

eDebtRecovery Client Portal

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1 Features Overview

File Lookup using Client Reference 1, Client Reference 2, Agency File Code, Legal Case Number, Debtor Name, Portfolio, Active/Closed.

- **Viewing a File**
 - View File Details including:
 - Debtor information
 - Arrangement details
 - Debt details
 - Debt Balances
 - Diary Notes
 - Letters/documents produced and/or images linked to the file
 - Invoice details
 - Debt Ageing
 - Additional Information
 - Send an email to an internal operator
 - Add a Diary Notes (including uploading attachments). Notes are “flagged” as being unread to internal operators
 - File Print Out (Emailed document showing file details, history)
- **Client Work Queues**
 - See files queued by internal operators for Client review
 - Respond to internal operators and mark file as “Actioned”
- **New File Entry**
 - Direct File entry into Collexus on selected portfolio
 - Commencement of initial work-flow without internal operator intervention
 - File number given to Client once processing complete
- **Reporting**
 - Files Referred
 - Closed Files
 - Active Files
 - Active Files on Arrangements
 - Collections Spin Down Analysis Report
 - Payment Listing
 - Costs Listing
 - Debt/Invoice Listing
 - File Aged Balances
 - Debtor Aged Profile

2 Username and Password Login

- You will have received an email setting out your username and temporary password.
- Go to <https://mscollexus.gadens.com/Login.aspx>
- You will be presented with the Login screen:

A screenshot of a web browser's login form. The form is titled "Login" in blue text. It contains two input fields: "User ID:" and "Password:". The "User ID:" field is currently empty and has a blue border. The "Password:" field is also empty and has a blue border. To the right of the "Password:" field is a "Login" button with a grey background and black text.

- ▶ Place the cursor in the **User ID:** field and enter your username
- ▶ Place the cursor in the **Password:** field and enter your password as initially supplied (case sensitive).
- ▶ Then click on **Login**

On initial login, you will be requested to change your password and confirm your new password – the password must be at least 6 characters.



3 Main Menu Options

You will be presented with a screen with the below options across the top menu bar:

- **Home**
- **File Enquiry**
- **File Entry**
- **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.



Home File Enquiry File Entry Reports Change Password

Welcome

This is your Home page
To the right you will see a list of files awaiting instructions from you.

To search for a specific file that is not in your work queue, click on File Enquiry and enter a search criteria.

User Stats

Your Work Queue: **1 files**

Show Actioned Files

Work Queue - 1 files in your queue awaiting instructions. By Date Review Date ▼

Actioned	Portfolio	File Num	Debtor Name	Status	Requested	Review Date	Review Instruction
		108231			18 Sep 2019	25 Sep 2019	

From the work queue, you can action each account that has been referred to you by clicking on the blue hyperlink file number. This will open the account, and display the most recent file notes.

Go to section: **6 Working on the file** for an in depth look at what you can do when in the **File Display** page.

Once you have done what you need to on the file ensure you tick the box as “Actioned” to remove this account from your queue.

Note, to refresh the queue, click on **Refresh Work Queue** on the left of the log in page.

4 File Enquiry

To look up any file you use the **File Enquiry Tab** – you can use the **Search By File** fields or **List All Active Files**:

Home	File Enquiry	File Entry	Reports	Change Password																		
<div style="display: flex;"> <div style="flex: 1;"> <p>Search By File</p> <p>Account Ref 1: <input type="text"/></p> <p>Account Ref 2: <input type="text"/></p> <p>Agency Debt Reference: <input type="text"/></p> <p>Plaint Number: <input type="text"/></p> <p>Debtor Name: <input type="text" value="SMITH"/></p> <p>Portfolio: <input type="text"/></p> <p><input checked="" type="checkbox"/> Include Closed Files</p> <p><input type="button" value="Search"/></p> <p><input type="button" value="List All Active Files"/></p> </div> <div style="flex: 2;"> <p>1 results found. HINT: Click column headings to sort.</p> <table border="1"> <thead> <tr> <th>File Num</th> <th>A/c Ref 1</th> <th>A/c Ref 2</th> <th>Debtor Name</th> <th>Plaint Num</th> <th>Orig Debt</th> <th>Outstanding</th> <th>Status</th> <th>Portfolio</th> </tr> </thead> <tbody> <tr> <td>300072</td> <td>12345</td> <td></td> <td>Jane Smith</td> <td></td> <td>10000.00</td> <td>10000.00</td> <td>SOLACT</td> <td>TEST</td> </tr> </tbody> </table> </div> </div>					File Num	A/c Ref 1	A/c Ref 2	Debtor Name	Plaint Num	Orig Debt	Outstanding	Status	Portfolio	300072	12345		Jane Smith		10000.00	10000.00	SOLACT	TEST
File Num	A/c Ref 1	A/c Ref 2	Debtor Name	Plaint Num	Orig Debt	Outstanding	Status	Portfolio														
300072	12345		Jane Smith		10000.00	10000.00	SOLACT	TEST														

