

Level 2 91 William Street Melbourne, Victoria 3000 Box 138 Collins Street West Post Office Melbourne, Victoria 8007 PO Box 2562 Graceville East, Queensland 4075 Kearley Lewis Pty Ltd ACN 061 754 854 ABN 56 061 754 854

T > [03] 9629 8777 F > [03] 9629 8310 E > collect@kearleylewis.com.au

W > www.kearleylewis.com.au

# Instructions to access Kearley Lewis Client Portal

1. Go to <u>www.kearleylewis.com.au/</u>

2. Click on **Client Access** on the top menu, then click **Client Login** from the dropdown box

3. Enter your username & password

4. Click Sign in

#### The screen you will first see is as follows:

C Secure   https://kearleylewis.webstr	ream.net.au/kearleylewisportal/(S(i2w	viswptxghwjxjitvquxz3w))/DebtorSearch	1.aspx	
Kearley Lewis		Tuesda	ay 27 March 2018	
Realicy Lewis				
YOUR DEBT RECOVERY EXPERTS				
DebtCol Cases - Reports In				
Search				
Q Search 🛞 Clear 🕑 Export	: Results 🛛 🚔 Print			
Mar County Mar County				
My Search My Queues				 1
● Open ○ Closed ○ All Debts				
Selected department				
(1221) - Kearley Lewis Pty Ltd	Count by Accord Date Count by C	Chattan Constant for New Data	¥	
Beforence Type	Search by Accepted Date   Search by S	Status Search by Next Due Date		
Primary Client Reference	*			
Reference Number				
Note: Information collected from	reach tab will be used to perfe	orm the search.		
				_

#### The menubar across the top has three tabs:

#### 1. Cases

This is the section for managing new and existing debts.

See 'Cases' below for more information and instructions on this section.

2. Reports – this is where you can run reports on the debts you have created.

3. Invoices and Statements - this section is not in use

### 1. <u>Cases</u>

In this section you can manage new and existing debts.

You can:

- view your debts and see the progress as we work on them; every stage of our recovery process is transparent in this section
- upload new debts and raise a Final Notice letter or request a Solicitors Letter
- advise us of payments when you have received them from debtors
- add notes against debts if you need us to be aware of anything, or have information that will assist the recovery process
- attach documents, for example copy invoice(s), correspondence from the debtor, copy PODs.

There are three tabs under the **Cases** section, and each is explained below:

Search			

You can search for a debt under this section, for example by asking to search all 'Open' debts, 'Closed' debts or 'All debts'.

By default a list appears on this screen of all 'Open' debts, and if you click on any of these, you can drill down to see more detail on the individual debts.

This is where you can view copies of the letters sent to debtors, including any **Final Notice** letters you have raised.

Once you drill down into an individual debt, you can also advise us if you have received a payment from a debtor. You will see a button '**Process Payment**' and if you click this, you can input the date you received a payment and how much the payment was for.

|--|

You can view an individual debt from this section, and again, this is another way you can advise us if you have received a payment. The section will ask you for the payment amount and the date.

#### New

This section is where you enter new debts, you can select one of two options:

- Generate a Final Notice Letter that you can send to your debtor
- Request a Solicitor's Letter be sent to the debtor by us

The process of entering the new debt details is the same for either of the above options you wish to choose.

#### See the last page of this User Guide for a summary of the two letters. The Final Notice letter is an optional step 1, the Solicitors letter is step 2

Below is the first screen for entering a new debt, and it confirms your account details, if these are correct you click the **Next** button.

🗋 QRM Online - Add New 🗆 🗙 🗋 QRM Online - Add	New 🤇 🗙 🔄 🕂 🛱 📶	DESKTOP-NHIMI	D4 – 1	₽ ×	θ	- 6	i ×
$\leftarrow$ $\rightarrow$ C $$ Secure   https://kearleylewis.webstr	ream.net.au/kearleylewisportal/(Si	(cc4v5hqjqwz4y0g0mkv121el	))/debtentry.aspx				☆ :
		Client Po	rtal		Tuesday 20 March 2018	Log Out	
Kearley Lewis							
CASES REPORTS INVO	DICES AND STATEMENTS	USER SETTINGS					
SEARCH VIEW NEW							
Create A New Case							
Select the client							
Kearley Lewis Pty Ltd - (1221) V							
Type here to search		🧭 🖳 関 😰	<b>9</b>	<b>(</b> )	x <sup>Q</sup> ^ ⓑ 팊 ᆀ	NG 10:54 AM US 20/03/20	1 18 21

The next screen is where you enter any internal reference you have for the debt, the dates the debt was created and a description of the debt, for example you can enter the description 'Services provided' or 'Goods delivered'.



