

**WEBSITE APPLICATION ACCESS  
& USER INSTRUCTION MANUAL**

**MARSHALLS**

Solicitors

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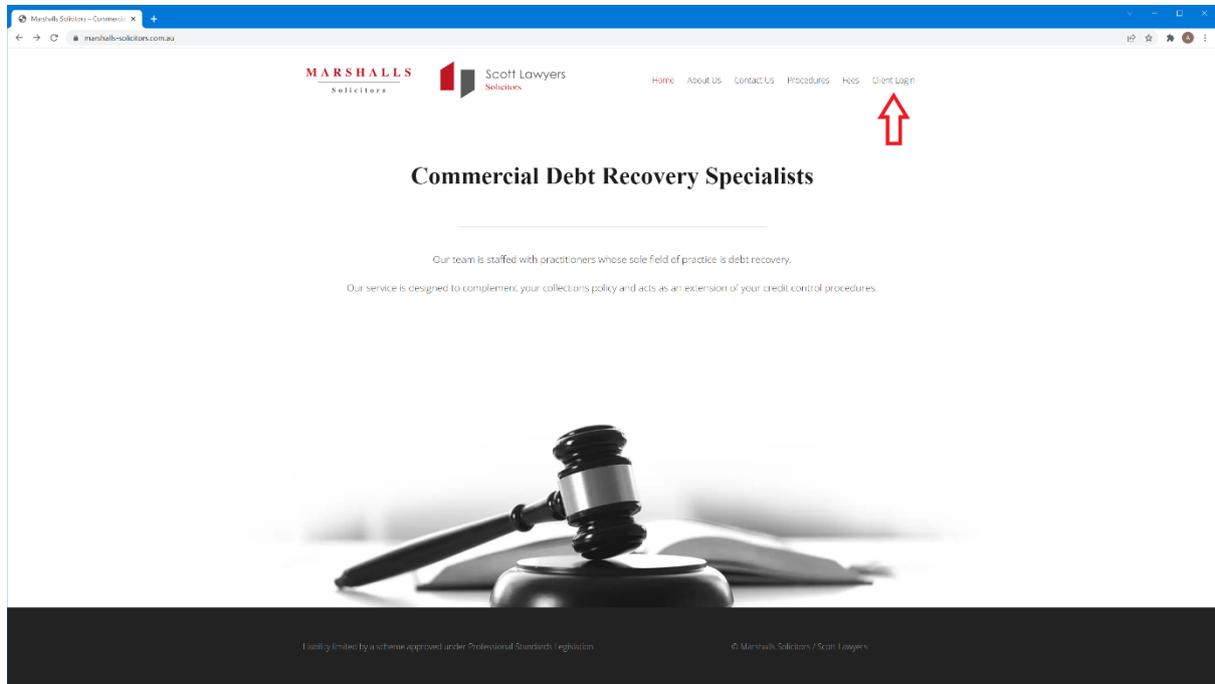
Email : [mail@marshalls-solicitors.com.au](mailto:mail@marshalls-solicitors.com.au)  
Website : <http://www.marshalls-solicitors.com.au>

## ACCESSING THE WEBSITE

From your internet browser, enter:

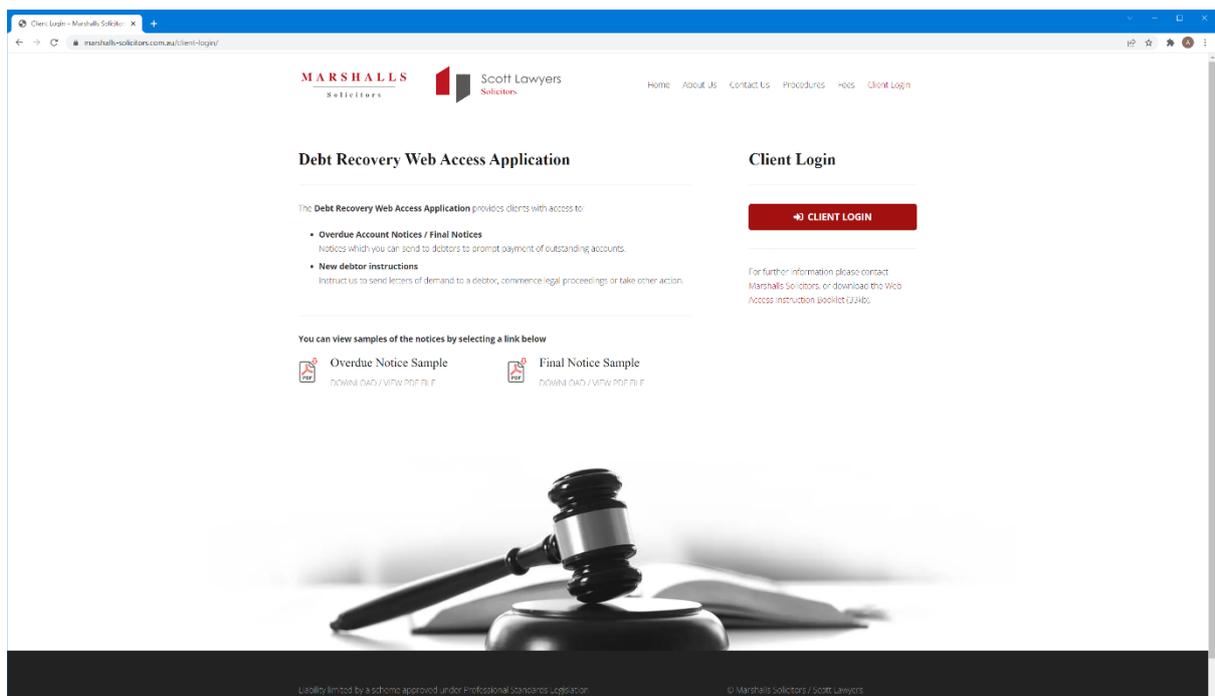
[marshalls-solicitors.com.au](http://marshalls-solicitors.com.au)

That will take you to the site's home page:



Click on the Client Login button (indicated by the red arrow).

