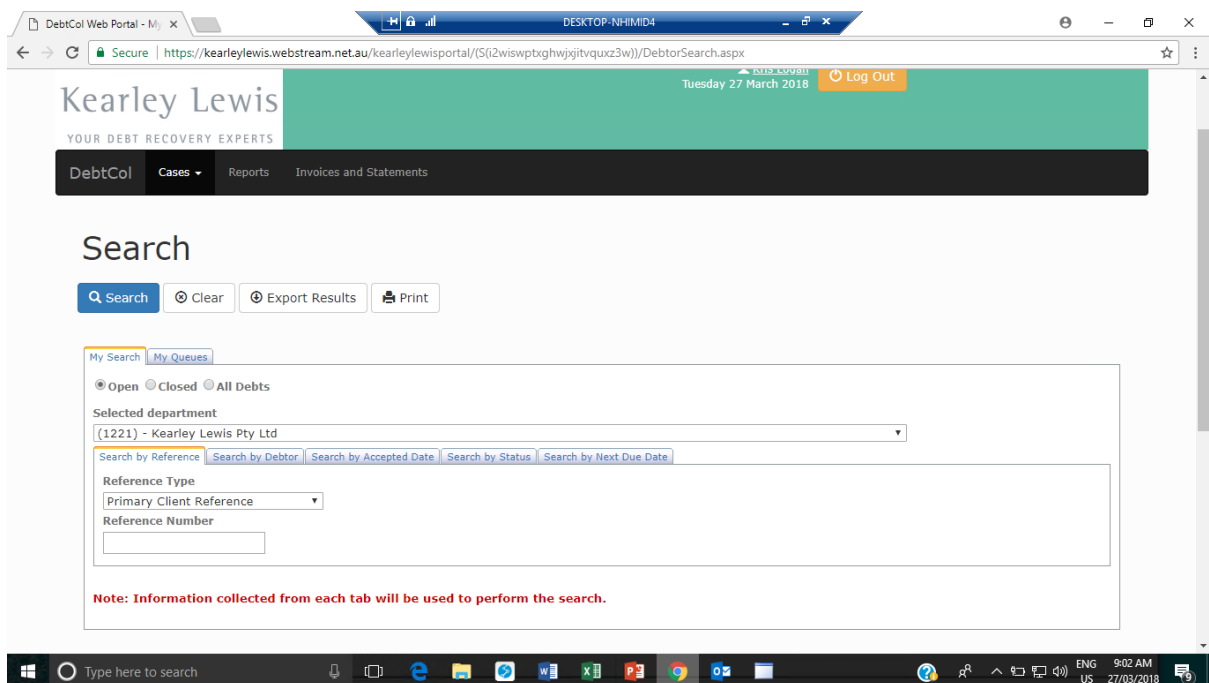


Instructions to access Kearley Lewis Client Portal

1. Go to www.kearleylewis.com.au/
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:



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. Cases

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.