Once you have entered the details, click the Next button.

The next screen is where you enter the total debt value, including GST.

Once you have entered the details, click the **Next** button.



The next screen is where you enter details of the debtor, which can be a business or an individual (consumer) debtor. Once you have entered the details, press '**Add Debtor'** and a summary of the debtor will be shown.

If you are happy with the details, click the **Next** button. If you need to edit the detail, press **edit.** 

ASRS REPORTS INVOICES AND STATEMENTS USER SETTINGS SEARCH VIEW NEW Create A New Case Previous Nex Debtor Information No debtors currently associated with this debt. Company/Surname Given Name Title Relationship Contact Gender Date of Birth Email Address Mork STD Home STD Hailing Address Street Address Work STD Home STD Hailing Address 1 Suburb Work Number Home Number Hailing Address 3 Postode Hobile Hobile Late Company/Late Compan	🔋 🗎 Secure   https://kearle	ylewis.webstream.net.au/kearley	ylewisportal/(S(cc4v5hqjqwz4y0g0ml	w121el))/debtentry.aspx	
REPORTS INVOICES AND STATEMENTS   USER SETTINGS	OUR DEBT RECOVERY EXP	PERTS			
CASES     REPORTS     INVOICES AND STATEMENTS     USER SETTINGS       SEARCH     VIEW     NEW   Create A New Case       Previous     New   Previous       New   Debtor Information No debtors currently associated with this debt.       Company/Surname     Given Name     Title   Relationship       Octast     Gender     Select   Primary Debtor •       Contact     Gender     Date of Birth   Maling Address 1       Suburb     Work STD     Home STD       Maling Address 2     State   Haling Address 3       Pestode     Hobite					
SEARCH     VIEW       Create A New Case         Previous	CASES REPORTS	INVOICES AND STAT	TEMENTS USER SETTINGS		
	SEARCH VIEW	NEW			
Create A New Case		•			
Previous       Next         Debtor Information         No debtors currently associated with this debt.         Company/Surname       Given Name         Given Name       THe         Relationship         Contact       Gender         Date of Birth       Enail Address         Please Select *       Work STD         Haling Address 1       Suburb         Work Number       Home Number         Haling Address 2       State         Haling Address 3       Postcode         Habilite       Hobilite	Create A New O	Case			
Previous Nex Debtor Information No debtors currently associated with this debt. Company/Surname Given Name THE Relationship Contact Gender Date Of Birth Email Address Please Select V Primary Debtor V Contact Gender Date Of Birth Email Address Work STD Home STD Mailing Address 1 Suburb Work Number Home Number Mailing Address 2 State Mailing Address 3 Postcode Hobile Mailing Address 3 Postcode Hobile					
Previous Next Debtor Information No debtors currently associated with this debt. Company Surname Given Name Title Relationship Contact Gender Date of Birth Email Address Please Select  Vork STD Home STD Naling Address 1 Suburb Work Number Home Number Mailing Address 2 State Work STD Home STD Mailing Address 3 Postcode Hobile Mailing Address 3 Postcode Konce Kidd Debtor Cance					
Previous Nex Debtor Information No debtors currently associated with this debt. Company/Surname Given Name Title Relationship Contact Gender Date Of Birth Email Address Contact Gender Date Of Birth Email Address Mailing Address Street Address Work STD Home STD Mailing Address 1 Suburb Work Winber Home Number Mailing Address 2 State Hailing Address 3 Postcode Hobile Mailing Address 3 Conce					
Debtor Information  No debtors currently associated with this debt.  Company/Surname Given Name Title Select. Primary Debtor Contact Gender Date of Birth Email Address Please Select Please Select Vork STD Home STD Home STD Hailing Address 1 Suburb Vork Number Home Number Mailing Address 3 Postcode Mobile Gence	Previous Next				
No debtors currently associated with this debt. Company/Surname Given Name Select. Please Select Please Select Work STD Home STD Mailing Address 1 Suburb Work Number Home Number Homing Address 2 State Hobile Hobile Hobile Kadd Debtor Cance	Dahtan Information				
No debtors currently associated with this debt. Company/Surname Given Name Title Relationship Select.  Pirimary Debtor  Contact Gender Date Of Birth Email Address Please Select  Work STD Home STD Mailing Address Street Address Work STD Home STD Mailing Address 2 State Hobite Holite Hailing Address 3 Postcode Hobite Holite Kaid Debtor Cance	Deptor Information				
Company/Surname     Given Name     Title     Relationship       Contact     Gender     Date of Birth     Email Address       Please Select *     Image: Street Address     Work STD     Home STD       Maling Address 1     Suburb     Image: Street Address     Work Number       Maling Address 2     State     Image: Street Address     Home Number       Maling Address 3     Postcode     Hobite       Maling Address 3     Postcode     Hobite					
