



Tasmanian Collection Service

Webcollect User Manual

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1. INTRODUCTION

2. LOGGING IN

Logging in allows you access to your customer accounts.

You will be allocated **log in** details by the Tasmanian Collection Service. If you have not yet been provided your log in details, please contact TCS.

The **Can't Login** hyperlink opens up an email to communicate with Tasmania Collection Service.

Login Security

Your logged in session is set to expire in a certain amount of time for security purposes. If you leave the system idle, it will log you out automatically.

3. HOME PAGE

The **Home Page** allows you access to a series of options to review your accounts online.

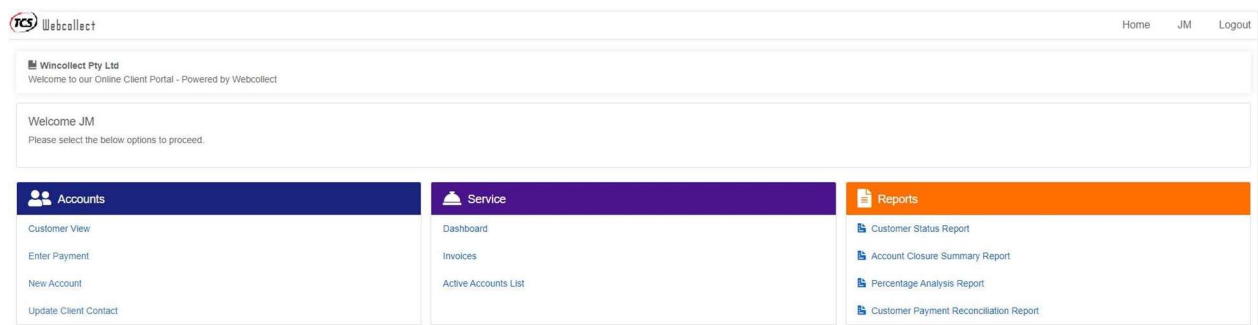
You will notice in the top right-hand corner there are three (3) options.

Home when pressed will return you to the home page if viewing another page.

Log in ID which will display differently for each user. In this example you see JM. When you select this, it allows the user to **change** their **password**.

Logout logs you out of the system.

Once logged in you will be shown the Home Page.



4. ACCOUNTS SECTION

The **Accounts** section is the location for information about your accounts.



[Customer View](#) allows you to review your customer accounts.

[Enter Payment](#) allows you to enter payments received directly to your office. This notifies the agency that a payment has been received by you.

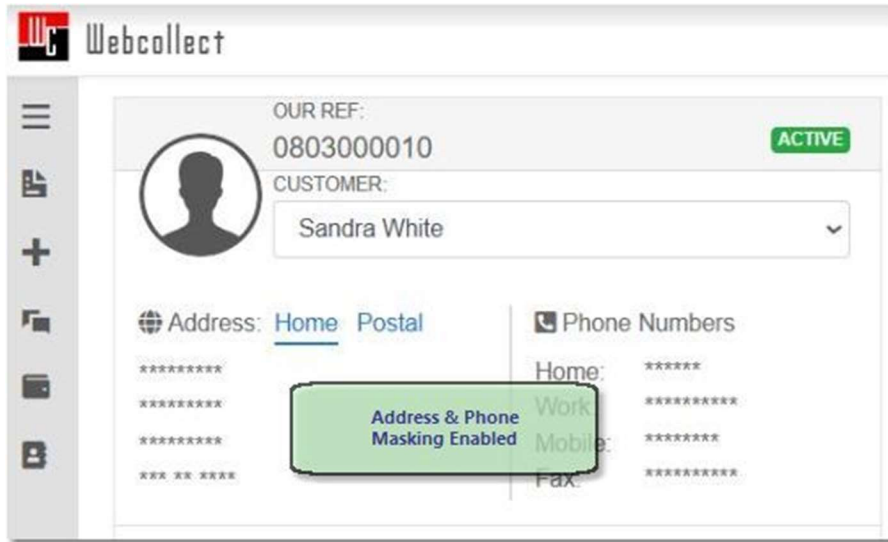
[New Accounts](#) is the location to enter a new account you would like actioned by the agency.

[Update Client Contact](#) is the location for user to update their contact details.