View

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

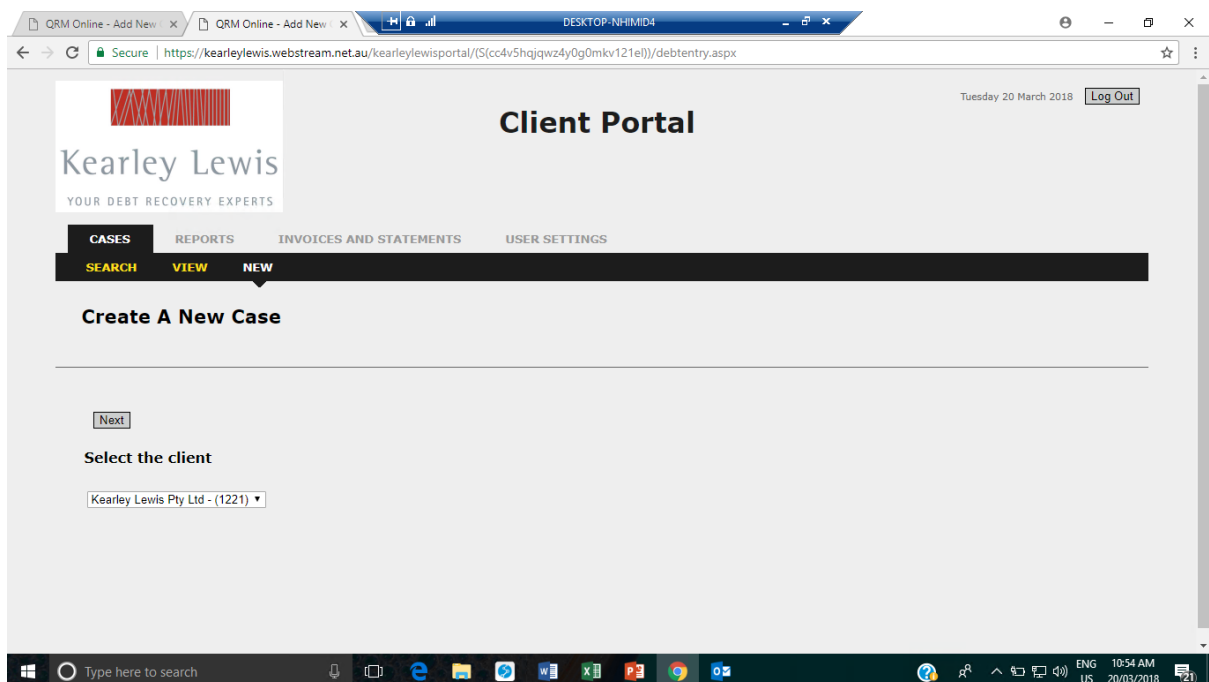
This section is where you enter new debts, you can select one of two options:

- 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.



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 screenshot shows a web browser window with the URL [https://kearleylewis.webstream.net.au/kearleylewisportal/\(S\(cc4v5hqjqwz4y0g0mkv121e1\)\)/debtentry.aspx](https://kearleylewis.webstream.net.au/kearleylewisportal/(S(cc4v5hqjqwz4y0g0mkv121e1))/debtentry.aspx). The page title is "Kearley Lewis YOUR DEBT RECOVERY EXPERTS". The navigation menu includes "CASES", "REPORTS", "INVOICES AND STATEMENTS", and "USER SETTINGS". The "CASES" menu is expanded to show "SEARCH", "VIEW", and "NEW". The main heading is "Create A New Case". Below the heading are "Previous" and "Next" buttons. The "General Information" section contains the following fields:

- Your Primary Reference:
- Your Secondary Reference:
- Start Date Of Debt: (with a calendar icon)
- End Date Of Debt: (with a calendar icon)
- Collection Commencement Date: (with a calendar icon)
- Debt Description:

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

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

The screenshot shows the same web browser window as the previous one, but the "Case Amounts" section is now visible. It includes "Previous" and "Next" buttons. The "Case Amounts" section contains a table:

Debt Type	Debt Amount (\$)
DEBT	\$10,851.32
Total	\$10851.32

The top right of the page shows "Tuesday 20 March 2018" and a "Log Out" button. The navigation menu is the same as in the previous screenshot.

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**.

The screenshot shows a web browser window with the URL [https://kearleylewis.webstream.net.au/kearleylewisportal/\(S\(cc4v5hqjqwz4y0g0mkv121e1\)\)/debtentry.aspx](https://kearleylewis.webstream.net.au/kearleylewisportal/(S(cc4v5hqjqwz4y0g0mkv121e1))/debtentry.aspx). The page title is "YOUR DEBT RECOVERY EXPERTS". The navigation menu includes "CASES", "REPORTS", "INVOICES AND STATEMENTS", and "USER SETTINGS". Below the menu are "SEARCH", "VIEW", and "NEW" buttons. The main heading is "Create A New Case". There are "Previous" and "Next" buttons. The "Debtor Information" section has a red message: "No debtors currently associated with this debt." The form fields are: Company/Surname, Given Name, Title (dropdown), Relationship (dropdown), Contact, Gender (dropdown), Date Of Birth, Email Address, Mailing Address 1, Suburb, Mailing Address 2, State, Mailing Address 3, Postcode, Work STD, Home STD, Work Number, Home Number, and Mobile. At the bottom are "Add Debtor" and "Cancel" buttons.

