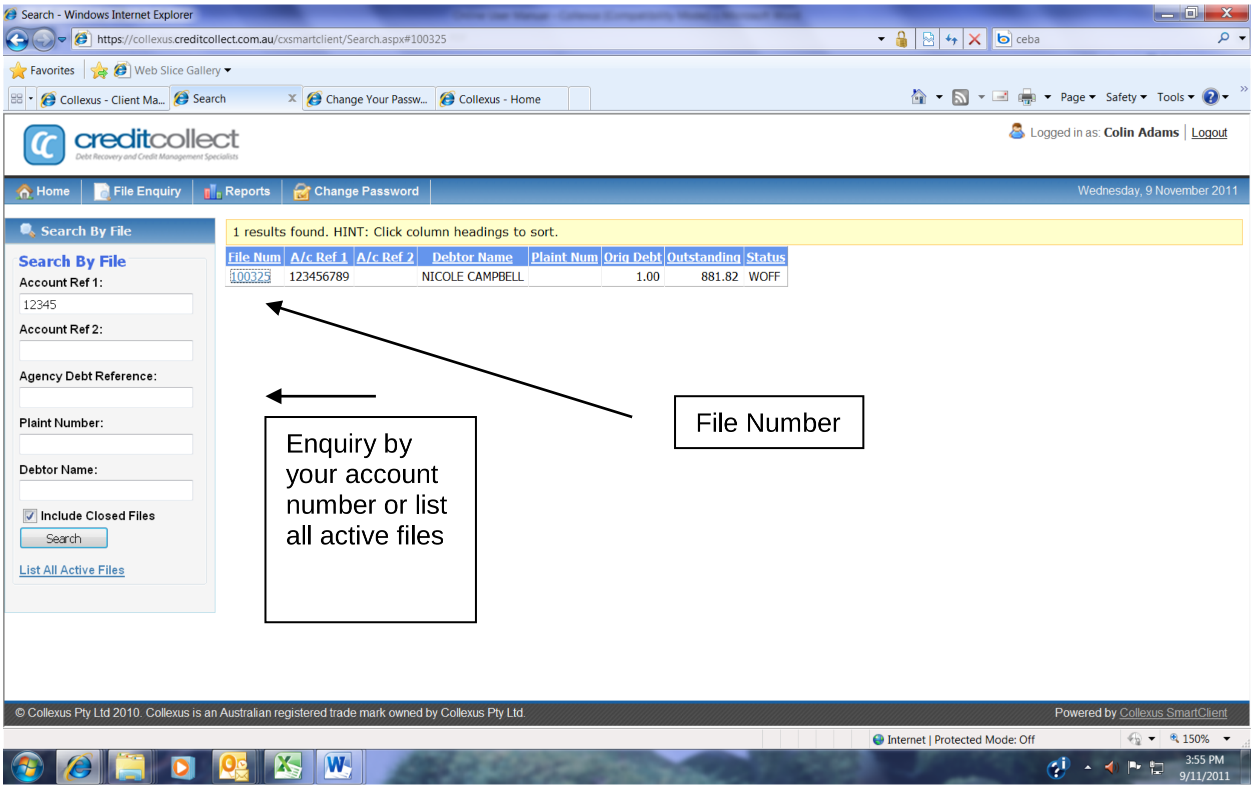
FILE ENQUIRIES

This is the option tab that you will use from the main menu to enquire on accounts that are not in your work queue.

The “File Enquiry” tab (see example below) gives you the options to search by:

Account Ref 1: & Account Ref 2: both these numbers refer to your account number
Agency Account Reference – our file number
Plaintiff Number – number issued by the court if legal action has been taken
Debtor name

Plus an option to view all files



This enquiry will display files as selected and you can the click on the File Number (pale blue on left of results found) to further display the particular file that you require.

You can then action as previously explained by adding a note or reading the file notes already on file.

Added note will again be processed and forwarded to the account operator for action.

REPORTS

The four options referred in the reports area are:

Files Referred:

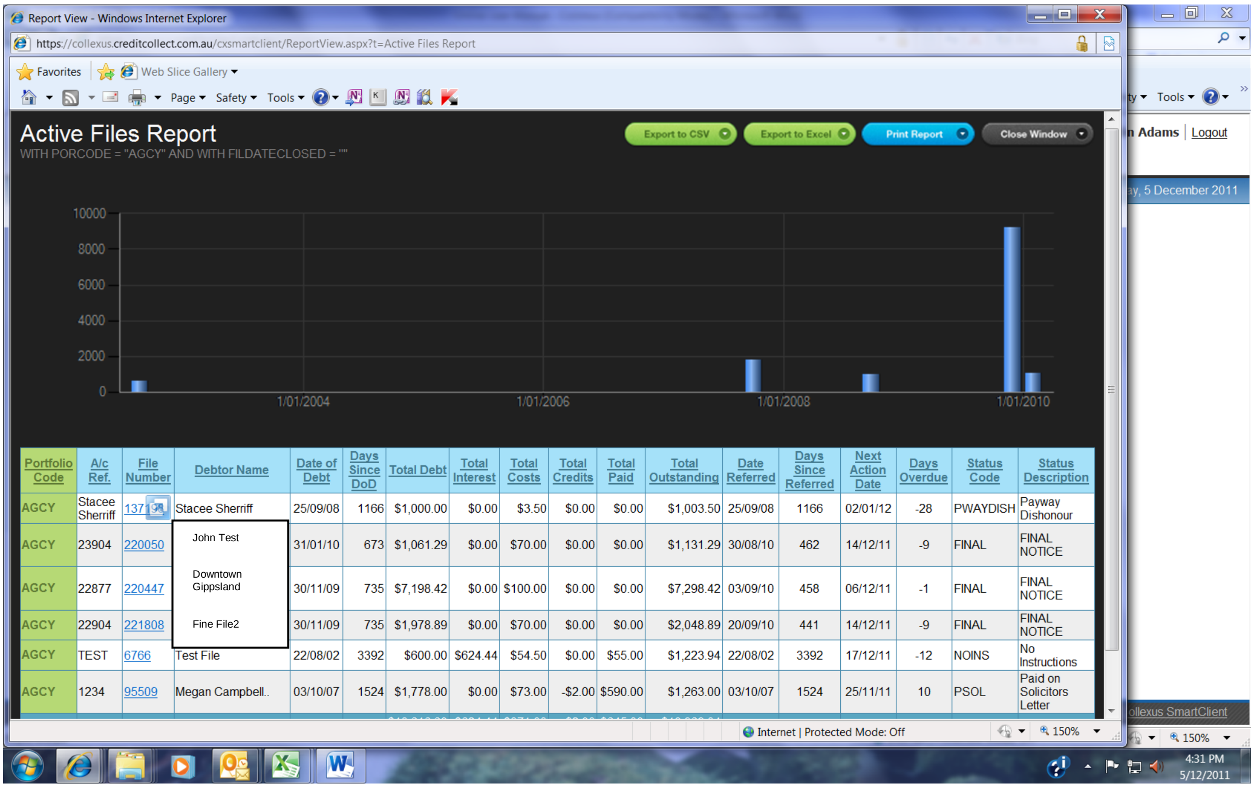
Closed Files:

Active Files

Spin Down:

These reports are reasonably self-explanatory and each report offers options in regard to start and finish dates as well as which portfolio to report on if you have more than one.

All reports have the option to be exported to a CSV file, to excel or printed.



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LOGOUT

Click on this menu item to log out to the Client Extranet screen. You should then click on the **X** in the top right hand corner to completely exit the internet, or, insert another internet address.