WEBSITE APPLICATION ACCESS

& USER INSTRUCTION MANUAL

M A R S H A L L S

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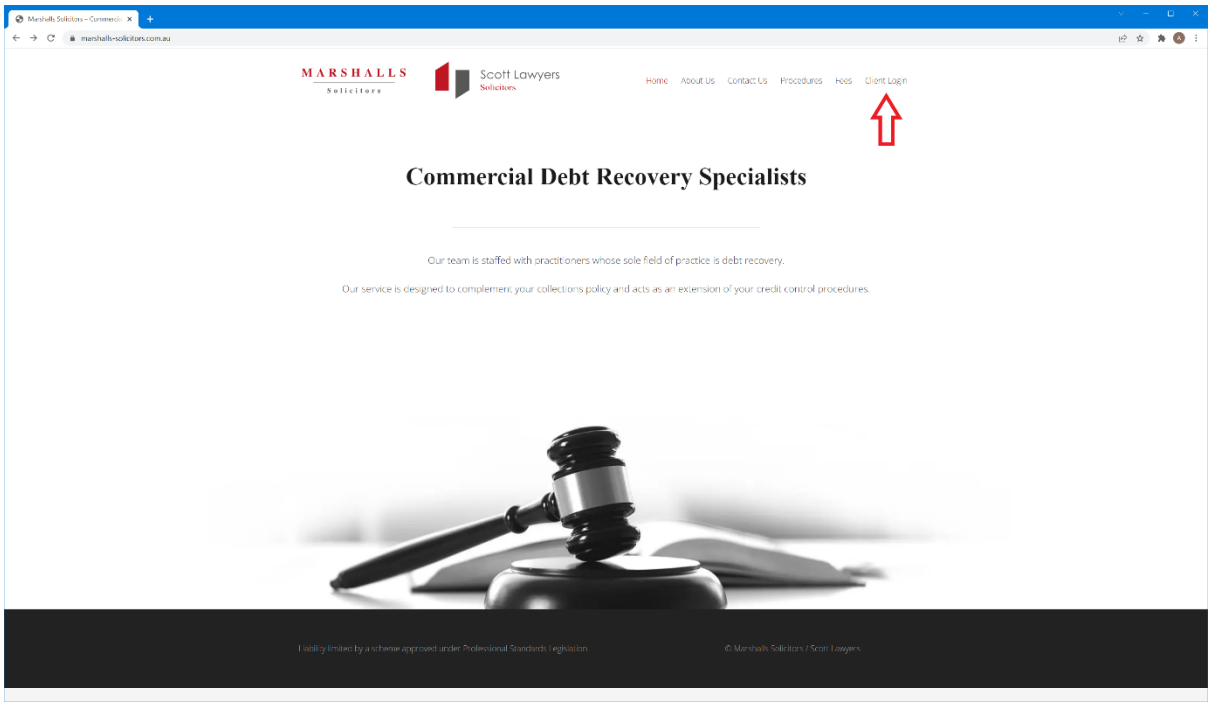
ACCESSING THE WEBSITE

From your internet browser, enter:

