



Tasmanian Collection Service

Customer Portal User Manual

CONTENTS

| | | |
|------|-----------------------------------|---|
| 1. | Chapter 1 - Using the Portal..... | 3 |
| 1.1. | Logging In | 3 |
| 2.1. | Welcome Page | 4 |
| 2.2. | Make a Payment | 5 |
| 2.3. | Set up a Payment Plan | 6 |
| 2.4. | Update My Contact Details | 7 |
| 2.5. | Send a Comment..... | 8 |

1. Chapter 1 - Using the Portal

The **Customer Portal** allows access to take actions on an account via the web. These actions are the following:

- [Make a Payment](#)
- [Set up a Payment Plan](#)
- [Update My Contact Details](#)
- [Send Comment](#)

1.1. Logging In

To access the **Customer Portal** you will be required to log in.

By logging in, the user accepts the **Privacy and Credit Information Policy Statement**. Clicking on the hyperlink will open up the statement to be read.

1. Type in the **Account number** that was assigned to you, the customer. If you have received correspondence from the Agency, then the **Our Ref** number will be the Account number.

2. Now you will need to type in your **Date of Birth**.

3. To log in, press the **LOGIN** button. If the details are incorrect, a message will appear in red indicating the issue.

4. This action takes you to the **Welcome Page** where you will see your **Account** number, the **Balance** of your account and **four options** to select from.

The screenshot shows the Wincollect Customer Portal login interface. At the top, there is a navigation bar with links for 'Home', 'About', and 'Contact Us'. The main content area is titled 'Welcome to Wincollect's Customer Portal' and includes a brief description: 'The simplest way to pay your account without having to speak to us. You can also setup a payment plan and update your contact details.' Below this is the 'Account Login' section, which states 'By logging in you accept our [Privacy and Credit Information Policy Statement](#)'. There are two input fields: 'Account' and 'Date of Birth'. A blue 'LOGIN' button is positioned below the input fields. At the bottom left, there is a link to 'View Privacy and Credit Information Policy Statement', and at the bottom right, the copyright notice '© 2020 - Wincollect CRM' is displayed.

2.1. Welcome Page

The **Welcome page** displays all of the information needed.

Let's take a closer look at what this page does.

1. **Account** is the number that identifies the account with the Agency.
2. **Balance** is the total amount owed.
3. **Session Time** is the counter which tells you how long you have left in the logged in session.
Each session **defaults to 10 minutes**. Once the time period expires it will log the user out and return to the login screen.
4. **Log-out** is where the user can log out of the session once they have completed what they are doing.
5. **Options** provides a list of actions, when selected takes you to another screen. For example, if you wanted to make a payment you would select the Make Payment option.



The screenshot shows a user interface for a customer portal. At the top left, it says "Welcome Paul". At the top right, it shows "Session Time: 09:16" and a "Log-out" link. Below this, there is a prompt: "Please select from the below options to proceed". Underneath, the account information is displayed: "Account: 0803000001" and "Balance: \$262.00". A horizontal line separates this information from a section titled "Options". This section contains four buttons: "Make Payment" (with a credit card icon), "Setup a Payment Plan" (with a calendar icon), "Update My Contact Details" (with a person icon), and "Send Comment" (with a speech bubble icon).

2.2. Make a Payment

This is where you can make a **payment using a Credit Card**. These payments are processed using Ezidebit. Depending on the type of Credit Card being used, the picture will reflect, Visa, Master Card etc.

***Note:** The Credit Card Details being used in this manual are not connected to a real account. They are used for illustration purposes only.*

1. Enter Payment Amount (Min \$2.00 | Max \$10,000)

Type in the amount you want to make the payment for.

2. **Credit Card No.** is the account number located on the front of the credit card. As you type in the number it will be displayed on the card visual.

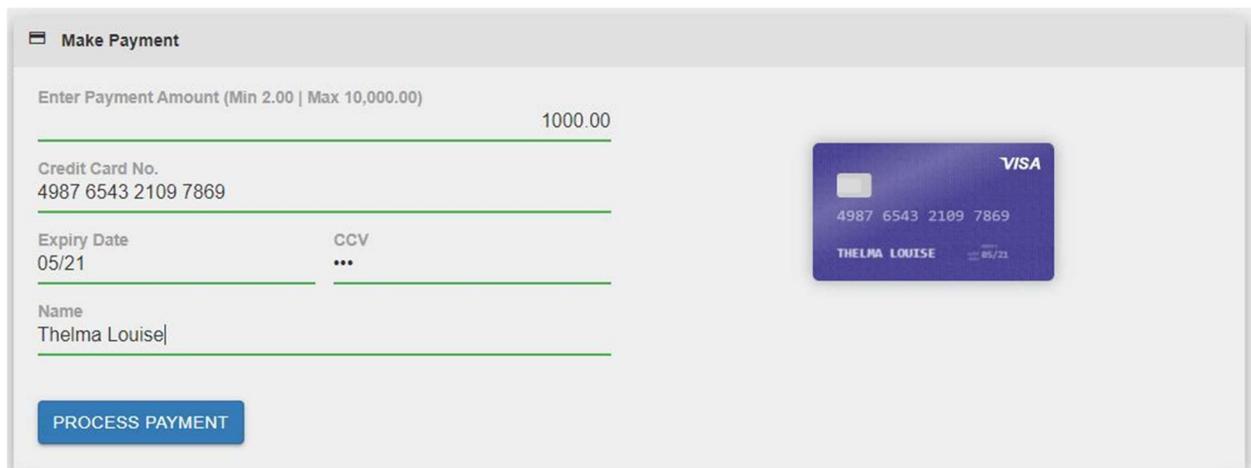
3. The **Expiry Date** is when the credit card is valid for use until.

