

On-Line User Guide

Jason Dowling General Manager, Client Services

Midstate Creditcollect Pty Ltd PO Box 1655 TRARALGON VICTORIA 3844 Mobile: 0404 335 713

Kellie Smith Business Development Manager

Midstate Creditcollect Pty Ltd PO Box 1655 TRARALGON VICTORIA 3844 Office: 03 5173 6201 Mobile: 0412 065 154

CONTENTS

CONTENTS	.2
CONTACT	.3
WEB ADDRESS DETAILS	.3
USERNAME AND PASSWORD LOGON	.3
MAIN MENU OPTIONS	.4
FILE DISPLAY	.5
FILE NOTES	.6
FILE ENQUIRIES & REPORTS	.8
LOGGING OUT	.9

CONTACT

If you are experiencing any difficulties please contact Jason Dowling or Kellie Smith on:

Jason Dowling General Manager - Client Services Midstate Creditcollect Pty Ltd PO Box 1655 Traralgon Vic 3844 Mobile: 0404 335 713 Kellie Smith Business Development Manager Midstate Creditcollect Pty Ltd PO Box 1655 Traralgon Vic 3844 Office: 03 5173 6201 Mobile: 0412 065 154

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 <u>*Client Login*</u> (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.

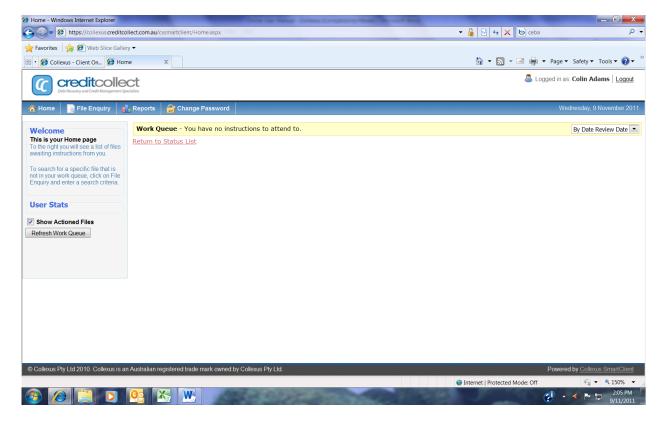
On initial login you will be requested to change your password and to confirm your new password. If all works well you will be presented with the 'Welcome' (initial Summary) screen.

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

~	🛛 🛄 View H	istory 🛛 🖾 Contact Operator	📣 Advise of Payment	🔒 Print	Export to Excel	Close			
lient ode/Name: eview Date:	-	ditCollect T/as CreditCollect		~			Debt Debt Ref: A/c Ref 1:	100325 123456789	,
ebtor ame: ddress: ome Phone:	NICOLE CA P.O. BOX 10 Traralgon V	655					A/c Ref 2: Plaint Nur Date of D Claim Ser Judgment	nber: ebt: vice:	
lus. Phone: lobile Phone:	5174 7011						Status Co Next Activ Cause Co	de: WOFF - Ac ity: 27 Jan 221	count Written Off IO
Arrangement E Arrangement: Vext Instalment: Arrears:	0etails \$0.00						Operator Agent Co Debt Am	Code: CX - Collex de:	us
Additional Info	rmation						Original D Debt:		\$1.00 \$4,734.67
							Costs: Interest Total Paic Outstandii	t	\$525.60 \$0.00 \$4,378.45 \$881.82
listory <u>Notes</u> Date	<u>All Notes</u> In Time Op	terest Documents	Note		Debtor	Client	Costs: <u>Interest</u> : Total Paic	t	\$0.00 \$4,378.45
Date	Time Op		d from Account open		Debtor Amount	Client Amount	Costs: <u>Interest</u> : Total Paic	t	\$0.00 \$4,378.45
	Time Op 10:15:37 CX	The account status was change to Letter For Balance Of Acc on	d from Account open Dec 14 2009 NICOLE CAMPBELL at 3844 Australia				Costs: <u>Interest</u> : Total Paic	t	\$0.00 \$4,378.45

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)