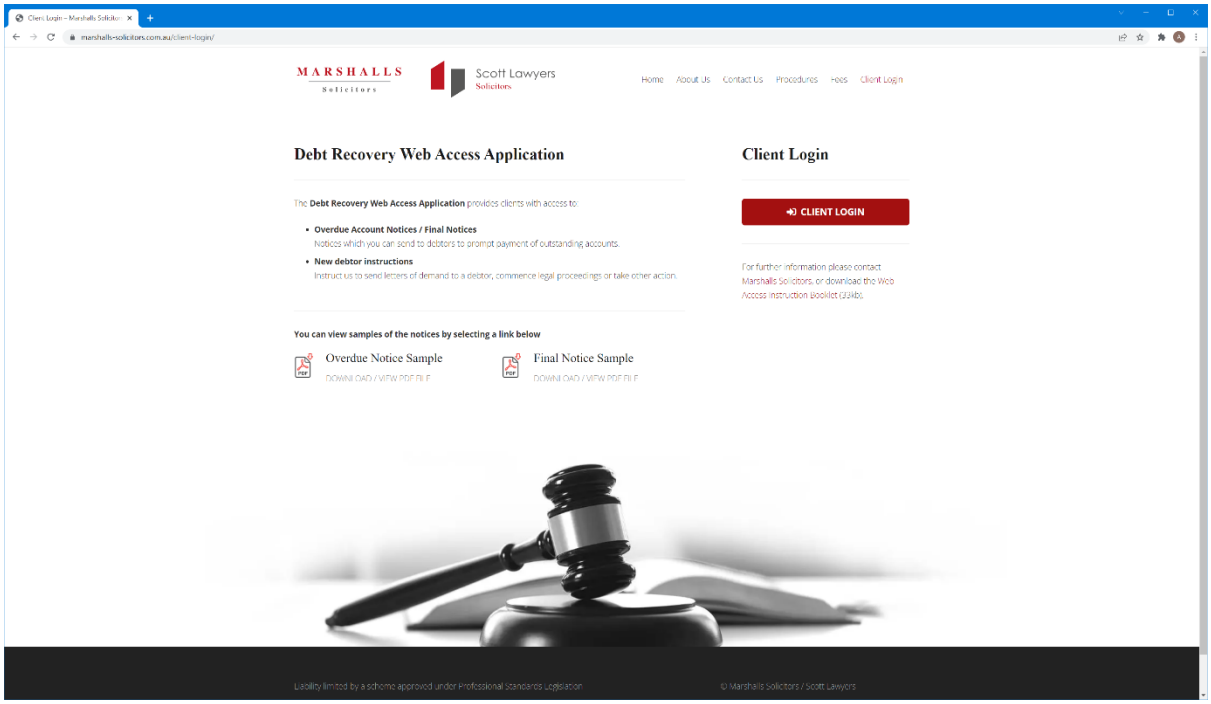
marshalls-solicitors.com.au

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



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

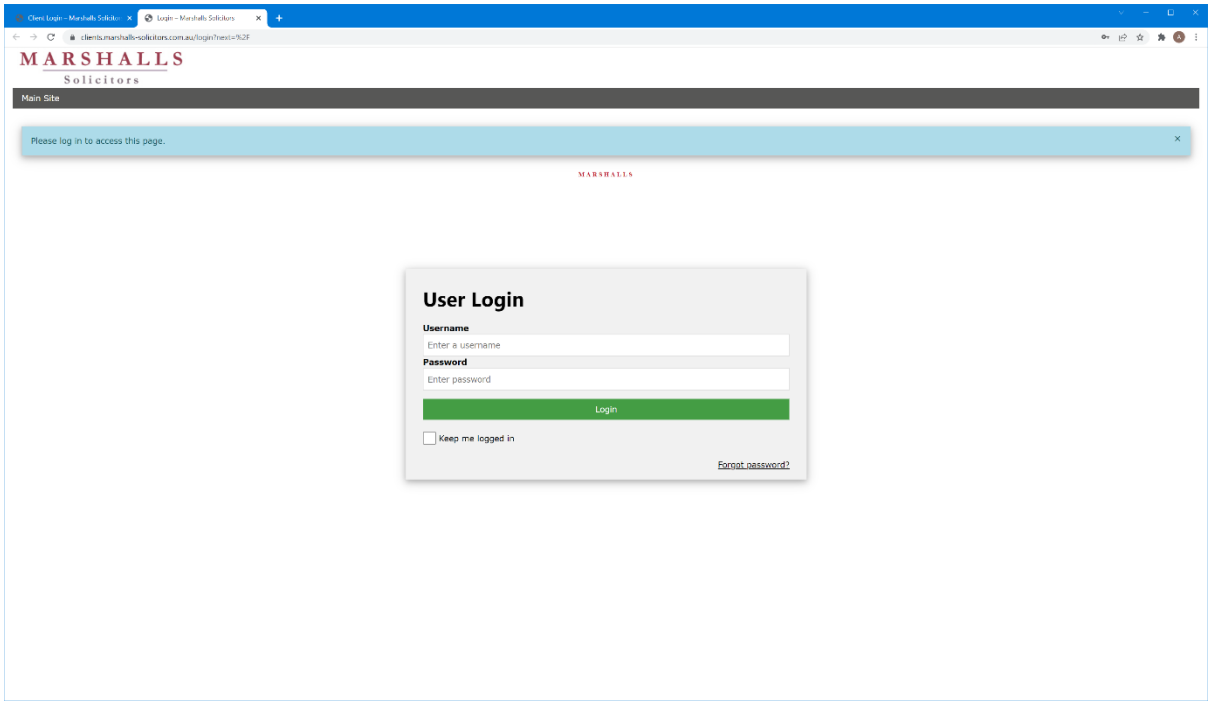
That will take you to the Client Login page:



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.

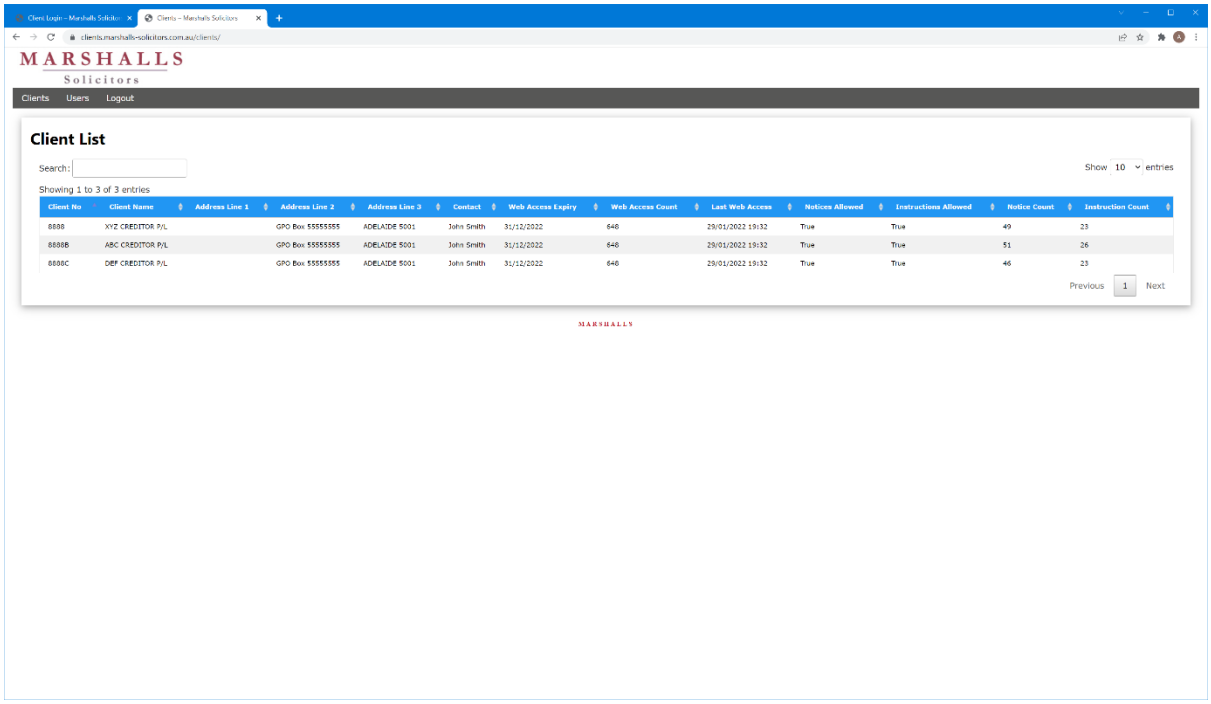
The site will remember your username and password.