The **File Enquiry** tab gives you the options to search by;

- **Account Ref 1:** & **Account Ref 2:** both these numbers refer to your account number
- **Agency Account Reference** – Agencies file number
- **Plaintiff Number** – number issued by the court if legal action has been taken
- **Debtor name**
- An option to view all files

This enquiry will display files as selected, you can then click on the **File Number** (blue hyperlink on left of “Results Found”) to further display the particular file that you require.

You can then action by adding a note or reading the file notes already on file (See section: **6 Working on the file**).

Any notes entered will be processed and forwarded to the Account Operator for action.

5 File Entry

Click on here to enter details of new file – you can add multiple Debtors:



Home File Enquiry File Entry Reports Change Password

File Entry

Client

Client Portfolio Code:

Your Reference 1:

Your Reference 2:

Action

Initial Action Required:

Debt

Date Of Debt (dd/mm/yyyy):

End Date Of Debt (dd/mm/yyyy):

Invoice Number:

Original Debt Amount:

File Description:

Debtor 1 Details

Legal Type (Please select):

Company Name:

Contact Name:

Trading Name:

ACN/Company Number:

Date Of Birth (dd/mm/yyyy):

Email Address:

Debtor 1 Contact Numbers

Phone Number - Business:

Phone Number - Home:

Phone Number - Mobile:

Phone Number - Fax:

Postal Address

Postal Address Line 1:

Postal Address Line 2:

Postal Address Line 3:

City/Suburb:

State:

Postcode:

Street Address

Street Address Line 1:

Street Address Line 2:

Street Address Line 3:

City/Suburb:

State:

Postcode:

[Add Another Debtor](#) [Submit File](#)



6 Working on the file

Once you have the current file open, you can view the recent actions on the file, and see the actions of the Account Manager or Operator.

Enter A Note	View History	Contact Operator	Advise of Payment	Print	Export to Excel	Close
Client Code/Name: TEST - Test Client Review Date:		Debtor(s) + Jane Smith Address: 123 Pretend Street Somewhere VIC 3132		Debt Amounts Original Debt: \$10,000.00 Debt: \$10,000.00 Credits: \$0.00 Costs: \$0.00 Interest: Total Paid: \$0.00 Outstanding: \$10,000.00		
Debt File Num: 300072 A/c Ref 1: 12345 A/c Ref 2: Plaintiff Num: Date of Debt: Credit Card Claim Service: Judgment Date: Status Code: SOLACT - SOLICITORS ACTING Next Activity: 02 Dec 2019 Cause Code: DE - DEBT Operator Code: NJD - Nadine Deacon Aged Debtor Profile: 365		Additional Information :		Debt Ageing Current: \$0.00 30 Days: \$0.00 60 Days: \$0.00 90 Days: \$0.00 120 Days: \$0.00 150+ Days: \$0.00		
Arrangement Details Arrangement: 26 Nov 2019 Frequency: Monthly Next Instalment: \$500.00 on 27 Nov 2019 Arrears: \$0.00		History Notes All Notes Interest Documents Payments Debts/Invoices				
Date	Time	Op	Note	Dtr Amt	cli Amt	
26 Nov 2019	08:21:05	NJD	ARRANGEMENT ENTERED AS FOLLOWS: 20 monthly instalments of \$500.00 commencing on 27/11/2019 with the final instalment to be paid on or before 27/06/2021			
26 Nov 2019	08:19:14	NJD	DIARY DATE CHANGED TO 26/11/2019.			
26 Nov 2019	07:17:54	NJD	INSTRUCTIONS TO SOLICITOR TO PROCEED Instructions to solicitor to proceed with legal action against debtor DIARY DATE CHANGED TO 27/11/2019.			