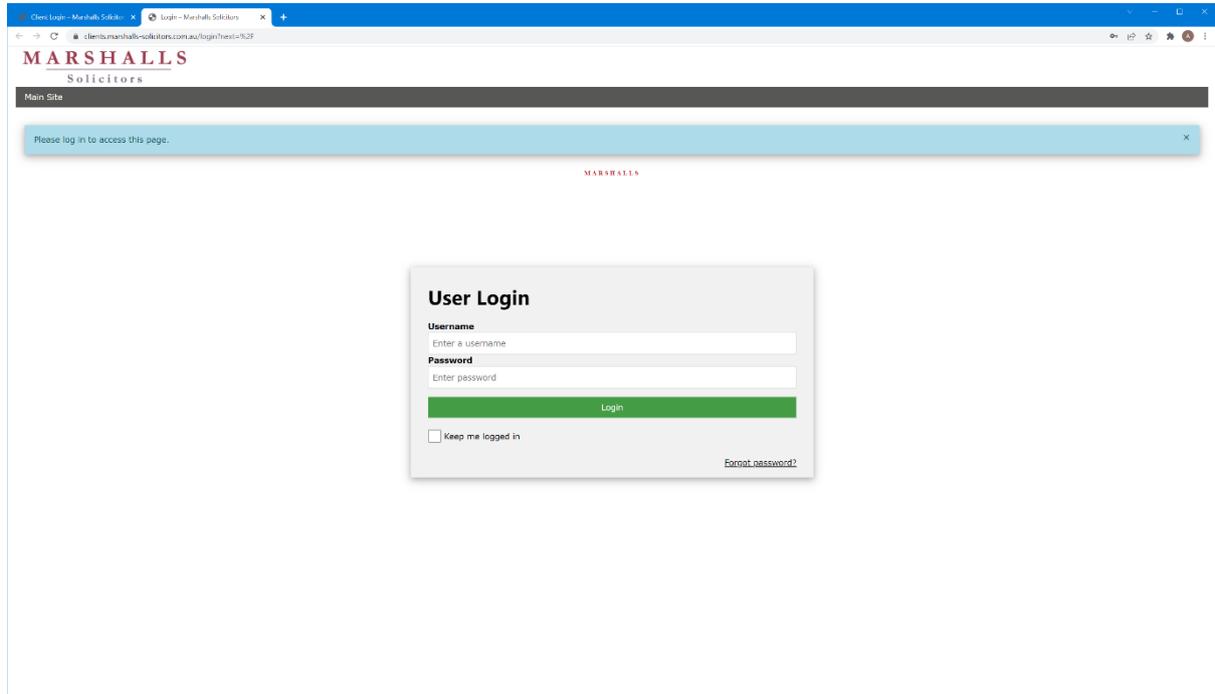
That will take you to the Client Login page:



Click on the red Client Login button to proceed to User Login.

## USER LOGIN

The next screen will be the following:



If you have already been assigned your username and password, simply enter those in the appropriate boxes to proceed. If you have not had these assigned already, then you will need to telephone us to have these assigned. Assigning your username and your initial password can only be done by us.

Usernames will generally be your actual name separated by an underscore. For example, Fred Bloggs' username would be:

Fred Bloggs

Passwords (which are case sensitive) must contain 4 alpha characters (with one uppercase character) plus 4 numbers plus one special character (~!@#\$%^&\*()-\_+={}[]|\;:"<>.,/?). Passwords will not be sent by email.

Once you have access to the website, you can re-set your password to whatever you choose but you should include at least one of the above special characters. You cannot change your username.

Once you have correctly entered your username and password, you will be taken to the Client List.

The site will remember your username and password.

If you wish to change your password from the one originally assigned to you by us when you first register, simply click on the "Change Password" tab at the first screen you access and from there you are taken to a form which requires you to enter your current password and the new password you wish to use. Once you click on the button "Update Password" your new password is in effect.

If you operate on one account, that client only will appear in the Client List. Simply click on that client to move to the next page.

If you operate more than one set of accounts, you will be presented with the client accounts that you have been assigned access to. For example, if in the user registration process you nominate two entities that you look after which you will be presented with a Client List showing those clients.

An example of the Client List is below (Simply click on the client you wish to access, if you have access to more than one client):

Client No.	Client Name	Address Line 1	Address Line 2	Address Line 3	Contact	Web Access Expiry	Web Access Count	Last Web Access	Notices Allowed	Instructions Allowed	Notice Count	Instruction Count
8888	XYZ CREDITOR P/L	GPO Box 55555555	ADELAIDE 5001		John Smith	31/12/2022	646	29/01/2022 19:32	True	True	49	23
8888B	ABC CREDITOR P/L	GPO Box 55555555	ADELAIDE 5001		John Smith	31/12/2022	646	29/01/2022 19:32	True	True	51	26
8888C	DEF CREDITOR P/L	GPO Box 55555555	ADELAIDE 5001		John Smith	31/12/2022	646	29/01/2022 19:32	True	True	46	23

## **NAVIGATING THE VARIOUS LISTS**

### **SEARCHING**

In all lists users can search for records by typing into the search box some text and all entries in the list which contain that text will be displayed. This includes any matching information from any of the columns of information displayed

For example, if you enter PET in the search box then all entries that have those characters in any of the fields displayed in the list will be displayed.