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):



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:

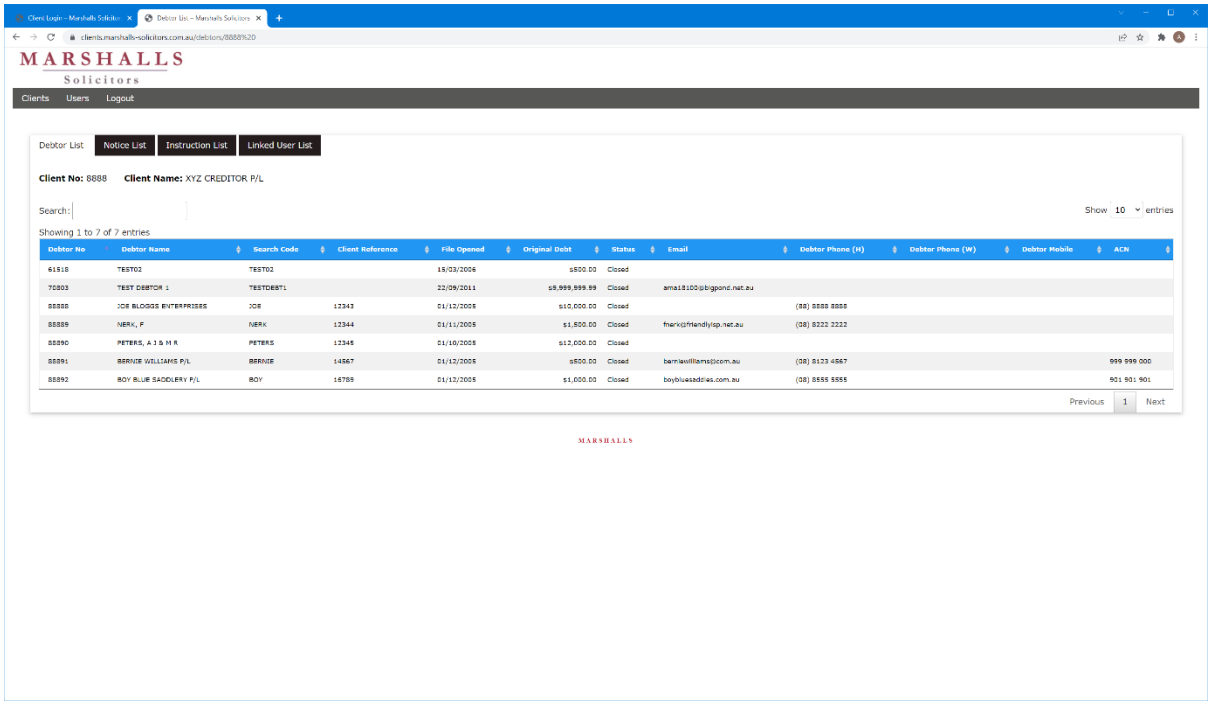
- The Debtor List sorts from the newest debtor to the oldest debtor (by our debtor number)
- The Notice List sorts from the most recent notice created to the oldest.
- The Instruction List sorts from the most recent instruction created to the oldest.

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:

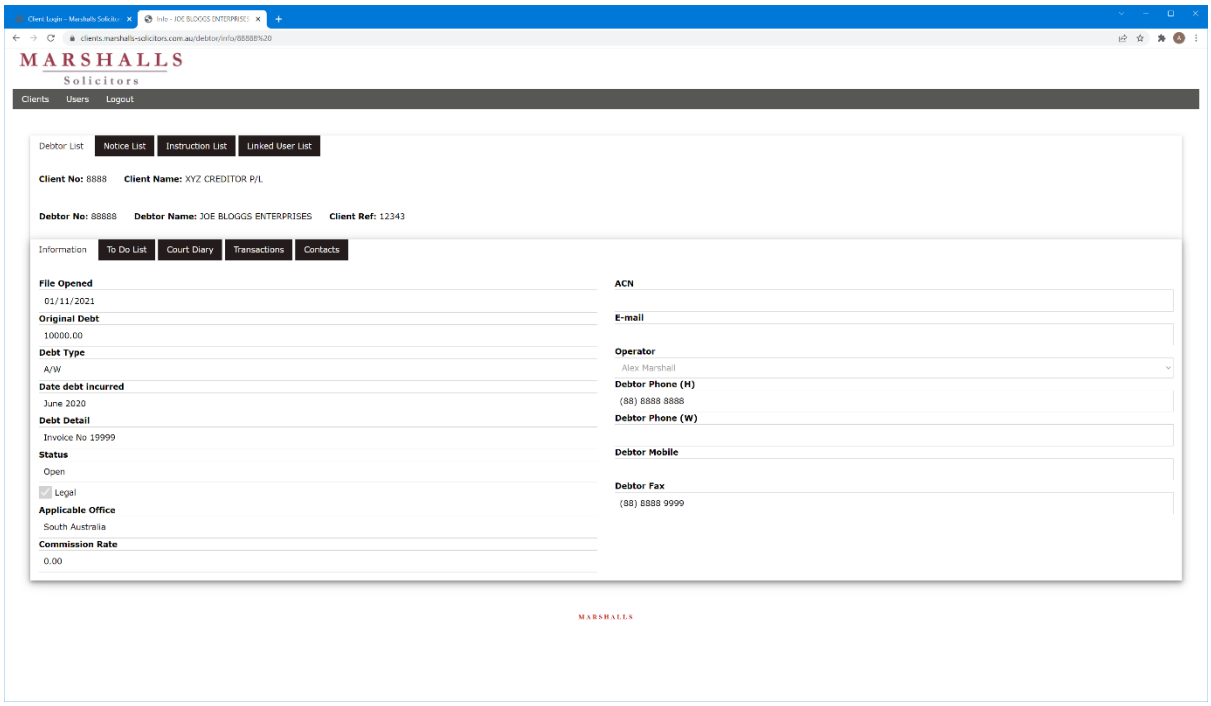


To search for a particular debtor, simply insert a few characters into the search box and you will be taken to the nearest match. Clicking on that debtor brings up various pages of information regarding the debtor and action taken or to be taken by us.

