

Your Debts Online

Version 2.0

User Guide

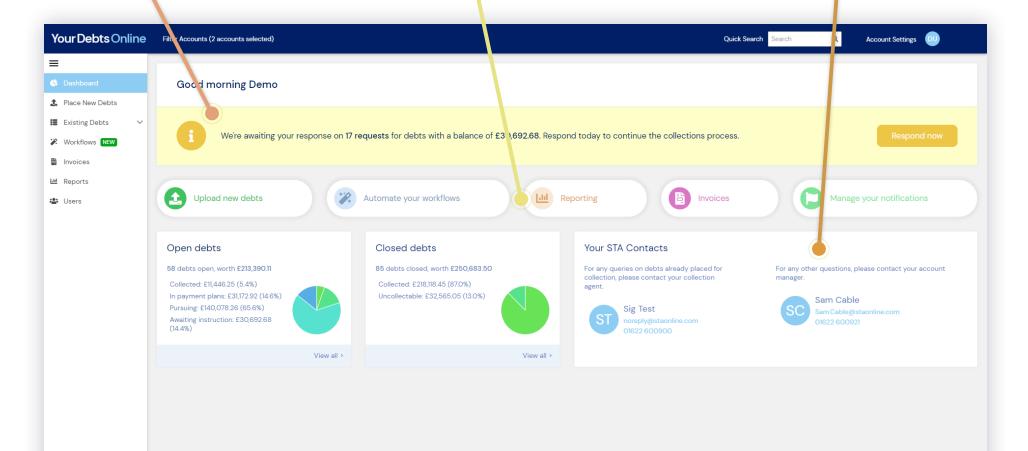


An overview of the debts you've placed with us with quick links to review files where we're awaiting your response, place new debts, change your notification settings, and more.

The notification banner shows the volume and value of debts outstanding where we're awaiting a response from you to continue with collection. 2

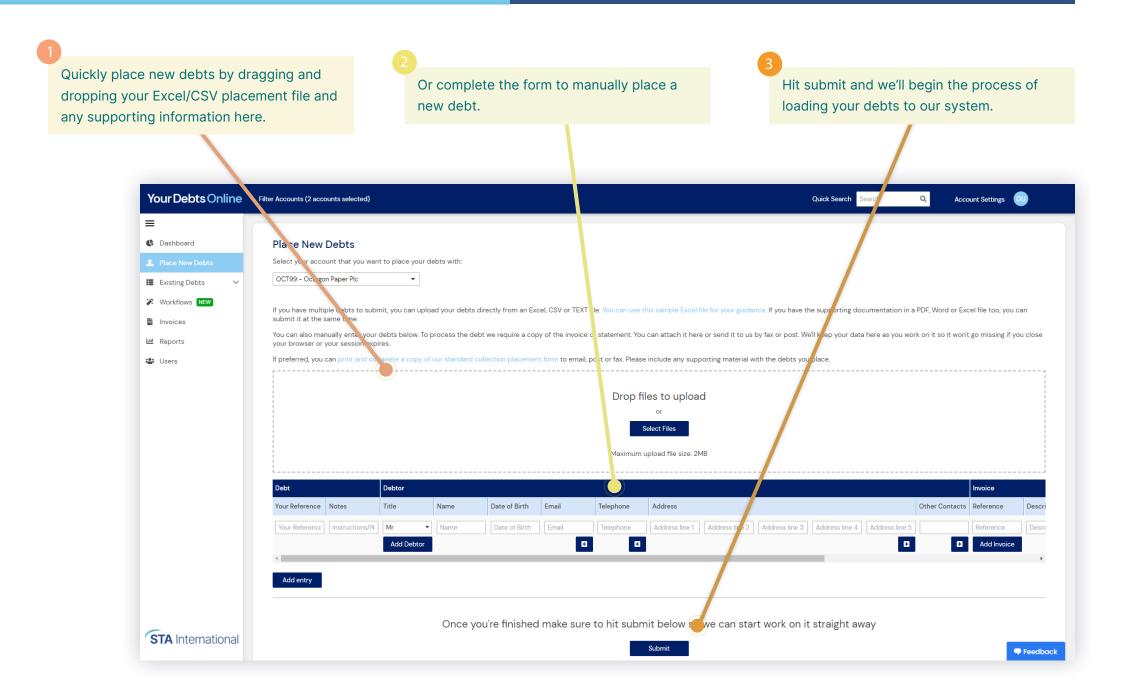
Quick links to place new debts, set workflow automation, view reporting and invoices (permission-based), and change your notification settings.