Another example would be if you are searching for a debtor in the Debtor List by your reference or account number. You can enter that account number and any matching or similar entry will be displayed.

### **SHOWING MORE OR LESS ENTRIES**

The default number of entries showing in all lists is 10.

If you wish, you can increase the number of entries displayed (up to 100 per list) by selecting the desired number from the "Show entries" box on the right-hand side of the list screens (just above the column headings).

### **CHANGING THE SORT ORDER**

The three (3) lists available to clients by default each sort into the following order:

- The Debtor List sorts from the newest debtor to the oldest debtor (by our debtor number)
- The Notice List sorts from the most recent notice created to the oldest.
- The Instruction List sorts from the most recent instruction created to the oldest.

Users can temporarily change the sort order by clicking on the column heading above the column that they wish to sort on. For example, in the Notice List if you click on the column heading "Notice created" the sort order is changed from newest to oldest and becomes oldest to newest. The sort order will revert to the default sort order when you exit that list.

Clicking on any column heading changes the sort order based on that column's information.

## DEBTOR LIST

The page starts with a list of all debtor actions that we are taking or have been taken on your behalf:

Client No: 8888 Client Name: XYZ CREDITOR P/L

Search: [ ] Show 10 entries

Showing 1 to 7 of 7 entries

Debtor No	Debtor Name	Search Code	Client Reference	File Opened	Original Debt	Status	Email	Debtor Phone (H)	Debtor Phone (M)	Debtor Mobile	ACN
41518	TEST02	TEST02		15/03/2008	\$800.00	Closed					
70803	TEST DEBTOR 1	TESTDEBT1		22/09/2011	\$9,999,999.99	Closed	ama18100@bigpond.net.au				
88888	JOE BLOODES BUTTERPRISES	JOE	12343	01/12/2008	\$10,000.00	Closed		(08) 8888 8888			
88889	MARK, P	MARK	12344	01/11/2008	\$1,800.00	Closed	markoffhandy@p.net.au	(08) 8222 2222			
88890	PETERS, A J & M R	PETERS	12345	01/10/2008	\$17,000.00	Closed					
88891	BERNIE WILLIAMS P/L	BERNIE	14567	01/12/2008	\$800.00	Closed	berniawilliams@p.com.au	(08) 8123 4567			999 999 000
88892	BOY BLUE SADDLERY P/L	BOY	16789	01/12/2008	\$1,000.00	Closed	boy@blueadd@p.com.au	(08) 8555 5555			901 901 901

Previous 1 Next

MARSHALLS

To search for a particular debtor, simply insert a few characters into the search box and you will be taken to the nearest match. Clicking on that debtor brings up various pages of information regarding the debtor and action taken or to be taken by us.

Once you have selected the debtor that you wish to look at, clicking on it will bring up the the following screen and the first of 5 tabs of information:

## INFORMATION TAB

The first tab or page accessed once you select a particular debtor is the Information tab. For example:

The screenshot shows the Marshalls Solicitors web application interface. At the top, there are navigation tabs: 'Debtor List', 'Notice List', 'Instruction List', and 'Linked User List'. Below these, the client and debtor information is displayed: Client No: 8888, Client Name: XYZ CREDITOR P/L, Debtor No: 88888, Debtor Name: JOE BLOGGS ENTERPRISES, and Client Ref: 12343. A secondary navigation menu includes 'Information', 'To Do List', 'Court Diary', 'Transactions', and 'Contacts'. The 'Information' tab is active, showing a form with the following fields:

- File Opened:** 01/11/2021
- Original Debt:** 10000.00
- Debt Type:** A/W
- Date debt incurred:** June 2020
- Debt Detail:** Invoice No 19999
- Status:** Open
- Applicable Office:** South Australia
- Commission Rate:** 0.00
- ACN:** [Empty field]
- E-mail:** [Empty field]
- Operator:** Alex Marshall
- Debtor Phone (H):** (88) 8888 8888
- Debtor Phone (W):** [Empty field]
- Debtor Mobile:** [Empty field]
- Debtor Fax:** (88) 8888 9999

This is some of the information that you provided to us when you instructed us.

The various information boxes contain the following:

Field	Contains
<b>File opened</b>	The date our file was first opened.
<b>Original debt</b>	The amount of the debt that you first instructed us to collect.
<b>Debt Type</b>	The type of debt that you selected when you instructed us. The choices are: GSD – Goods sold & delivered WL – Work done WLDMS – Work & labour done & materials supplied PS – Professional services rendered A/W – Agreement in writing GH – Goods hired O – Other  These choices are explained in more detail in Appendix B.
<b>Date debt incurred</b>	The date your debt was incurred or the dates between which it was incurred
<b>Debt details</b>	If supplied, the Invoice No/s or similar.
<b>Status</b>	The current file status, signified by the following: Open – File open and active. Arrangement – debtor paying by instalments Hold – further action on hold as per your instructions Defended – action defended (defence filed) Interstate – Interstate agents instructed Closed – file closed

Field	Contains
Legal	If ticked this means that legal proceedings have been issued. If unticked, they have not.
Applicable Office	As we no longer operate offices interstate ourselves, this field will always be South Australia.
Commission Rate	When we operated offices outside South Australia ourselves, in some jurisdictions this applied. This field has only been retained for backward compatibility with our old interstate debtor data and does not apply with South Australian based actions.
ACN	The debtor's ACN (if applicable)
Email	The debtor's primary email address (if known)
Operator	The person from our firm who primarily looks after this matter.
Debtor Phone (H)	The debtor's home telephone number (if known)
Debtor Phone (W)	The debtor's work telephone number (if known)
Debtor Mobile	The debtor's mobile telephone number (if known)
Debtor Fax	The debtor's fax number (if known)

## TO DO LIST

This page displays our diary or to-do-list relating to the debtor action.