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:



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

The various information boxes contain the following:

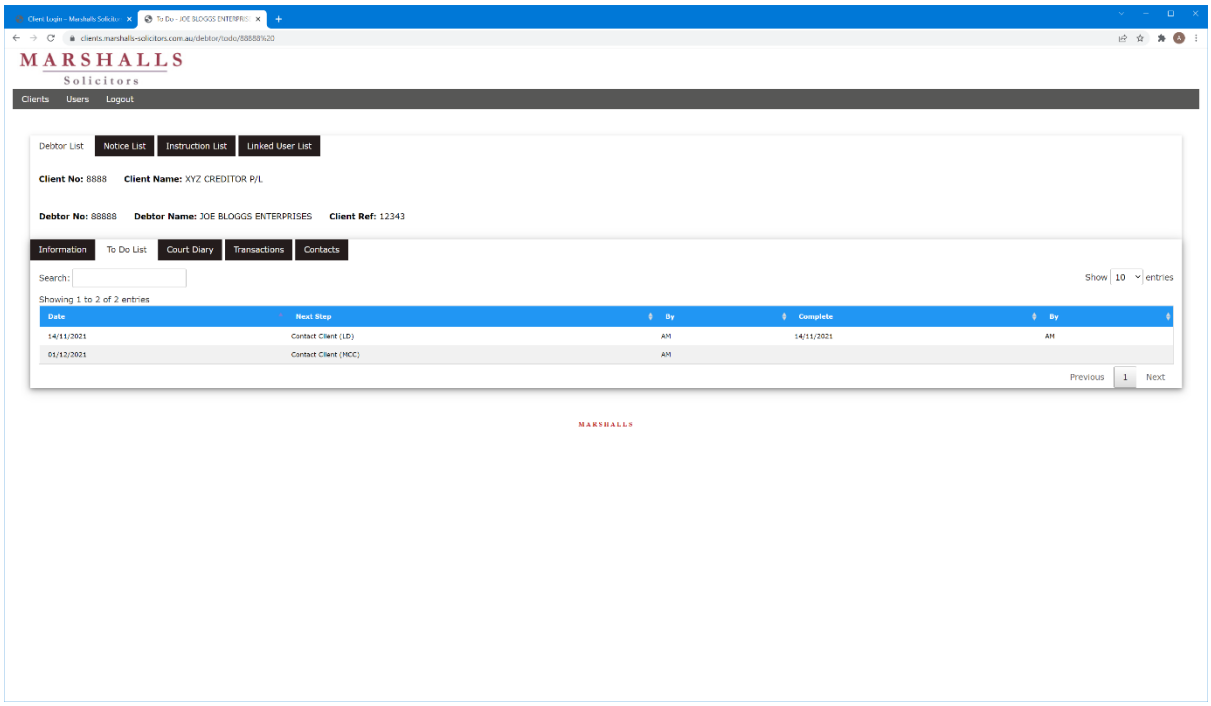
Field	Contains
File opened	The date our file was first opened.
Original debt	The amount of the debt that you first instructed us to collect.
Debt Type	The type of debt that you selected when you instructed us. The choices are: GSD – Goods sold & delivered WL – Work done WLDMS – Work & labour done & materials 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.
Date debt incurred	The date your debt was incurred or the dates between which it was incurred
Debt details	If supplied, the Invoice No/s or similar.
Status	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 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}.

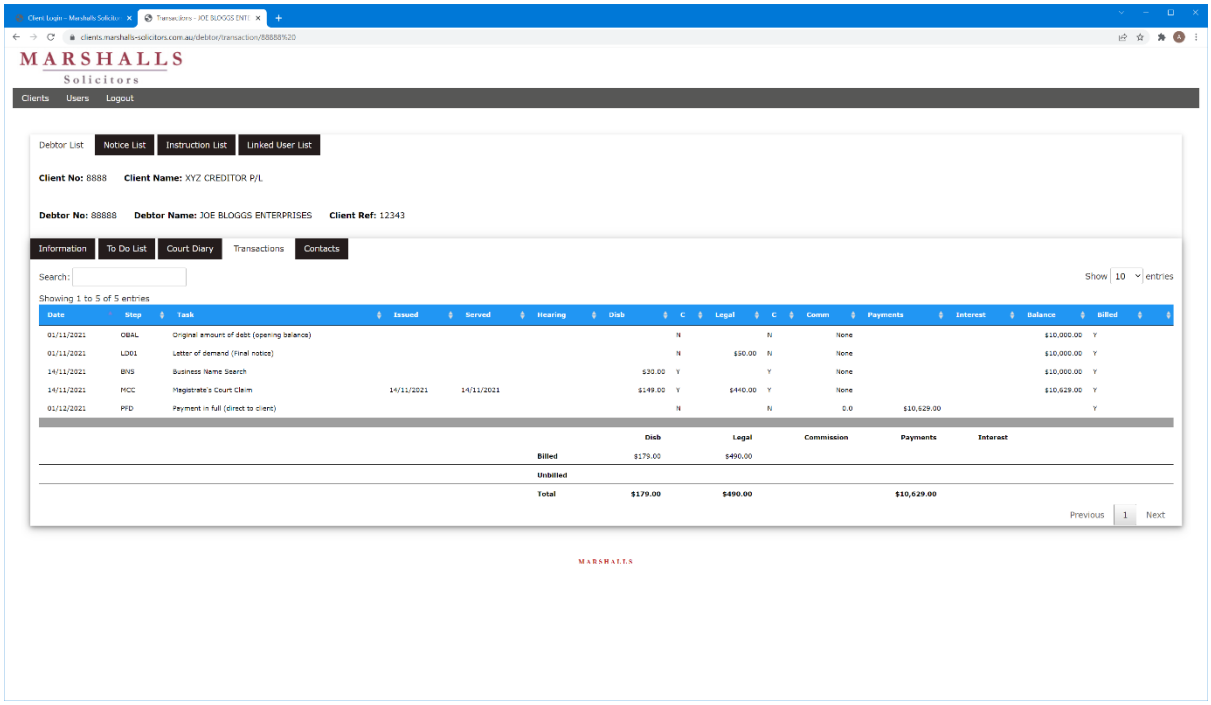
COURT DIARY

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.