Select. •     Primary Debtor •       Contact     Gender       Date of Birth     Email Address       Maling Address     Work STD       Hame STD     Home STD       Maling Address 1     Suburb       Work Number     Home Number       Maling Address 3     Postcode       Maling Address 3     Postcode       Maling Address 4     State	No debtors currently associa	ted with this debt.			
Contact     Gender     Date Of Birth     Email Address       Please Select *     Imail Address       Mailing Address 1     Suburb     Home STD       Mailing Address 2     State       Mailing Address 3     Pestcode       Mailing Address 3     Pestcode       Mailing Address 1     State       Mailing Address 3     Pestcode       Mailing Address 4     Imailing Address	No debtors currently associa Company/Surname	ted with this debt. Given Name	Title	Relationship	
Please Select •       Mailing Address       Suburb       Mailing Address 1       Suburb       Mailing Address 2       State       Mailing Address 3       Postcode       Hobile       Add Debter	No debtors currently associa Company/Surname	ited with this debt. Given Name	Title Select▼	Relationship Primary Debtor ▼	
Maling Address     Work STD     Home STD       Maling Address 1     Suburb	No debtors currently associa Company/Surname Contact	ted with this debt. Given Name Gender	Title Select ¥ Date Of Birth	Relationship Primary Debtor V Email Address	
Maling Address 1 Suburb Work Number Home Number Maling Address 2 State Maling Address 3 Postcode Maling Address 3 Postcode Maling Address 3 Postcode Maling Address 3 Postcode	No debtors currently associa Company/Surname Contact	tted with this debt. Given Name Gender Please Select ▼	Title Select V Date Of Birth	Relationship Primary Debtor V Email Address	
Mailing Address 3 Suburb Mailing Address 2 State Mailing Address 3 Postcode Mailing Address 4 Postcode Mailing Address 4 Postcode Mailing Address 4 Postcode Mailing Address 5 Postcode Mailing Address 5 Postcode Mailing Address 6 Postcode Mailing Address 6 Postcode Mailing Address 7 Postcode Mailing	No debtors currently associa Company/Surname Contact	ted with this debt. Given Name Gender Please Select ▼	Title Select T Date Of Birth	Relationship Primary Debtor V Email Address	
Mailing Address 2 State Mailing Address 3 Postcode Mailing Address 3 Postcode Add Debtor Cence	No debtors currently associa Company/Surname Contact Mailing Address Street Add	ted with this debt. Given Name Gender [Please Select •]	Title Select • Date Of Birth Work STD	Relationship Primary Debtor • Email Address Home STD	
Mailing Address 3 Postcode Mobile	No debtors currently associa Company/Surname Contact Mailing Address Street Add Mailing Address 1	ted with this debt. Given Name Gender Please Select V ress Suburb	Title Select* Date of Birth Work STD	Relationship Primary Debtor • Email Address Home STD	
Malling Address 3 Postcode Mobile	No debtors currently associa Company/Surname Contact Mailing Address Street Add Mailing Address 1 Mailing Address 2	diven Name Given Name Gender Please Select ▼ ress Suburb State	Title Select • Date of Birth Work STD	Relationship Primary Debtor  Email Address Home STD Home Number	
Ád Debtor Cance	No debtors currently associa Company/Surname Contact Mailing Address Street Add Mailing Address 1 Mailing Address 2	ted with this debt. Given Name Gender Please Select ▼ ress Suburb State	Title Select. • Date of Birth Work STD Work Number	Relationship Primary Debtor  Email Address Home STD Home Number	
Add Debtor	No debtors currently associa Company/Surname Contact Mailing Address Street Add Mailing Address 1 Mailing Address 2 Mailing Address 3	eted with this debt. Grven Name Gender Please Select ▼ ress Suburb State Postcode	Title Select. • Date Of Birth Work STD Work Number Mobile	Relationship Primary Debtor  Email Address Home STD Home Number	
[Add Debtor] [Cancel]	No debtors currently associa Company/Surname Contact Mailing Address 1 Mailing Address 1 Mailing Address 2 Mailing Address 3	eted with this debt. Given Name Gender Please Select  Fess Suburb State Postcode	Title Select• Date Of Birth Work STD Work Number Mobile	Relationship Primary Debtor  Email Address Home STD Home Number	
	No debtors currently associa Company/Surname Contact Mailing Address Street Add Mailing Address 1 Mailing Address 2 Mailing Address 3	ted with this debt. Given Name Gender Plesse Select ▼ ress Suburb State Postcode	Title Select V Date of Birth Work STD Work Number Mobile	Relationship Primary Debtor V Email Address Home STD Home Number	