This enables clients to see at a glance what steps have been taken to date and remain to be taken. Importantly, clients are able to view what the next step in the action is and when it is scheduled to occur.

The screenshot shows the 'To Do List' interface for a debtor action. The client is XYZ CREDITOR P/L (Client No: 8888) and the debtor is JOE BLOGGS ENTERPRISES (Debtor No: 88888, Client Ref: 12343). The interface includes a search bar and a table of tasks.

Date	Next Step	By	Complete	By
14/11/2021	Contact Client (LD)	AM	14/11/2021	AM
01/12/2021	Contact Client (MCC)	AM		

The first column displays the date upon which any action is to be or has been taken.

The second column displays the next step to be taken.

The third column displays the initials of the person who has been assigned the relevant task.

The fourth column sets out the date upon which the task was completed. If this date is blank the task is yet to be undertaken.

The final column specifies the initials of the person who completed the task (if applicable).

## COURT DIARY

If there are any matters heard or to be heard in Court, then these are listed on this page.

Hearing dates for recovery processes (for example, Investigation and/or Examination Summonses) will not appear here. For these you should refer to the Debtor Transactions page.

## TRANSACTIONS

This page displays a brief summary of action taken on the file.

The screenshot shows the Marshalls Solicitors web application interface. The main content area displays the 'Transactions' tab for a debtor. The client information is XYZ CREDITOR P/L (Client No: 8888) and the debtor is JOE BLOGGS ENTERPRISES (Debtor No: 88888, Client Ref: 12343). The transactions table lists five entries:

Date	Step	Task	Issued	Served	Hearing	Disb	C	Legal	C	Comm	Payments	Interest	Balance	Billed
01/11/2021	OBAL	Original amount of debt (opening balance)					N		N	None			\$10,000.00	Y
01/11/2021	L001	Letter of Demand (final notice)					N	\$50.00	N	None			\$10,000.00	Y
14/11/2021	BVS	Business Name Search				\$30.00	Y		Y	None			\$10,000.00	Y
14/11/2021	MCC	Magistrate's Court claim	14/11/2021	14/11/2021		\$149.00	Y	\$440.00	Y	None			\$10,629.00	Y
01/12/2021	PRD	Payment in Full (direct to client)					N		N	5.0	\$10,629.00			Y

Summary table at the bottom of the transactions list:

	Disb	Legal	Commission	Payments	Interest
Billed	\$179.00	\$490.00			
Unbilled					
Total	\$179.00	\$490.00		\$10,629.00	

What is shown in each column is set out in the following table:

<b>Column</b>	<b>Information</b>
<b>Date</b>	Date upon which any step was taken
<b>Step</b>	Step taken.
<b>Task</b>	Fuller explanation of the step code.
<b>Issued</b>	If a legal process is involved, the date the process is actually issued by the Court is shown here
<b>Served</b>	If a legal process is involved & that process needs to be served upon the debtor, the date the process was served is shown here. If more than one debtor is involved in the action & each debtor is served upon a different date, the date shown here is the date the last debtor was served
<b>Hearing</b>	If a legal process is involved & the action is not defended, any hearing date is displayed here.
<b>Disb</b>	Any disbursements or out-of-pocket expenses expended on any particular step are shown here
<b>C</b>	Specifies whether or not the disbursement or out-of-pocket expense is claimable from the debtor
<b>Legal</b>	Any legal fee applicable to the particular step
<b>C</b>	States whether or not the particular legal fee is claimable from the debtor
<b>Comm</b>	Commission payable – not applicable in South Australia
<b>Payments</b>	If the particular step or transaction is a payment, the amount of that payment is shown here
<b>Interest</b>	If any interest is added by any step (usually a recovery or enforcement process) that amount is shown here
<b>Balance</b>	Balance due
<b>Billed</b>	Specifies whether or not the particular step/transaction has been billed

Below the transaction table are some summaries of the monetary information shown on the table.

It should be noted that the information in relation to fees and/or the balance owing will not be final where the action is defended or where a winding up application or bankruptcy proceedings have been issued. In these instances, you should contact us for the full and complete information regarding billed and/or unbilled fees or the balance owing.

## CONTACTS

This page shows a longer version of events which have taken place with respect to the particular debtor. We include in this information relating to incoming and outgoing letters and telephone calls, as well as Court documents prepared and received.