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

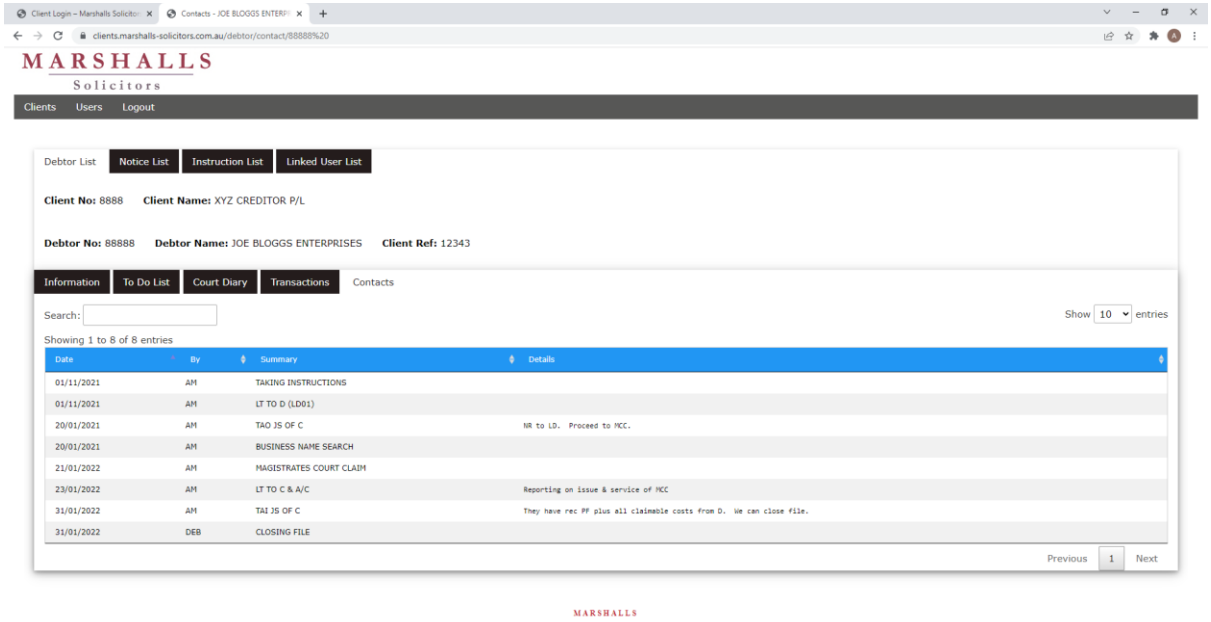
Column	Information
Date	Date upon which any step was taken
Step	Step taken.
Task	Fuller explanation of the step code.
Issued	If a legal process is involved, the date the process is actually issued by the Court is shown here
Served	If a legal process is involved & that process needs to be served upon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

Column	Information
Date	Date upon which any contact made/received
By	Initials of person (where applicable) who sent letter or who engaged in telephone call
Summary	Brief description of the actual contact.
Details	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. 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.

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

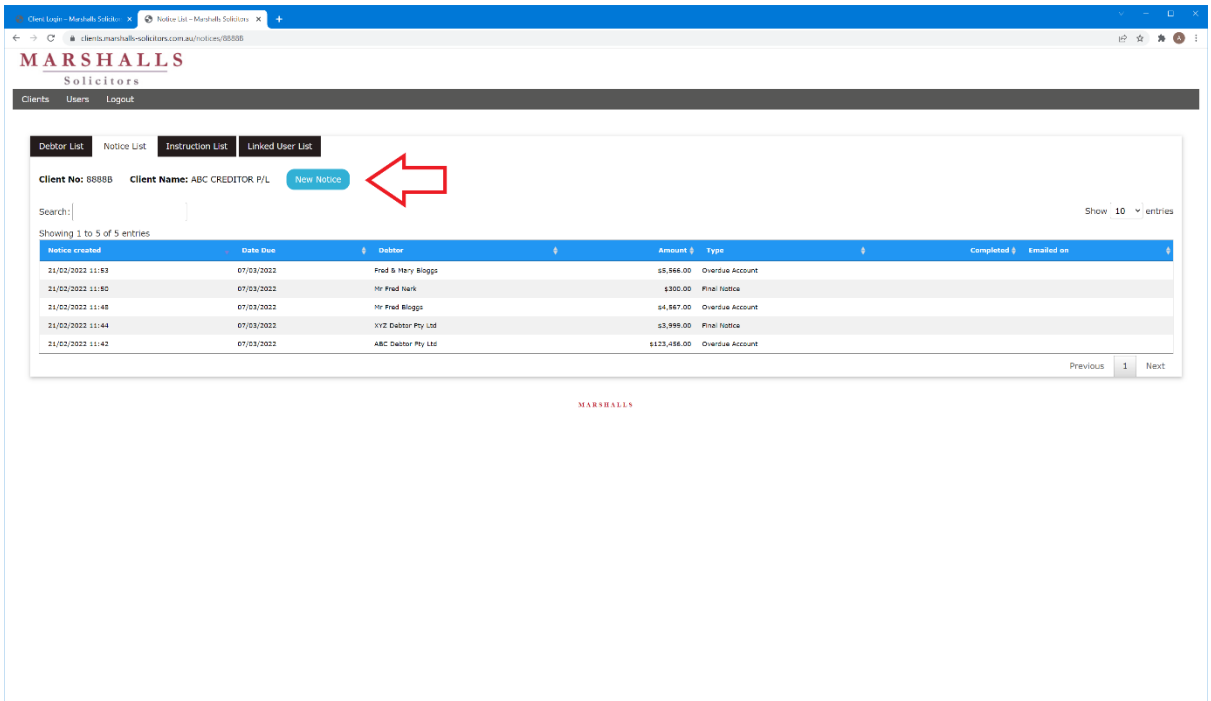
Email – the number of times you have emailed the notice to the debtor

