STA International

Your Debts **Online**

Version 2.0

User Guide

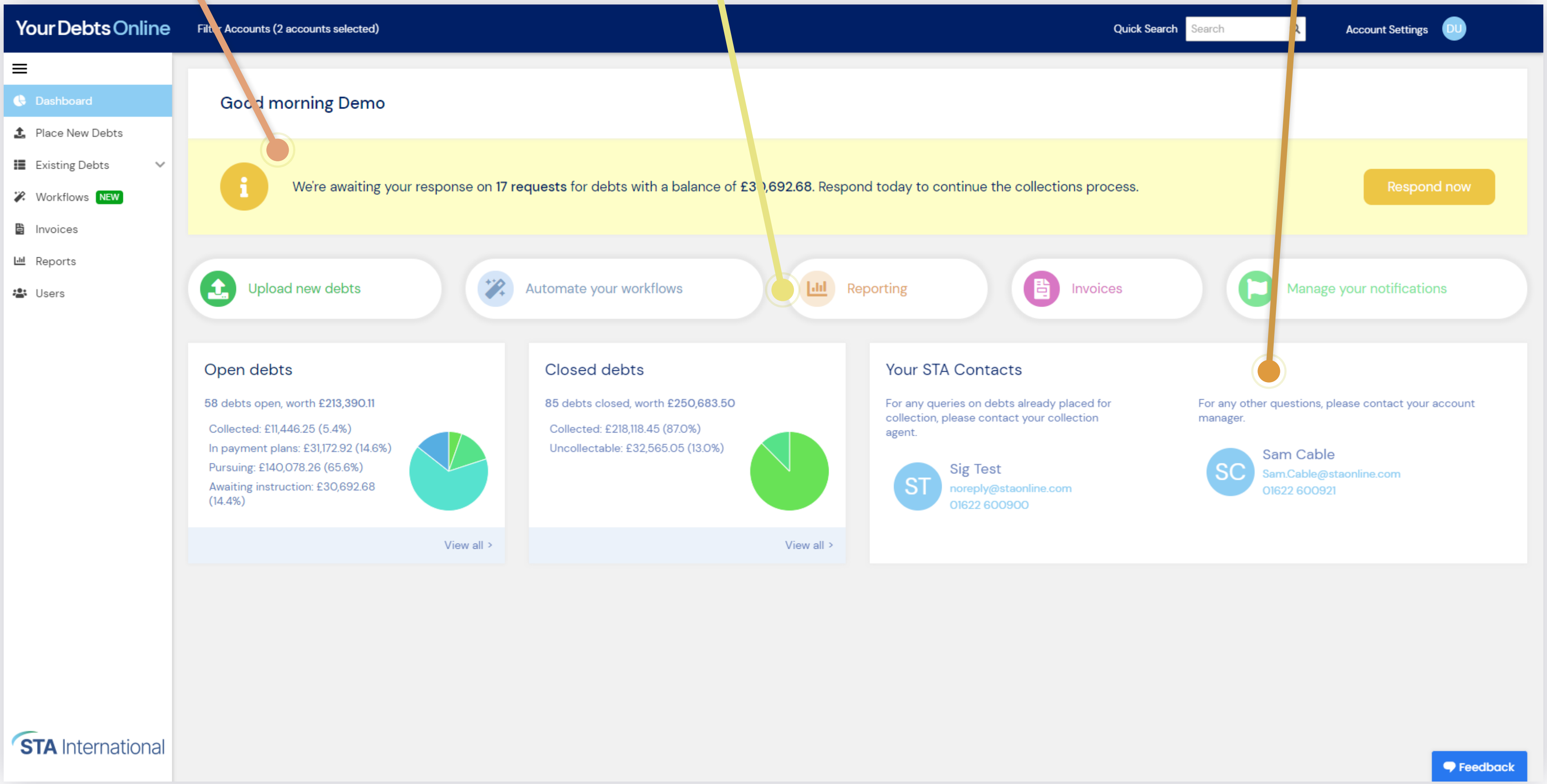
Dashboard

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.

1 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.