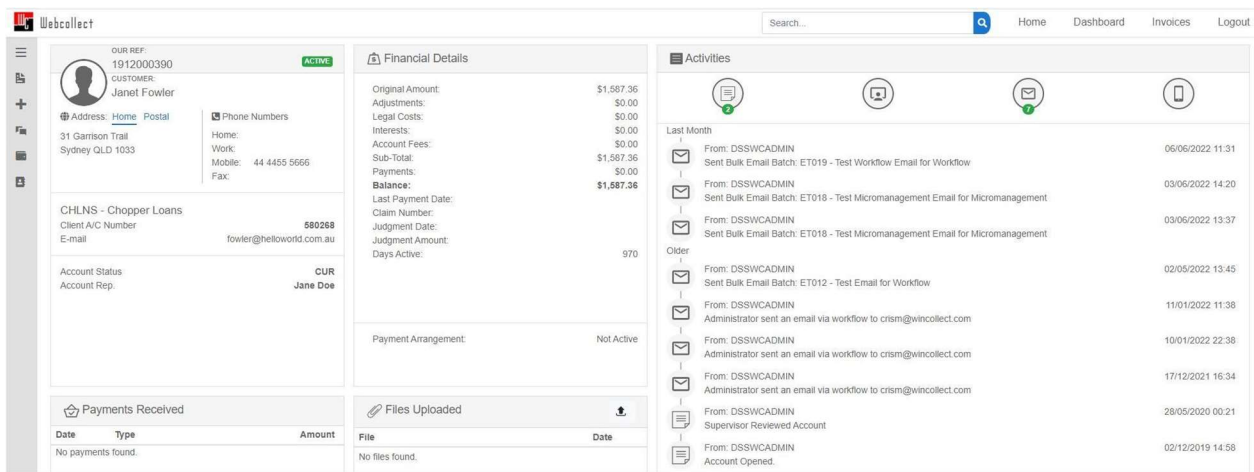
4.1. CUSTOMER VIEW

From the **Accounts** options, select the **Customer View** hyperlink. Once this opens, you can see there are a number of sections to this page.

All addresses, phone numbers and fax will be **masked**. Instead of details you will just see asterisks.



Let's take a closer look at what some of the features are on this page.



1. Across the top of this screen you will see a few option headings.

Home will take you back to the Home page.

Dashboard takes you to an overview screen tracking the activity of the Clients customers.

Invoices opens up the list of Client invoices that can be printed or downloaded.

Logout will log you out of the Webcollect system.

The **Search** option allows you to locate a particular customer to view.

You can search by:

- Customer Ref Number
- Client Account Number
- Customer Name

When you type in a full or partial name to search by you will be presented with a list of search results. You can search by Client Code as well as by customer.

These results are divided into two (2) sections. **Recent Accounts** which are searches similar to the current search being done. **Customers** is the search result of the first ten (10) matching accounts.

2. The Customer details box displays the contact details for the customer.

You will notice the **Home** and **Postal** options are active links and display the address details of the customer. You can toggle between the two address options.

This section also shows you the **Account number** for the account, the **Account Status** currently assigned and the name of the **Account Manager** looking after the account.

3. The **Payments Received** displays a snapshot of all payments received from the customer. The first twenty (20) payments are displayed and beyond that you can select the Find More option to view further payments.

4. Financial Details displays the amount of the account and other financial details like fees charged, interest etc.

This section also displays details of a payment arrangement that may be activated on this account.

5. Files Uploaded shows you any files that have been attached to this account. If you would like to upload a file, select the Upload Load option and attach it. To view an attached file simply click on it to open the document.

The **Activities** section displays four (4) icons.

Notes is the option which displays all the notes on the account.

Apps refers to the times the customer has logged onto their account via the Customer Portal

Emails displays all the emails that have been sent to the customer

SMS displays all of the text messages (SMS) that have been sent to the customer

When there are new activities, a number will display indicating how many items are available to be viewed. In this example you can see there are 3 new notes, 4 apps and 13 emails ready for viewing. These show the actions that have taken place on this account.