Cards show summary of your open and closed debts and contact details for your appointed collector and account manager.



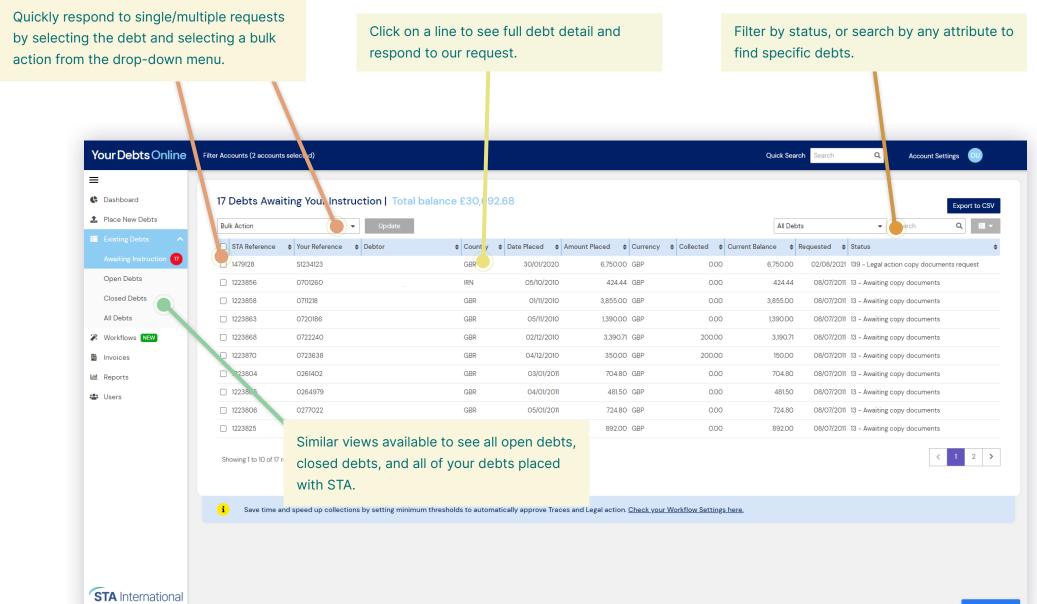
Place New Debts

Securely refer your overdue accounts to us to begin our collection process.



Awaiting Instructions

A quick view of all the files where we're awaiting your instructions before proceeding with our collection efforts





View current collection status, breakdown of payments and charges, documents and our diary notes relating to a specific debt. You can also respond to our queries and upload documents we've requested.

C Dashboard	Debt Deta	il						
1 Place New Debts	Overview							
Existing Debts	Your Reference	S1234123	STA Reference	1479128	You can automa	ate your response for	this file:	
Awaiting Instruction 77	Debtor Name		Country	GBR	Trace	Approved	· ·	Automatically approve or deny all
Open Debts	Current Status	Current Status 139 - Legal action copy documents request					n request	requests for Trace or Legal action on
Closed Debts	Status Note	We have completed our prelegal collection proce					Update	the current file.
All Debts		balance due. We have assessed the case and we to pay. We have written to you separately, howeve legal action. Should you wish to proceed with lega	r note that we are missing documen	tation to start 🦳	Document	6		
🗱 Workflows NEW		missing (1) copy invoices and/or statement; (2) er confirmation of enrolment date, or copy of the ag	rolment form (on-line registration fo					
Invoices	Debt Value	GBP 6750.00	► View breakd	own		/pe	File	
네 Reports	Payments	GBP 0.00				formation from Client	1.jpg 2.jpg	Overview of the file details and current
🔹 Users	Debt Balance	GBP 6750.00				formation from Client	3.jpg	status of our collection efforts.
			status of our collection enorts.					
	Provide an	update						
	Instruction requ	ested: Monday 2nd August 2021 (74 days ago)						
	This file rec	quires your attention.						
	We have co We have as to you sepa proceed wi	action copy documents request ompleted our prelegal collection process but it has n issessed the case and we think that only legal action arately, however note that we are missing document ith legal action please return the signed authorisatio ant form (on-line registration form)or confirmation o	would persuade the subject to pay. V ation to start legal action. Should you n with missing (1) copy invoices and/o	Ve have written wish to or statement;				View and download documents related to the file.
	Action	Message only 💌	Delay action DD/MM/YYYY					Respond to any requests, upload
	Message	Write your notes here						relevant documents, or give an
								update on the file. You can also
		Dere files have an always there		ĥ				
		Drop files here or choose them						choose to put the file on hold.
				Send				
	Notes							
	NOLES							Complete view of our actions to date
	Date	Note						on the file.
	08/10/2021	Web Message from ydo on 08-10-2021 at 14:45:17	-	: test				on the file.
	08/10/2021	Web Message from ydo on 08-10-2021 at 14:30:13 received a potification and the and date is 28th 0		: We have				