The screenshot shows the 'Contacts' page in the Marshalls Solicitors system. At the top, there are navigation tabs for 'Debtor List', 'Notice List', 'Instruction List', and 'Linked User List'. Below these, client information is displayed: 'Client No: 8888', 'Client Name: XYZ CREDITOR P/L', 'Debtor No: 88888', 'Debtor Name: JOE BLOGGS ENTERPRISES', and 'Client Ref: 12343'. A secondary navigation bar includes 'Information', 'To Do List', 'Court Diary', 'Transactions', and 'Contacts'. A search bar is present with a 'Show 10 entries' dropdown. The main content is a table with the following data:

Date	By	Summary	Details
01/11/2021	AM	TAKING INSTRUCTIONS	
01/11/2021	AM	LT TO D (LD01)	
20/01/2021	AM	TAO JS OF C	NR to LD. Proceed to MCC.
20/01/2021	AM	BUSINESS NAME SEARCH	
21/01/2022	AM	MAGISTRATES COURT CLAIM	
23/01/2022	AM	LT TO C & A/C	Reporting on issue & service of MCC
31/01/2022	AM	TAI JS OF C	They have rec PP plus all claimable costs from D. We can close file.
31/01/2022	DEB	CLOSING FILE	

The information shown in each column is as follows:

Column	Information
<b>Date</b>	Date upon which any contact made/received
<b>By</b>	Initials of person (where applicable) who sent letter or who engaged in telephone call
<b>Summary</b>	Brief description of the actual contact.
<b>Details</b>	<p>Details of the actual attendance. With letters, there will usually be a brief precis of the incoming or outgoing correspondence. With telephone calls, there will be a brief precis of the call.</p> <p>We are currently experimenting with amendments to the website program which will link .pdf versions of incoming and outgoing letters and documents plus links to the actual versions of incoming and outgoing emails.</p>

## NOTICES

This section enables clients to send notices to delinquent accounts, with those notices acting as either a payment prompt (the Overdue Account Notice) or as a formal demand for payment (the Final Notice).

### NOTICE LIST

Clicking on the Notice List tab, takes you to a list of all Final and Overdue Account Notices that you have created to date. These are sorted from the most recent notice created onwards. You can change that to the oldest notice created by clicking on the “Notice Created” column heading. You can also do the same with each column heading.

You can search for a notice already sent by entering a few characters in the search box, which will take you to the nearest match or nearest matches.

Clicking on any one of these enables you to view, edit, re-save the information already entered and re-send the notice (if you wish). In the bottom right-hand corner of the form, counters indicate the following:

Revision – the number of times you have edited the information in the form and re-saved

Display – the number of times you have displayed a .pdf version of the notice

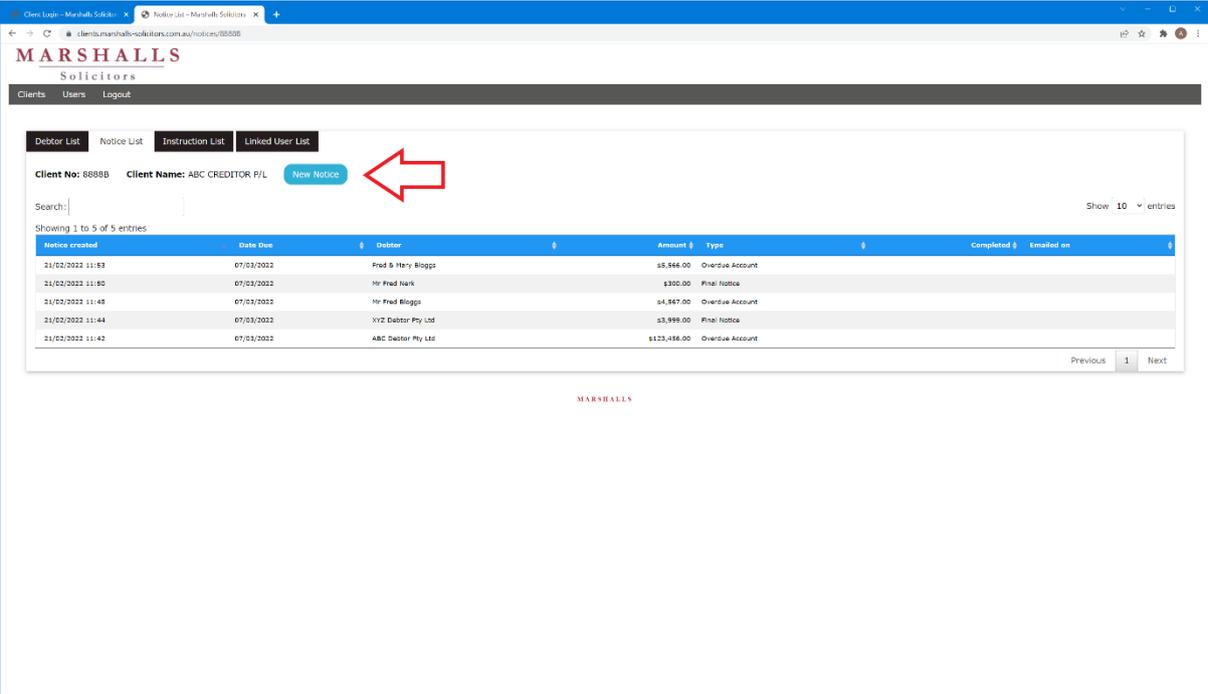
Email – the number of times you have emailed the notice to the debtor

Notice last emailed – date notice last emailed to debtor

### CREATING A NEW FINAL AND/OR OVERDUE ACCOUNT NOTICE

Accessing this page enables you to create and send Final and/or Overdue Account Notices. Examples of these notices are available for viewing at the initial Client Login page.

Simply click on the “New Notice” button (indicated by the red arrow below):



The screenshot shows the MARSHALLS Solicitors web application interface. At the top, there are navigation tabs: Debtor List, Notice List, Instruction List, and Linked User List. Below the tabs, the client information is displayed: Client No: 8888B, Client Name: ABC CREDITOR P/L. A red arrow points to a blue 'New Notice' button. Below this is a search box and a table of notices. The table has columns for Notice created, Date Due, Debtor, Amount, Type, Completed, and Emailed on. The table shows 5 entries. At the bottom right of the table, there are 'Previous', '1', and 'Next' navigation buttons.