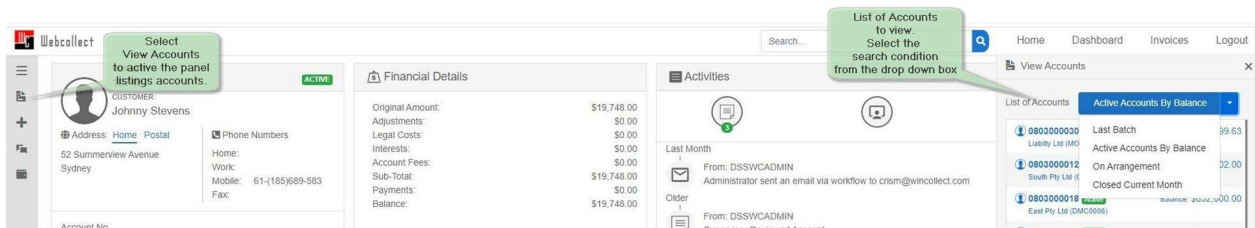
To view all of the notes, click on the icon and the Activities section will adjust to display the notes. To return to all activities click on the same icon, in this example, the notes icon.

The Activities are broken up into sections of Today, This Week, Last Week, This Month, Last Month depending on when activity is present on the account.

4.1.1. VIEWING AN ACCOUNT

From the **Customer View**, select the **View Accounts** option on the Menu panel located on the left hand side of the screen.

The View Account is a search tool.



When you select view accounts, the drop down list of options to search by allows you to drill down to locate a customers details. This panel will display to the right of the screen.

Last Batch displays the most recent batch of accounts that were imported into Wincollect.

Active Accounts By Balance shows the list of accounts by balance in descending order of dollar value.

On Arrangement lists the accounts that are currently in a payment arrangement.

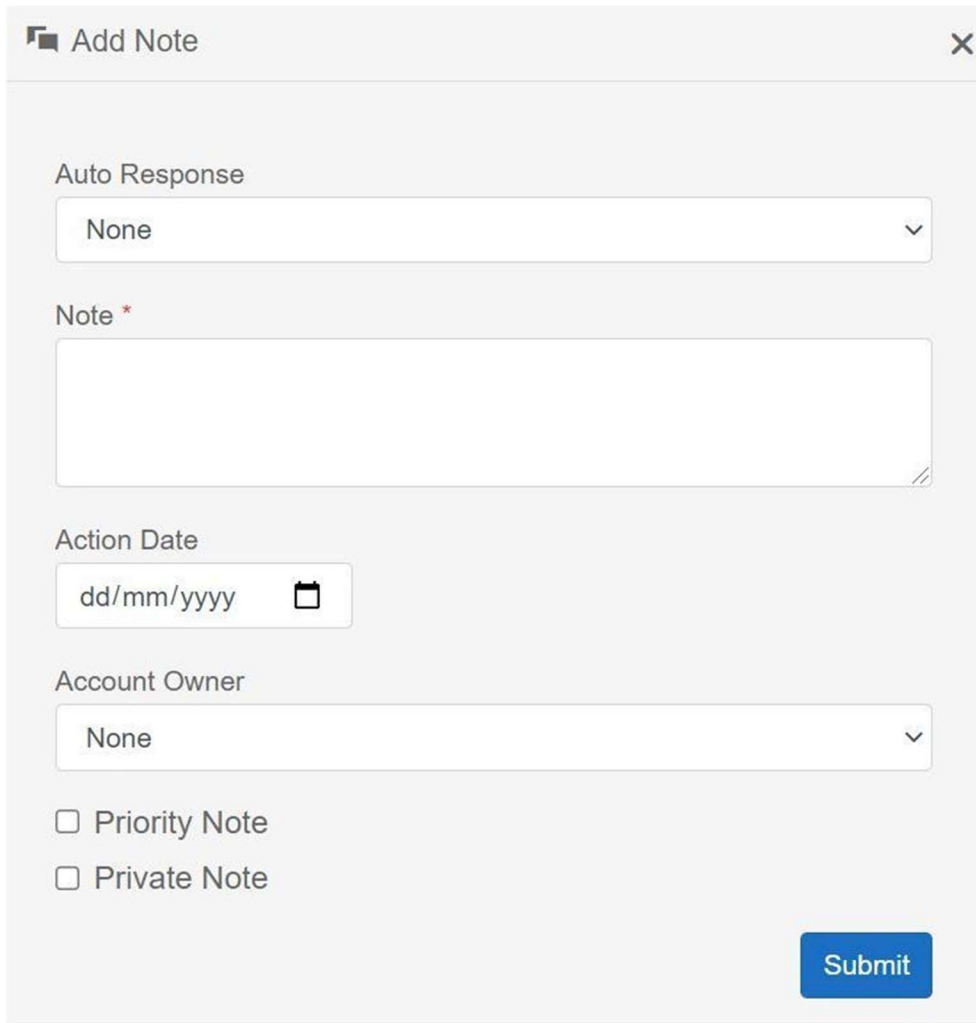
Closed Current Month shows a list of accounts that have been closed in the current month.