The next screen is where you can add notes regarding the debt, and it also enables you to attach documents, for example copies of the invoices, proof of delivery documents and copies of correspondence with the debtor relating to the debt.

Once you have attached all the relevant documentation, click the **Next** button.

🕒 QRM Online - Add New 🗇 🗙 🗋 QRM Online - Add New 🖓 🗙 🛄	DESKTOP-NHIMID4 _ 🗗 🗙	• - • ×
$\leftrightarrow$ $\rightarrow$ C $$ Secure   https://kearleylewis.webstream.net.au/kearleylewisportal/(	S(cc4v5hqjqwz4y0g0mkv121el))/debtentry.aspx	☆ :
	Client Portal	Tuesday 20 March 2018 Log Out
Kearley Lewis		
YOUR DEBT RECOVERY EXPERTS		
CASES REPORTS INVOICES AND STATEMENTS	USER SETTINGS	
SEARCH VIEW NEW		
•		
Create A New Case		
Previous Next		
Notes and Attachments		
Notation		
Choose Files No file chosen	Attach	
		*
🛨 🔿 Type here to search 🛛 📮 🔁 😑		(?) 유 ^ 七 문 네) ENG 11:08 AM US 20/03/2018

The next screen is the final screen where you select whether you wish to generate a **Final Notice Letter** or request a **Solicitors Letter** be sent by us.

#### See the last page of this User Guide for a summary of the two letters. The Final Notice letter is an optional step 1, the Solicitors letter is step 2

Once you have made your selection, click the **Next** button and a summary of what you have input will display. Click **Finish** to complete your request.

If you have requested a **Final Notice letter**, the letter will be saved to the debt you have created, and you can access the letter to send to the debtor by going into the individual debt (via the 'Cases' and then 'Search' tab).

We are currently working on this letter being emailed to you directly, so you don't have to search for it once you have generated it.

We'll contact you a week after this letter has been raised to see if you require our assistance in recovering the debt.

If you selected a Solicitor's letter then we will issue a Solicitor's letter upon receiving your request. You will be able to view the letter in our portal, by going to the 'Cases' and then 'Search' tab.



## 2. <u>Reports</u>

You can run reports from this section, the dropdown menu will show the reports that are available.

When you request a report you can select if you wish to view the report, be emailed the report or if you wish to export the report to excel. Press '**Run Report**' once your selection has been made. You will need to unblock pop ups in order for the report to be run.

### 3. Invoices & Statements

This section is not in use.

# What is a Final Notice Letter?

#### When should you use this letter?

As a member of Kearley Lewis, you can generate as many of these letters as you require through the year. This letter gives your clients 7 days to pay their outstanding debt, and the letter is printed on Kearley Lewis letterhead.

You create, printout and send this letter to your clients.

You may wish to send this letter before you instruct us to send a Solicitor's letter, as it gives your client one last chance to pay before you instruct us to act on your behalf. You can only generate one of these letters per outstanding debt, unless the amount due has changed.

Once you generate this letter, we will contact you 7 days later to see if your client has paid, or whether you would like us to generate a Solicitor's letter and undertake collections on your behalf from there.

When you submit a final notice letter online, you are required to forward this letter onto your debtor by either post, fax or email. It is a good idea to add the Kearley Lewis website to your favourites for quick access.

### What is a **Solicitor's Letter**?

When should you use this letter?

If you request