The menu across the top now gives you various options including:

- **Enter a Note** – At this point you can enter a note which is then forwarded to the Account Manager for action on their review list. It is here that you can **upload documents**.

Notes / Instructions

To enter notes on this file, use the form below.

Notes:

*When instructing a step of legal action, please confirm the debt balance on your records

Attach files Choose Files No file chosen

Save
Cancel

- **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.

Contact Operator

To email the operator of this file, use the form below.

Email Subject:

Email Body:

- **Advise of Payment** – Used if you have received a direct payment.

Advise Of Payment

Advise of payment below.

Payment Date:

Payment Amount: Credit Amount: New Balance:

Enter notes on this file (optional).

Notes:

- **Print** – Options to print the file.
- **Export to Excel** – Allows you to export the file to Excel.
- **Close** – Will close that window and return you to the previous page.

The menu along the bottom also gives you various options:

				History	Notes	All Notes	Interest	Documents	Payments	Debts/Invoices
Date	Time	Op	Note	Dtr Amt	Clk Amt					
26 Nov 2019	08:21:05	NJD	ARRANGEMENT ENTERED AS FOLLOWS: 20 monthly instalments of \$500.00 commencing on 27/11/2019 with the final instalment to be paid on or before 27/06/2021							
26 Nov 2019	08:19:14	NJD	DIARY DATE CHANGED TO 26/11/2019.							
26 Nov 2019	07:17:54	NJD	INSTRUCTIONS TO SOLICITOR TO PROCEED Instructions to solicitor to proceed with legal action against debtor STATUS CODE CHANGED FROM Nothing TO SOLACT.							

- **History**
- **Notes**
- **Interest** – Shows interest listed on the file.
- **Documents** – Here is where all documents uploaded by you or by the Operator can be accessed.

7 Reports

Home	File Enquiry	File Entry	Reports	Change Password
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Reports

- [Files Referred](#)
- [Closed Files](#)
- [Active Files](#)
- [Active Files Arrangements](#)
- [Spin Down Report](#)
- [Payment Listing Report](#)
- [Costs Listing Report](#)
- [Debt / Invoice Listing Report](#)
- [File Aged Balances](#)
- [Aged Debtor Profile Report](#)

Please select a report

To run the report, click on the report name and input criteria will appear for you to select:

Reports

- [Files Referred](#)
- [Closed Files](#)
- [Active Files](#)
- [Active Files Arrangements](#)
- [Spin Down Report](#)
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- [Costs Listing Report](#)
- [Debt / Invoice Listing Report](#)
- [File Aged Balances](#)
- [Aged Debtor Profile Report](#)

Costs Listing Report

Select Portfolio/s:

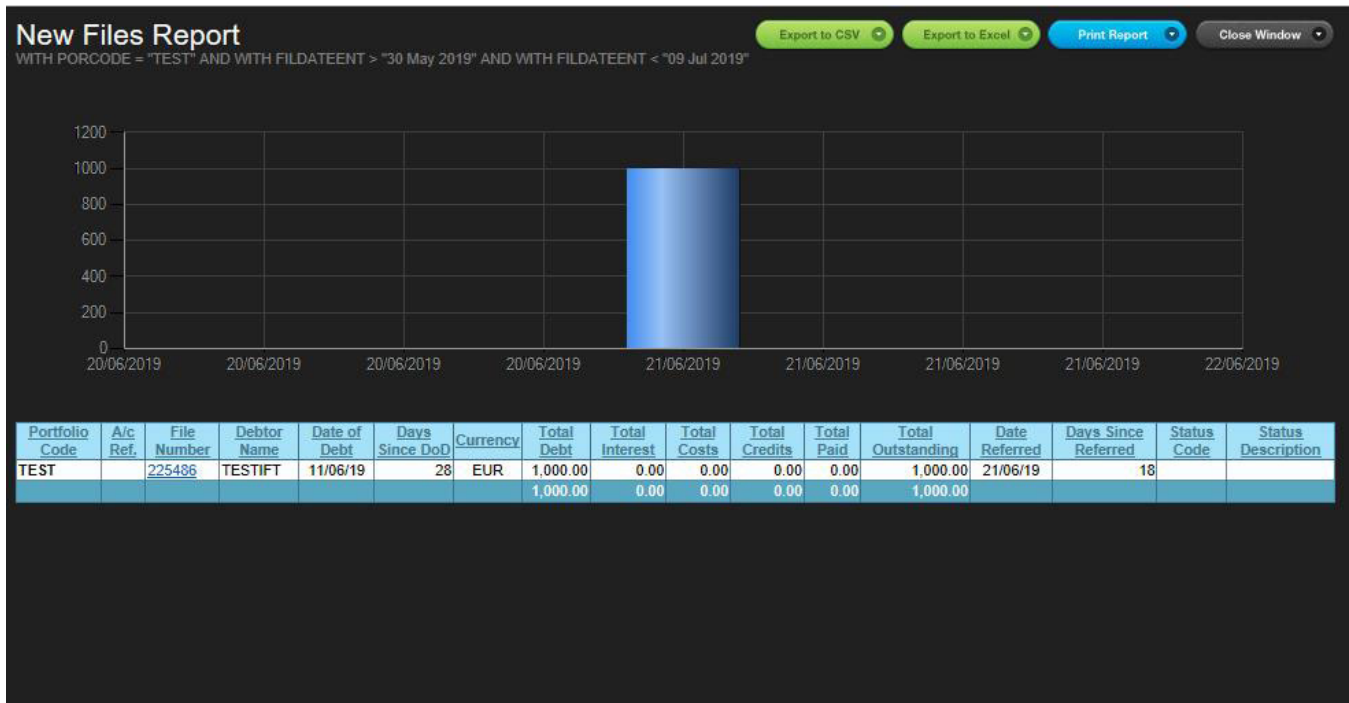
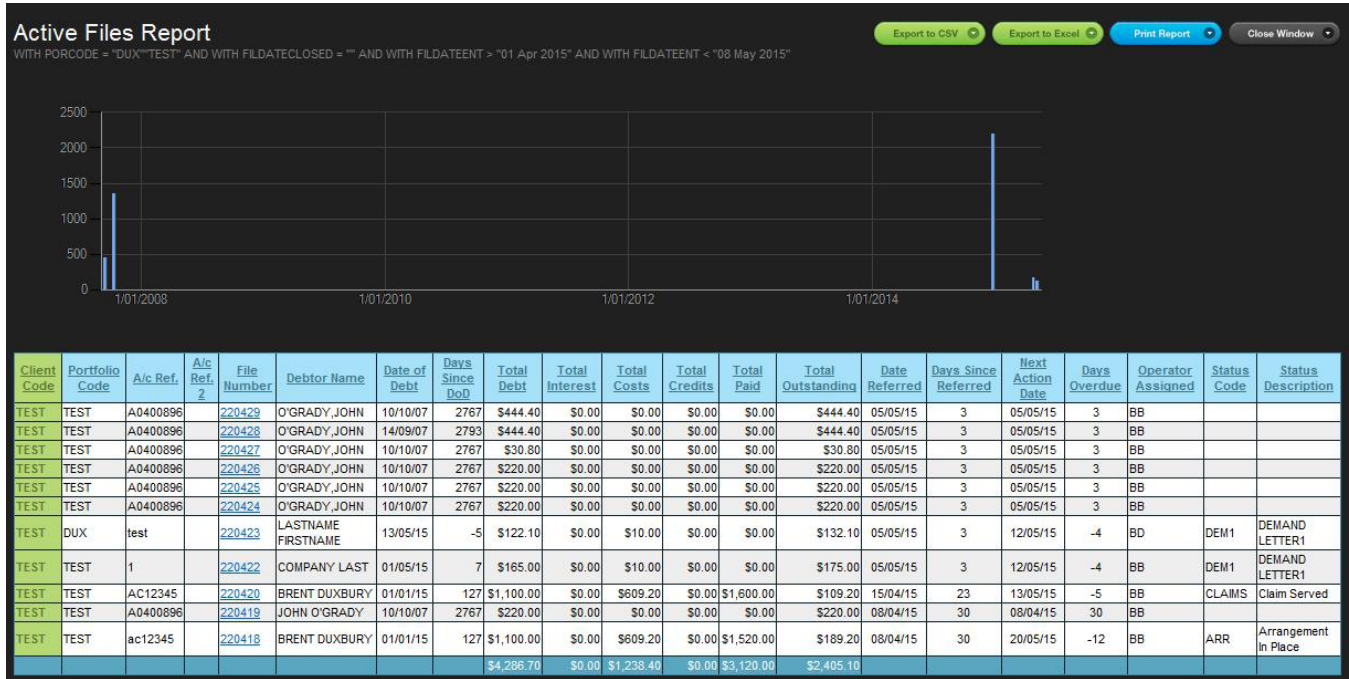
Date File Entered Greater Than:

Date File Entered Less Than:

These reports are reasonably self-explanatory. 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 to be printed.

