| | |
|---|---|
| *How do I log in for the first time?* | When logging in for the first time, you'll need to update your password. Here's how:<br><br>1. Locate your **Login ID** in the top left corner of the homepage.<br>2. Click your Login ID to open the password change fields.<br>3. Enter your new password.<br>4. Click **Submit** to save your changes.<br>5. Log in again using your updated password. |
| *What should I do if I forget my username or password?* | No worries! Just send us an email at clientservices@tascol.com.au or call us at **03 6213 5587** (Monday to Friday, 8:30 AM – 5:00 PM), and we'll be happy to help you reset your details. |
| *How do I update my login credentials?* | To update your password:<br><br>1. On the **Home page**, find your **Login ID** at the top right, between 'Menu' and 'Logout.'<br>2. Click your Login ID to open the password change option.<br><br>Need help resetting your password or login details?<br>Contact us at clientservices@tascol.com.au or call **03 6213 5587** during business hours (Monday to Friday, 8:30 AM – 5:00 PM). We're happy to assist! |
| *How do I view my current debt lodgements?* | You can view your current debts with TCS in a few ways:<br><br>1. **Using the Accounts Menu:**<br>• Go to **'Customer View'** under the **Accounts** menu.<br>• Either click the **'View Accounts'** icon on the left menu bar or use the **Search** function at the top.<br>2. **Using the Reports Menu:**<br>• Select **'Customer Status Report'** under the Reports menu.<br>• Search by a date range to see a list of lodgements.<br>• Click the blue **'Debt Code'** number to view more details about a specific account. |
| *How do I add a note on an account in Webcollect?* | 1. Go to the **Accounts** menu and click on the **Customer View** hyperlink.<br>2. Once the customer's account loads, click on the **Add Note** option. A panel will appear on the right side of the screen.<br>3. Complete the following fields:<br>• **Auto Response:** If allowed, select a predefined response from the dropdown menu. |

| | |
|---|---|
| | • **Note:** Type your message here. The assigned collector will see this note the next time they access the account.<br>• **Action Date:** Set a date for the note to appear on the collector's action list for follow-up.<br>4. Click **Submit** to save the note to the customer's account. |
| *Where can I access reports and statistics?* | You can find reports and statistics in two main places:<br><br>1. **Reports Tile (Home Page):**<br>Access various reports such as:<br>• Customer Status Report<br>• Account Closure Summary Report<br>• Percentage Analysis Report<br>• Customer Payment Reconciliation Report<br>2. **Dashboard (Service Tab):**<br>View an overview of new accounts from the past month and general performance statistics.<br><br>If you need tailored reports or assistance, email us at clientservices@tascol.com.au. We'll be happy to help! |
| *How do I lodge a new debt?* | 1. Go to the **Accounts Tile** menu and select the **New Account** option.<br>2. Choose whether the debt is for an individual or a company.<br>3. Enter as much information as possible about the debt.<br>4. Once complete, submit the details to TCS. |
| *Can I track the progress of a specific case?* | Yes! Here's how:<br><br>1. Go to **Customer View** under the **Accounts** menu.<br>2. Use either:<br>• The **View Accounts** icon on the left menu bar, or<br>• The **Search** function at the top (search by customer name or debt code).<br>3. Once the account loads, you can see the status, recent updates, payments, and any notes on the file. |
| *How do I update my contact information?* | 1. On the **Home screen**, go to the **Accounts** tab and select **Update Client Contact** to update your details.<br>2. To update your bank account details for payments:<br>• Call us at **03 6213 5555**, or<br>• Email us at clientservices@tascol.com.au (we'll call you to verify the changes). |

| | |
|---|---|
| *What happens to my old portal data? Is it transferred?* | Yes! All your existing accounts will be transferred to the new portal. You will be able to access:<br>• Customer accounts<br>• Invoices<br>• New reports<br><br>Everything you need will be available in the new system. |
| *Is there a tutorial or guide to help me learn the new system?* | Yes! We have a user guide available for you to refer to. [Available Here].<br>You can also book time with our **Client Relationship Specialist** for dedicated support by Book time with Claire Charlton |
| *Who do I contact if I encounter issues or need help?* | If you need assistance, feel free to reach out:<br>• Email: clientservices@tascol.com.au<br>• Call: **03 6213 5587** (during business hours) |
| *How can I provide feedback about the portal?* | We welcome your feedback! Please email us at clientservices@tascol.com.au with any suggestions or comments. |
| *Can I view my billing history and invoices on the portal?* | Yes, you can easily view your invoices by following these steps:<br>1. In the **Service Section**, click on the **Invoices** hyperlink to display your invoice options.<br>2. Your **client name** will be automatically populated.<br>3. Use the **filter** to set the search parameters for the invoices you're looking for. Once set, click **Submit** to search for the invoices.<br>   • **Invoice #** defaults to **Any**, but you can specify a particular invoice number if you know it.<br>   • **Date** has a dropdown list with options like "This Week," "This Month," etc.<br>4. The **Display** section will show a list of invoices that match your search.<br>5. Click the **Export to CSV** button to download the invoice list in CSV or Excel format.<br>6. To view a specific invoice, click on the invoice number hyperlink. The invoice will open on your screen.<br>7. You can also **Print** the invoice directly or save it as a PDF if your printer allows you to set the destination to PDF. |