Depending on your permission level, set thresholds for automatic approval of trace requests and requests for legal action, expediting our collection process and saving you valuable time.

Enter values to automatically decline	Enter values to automatically approve	Any debt value in between the two value		
equests for trace/legal action for debts	requests for trace/legal action for debts	you enter will need to be approved at the		
below a certain balance threshold.	above a certain balance threshold.	time of request before we proceed.		
	hay need to make a request for your to authorise. You can now automate some of these override this setting for each individual debt from your existing debts. Anything between the	Quick Search C Account Settings		



Depending on your permission level, you're able to view and download copies of all invoices we've raised on your account and specify the credit control contact that should receive invoices by email.

Click on the invoice line to see a full breakdown of the charges, and download PDF or CSV copies

Filter Accounts (2 accounts selected

Click Add Recipient to specify the credit control contact that should receive PDF and/or CSV copies of invoices by email. You can also choose to anonymise debtor details in the email attachments.

Your Debts Online

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ashboard	Invoices						Export to CSV
ace New Debts	Outstanding	-					
xisting Debts 🗸 🗸	Invoice No	Description	Invoice Date	Due Date 🔶	Charge GBP 🔶	VAT GBP 🔶	Total GBP 💠 C
orkflows NEW	75821	Commission	30/06/01	30/07/2011	55.00	11.00	66.00
voices	75820	Commission	31/05/2011	30/06/2011	110.75	22.15	132.90
eports	75819	Commission	30/04/2011	30/05/2011	47.50	9.50	57.00
sers	75818	Commission	31/03/2011	30/04/2011	348.83	69.77	418.60
	75817	Commission	28/02/2011	30/03/2011	143.20	28.64	171.84
	75816	Commission	31/01/2011	02/03/2011	35.85	7.17	43.02
	75815	Commission	31/12/2010	30/01/2011	303.09	60.62	363.71
	75814	Commission	30/11/2010	30/12/2010	1,119.93	223.99	1,343.92
	75813	Commission	31/10/2010	30/11/2010	927.93	185.59	1,113.52
	75812	Commission	30/09/2010	30/10/2010	659.12	131.82	790.94
	75811	Commission	31/08/2010	30/09/2010	3,859.95	771.99	4,631.94
	75810	Commission	31/07/2010	30/08/2010	3,007.67	601.53	3,609.20
	75809	Commission	30/06/2010	30/07/2010	1,589.74	317.95	1,907.69
	75709	Commission	31/05/2010	30/06/2010	4,298.82	859.76	5,158.58
	75708	Commission	30/04/2010	30/05/2010	1,762.53	352.51	2,115.04

 Quick Search
 Carch
 Count Settings
 DT

 Get notified when an invoice is generated
 generated
 you can choose to have your invoices emailed to you and whether you want the data available as a CSt file.
 DF CSV