Once you select an account it will populate into the customer view.

4.1.2. ADDING A NOTE

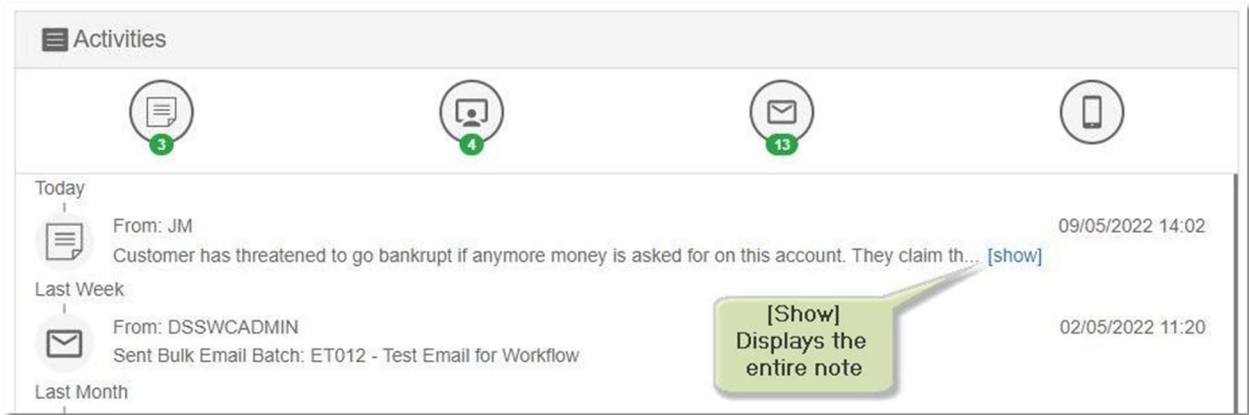
From the **Accounts** options, select the **Customer View** hyperlink.

After loading a customer, you can select the **Add Note** option to be presented with a screen panel that displays on the right hand side of the screen.



1. **Auto Response** is a drop down list. If permitted, you will be able to select an auto response. This is not a compulsory field.
2. **Note** is the field where you type in the message for the account. The collector allocated to looking after this account will see the note when next they log into it. This is a compulsory field.
3. **Action Date** allows you to set a date which then will appear in the list of accounts the collector will action on that specified date.
4. Press the **Submit** button to save the note on the customers account.

Once the note is **saved**, it will display in the **Activities** section of the **Customer View**. Diary notes are the default display. If you have a **large note** you will see a **[Show]** option. When this is selected, it **expands** the entire note to be seen in full.



4.2. ENTERING A PAYMENT

There are two (2) ways to locate the **Enter Payment** screen.

1. To locate the **Enter Payment** screen from the [Home Screen](#), navigate to the Accounts option and select the Enter Payment hyperlink.
2. You can also select this option from the Menu, when you are in the [Customer View](#).

After **loading a customer**, you can select the Enter Payment option to be presented with a screen panel that displays on the right hand side of the screen. This will be either over the Customer View screen or the Home screen, depending on how you access this option.

1. **Our Reference** refers to the reference number TCS has allocated to the account. Alternatively, you can enter the name of the customer.
2. **Account Number** refers to clients reference number given to the agency. Alternatively, you can enter the name of the customer. If you use the customer name in the Our Reference field and there is an account number allocated then it will automatically be populated into this field.
3. **Current Balance** displays the amount that is still owing on the account. This will automatically be displayed when you populate an account into the Our Reference field.
4. **Payment Amount** is the field where you enter the dollar value of the payment being recorded against the account. This step also records a note on the account.
5. **Payment Date** will default to today's date but you can back date this if required.
6. **Payment Type** is a drop down list where you can select the type of payment, for example, Direct to Client, Direct Debit, Cash etc.

7. Press the **Submit** button to record the payment against the account.

4.3. ADDING NEW ACCOUNTS

There are two (2) ways to locate the New Accounts screen.

1. To locate the **New Account** screen, from the [Home Screen](#), navigate to the Accounts option and select the New Account hyperlink.
2. You can also select this option from the Menu, when you are in the [Customer View](#).

When you select the **New Account** option you will be presented with the Add Customer screen. From here you need to make a selection regarding what type of customer is being entered into the system.