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.

The screenshot shows the same web browser window as the previous one, but the page content has changed. The heading is "Client Portal". The navigation menu and "Create A New Case" heading are still present. The "Notes and Attachments" section has a "Previous" and "Next" button, a "Notation" text area, and a file upload area with "Choose Files", "No file chosen", and "Attach" buttons. The date "Tuesday 20 March 2018" and a "Log Out" button are visible in the top right corner.

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

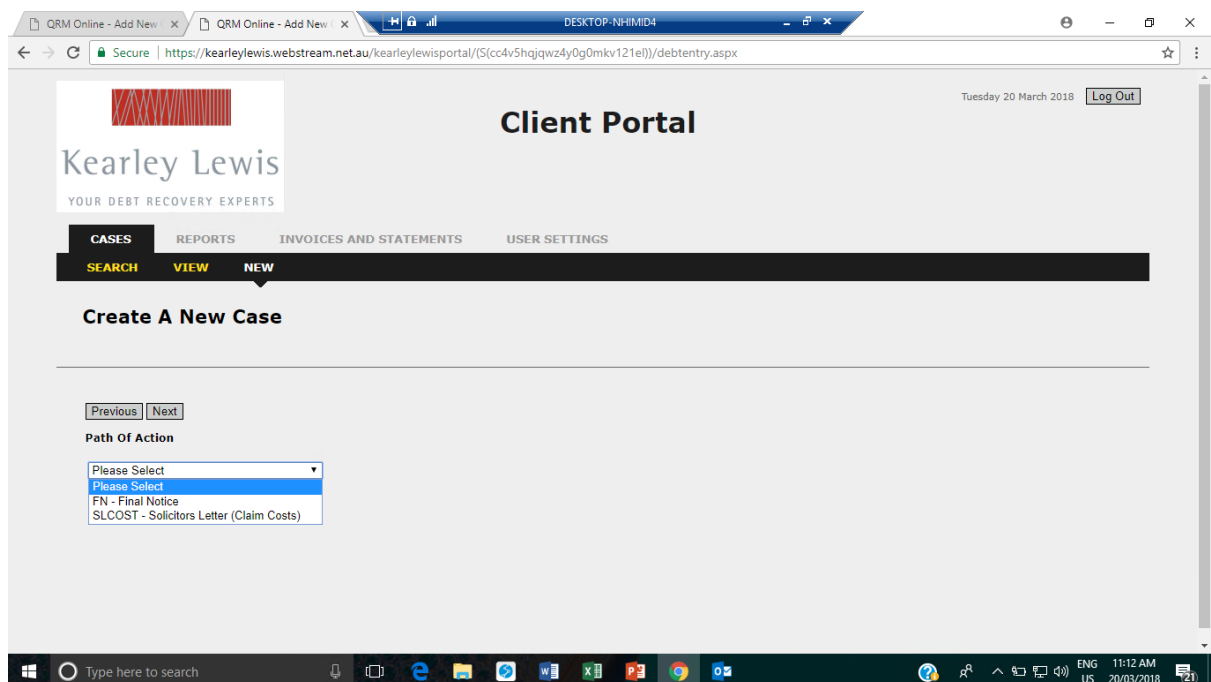
Once you have made your selection, click the **Next** button and a summary of what you have input will display. Click **Finish** to complete your request.

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. Reports

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