 Email
 Client Accounts
 PDF CSV

 Add Receipient



our Debts Online	Filter Accounts (2 accounts selected)							Quick Search	Search	Q Acco	unt Settings
=											
Cashboard	Reporting										
1 Place New Debts											
Existing Debts 🗸 🗸	Reports										
Workflows NEW	Placement Performance	Your Reference	STA Reference 🖨	Date Placed 🖨	Debtor 🖨	Currency	♦ Amount Placed	Debt Value 🖨	Collected 🖨	Commission 💠 1	race 💠 Leg
Invoices	Collection Per Debt	0055462	1223738	2010-01-07	Anonymised: 201	GBP	7,122.50	7,122.51	7,980.58	712.25	35.00
🔟 Reports	Monthly Cashflow	0061166	1223749	2010-01-09	Anonymised: 201	GBP	1,725.70	1,725.70	1,750.78	0.00	35.00
Subsers		0158785	1223750	2010-01-10	Anonymised: 201	GBP	2,270.66	2,270.66	2,303.66	227.07	35.00
		0369207	1223739	2010-02-07	Anonymised: 201	GBP	1,933.25	1,933.25	2,166.15	193.33	35.00
		0381041	1223787	2011-01-06	Sta International	GBP	531.58	531.58	0.00	0.00	0.00
		0381186	1223751	2010-02-09	Anonymised: 201	GBP	3,678.47	3,678.47	3,731.92	367.85	35.00
		0386524	1223752	2010-03-01	Anonymised: 201	GBP	1,226.15	1,226.16	1,243.98	122.62	35.00
		0476101	1223753	2010-03-10	Anonymised: 201	GBP	1,934.60	1,934.60	1,962.71	193.46	35.00
		0480297	1223754	2010-04-01	Anonymised: 201	GBP	4,541.32	4,541.33	4,607.33	454.13	35.00
		0483395	1223740	2010-04-08	Anonymised: 201	GBP	2,391.12	2,391.13	2,679.20	239.11	35.00
		0503086	1223756	2010-04-10	Anonymised: 201	GBP	4,962.96	4,962.96	5,030.57	496.30	35.00
		0518226	1223757	2010-05-10	Anonymised: 201	GBP	2,406.90	2,406.90	2,439.69	240.69	35.00
		0518377	1223758	2010-06-01	Anonymised: 201	GBP	908.26	908.27	920.65	90.83	0.00
		0522125	1223791	2011-02-06	Sta International	GBP	2,101.31	2,101.31	0.00	0.00	0.00
		0524226	1223778	2011-02-08	Sta International	GBP	1,872.36	1,872.36	0.00	0.00	0.00

***use feedback to request other useful reports?



Depending on your permission level, you can add or remove users from your organisation, assign accounts that they can view, and change their permission levels.

Click Add User to set up a new YDO user. Enter their email address, select the account(s) they will be able to view. Their access levels can be defined by choosing either 'No Access', 'View Only' or 'Editor' from the relevent drop-down menus.

To delete a user, check the tick box next to their email address, and choose Delete from the Bulk Action menu above.

Your Debts Online	F Iter Accounts (2 accounts selected) Quick Search S	Search Q Account Settings D
=		
Cashboard	Manage Users for Your Client Accounts	
1 Place New Debts	Add, edit, or delete users from YDO. New accounts will be sent an invite to setup their account.	
Existing Debts 🗸	Bulk Action Vpdate	
Workflows NEW	Email Client Accounts	Workflows Invoices Users
Linvoices	Gene@ydo.stainternational.co	Editor • Editor • Editor •
내 Reports	Add User	Save Changes



Change your password, update your contact details and set your email notification preferences

Your Debts Online	Filter Accounts (2 accounts selected)		Quick Search Search	Q Account Settings							
=											
C Dashboard	My Account										
1 Place New Debts		You can change any of your details below. Unsaved changes will be highlighted orange; make sure to save your changes once complete. Saved changes will be highlighted green and any errors will be flagged red.									
Existing Debts 🗸		Change your email:									
Workflows NEW											
Invoices	Change your password:	•••••	8-character minimum; case sensitive. And at least one of each;								
Lui Reports		Confirm New Password	uppercase character, lowercase character, number, symbol								
📇 Users	Change your contact details:										
		Telephone									
	Notifications:	Disabled									
			Send an alert on debts that require instruction.								
	Date format:	DD/MM/YYYY	The format dates will display across YDO.								
	YDO demo:	Click here to watch the YDO demo again									
				Save Changes							
		Ch	oose how often you'd like to be emailed								
			h notifications on debts where we're								
			aiting your instruction to proceed with our								
			lections process.								
			ase note that the default notification setting is Weekly								
			is the total the default he the the the default he the default he the default he the default he								

Need assistance?