Notice last emailed – date notice last emailed to debtor

CREATING A NEW FINAL AND/OR OVERDUE ACCOUNT NOTICE

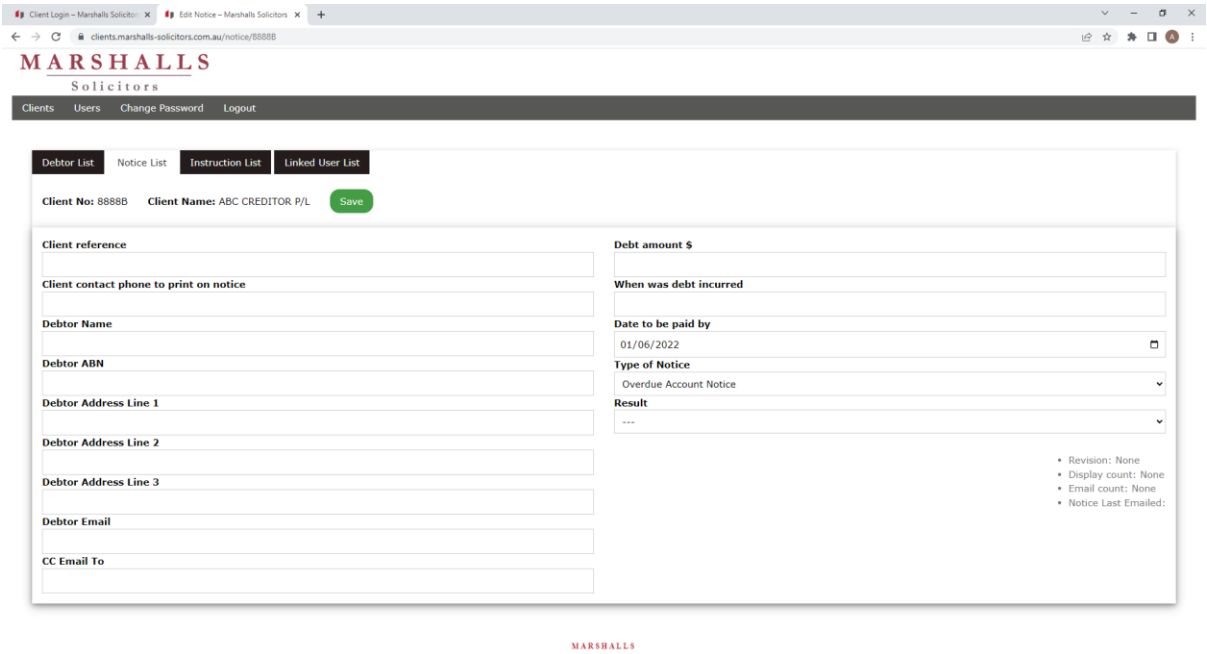
Accessing this page enables you to create and send Final and/or Overdue Account Notices. Examples of these notices are available for viewing at the initial Client Login page.

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

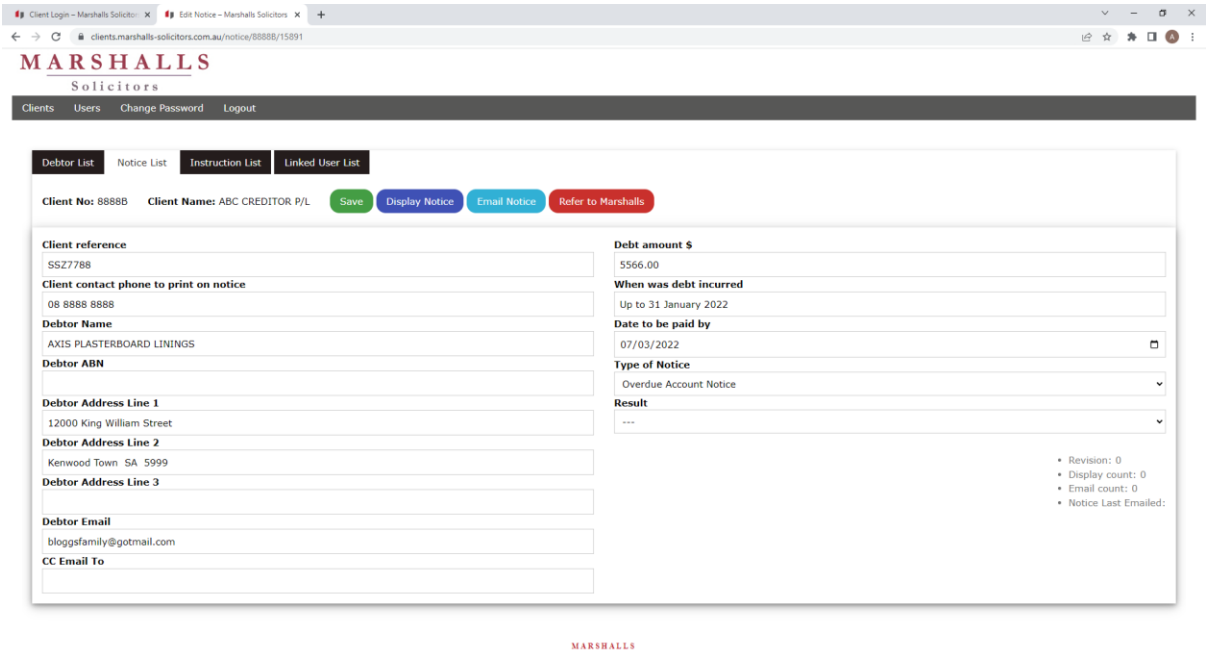


That will take you to the screen, where you will need to enter the information required for the notice. Most of the text boxes where information is to be inserted are self-explantory. An explanation of what information is to be inserted into each field is contained in Appendix A. As always, if you are 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.



