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

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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:

- ► 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.

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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.

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.

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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*:

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**).

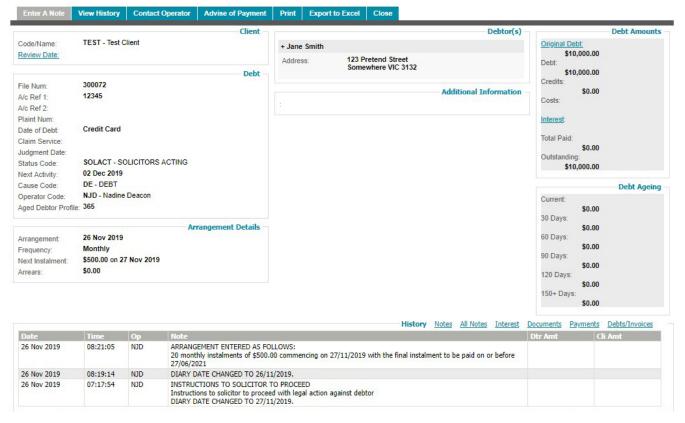Any notes entered will be processed and forwarded to the Account Operator for action.

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5   File Entry

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

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.

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**.

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

- *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*

- *Interest* – Shows interest listed on the file.

- *Documents* – Here is where all documents uploaded by you or by the Operator can be accessed.

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7   Reports

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

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.

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8 Examples of Reports

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	$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%		
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

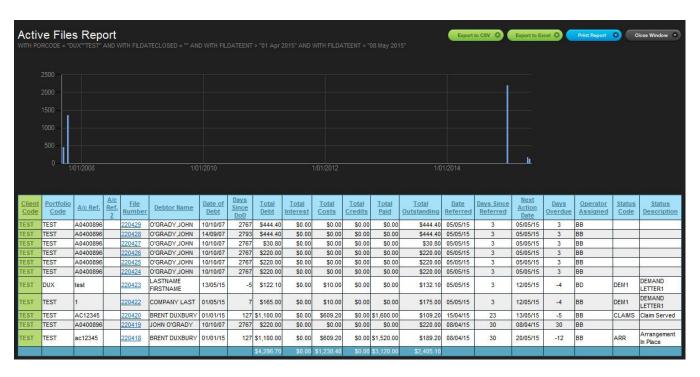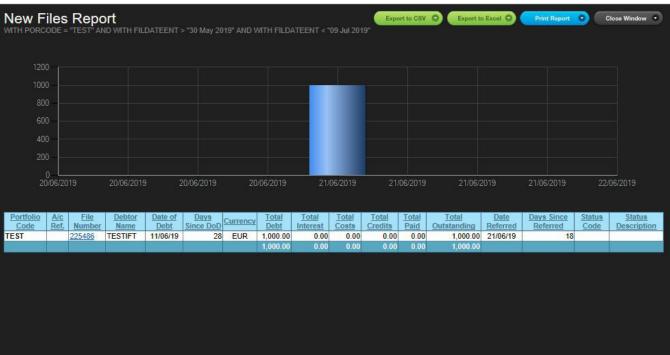| Months Since Referral	May 2015	Apr 2015	Mar 2015	Feb 2015	Jan 2015	Dec 2014	Nov 2014	Oct 2014	Sep 2014	Aug 2014	Jul 2014	Jun 2014	Prior
0	0.00 %	90.91 %	0.00 %	5.00 %	45.84 %	14.35 %	2.73 %	0.61 %	0.43 %	0.00 %	0.97 %	0.00 %	0.00 %
1		90.91 %	9.01 %	5.00 %	53.50 %	24.89 %	2.99 %	0.61 %	0.43 %	0.00 %	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 %

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9   Change Password

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

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28⁶⁵ 29⁷⁰

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878

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