Notice created	Date Due	Debtor	Amount	Type	Completed	Emailed on
21/02/2022 11:53	07/03/2022	Fred & Mary Bloggs	\$5,866.00	Overdue Account		
21/02/2022 11:50	07/03/2022	Mr Fred Nark	\$300.00	Final Notice		
21/02/2022 11:48	07/03/2022	Mr Fred Bloggs	\$4,547.00	Overdue Account		
21/02/2022 11:44	07/03/2022	XYZ Debtor Pty Ltd	\$3,999.00	Final Notice		
21/02/2022 11:42	07/03/2022	ABC Debtor Pty Ltd	\$123,456.00	Overdue Account		

That will take you to the screen, where you will need to enter the information required for the notice. Most of the text boxes where information is to be inserted are self-explanatory. An explanation of what information is to be inserted into each field is contained in Appendix A. As always, if you are not sure then feel free to contact us.

Once you click on the “New Notice” button, you will be presented with a screen where you can enter the information required to create the notice.

Client No: 8888B Client Name: ABC CREDITOR P/L [Save](#)

Client reference

Client contact phone to print on notice

Debtor Name

Debtor ABN

Debtor Address Line 1

Debtor Address Line 2

Debtor Address Line 3

Debtor Email

CC Email To

Debt amount \$

When was debt incurred

Date to be paid by  
01/06/2022

Type of Notice  
Overdue Account Notice

Result  
---

- Revision: None
- Display count: None
- Email count: None
- Notice Last Emailed:

Below is an example of the information to be inserted to create a new notice:

Client No: 8888B Client Name: ABC CREDITOR P/L [Save](#) [Display Notice](#) [Email Notice](#) [Refer to Marshalls](#)

Client reference  
SSZ7788

Client contact phone to print on notice  
08 8888 8888

Debtor Name  
AXIS PLASTERBOARD LININGS

Debtor ABN

Debtor Address Line 1  
12000 King William Street

Debtor Address Line 2  
Kenwood Town SA 5999

Debtor Address Line 3

Debtor Email  
bloggsfamily@gmail.com

CC Email To

Debt amount \$  
5566.00

When was debt incurred  
Up to 31 January 2022

Date to be paid by  
07/03/2022

Type of Notice  
Overdue Account Notice

Result  
---

- Revision: 0
- Display count: 0
- Email count: 0
- Notice Last Emailed:

Once you have finished inserting the information, press the green “Save” button.

Once the record has been saved, you will be presented with three further options namely “Display Notice”, “Email Notice” and “Refer to Marshalls”.

If you click on “Display Notice”, you will be displayed with a .pdf version of whatever notice you have created (if you wish to check anything on the form). If you are satisfied that you have entered all information correctly, then what you do from here depends on how you are going to send the notice.

If you intend to mail the notice, then simply print the notice once you have displayed it using the Adobe Acrobat print options.

If you want to email the notice and have an email address for the debtor which you entered when creating the notice, you have three options:

- Firstly, you can print the notice to a printer then scan it and attach it to your own email.
- Secondly, you can use the print options to save the form as a .pdf and attach that to your own email.
- Thirdly, you can have the website email the notice to your debtor by simply clicking on the light blue “Email Notice” button that appears once you have saved the notice. Shortly we will be having the system send a copy of the forwarding email to your nominated email address.

If you email the notice, through the website the date the notice was emailed is inserted into the appropriate field which displays in the Notice List.

The “Result” field is entered when you access the Notice in the list, selecting from the drop-down list what the result of the notice was (for example, “Paid in full”).

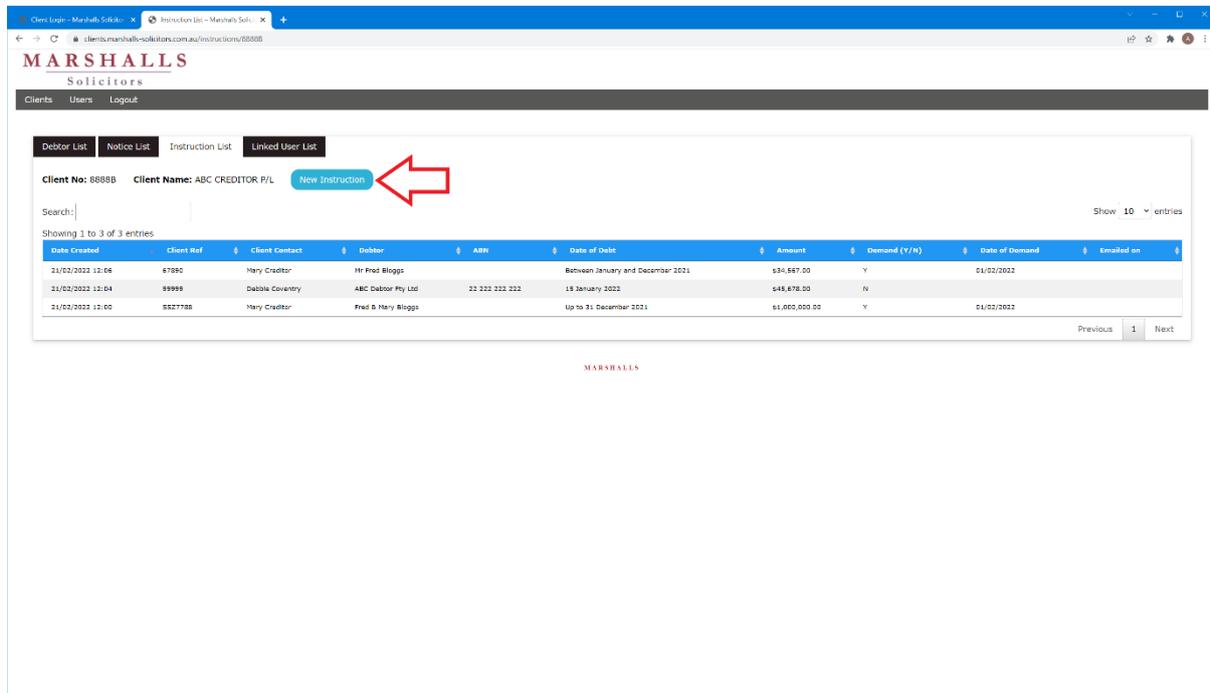
The button “Refer to Marshalls” will be used later if your debtor does not satisfactorily respond to the notice and you then wish to instruct us to pursue the matter further on your behalf. If/when you click on that button you will be taken to a new Instruction form which will be part-populated with information that you already entered when creating the notice, with some additional information to be added. The “Result” field will be entered automatically with the information “Referred to Marshalls” and the date of referral will be added also.