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



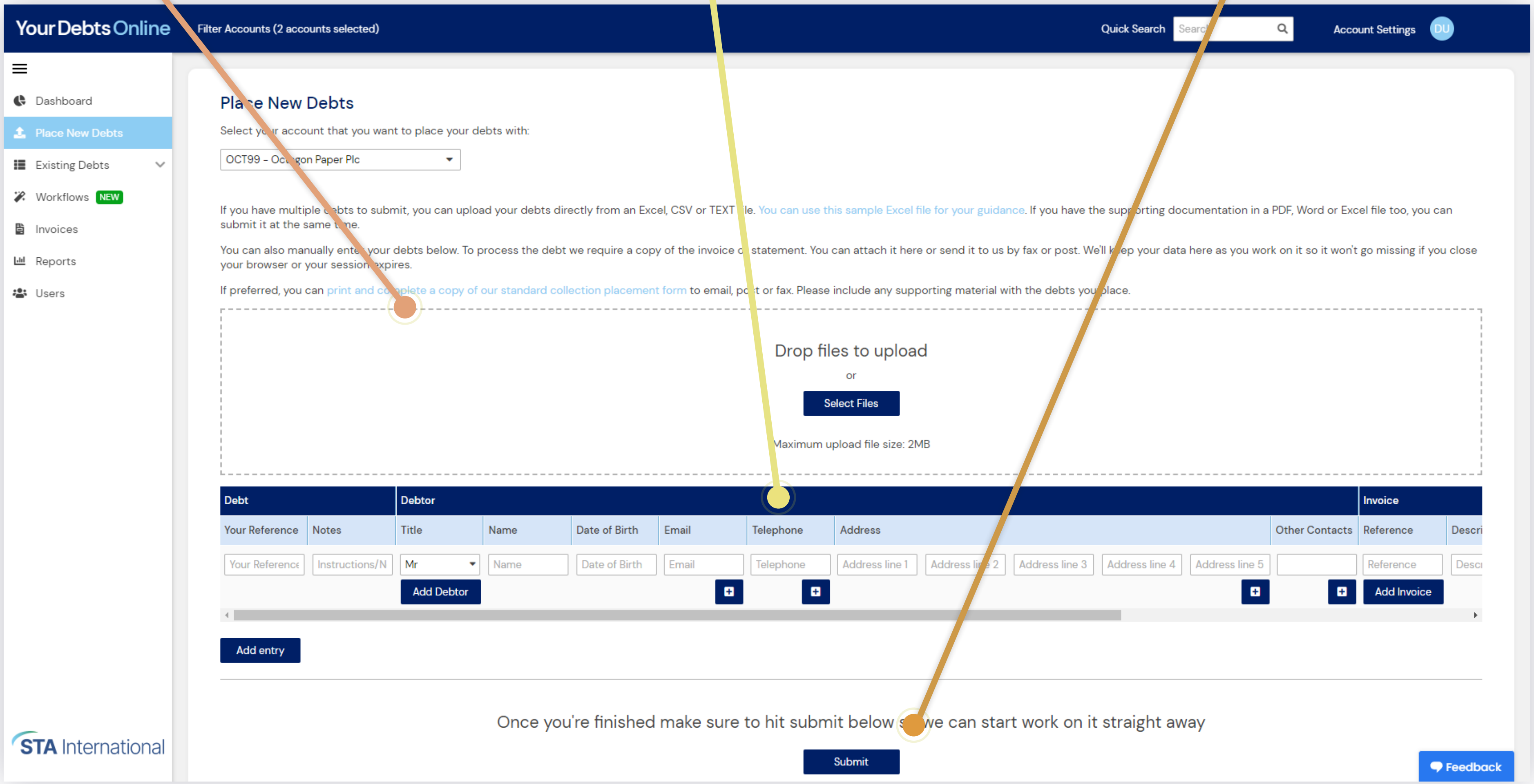
Place New Debts

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

1. Quickly place new debts by dragging and dropping your Excel/CSV placement file and any supporting information here.

2. Or complete the form to manually place a new debt.