Select from:

Individual refers to a person. When you select this option the relevant fields will display to place the individuals name into.

Company refers to an organisation. When you select this option the relevant fields will display to place the Company name into.

Search allows you to locate an existing customer you may want to add addition outstanding amounts to.

Now you can begin to enter all the details for the customer account.

New Account

Customer Details

Account Information

Invoice Details

Finish

First Names Middle Name Last Name * Suffix

Home Phone Work Phone Mobile

Email

Address

Suburb State Postcode

Search...

Is Customer still at this address?

Yes No

Change Customer Next

1. Enter the **Name** and **address details** for the Individual or Company. The **Is Customer Still at this address: Yes or No** determines if the **address** is set to **Good or Bad** for the sending of correspondence.

2. When entering the Customer Details (Company or Individual) the button **Change Customer** is displayed. If you would like to change the customer being added to a company, individual, or select from the existing customer, select the Change Customer button.

3. Once this screen is completed, press **Next**.

4. This screen gives you a list of customers added. You will notice there is an **Add button** here as well. If you wish to add another customer then select that button or press **Next** to continue with adding the current customer you have created.
5. You will now see the Client details. Complete the rest of the fields on this screen. Note, only the Client and Account Type are compulsory fields.
6. Next page is the **Invoice details** of the account being entered. The **Original Amount** is the only compulsory field on this screen. Pressing next will display the details of the amount owing.
7. Place any **notes** you would like TCS to know about this account.
8. Press the **Submit** button to lodge this new account to TCS for further action. If you no longer want to add the customer, press the Cancel button to remove the entry.

4.4. UPDATING CLIENT CONTACT INFORMATION

From the **Accounts** options, select the **Update Client Contact** hyperlink. Once this opens, you can see there are a number of fields that can be updated with information from the client.

Update Client Contact

Enter client code or name...

Contact Email

Mobile Phone Fax

Street Address 1

Street Address 2

Street Address 3

Suburb State Zip

Corr. Address Line 1

Corr. Address Line 2

Corr. Address Line 3

Suburb State Zip

Plaintiff Address

When you select the **Update Client Contact** option you will be presented with side screen. From here you can update or enter any relevant information.

Once you have completed updating the fields select the **Submit** button to save the information.

A confirmation message will appear and then the update client contact screen will close.

5. SERVICE SECTION

The **Service** section is the location for statistics and invoices.



[Dashboard](#) give the client an overview of their accounts.

[Invoices](#) provides a list of client invoices.

[Active Accounts List](#) provides a list of clients customer accounts.

5.1. DASHBOARD

From the **Service** Section, select the **Dashboard** hyperlink to display. This is a **view only** screen.

Client Dashboard [Search client code or name...]

Home Invoices Customer View Logout

New Accounts This Month	0	New Accounts Value This Month	\$0.00	Total Amount Paid This Month	\$0.00
Percentage Paid In 6-Months	0.00%	Best Performance In 6-Months	0.00%	Total Balance In 6-Months	\$0.00

Performance Statistics
Assigned Accounts

	No.	Orig.Amount	Ave.Value
MTD	0	\$0.00	\$0.00
YTD	0	\$0.00	\$0.00
Total	0	\$0.00	\$0.00

Active Accounts

	No.	Orig.Amount	Princ.Paid	Princ.Balance
MTD	0	\$0.00	\$0.00	\$0.00
YTD	0	\$0.00	\$0.00	\$0.00
Total	0	\$0.00	\$0.00	\$0.00

Inactive Accounts

	No.	Orig.Amount	Princ.Paid	Princ.Balance
MTD	0	\$0.00	\$0.00	\$0.00
YTD	0	\$0.00	\$0.00	\$0.00
Total	0	\$0.00	\$0.00	\$0.00

Percentage Recovered

New Accounts

Accounts	Date	Count	Amount
Entered:	24/01/2022	0	\$0.00
Month To:	24/01/2022	0	\$0.00

Payments

	Date	Amount
Payments Entered:	24/01/2022	\$0.00
Payments Month To:	24/01/2022	\$0.00

1. **New Accounts This Month** displays the total number of account given to TCS for the current month.
2. **New Accounts Value This Month** indicates the total dollar value of the new accounts given to TCS for the current month.
3. **Percentage Paid in 6-Months** gives you the percentage of successfully payments received for the 6 month period.
4. **Best Performance in 6-months** give you the percentage of the best performing
5. **Total Balance in 6-months** displays the total dollar value of payments received for the 6 month period.
6. The next section of this screen gives you an overview of the **Performance Statistics** for **Assigned Accounts, Active Accounts** and **Inactive Accounts**.
7. The **Percentage Recovered** graph gives you a visual outline of how your recovered accounts are tracking.
8. The next section of this screen gives you an overview of **New Accounts** month to day with regards to the number of accounts entered and total dollar value. It also outlines the total amount of payments received.