https://collexa	us.creditcollect.com	au/cxsmartclient/FileView.as	px?id=100325				Contraction	7
Enter A No				🔒 Print 🛛 🕱 Export to Ex	cel Close			-
ent de/Name: view Date:		itCollect T/as CreditCollect	-			Debt Debt Ref. A/c Ref 1:	100325 123456789	
otor ne: fress:	NICOLE CA P.O. BOX 16 Traralgon V	55		<		A/c Ref 2: Plaint Number: Date of Debt: Claim Service:		
ne Phone: Phone: pile Phone:	5174 7011		Enter a note Co All notes	ntact Operator Documents		Judgment Date: Status Code: Next Activity:	WOFF - Account Written Off 27 Jan 2210	
angement angement: t Instalment				/		Cause Code: Operator Code: Agent Code: Debt Amounts	CX - Collexus	
ears:						Original Debt	\$1.00	
ditional In						Debt: Costs: Interest Total Paid:	\$4,734.67 \$525.60 \$0.00 \$4,378.45 \$881.82	
		erest Documents	Note	Debtor	Client	Debt. Costs. Interest.	\$525.60 \$0.00	
t <mark>ory <u>Note</u> Date</mark>	es All Notes Int		s changed from Account open	Debtor Amount	Client Amount	Debt: Costs: Interest Total Paid:	\$525.60 \$0.00 \$4,378.45	
tory <u>Note</u> Date Dec 2009	es <u>All Notes</u> Int Time Op	The account status was to Letter For Balance O 10:15AM. The letter BALLTR was P.O. BOX 1655 Tranalo	s changed from Account open If Acc on Dec 14 2009 s sent to NICOLE CAMPBELL at			Debt: Costs: Interest Total Paid:	\$525.60 \$0.00 \$4,378.45	
Date Dec 2009	s All Notes Int Time Op 10:15:37 CX	The account status was to Letter For Balance O 10:15AM. The letter BALLTR was P.O. BOX 1655 Tranalo	s changed from Account open of Acc on Dec 14 2009 sent to NICOLE CAMPBELL at on VIC 3844 Australia		Amount	Debt: Costs: Interest Total Paid:	\$525.60 \$0.00 \$4,378.45	
tory Note Date Dec 2009 Dec 2009 Mar 2010	s All Notes Int Time Op 10:15:37 CX 10:15:41 CX	The account status was to Letter For Balance O 10:15AM. The letter BALLTR was P.O. BOX 1655 Traralg run on Dec 14 2009 11 Write-off Adjustment The account status was	s changed from Account open if Acc on Dec 14 2009 s sent to NICOLE CAMPBELL at on VIC 3844 Australia D:15AM by System Server s changed from Letter For unt Written Off on Mar 16	Amount	Amount	Debt: Costs: Interest Total Paid:	\$525.60 \$0.00 \$4,378.45	
tory Note Date Dec 2009 Dec 2009 Mar 2010	es All Notes Int Time Op 10:15:37 CX 10:15:41 CX 00:00:00	The account status was to Letter For Balance O 10:15AM. The letter BALLTR was P.O. BOX 1655 Traral run on Dec 14 2009 11 Write-off Adjustment The account status was Balance Of Acc to Acco 2010 10:53AM.	s changed from Account open if Acc on Dec 14 2009 s sent to NICOLE CAMPBELL at on VIC 3844 Australia D:15AM by System Server s changed from Letter For unt Written Off on Mar 16	Amount	Amount	Debt: Costs: Interest Total Paid:	\$526.80 \$0.00 \$4.378.85 \$881.82	50%

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.

196670 - Goo	gle Chroi	me								_	
) 192.168.10.10	/CxSmar	tClient/	/FileView	.aspx?id=196670							
🛃 Enter A Note		/iew Hi	story	💌 Contact Operator	· 💧 🔌 Advise of I	Payment	PI	rint 🛛	Export t	o Excel	Close
Code/Name: Review Date: Name:	17 J	un 2011 IY JOHI		Clien L 1 Debto	Debt Ref A/c Ref A/c Ref Plaint Nu Date of D	1: 2: mber:)ebt:	196670 AC1234 01/01/2	15 009 to 01	01/2011		- Debt
Address:	2 FIG CAR	NEGIE	Notes / I	nstructions	Claim Se	rvice:		_			
Home Phone: Bus. Phone: Mobile Phone:	03 9 0438	521 2 7 086		notes on this file, us	e the form below				pared		
Arrangement: Next Instalment Arrears:	\$0.0			his file off as Actioned in structing a step of legal a		n the debt	balance o	n your	0	Debt A	mounts
Property 1: Assessment Number: Check Digit:			Attach file	es Choose Files No fi	le chosen				0 2 0 2		
Pensioner:			Sa	ave Cancel							
						History	Notes	All Notes	Interest	Docume	nts –
Date									otor ount	Client Amoun	
30 Nov 2011	11:32:42	СХ	DOC LI	INKED: 196670_Koala pic	.jpg						
30 Nov 2011	11:32:57	CX	last on DOC LI	e INKED: 196670_Tulips.jp	9						
01 Dec 2011	09:32:18	CX	now wi	ith loading display							