3. Hit submit and we'll begin the process of loading your debts to our system.



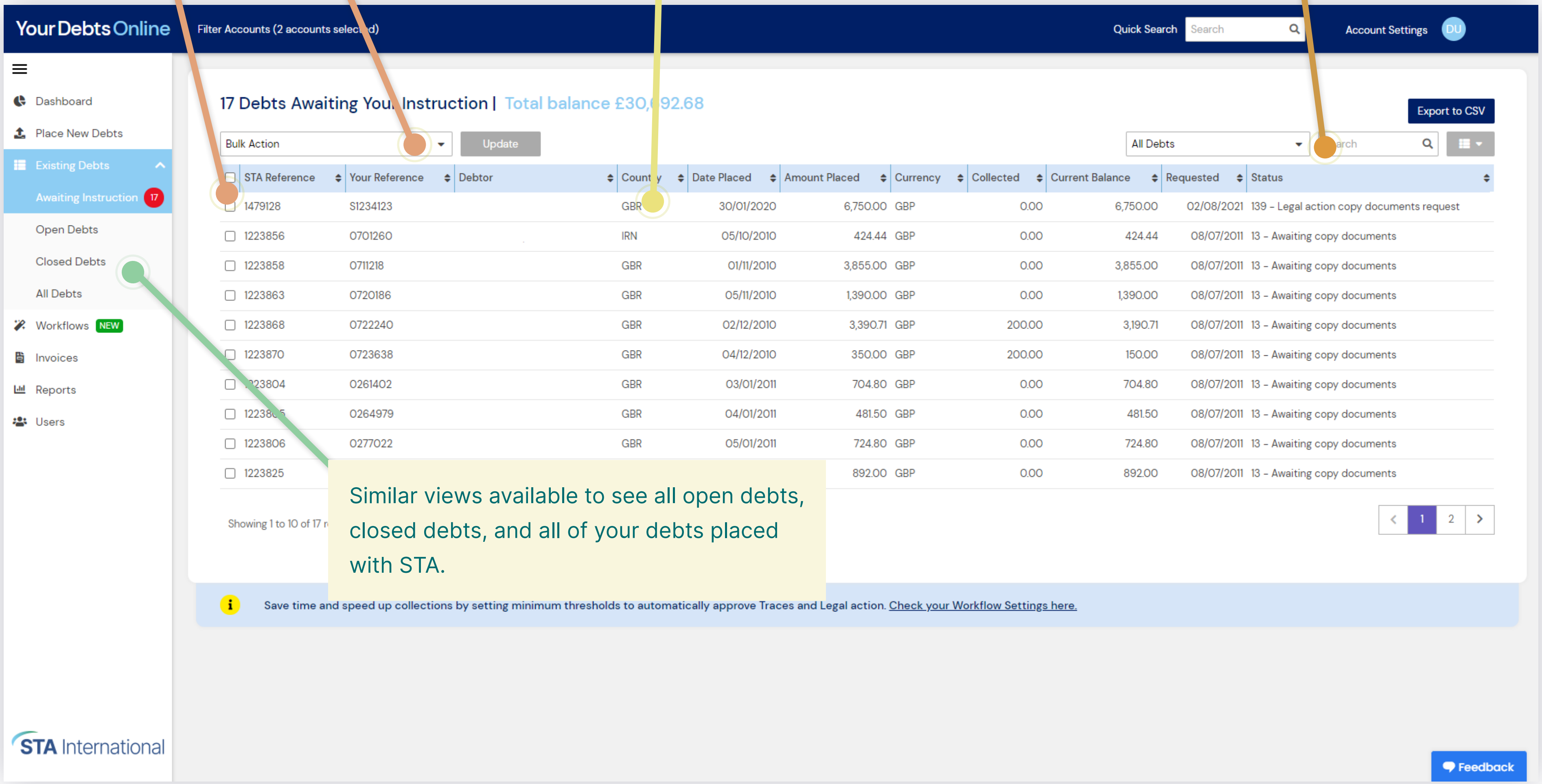
Awaiting Instructions

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

Quickly respond to single/multiple requests by selecting the debt and selecting a bulk action from the drop-down menu.

Click on a line to see full debt detail and respond to our request.