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



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”).

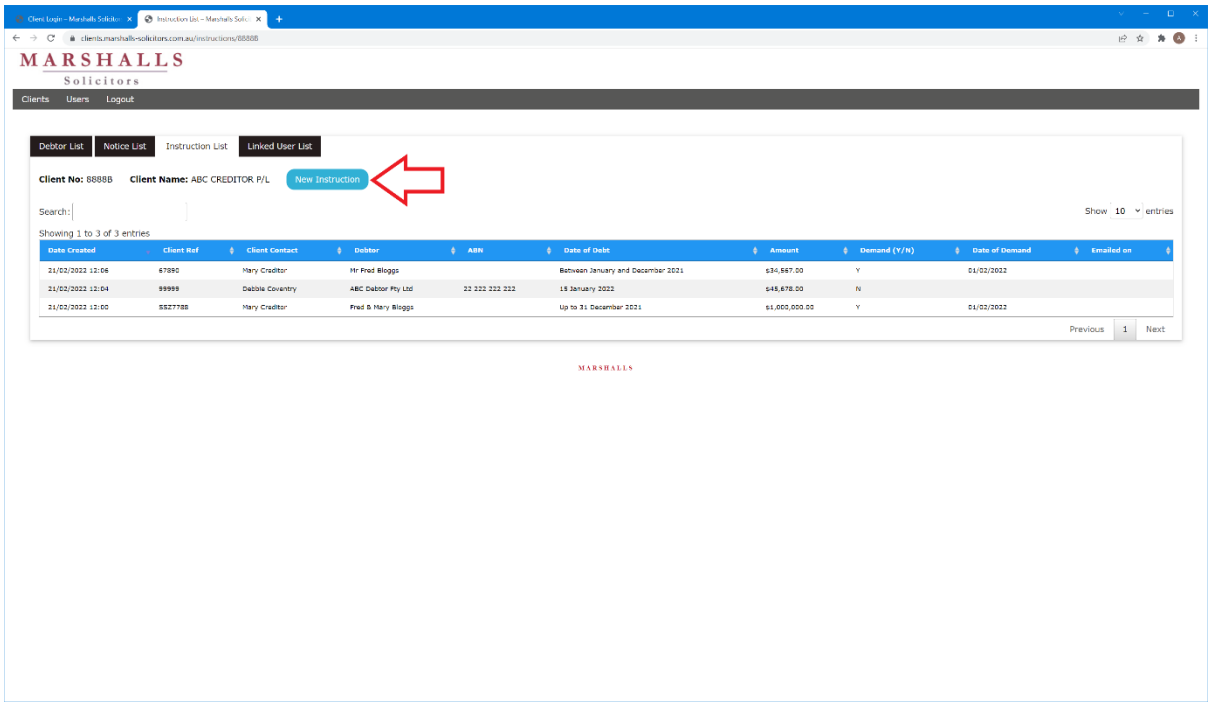
The button “Refer to Marshalls” will be used later if your debtor does not satisfactorily respond to the notice and you then wish to instruct us to pursue the matter further on your behalf. If/when you click on that button you will be taken to a new Instruction form which will be part-populated with 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

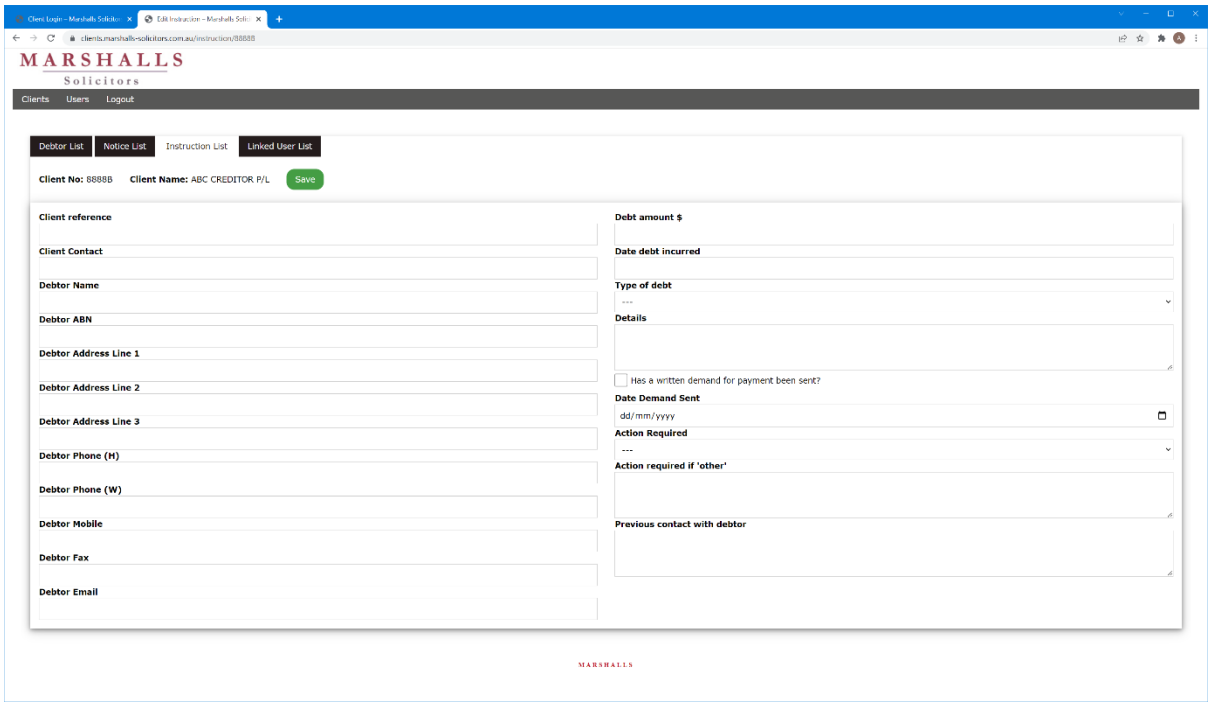
This section enables clients to send us instructions to take action on a debtor.