5.2. INVOICES

From the **Service** Section, select the **Invoices** hyperlink to display.

Client Invoices

EBC - Eastpac Financial Services

Filter: Invoice # Any | Date From: Any | Reset | Submit | Export To CSV

Invoice #	Date From	Date To	Invoice Amount	Payable Amount
0000000008	31/12/2019	30/08/2021	\$178.27	\$115.99
0000000004	18/03/2008	30/12/2019	\$919.07	\$90.02

1. The **Client Name** will be automatically populated.
2. The **Filter** allows you to set the search parameters of the invoice/s you are looking for. Once you set the parameters, press the **Submit** button to locate the invoices.
 - (a) Invoice # is defaulted to Any but you can specify an invoice number if known.
 - (b) Date From Any is a drop down list of date options, for example, This Week, This Month etc.

3. The **Display** section will list the invoices matching your search parameters.
4. **Export To CSV** button allows you to Export the list of invoices displayed to either CSV or Excel. Press this button to download the spreadsheet to your Computer.
5. To **view an invoice** click on the invoice number hyperlink. The invoice will display on your screen. The Print option allows you to print the invoice to printer or to PDF if you have the ability to set the Destination on your printer to PDF.

5.3. ACTIVE ACCOUNTS LIST

From the **Service** Section, select the Active Accounts List hyperlink to display.

The screenshot shows the 'Active Accounts List' page in the Webcollect system. At the top left is the 'Webcollect' logo. The page title is 'Active Accounts List'. Below the title is a search filter section. It includes a dropdown menu labeled 'Choose a client...' with a callout box stating: 'If a User is restricted to multiple Clients, this field will be a drop down list to select from'. Below this are filter options for 'Input Date: Any', 'Account Balance', and 'Account Status'. There is also an input field for 'Client A/c No' and a 'Reset' button. A blue 'Submit' button is located to the right of the 'Client A/c No' field. Below the filters is a table with the following columns: 'Our Ref.', 'Customer', 'Client', 'Client A/C Number', 'Account Status', 'Balance', and 'Status'. The table currently displays 'No account to display.' The top right of the page has 'Home' and 'Logout' links.

1. The **Client field** is populated with the client code and name if the restriction is for one client. If two or more clients are restricted to the client user then this field becomes a drop down list to select from.
2. The **Filter** is set to display **active accounts only** for client users. An agency user will have the filter option to **search by active, closed or both**.
The search filters allow you to **search** by **Input Date, Account Balance, Account Status** and **Client A/c No**.
3. The search results will display a **maximum of 30 records** and display the **Find more results** button if there are more accounts to view.
4. The **Our Ref** column displays each account number as a hyperlink. When you click on it, the account will display on screen.

Our Reference	Customer	Client A/C Number	Account Status	Balance	Status
220600004	Irma Castro		CURRENT	\$12,000.00	ACTIVE
220600003	Test Company		CURRENT	\$1,985.00	ACTIVE
220600002	Irma		CURRENT	\$19,900.00	ACTIVE
220600001	Test Company		CURRENT	\$10,000.00	ACTIVE
2111000051	Jennifer Riley	616086	CURRENT	\$1,765.72	ACTIVE
2111000050	Virginia Lee	526859	CURRENT	\$1,431.10	ACTIVE
2111000049	Lillian Lopez	672840	CURRENT	\$1,903.39	ACTIVE
2111000048	Walter Fields	682678	CURRENT	\$1,082.61	ACTIVE
2111000046	Margaret Smith	492360	CURRENT	-\$109.58	ACTIVE
2111000045	Willie Pierce	625302	CURRENT	\$1,667.46	ACTIVE
2111000044	Jack Tucker	543061	CURRENT	\$1,424.41	ACTIVE
2111000043	Adam Ramos	615001	CURRENT	\$1,607.29	ACTIVE
2111000041	Brenda Dean	527514	CURRENT	\$1,492.26	ACTIVE
2111000040	Carl Montgomery	577932	CURRENT	\$1,934.65	ACTIVE
2111000039	Virginia Ross	504394	CURRENT	\$1,974.08	ACTIVE
2111000038	John Harris	501974	CURRENT	\$1,423.00	ACTIVE

5. The **Export to CSV** button allows the user to export the results to either CSV or Excel file. The default export is "Export to CSV". To select another option, use the drop down option on this button.