4. The **CCV** is located on the back of the credit card. When you click in this field the card visual will turn over and show you where the number is located.

5. Click in this field to type in the **Name** on the Credit Card. You will also notice that the card visual will turn back to the front and now display the name you have typed in.

6. Once you have checked to make sure all the card details are correct, select the **Process Payment** button.

7. Once the payment has been processed you will receive either a **confirmation** that the payment has been processed or declined.



The screenshot displays a 'Make Payment' form with the following fields and values:

- Enter Payment Amount (Min 2.00 | Max 10,000.00):** 1000.00
- Credit Card No.:** 4987 6543 2109 7869
- Expiry Date:** 05/21
- CCV:** ...
- Name:** Thelma Louise

A blue Visa credit card visual is shown on the right side of the form, displaying the same card number (4987 6543 2109 7869) and name (THELMA LOUISE) as entered in the form. The card also shows the VISA logo and the expiry date 05/21.

A blue button labeled 'PROCESS PAYMENT' is located at the bottom left of the form.

2.3. Set up a Payment Plan

Selecting the **Set up a Payment Plan** option, to begin a payment arrangement request.

1. **Frequency** is a drop down list and allows you to select either a Weekly, Fort-nightly or Monthly payment frequency.
2. The **Payment Amount** is where you will specify the amount you wish to make for each frequency chosen. Depending on the Frequency, the system will calculate what the minimum and maximum amounts that will be accepted. Any amount within these ranges is accepted by the system.
3. **1st Payment Date** is the date of the first payment to be processed on the account.
4. **Term** is a system generated time and can not be edited. This coincides with the Frequency chosen.
5. **Pay Type** is a drop down list and allows you to select either Bank Account or Credit Card.
6. **Payment Details** is where the details of the account or credit card are entered. Depending on what option you select from the screen will change to display the relevant fields to cater to the details of the pay type chosen.
7. **I agree tick box** must be selected to process the payment plan. This is a hyperlink and can be read prior to selecting by simply clicking on it. This takes you to the ezidebit DDR service agreement.
8. The **Process Payment Plan** button, once selected will complete the processing of the payment arrangement offered.
9. If the details of the account or credit card or incorrect you will receive this Payment Plan Failed message outlining what is incorrect. Select the back button to return to the payment plan screen and make the correction and repeat steps 7 and 8.

Payment Plan Failed

Error Message

Ezidebit Bank Account update failed: Invalid bank account BSB number entered

 **Setup a Payment Plan**

| | | | | |
|-----------|--|------------------|------|----------------|
| Frequency | Payment Amount (Min \$22.00 Max \$262.00) | 1st Payment Date | Term | Pay Type |
| Monthly ▼ | \$22.00 | 01/09/2020 | 12 | Bank Account ▼ |

Payment Details

| | | |
|--------------|-------------|-----|
| Account Name | Account No. | BSB |
| | | |

I agree to the [Terms and Conditions of the Direct Debit Request and Service Agreement](#)

[PROCESS PAYMENT PLAN](#)

2.4. Update My Contact Details

The **Update My Contact Details** option is where you can make any changes to your existing contact details held with us.

1. Make the required changes to your **contact details**.
2. Once you have done this, press the **Request Update** button.
3. This request will be sent directly to the Tasmanian Collection Service system

 **Update My Contact Details**

| | | | |
|----------------|--------|-------|-----------|
| Address | Suburb | State | Post Code |
| Address Line 1 | Suburb | AK | 456 |

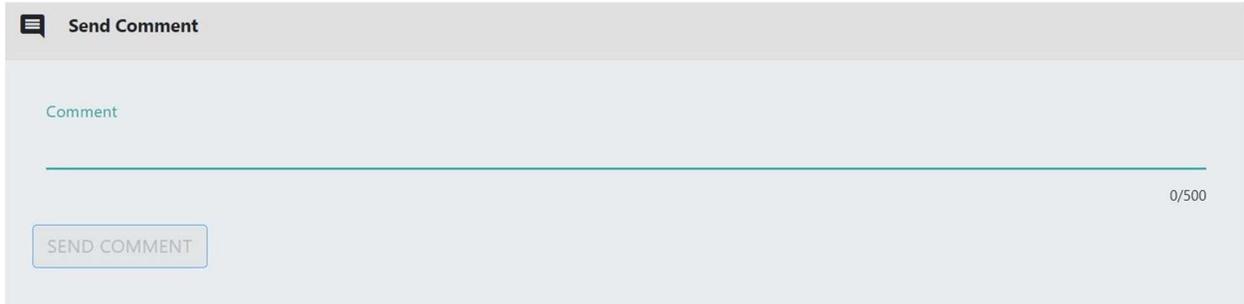
| | | |
|-------------|------------|------------|
| Mobile | Home Phone | Work Phone |
| 04007070000 | 0400700000 | 086478520 |

[REQUEST UPDATE](#)

2.5. Send a Comment

The **Send Comment** option allows you to send a note to the User at Tasmanian Collection Service who is assigned to the account.

1. Once you have typed your comment, press the **Send Comment** button.
2. This request will be sent to Tasmanian Collection Service and placed in the diary notes of your account.



The screenshot shows a web form titled "Send Comment". At the top left, there is a speech bubble icon and the text "Send Comment". Below this is a large text input area with the placeholder text "Comment". A horizontal line is drawn across the input area, and the character count "0/500" is displayed at the bottom right of the input area. Below the input area is a button labeled "SEND COMMENT".