8 Examples of Reports



Active Files Arrangements Report

SELECT CFILE WITH FILDATEENT < "01 Apr 2019" AND WITH FILDATEENT < "09 Jul 2019" AND WITH PORCODE = "TEST" AND WITH FILDATECLOSED = "" AND WITH FILDARDATE # " BY OPORCODEASS BY STACODE

Export to CSV Export to Excel Print Report Close Window

Client Code	Portfolio Code	A/c Ref.	File Number	Debtor Name	Date of Debt	Days Since DoD	Currency	Total Debt	Total Interest	Total Costs	Total Credits	Total Paid	Total Outstanding	Last Pay Entered	Last Pay Amt	Date Referred	Days Since Referred	Next Action Date	Days Overdue	Operator Assigned	Status Code	Status Description	Arr. Date	Arr. Total	Arr. Tot. Paid	Arr. Amass	Arr. Frack	Arr. Next Inst.	Arr. Next Inst. Amt.
TEST	TEST		225450		20/03/19	111	EUR	1,050.00	0.00	2.10	0.00	212.10	840.00	10/04/19	202	09/04/19	91	30/04/19	70	BB	AIR	Arrangement In Advance	10/04/19	1,040.00	202.00	838.00	F	21/06/19	
TEST	TEST		225451		09/02/19	150	EUR	1,045.50	0.00	0.10	0.00	10.10	1,035.50	10/04/19	10.1	10/04/19	90	15/04/19	85	BB	AIR	Arrangement In Advance	10/04/19	1,035.50	0.00	1,035.50	F	21/06/19	
								2,095.50	0.00	2.20	0.00	222.20	1,875.50											2,075.50	202.00	1,873.50			

Spin Down Report

Portfolio Code = TEST and Date File Entered >= 01 Jul 2014 and Date File Entered <= 08 May 2015

* Excludes: Duplicate File, Bad Files, Bankrupt, Client Requested File to be Returned, Opened in Error

Export to CSV

Export to Excel

Print Report

Close Window

Recovery Summary							
Month Referred	Files Referred	Value Of Files Referred	Files Closed	Value Recovered	Recovery Rate	Files Active	Value Active
May 2015	12	\$1,586	0	\$0	0 %	12	\$1,586
Apr 2015	3	\$2,200	0	\$2,000	91 %	3	\$200
Mar 2015	4	\$2,275	0	\$205	9 %	4	\$2,070
Feb 2015	3	\$600	0	\$40	7 %	3	\$560
Jan 2015	20	\$1,959	1	\$1,048	53 %	19	\$866
Dec 2014	5	\$4,600	0	\$1,560	34 %	5	\$3,040
Nov 2014	19	\$5,860	0	\$175	3 %	19	\$5,685
Oct 2014	12815	\$81,345	0	\$498	1 %	12815	\$80,847
Sep 2014	544	\$646,943	0	\$2,919	0 %	544	\$644,024
Aug 2014	1879	\$1,892,968	1	\$50	0 %	1878	\$1,892,168
Jul 2014	33	\$98,247	0	\$1,820	2 %	33	\$96,427
Jun 2014	0	\$0	0	\$0	0 %	0	\$0
Total	15337	\$2,738,583	2	\$10,315	0 %	15335	\$2,727,473