6. REPORTS SECTION

The **Reports** section is the location for information in report format.



6.1. CUSTOMER STATUS REPORT

From the **Reports** Section, select the **Customer Status Report** hyperlink.

Customer Status Report

CGR - Credit Gets Results

Filter: ALL

Our Ref	Customer Name	Your Ref	Initial Balance	Current Balance
Status: CURRENT				
123456789	Sally Smith	AVN	\$10,000.00	\$10,000.00
2209000050	Jennifer Riley	616086	\$1,765.72	\$1,765.72
2209000049	Virginia Lee	526859	\$1,431.10	\$1,431.10
2209000048	Lillian Lopez	672840	\$1,903.39	\$1,903.39
2209000047	Walter Fields	682678	\$1,082.61	\$1,082.61
2209000046	Theresa Holmes	539596	\$1,218.92	\$1,218.92

1. The **client name** will be automatically populated.
2. The **Filter** allows you to set the search parameters of the report. Once you set the parameters, press the **Submit** button display the accounts. Select from the drop down list.
 - (a) The first field is a drop down box listing the available **account status's** you can select from. It defaults to ALL and if used the report will show you all accounts with all status's.
 - (b) **Entry Date From** and **Entry Date To** allow you to set the date range of information being displayed in the report. Both of these fields are drop down boxes. The date reflects the date the accounts were entered into Wincollect.
3. The **Submit** button will display the information matching your search parameters.
4. The **Print Preview** button displays the report to screen ready for printing. Select the Print option to print your report.
5. The **Export to CSV** button is a drop down and allows you to export the report to either CSV or Excel format. Press the button to downloads an spreadsheet version of the report.
7. Select the **Home** option to return to the main screen of the client portal.

7.1. ACCOUNT CLOSURE SUMMARY REPORT

From the **Reports** Section, select the **Account Closure Summary Report** hyperlink.

Account Closure Summary Report

CGR - Credit Gets Results

Filter: Date Closed From: Any Date Closed To: Any Closure Reason: [] [Reset] [Submit] [Print Preview] [Export To CSV]

Close Date	Account	Customer Name	Address	Days Act.	Amount	Balance
Paid In Full						
17/11/2022	CGR0002	Don Wain		5,357	\$5,000.25	\$4,256.03
		No of Accounts: 2		Total:	\$5,000.25	\$4,256.03
		No of Accounts: 1		Report Total:	\$5,000.25	\$4,256.03

1. The **client name** will be automatically populated.
2. The **Filter** allows you to set the search parameters of the report. Once you set the parameters, press the **Submit** button display the accounts. Select from the drop down list.
 - (a) **Date Closed From** and **Date Closed To** allow you to set the date range of information being displayed in the report. Both of these fields are drop down boxes. The date reflects the date the accounts were closed in Wincollect.
 - (b) The **Closure Reason** field allows you to specify a specific reason for closure. If left blank, it returns all closure reasons on your closed accounts.
3. The **Submit** button will display the information matching your search parameters.
4. The **Print Preview** button displays the report to screen ready for printing. Select the Print option to print your report.
5. The **Export to CSV** button is a drop down and allows you to export the report to either CSV or Excel format. Press the button to downloads an spreadsheet version of the report.
8. Select the **Home** option to return to the main screen of Webcollect.

8.1. PERCENTAGE ANALYSIS REPORT

From the **Reports** Section, select the **Percentage Analysis Report** hyperlink.

