WebCollect Manual

Score Debt Management On-line

Browsers supported:
- **Internet Explorer V8 and above**
- **Google Chrome**
- **Firefox Mozilla**
- **Opera**
- **Safari**
- **Others (maybe but not tested)**

Login using the Login & Password already provided to you (They are case sensitive)

Dashboard – view & print past invoices, assess generic information regarding the status of your debts categorised, see this month's payments and new files; & gain some insight into our results.

View Account Activity – gain an overview of a particular debt, see all of our notes including correspondence, get an accurate balance, see any payment plan that might exist and print a copy of our file for your records.

Enter New Account – **DISABLED – To place new debts with us use the form or spreadsheet already supplied to you; or; go to** Place A Debt **on our home page.**

Enter Payment you received – **DISABLED – due to extreme possibility of mistakes that can impact the collection significantly. Email us when payment is received**

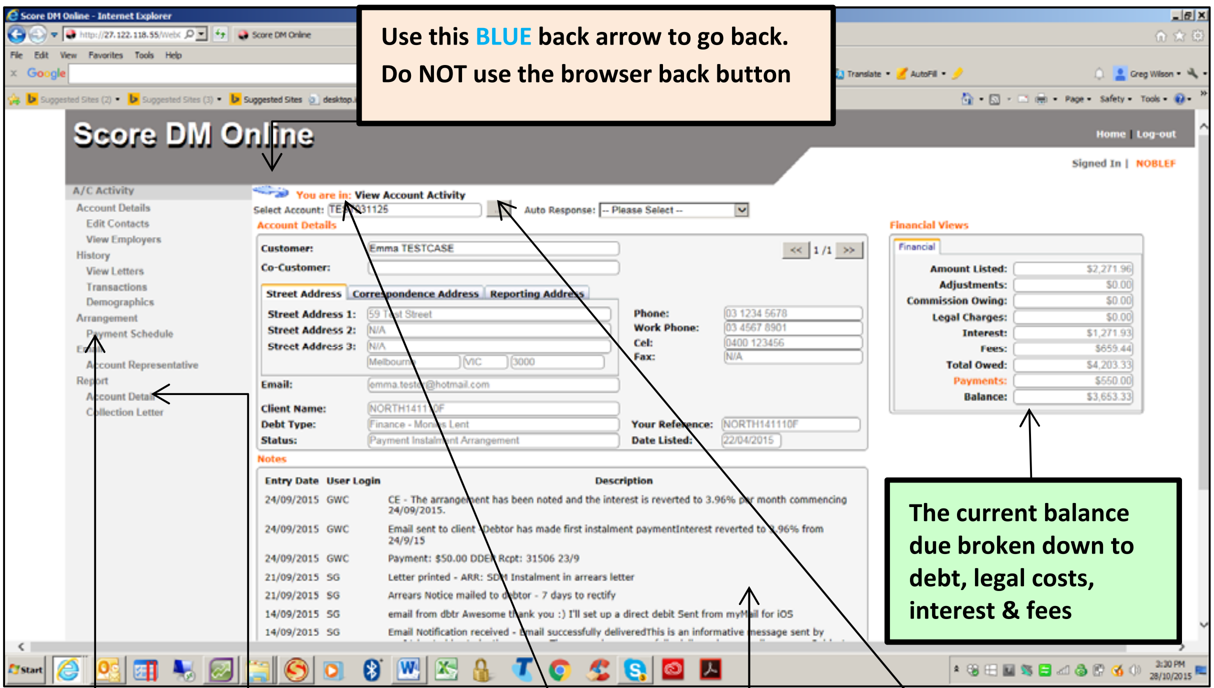
Update my contact details – **DISABLED**

Reports – access a range of reports that are available to you

CALL GREG WILSON 1300-729809 IF ASSISTANCE IS REQUIRED OR EMAIL TO score@scoredebtcollection.com.au

View Account Activity (See the notes on your debts)

Use this BLUE back arrow to go back.
Do NOT use the browser back button



The current balance due broken down to debt, legal costs, interest & fees

Select Account if OUR reference is known to you; enter it here <u>then use ENTER on your keyboard to select it</u>

Search Button if our reference NOT known. It OPENS a search box. Select your criteria (Your account number or debtors name etc.) Then "Search" – <u>OR</u> – just click on "Search" (bottom left) and ALL files will display.
<u>Then select the underlined Code</u>

Account Detail
<u>PRINT THIS FILE</u>

Click on this and a new screen opens. There is no need to do anything other than "Generate".
A report will appear under the open box.
Use the print or export buttons on the top left hand side of the report

PAYMENT SCHEDULE

Click on this and a new table will appear under the notes box.
It lists details of any instalment arrangement that exists.

NOTES Box - Displays the notes in reverse chronological order.
<u>VIEW & NOTE THE FILE</u>
Use the << or >> keys to display earlier or later entries. Insert your comments too.
This shows you everything that has happened with respect to this debtor.
It includes letters sent; emails or SMS sent or received; details of phone conversations etc.
It also displays details of payments made to us or you (To you = DIRC)

<u>ALWAYS REMEMBER</u>:

1. **Always use the BLUE arrow at the top of each screen to go back inside the system. Do NOT use the back button of the browser.**
2. **Always use the <u>Home</u> button (TOP RIGHT OF SCREEN) to return to the main menu**
3. **Remember to LOG-OUT (top right of screen) when finished**

** <u>See next page to find out how to print a copy of your files or invoices.</u>

DASHBOARD – MY INVOICES

From here you can print any invoice that we have issued.
For example if we invoiced you on 31/10/2015 then on 1/11/2015 you could print it.
NB. Does not display an invoice for the current month in progress.

1. If you have more than 1 client code use the drop box search button to select the code that you want the invoice for.
2. Displayed will be prior invoices we issued to you, just select by clicking on the underlined Invoice ID. Then click “Generate” in the new window that appears.
3. The invoice will appear under the current box …then print or export from the top left of the displayed document.

DASHBOARD – MAIN VIEW

New Accounts This Month
This provides you with a list of accounts that you have placed with us for the current month only.

Amount Paid This Month
This provides details of ALL payments that we have processed for the month

Paid to Score show as	DDEP, CHEQ, MORD & CASH
Paid to you show as	DIRC, FWDC (Forwarded to you by us) & CRCON (credit/contra by you)

Accounts By Status
Displays a list of accounts that are categorised by their current status.
Click on the desired status and a list of the debts within that status are displayed.

REPORTS

HOW DO I PRINT A FULL REPORT ON MY DEBTS PLACED WITH SCORE?

SELECT – COLLECTOR (CLICK ON +) & THEN ACCOUNT ACTION REPORT

In the new screen that appears you only need to do 3 things

1. Select your Client Code (2nd top) (NB. No need if you only have 1 client code with Score)
2. Select your Debtor (3RD top) if you want a report on a specific debtor. LEAVE BLANK IF YOU WANT ALL DEBTS.
3. In the Debt Status Box (half way down)
   A. Leave as A if you want Active files only (Defaults to this setting)
   B. Change to C if you want Closed files only
   C. Leave blank if you want ALL files – both active and closed.

Then click on GENERATE REPORT
The report opens below where you generated it.
At top left of the first page you can select to either print the report or export it

IF YOU REQUIRE ANY ASSISTANCE PLEASE CALL US 1300 729809

scoreDM
debt collection