# INSTRUCTIONS

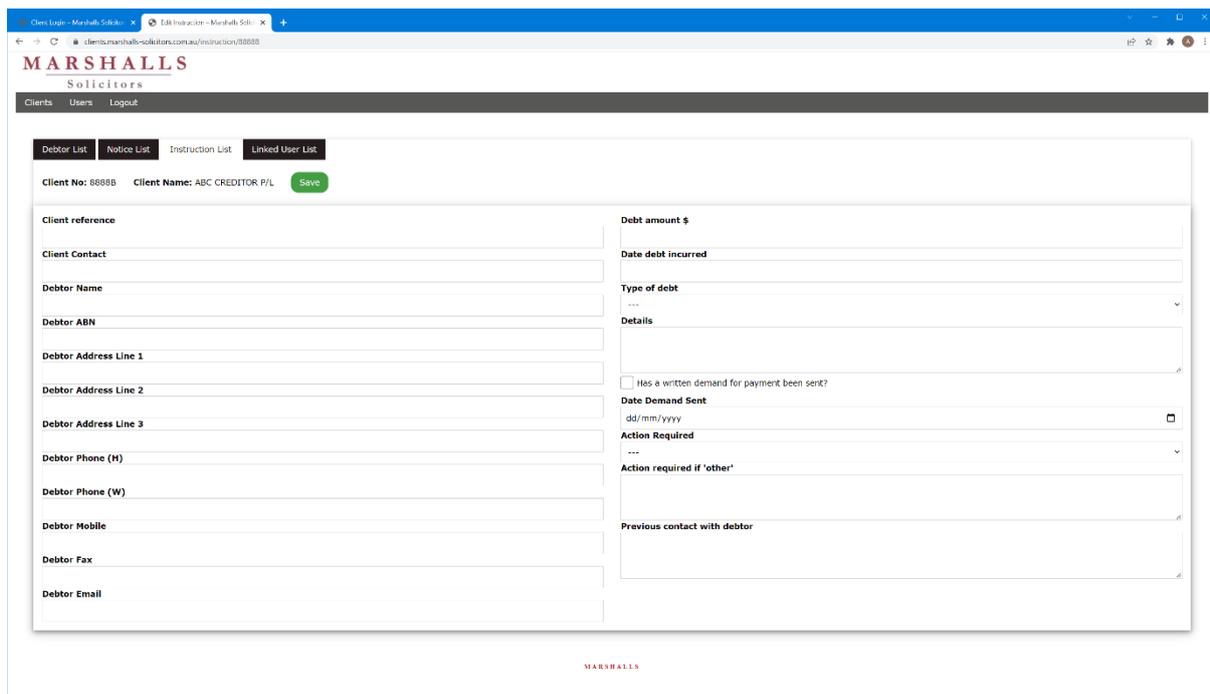
This section enables clients to send us instructions to take action on a debtor.

## INSTRUCTION LIST

Clicking on the Instruction List tab, takes you to a list of all matters that you have previously instructed us on.



To create a new instruction, click on the “New Instruction” button indicated by the red arrow). You will then be presented with the following data entry screen.



Enter the information to create the instruction to us. Most of the text boxes where information is to be inserted are self-explanatory. An explanation of what information is to be inserted into each field is contained in Appendix b. If you are not sure or need further explanation then feel free to contact us.

Below is an example of the information to be inserted:

The screenshot shows a web browser window with the URL [clients.marshalls-solicitors.com.au/instruction/88888/5835](https://clients.marshalls-solicitors.com.au/instruction/88888/5835). The page has a navigation bar with tabs: Debtor List, Notice List, Instruction List (selected), and Linked User List. Below the navigation bar, the client information is displayed: Client No: 88888, Client Name: ABC CREDITOR P/L. There are two buttons: 'Save & Send Instruction' (green) and 'Display Instruction' (blue). The form is divided into two columns. The left column contains fields for Client reference (99999), Client Contact (Debbie Coventry), Debtor Name (ABC Debtor Pty Ltd), Debtor ABN (22 222 222 222), Debtor Address Line 1 (12345 West Street), Debtor Address Line 2 (St Marks SA 5000), Debtor Address Line 3, Debtor Phone (H), Debtor Phone (W), Debtor Mobile (9999 999 999), Debtor Fax, Debtor Email (accounts@abcdebtor.com.au), and CC Email to. The right column contains fields for Debt amount \$ (45678.00), Date debt incurred (15 January 2022), Type of debt (Professional services rendered), Details, a checkbox for 'Has a written demand for payment been sent?' (checked), Date Demand Sent (dd/mm/yyyy), Action Required (Letter of Demand), Action required if 'other', and Previous contact with debtor. At the bottom right, there is a summary of statistics: Revision: None, Display count: 0, Email count: 0, and Instruction Last Emailed:.