INSTRUCTION LIST

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

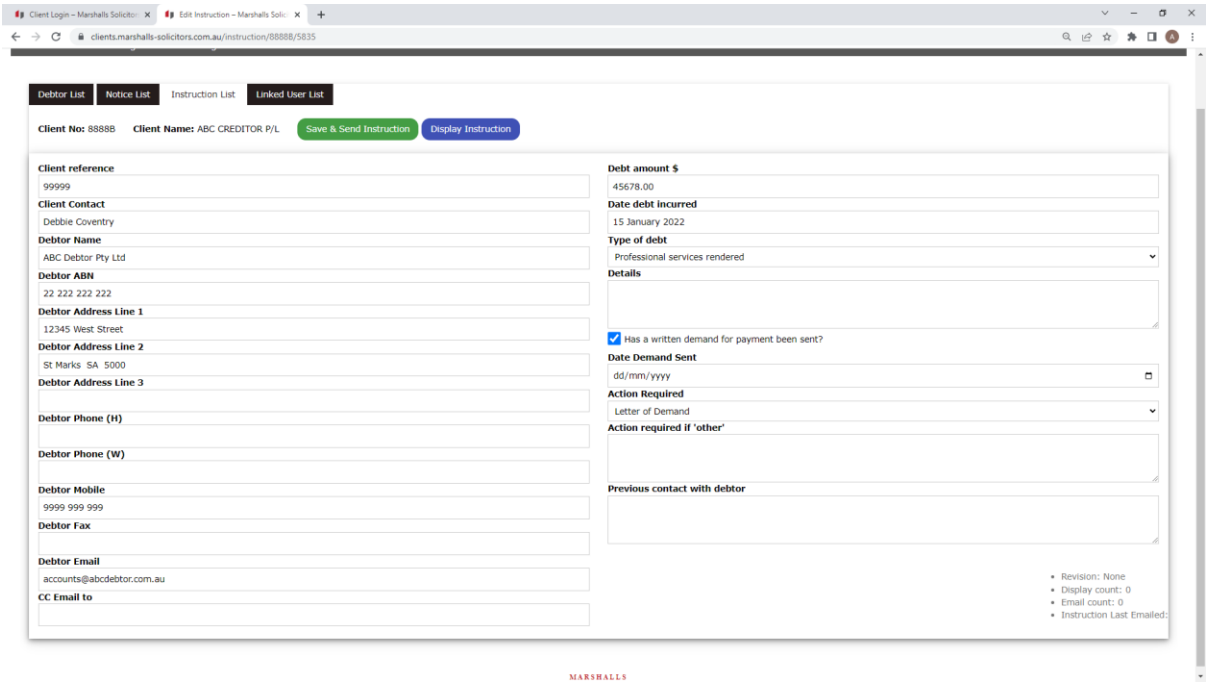


To create a new instruction, click on the "New Instruction" button indicated by the red arrow). You will then be presented with the following data entry screen.



Enter the information to create the instruction to us. Most of the text boxes where information is to be inserted are self-explantory. 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:



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
Client reference	If you have a specific reference for this debtor, insert that here.
Client contact phone	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.
Debtor Name	Insert the debtor's name.
Debtor ABN	Insert the debtor's ABN (if known).
Debtor Address Line 1	Insert the first line of the debtor's actual or postal address.
Debtor Address Line 2	Insert the second line of the debtor's actual or postal address.
Debtor Address Line 3	Insert the third line of the debtor's actual or postal address - if applicable).
Debtor Email	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.
CC Email to	If you want to have the notice emailed to a secondary email address, insert that email address here.
Debt amount $	Insert here the amount to be claimed – numbers only.
Date debt incurred	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…".
Date to be paid by	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.
Type of Notice	Choose between an Overdue Account Notice or a Final Notice.
Result	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
Client reference	If you have a specific reference for this debtor, insert that here.
Client Contact	If this matter is being handled by a specific person for the client, insert that name here.
Debtor Name	Insert the debtor's name.
Debtor ABN	Insert the debtor's ABN (if known).
Debtor Address Line 1	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).
Debtor Address Line 2	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).
Debtor Address Line 3	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).
Debtor Phone (H)	Insert the debtor's home telephone number – if the debtor is a person and if this is known.
Debtor Phone (W)	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.
Debtor Mobile	Insert the debtor's mobile telephone number – if the debtor is a person and if this is known.
Debtor Fax	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.
Debtor Email	Insert the debtor's email address (if a person) or the business email address (if a business).
CC Email to	If you have a secondary email address for the debtor insert that email address here.
Debt amount $	Insert here the amount to be claimed – numbers only.
Date debt incurred	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…".
Type of debt	Select from the drop-down list the debt type.
Details	Insert here details of the debt – for example, invoice numbers.
Has a written demand for payment been sent?	If a letter or email demanding payment and (preferably) warning of legal action signify accordingly.
Date demand sent	If a demand was sent, specify the date it was sent.
Action Required	Select the action required from the drop-down list.
Action required if 'other'	If you specified "Other" in the previous field, indicate what action you would like taken
Previous contact with debtor	A brief precis of previous contact with the debtor is helpful, especially promises of payment or disputes.