Percentage Analysis Report

CGR - Credit Gets Results

Filter: Date From: Any Date To: Any Reset Submit Print Preview Export To CSV

Act/Clsd	Status	Status Desc	No. A/C's	Orig Amount	%age	Payments	%age	Adjustments	%age	Charges	%age	Balance
ACTIVE	CUR	CURRENT	53	\$946,308.33	96.03	\$11,387.51	1.16	\$400.00	0.04	\$400.00	0.04	\$935,335.82
ACTIVE	BPA	BROKEN PAYMENT ARRANGEMENT	2	\$23,000.24	1.19	\$3,599.99	0.19	\$0.00	0.00	\$0.00	0.00	\$19,400.25
ACTIVE	DISC	Discontinue	1	\$10,000.25	0.51	\$15,958.00	0.82	\$499.75	0.03	\$499.75	0.03	-\$5,458.00
		Total:	56	\$979,308.82	97.73	\$30,945.50	2.17	\$899.75	0.07	\$899.75	0.07	\$949,278.07
CLOSED	CUR	CURRENT	1	\$1,158.56	0.06	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$1,158.56
CLOSED	CLOSE	CLOSED	1	\$5,000.25	0.26	\$1,236.00	16.89	\$200.00	2.73	\$200.00	2.73	\$4,256.03
		Total:	2	\$6,158.81	0.32	\$1,236.00	16.89	\$200.00	2.73	\$200.00	2.73	\$5,414.59
		Report Total:	58	\$985,467.63	98.04	\$32,181.50	19.06	\$1,099.75	2.80	\$1,099.75	2.80	\$954,692.66

1. The **Client name** will be automatically populated.
2. The **Filter** allows you to set the search parameters of the report. Once you set the parameters, press the **Submit** button display the accounts. Select from the drop down list.
 - (a) **Date From** and **Date To** allow you to set the date range of information being displayed in the report. Both of these fields are drop down boxes.
3. The **Submit** button will display the information matching your search parameters.
4. The **Print Preview** button displays the report to screen ready for printing. Select the Print option to print your report.
5. The **Export to CSV** button is a drop down and allows you to export the report to either CSV or Excel format. Press the button to download a spreadsheet version of the report.
6. Select the **Home** option to return to the main screen of Webcollect.

8.2. CUSTOMER PAYMENTS RECONCILIATION REPORT

From the **Reports** Section, select the **Customer Payments Reconciliation Report** hyperlink.

Customer Payments Reconciliation Report

CGR - Credit Gets Results

Filter: Date From: Any Date To: Any Reset Submit

Print Preview Export To CSV

Entry Date	Our Ref	Status	Name	Client Code	Rcpt No	Collector	Tax	Paid US	Paid You	Commission	Current Balance
CASH											
05/07/2022	0803000002	CLOSE	Don Waun	CGR	1000000132	BOB	\$12.50	\$500.00	\$0.00	\$125.00	\$4,256.03
						Total:	\$12.50	\$500.00	\$0.00	\$125.00	\$4,256.03
Direct to Client											
20/06/2022	0803000004	CJR	Fred Nerik	CGR		DAVIDK	\$0.03	\$0.00	\$1.01	\$0.25	\$7,072.99
16/06/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
08/06/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
08/06/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
08/06/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
26/05/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
26/05/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
26/05/2022	0803000002	CLOSE	Don Waun	CGR		BOB	\$0.25	\$0.00	\$10.00	\$2.50	\$4,256.03
						Total:	\$1.78	\$0.00	\$71.01	\$17.75	\$36,865.20
EziDebit CC PayNow											
10/06/2022	0803000002	CLOSE	Don Waun	CGR	1000000130	BOB	\$0.05	\$2.00	\$0.00	\$0.50	\$4,256.03
10/06/2022	0803000002	CLOSE	Don Waun	CGR	1000000129	BOB	\$0.05	\$2.00	\$0.00	\$0.50	\$4,256.03
10/06/2022	0803000002	CLOSE	Don Waun	CGR	1000000128	BOB	\$0.05	\$2.00	\$0.00	\$0.50	\$4,256.03
09/06/2022	0803000002	CLOSE	Don Waun	CGR	1000000127	BOB	\$0.05	\$2.00	\$0.00	\$0.50	\$4,256.03

1. The **client name** will be automatically populated.
2. The **Filter** allows you to set the search parameters of the report. Once you set the parameters, press the **Submit** button display the accounts. Select from the drop down list.
 - (a) **Date From** and **Date To** allow you to set the date range of information being displayed in the report. Both of these fields are drop down boxes.
3. The **Submit** button will display the information matching your search parameters.
4. The **Print Preview** button displays the report to screen ready for printing. Select the Print option to print your report.
5. The **Export to CSV** button is a drop down and allows you to export the report to either CSV or Excel format. Press the button to downloads an spreadsheet version of the report.
6. Select the **Home** option to return to the main screen of Webcollect.

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