Once you have finished entering the information, you can either “Display” a .pdf version of the Instruction Sheet for checking or email it to us for action (by pressing the “Save & Send Instruction” button. Prior to emailing it you can also amend any information that have inserted and save that.

## APPENDIX A – INFORMATION TO INSERT WHEN CREATING A NEW NOTICE

Field	Text
<b>Client reference</b>	If you have a specific reference for this debtor, insert that here.
<b>Client contact phone</b>	If the person generating the notice has a direct phone number insert that here. If this field is left blank, it will default to the client's primary telephone number.
<b>Debtor Name</b>	Insert the debtor's name.
<b>Debtor ABN</b>	Insert the debtor's ABN (if known).
<b>Debtor Address Line 1</b>	Insert the first line of the debtor's actual or postal address.
<b>Debtor Address Line 2</b>	Insert the second line of the debtor's actual or postal address.
<b>Debtor Address Line 3</b>	Insert the third line of the debtor's actual or postal address - if applicable).
<b>Debtor Email</b>	If you wish to email the notice to the debtor using the website email function, insert that email address here. Insert only one email address.
<b>CC Email to</b>	If you want to have the notice emailed to a secondary email address, insert that email address here.
<b>Debt amount \$</b>	Insert here the amount to be claimed – numbers only.
<b>Date debt incurred</b>	Insert here the date the debt was incurred. If the debt relates to only one invoice or account, insert the date of that invoice or account. If the debt relates to a number of invoices or accounts, insert the dates of the first and last invoices or accounts – for example "...From 01/01/2020 to 31/12/2020...". Alternatively, simply specify the months between which the debt was incurred – for example "January 2020 to December 2020...".
<b>Date to be paid by</b>	This date defaults to a date 14 days after you create the notice. You can select a different date by either simply typing one in or by selecting it from the calendar lookup. It is not advisable to select a date less than 7 days in the future, especially if you intend to mail the notice rather than email it.
<b>Type of Notice</b>	Choose between an Overdue Account Notice or a Final Notice.
<b>Result</b>	Leave this field blank when creating a new notice. This field enables you to complete the notice (when the matter is either resolved or the matter referred to us for further action).

As always, if you need further help in deciding what information to insert in any field feel free to contact us for support.

## APPENDIX B – INFORMATION TO INSERT WHEN CREATING A NEW INSTRUCTION

Field	Text
<b>Client reference</b>	If you have a specific reference for this debtor, insert that here.
<b>Client Contact</b>	If this matter is being handled by a specific person for the client, insert that name here.
<b>Debtor Name</b>	Insert the debtor's name.
<b>Debtor ABN</b>	Insert the debtor's ABN (if known).
<b>Debtor Address Line 1</b>	Insert the first line of the debtor's actual or postal address (this will need to be actual or physical address if you are instructing us to issue legal proceedings).
<b>Debtor Address Line 2</b>	Insert the second line of the debtor's actual or postal address (this will need to be actual or physical address if you are instructing us to issue legal proceedings).
<b>Debtor Address Line 3</b>	Insert the third line of the debtor's actual or postal address - if applicable (this will need to be actual or physical address if you are instructing us to issue legal proceedings).
<b>Debtor Phone (H)</b>	Insert the debtor's home telephone number – if the debtor is a person and if this is known.
<b>Debtor Phone (W)</b>	Insert the debtor's work telephone number – if the debtor is a person and if this is known otherwise if a business the telephone number of the business.
<b>Debtor Mobile</b>	Insert the debtor's mobile telephone number – if the debtor is a person and if this is known.
<b>Debtor Fax</b>	Insert the debtor's fax number – if the debtor is a person and if this is known otherwise if a business the fax number of the business.
<b>Debtor Email</b>	Insert the debtor's email address (if a person) or the business email address (if a business).
<b>CC Email to</b>	If you have a secondary email address for the debtor insert that email address here.
<b>Debt amount \$</b>	Insert here the amount to be claimed – numbers only.
<b>Date debt incurred</b>	Insert here the date the debt was incurred. If the debt relates to only one invoice or account, insert the date of that invoice or account. If the debt relates to a number of invoices or accounts, insert the dates of the first and last invoices or accounts – for example "...From 01/01/2020 to 31/12/2020...". Alternatively, simply specify the months between which the debt was incurred – for example "January 2020 to December 2020...".
<b>Type of debt</b>	Select from the drop-down list the debt type.
<b>Details</b>	Insert here details of the debt – for example, invoice numbers.
<b>Has a written demand for payment been sent?</b>	If a letter or email demanding payment and (preferably) warning of legal action signify accordingly.
<b>Date demand sent</b>	If a demand was sent, specify the date it was sent.
<b>Action Required</b>	Select the action required from the drop-down list.
<b>Action required if 'other'</b>	If you specified "Other" in the previous field, indicate what action you would like taken
<b>Previous contact with debtor</b>	A brief precis of previous contact with the debtor is helpful, especially promises of payment or disputes.