Effective Collection Rate excluding May 2015: 0 %

Month Referred	Files Referred	\$ Value Referred	May 2015	Apr 2015	Mar 2015	Feb 2015	Jan 2015	Dec 2014	Nov 2014	Oct 2014	Sep 2014	Aug 2014	Jul 2014	Jun 2014	Paid Prior	Total Paid	Active Number	Active Outstanding
May 2015	12	\$1,586	\$0													\$0	12	\$1,586
%			0.00%													0%		
Apr 2015	3	\$2,200	\$0	\$2,000												\$2,000	3	\$200
%			0.00%	90.91%												90.91%		
Mar 2015	4	\$2,275	\$0	\$205	\$0											\$205	4	\$2,070
%			0.00%	9.01%	0.00%											9.01%		
Feb 2015	3	\$600	\$0	\$10	\$0	\$30										\$40	3	\$560
%			0.00%	1.67%	0.00%	5.00%										6.67%		
Jan 2015	20	\$1,959	\$0	\$0	\$0	\$150	\$898									\$1,048	19	\$866
%			0.00%	0.00%	0.00%	7.66%	45.84%									53.50%		
Dec 2014	5	\$4,600	\$0	\$100	\$15	\$300	\$485	\$660								\$1,560	5	\$3,040
%			0.00%	2.17%	0.33%	6.52%	10.54%	14.35%								33.91%		
Nov 2014	19	\$5,860	\$0	\$0	\$0	\$0	\$0	\$15	\$160							\$175	19	\$5,685
%			0.00%	0.00%	0.00%	0.00%	0.00%	0.26%	2.73%							2.99%		
Oct 2014	12815	\$81,345	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$498						\$498	12815	\$80,847
%			0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.61%						0.61%		
Sep 2014	544	\$646,943	\$0	\$0	\$0	\$0	\$5	\$130	\$0	\$0	\$2,784					\$2,919	544	\$644,024
%			0.00%	0.00%	0.00%	0.00%	0.00%	0.02%	0.00%	0.00%	0.43%					0.45%		
Aug 2014	1879	\$1,892,968	\$0	\$0	\$0	\$0	\$0	\$0	\$50	\$0	\$0	\$0				\$50	1878	\$1,892,168
%			0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%				0.00%		
Jul 2014	33	\$98,247	\$0	\$250	\$0	\$0	\$0	\$0	\$600	\$0	\$20	\$0	\$950			\$1,820	33	\$96,427
%			0.00%	0.25%	0.00%	0.00%	0.00%	0.00%	0.61%	0.00%	0.02%	0.00%	0.97%			1.85%		
Jun 2014	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	0	\$0
%			0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0%		
Prior	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0	\$0
%			0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0%		
Totals	15337	\$2,738,583	\$0	\$2,565	\$15	\$480	\$1,388	\$805	\$810	\$498	\$2,804	\$0	\$950	\$0	\$0	\$10,315	15335	\$2,727,473

Month Referred Collection Progress													
Months Since Referral	May 2015	Apr 2015	Mar 2015	Feb 2015	Jan 2015	Dec 2014	Nov 2014	Oct 2014	Sep 2014	Aug 2014	Jul 2014	Jun 2014	Prior
0	0.00 %	90.91 %	0.00 %	5.00 %	45.84 %	14.35 %	2.73 %	0.61 %	0.43 %	0.00 %	0.97 %	0.00 %	0.00 %
1		90.91 %	9.01 %	5.00 %	53.50 %	24.89 %	2.99 %	0.61 %	0.43 %	0.00 %	0.97 %	0.00 %	0.00 %
2			9.01 %	6.67 %	53.50 %	31.41 %	2.99 %	0.61 %	0.43 %	0.00 %	0.99 %	0.00 %	0.00 %
3				6.67 %	53.50 %	31.74 %	2.99 %	0.61 %	0.45 %	0.00 %	0.99 %	0.00 %	0.00 %
4					53.50 %	33.91 %	2.99 %	0.61 %	0.45 %	0.00 %	1.60 %	0.00 %	0.00 %
5						33.91 %	2.99 %	0.61 %	0.45 %	0.00 %	1.60 %	0.00 %	0.00 %
6							2.99 %	0.61 %	0.45 %	0.00 %	1.60 %	0.00 %	0.00 %
7								0.61 %	0.45 %	0.00 %	1.60 %	0.00 %	0.00 %
8									0.45 %	0.00 %	1.60 %	0.00 %	0.00 %
9										0.00 %	1.85 %	0.00 %	0.00 %
10											1.85 %	0.00 %	0.00 %
11												0.00 %	0.00 %
Prior													0.00 %

9 Change Password

This allows you to change your current password at any given time.



Please change your password

Current Password:

New Password:

Repeat Password:

10 Logout

Click on this menu item to log out of the Client Portal screen.



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