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 ENQURIES

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

Creditcollect Cot Recovery and Code Management Specialize	Search - Windows Internet Explorer	Drive the New Colores Competitive, Walk (198) and New	
Image: Collexus - Client Ma. Search X Change Your Passw. Collexus - Home Image: Collexus - Client Mail Image: Collexus - Clie	🕞 🕞 🖉 https://collexus.creditcollect.com	n.au/cxsmartclient/Search.aspx#100325	- 🔒 🔄 ++ 🗙 🕒 ceba 🔎
Image: Wednesday, 9 November Image: November Im		X 🐲 Change Your Passw 🍘 Collexus - Home	🟠 🕶 🔜 👻 🗃 👘 🕶 Page 🕶 Safety 🕶 Tools 🕶 🔞
Search By File Account Ref 1: 12345 Account Ref 2: Plaint Number: Include Closed Files Include Closed Files	C creditcollect		Logged in as: Colin Adams Logout
Search By File Elic Num A/c Ref 1 A/c Ref 2 Debtor Name Plaint Num Orig Debt Outstanding Status Account Ref 1: 1:003223 12345 Account Ref 2: Agency Debt Reference: Image: Plaint Number: Plaint Number: Enquiry by your account number or list	🟠 Home 🛛 📄 File Enquiry 📊 Repo	orts 🛛 🔐 Change Password	Wednesday, 9 November 20
Account Ref 1: 12345 Account Ref 2: Agency Debt Reference: Plaint Number: Debtor Name: Include Closed Files NICOLE CAMPBELL 1.00 881.82 WOFF File Number File Number	🔍 Search By File 🕴 🕴 1 re	esults found. HINT: Click column headings to sort.	
Account Ref 2: Agency Debt Reference: Plaint Number: Plaint Number: Plaint Number: Plaint Number: File Number File Number your account number or list	Account Ref 1:		
Plaint Number: File Number Debtor Name: your account number or list			
Debtor Name: your account Include Closed Files number or list		File Number]
V Include Closed Files	Debtor Name:	your account	1
List All Active Files	List All Active Files		
	© Collexus Pty Ltd 2010. Collexus is an Austra	lian registered trade mark owned by Collexus Pty Ltd.	Powered by Collexus SmartClient

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.

https://	collexus.c	reditcollec	t.com.au/cxsmartclient,	/ReportView	.aspx?t=.	Active Files R	eport										<u></u>	3
Favorite	es 🁍	🧭 Web S	Slice Gallery 🔻															
• 🔓 • 🔊] - 🖃	-	Page ▼ Safety ▼ To	ols 🕶 🕜 🕶	N K	N 🛍 🕨	5											ty ▼ Tools ▼
Active	e File	es Re	eport								Export to CSV	D Exp	ort to Excel	0 🕞	int Report	o ck	ose Window 💿	n Adams L
			AND WITH FILDATED															
																		ay, 5 Decemb
																		_
				/01/2004				1/01/2				1/01				1/0	1/2010	-
Portfolio Code	<u>A/c</u> <u>Ref.</u>	<u>File</u> Number	Debtor Name	Date of Debt	Days Since DoD	<u>Total Debt</u>	<u>Total</u> Interest	<u>Total</u> Costs	<u>Total</u> Credits	<u>Total</u> Paid	<u>Total</u> Outstanding	<u>Date</u> <u>Referred</u>	<u>Days</u> <u>Since</u> <u>Referred</u>	<u>Next</u> Action Date	<u>Days</u> Overdue	<u>Status</u> <u>Code</u>	Status Description	
AGCY	Stacee Sherriff	<u>137</u> 198	Stacee Sherriff	25/09/08	1166	\$1,000.00	\$0.00	\$3.50	\$0.00	\$0.00	\$1,003.50	25/09/08	1166	02/01/12	-28	PWAYDISH	Payway Dishonour	
AGCY	23904	<u>220050</u>	John Test	31/01/10	673	\$1,061.29	\$0.00	\$70.00	\$0.00	\$0.00	\$1,131.29	30/08/10	462	14/12/11	-9	FINAL	FINAL NOTICE	
AGCY	22877	<u>220447</u>	Downtown Gippsland	30/11/09	735	\$7,198.42	\$0.00	\$100.00	\$0.00	\$0.00	\$7,298.42	03/09/10	458	06/12/11	-1	FINAL	FINAL NOTICE	
AGCY	22904	221808	Fine File2	30/11/09	735	\$1,978.89	\$0.00	\$70.00	\$0.00	\$0.00	\$2,048.89	20/09/10	441	14/12/11	-9	FINAL	FINAL NOTICE	
AGCY	TEST	<u>6766</u>	Test File	22/08/02	3392	\$600.00	\$624.44	\$54.50	\$0.00	\$55.00	\$1,223.94	22/08/02	3392	17/12/11	-12	NOINS	No Instructions	-
AGCY	1234	<u>95509</u>	Megan Campbell	03/10/07	1524	\$1,778.00	\$0.00	\$73.00	-\$2.00	\$590.00	\$1,263.00	03/10/07	1524	25/11/11	10	PSOL	Paid on Solicitors Letter	 ollexus Smart
						<u> </u>	<u></u>	0071 00	40.00	A		Inter	net Protect	ed Mode: C	off	4	▼ [®] 150% ▼	

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.