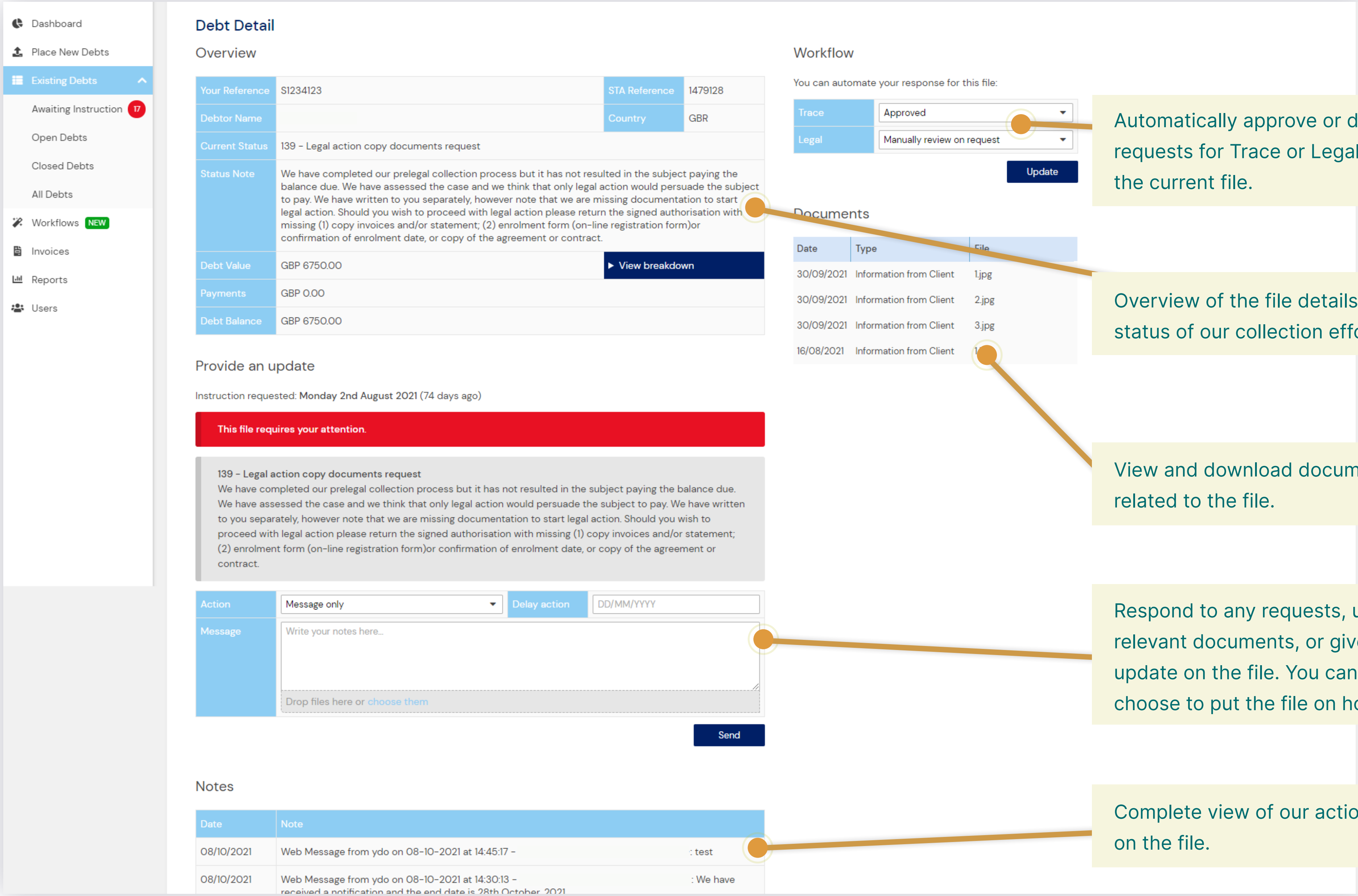
Filter by status, or search by any attribute to find specific debts.



Similar views available to see all open debts, closed debts, and all of your debts placed with STA.

Debt Detail

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.



Automatically approve or deny all requests for Trace or Legal action on the current file.

Overview of the file details and current status of our collection efforts.

View and download documents related to the file.

Respond to any requests, upload relevant documents, or give an update on the file. You can also choose to put the file on hold.

Complete view of our actions to date on the file.

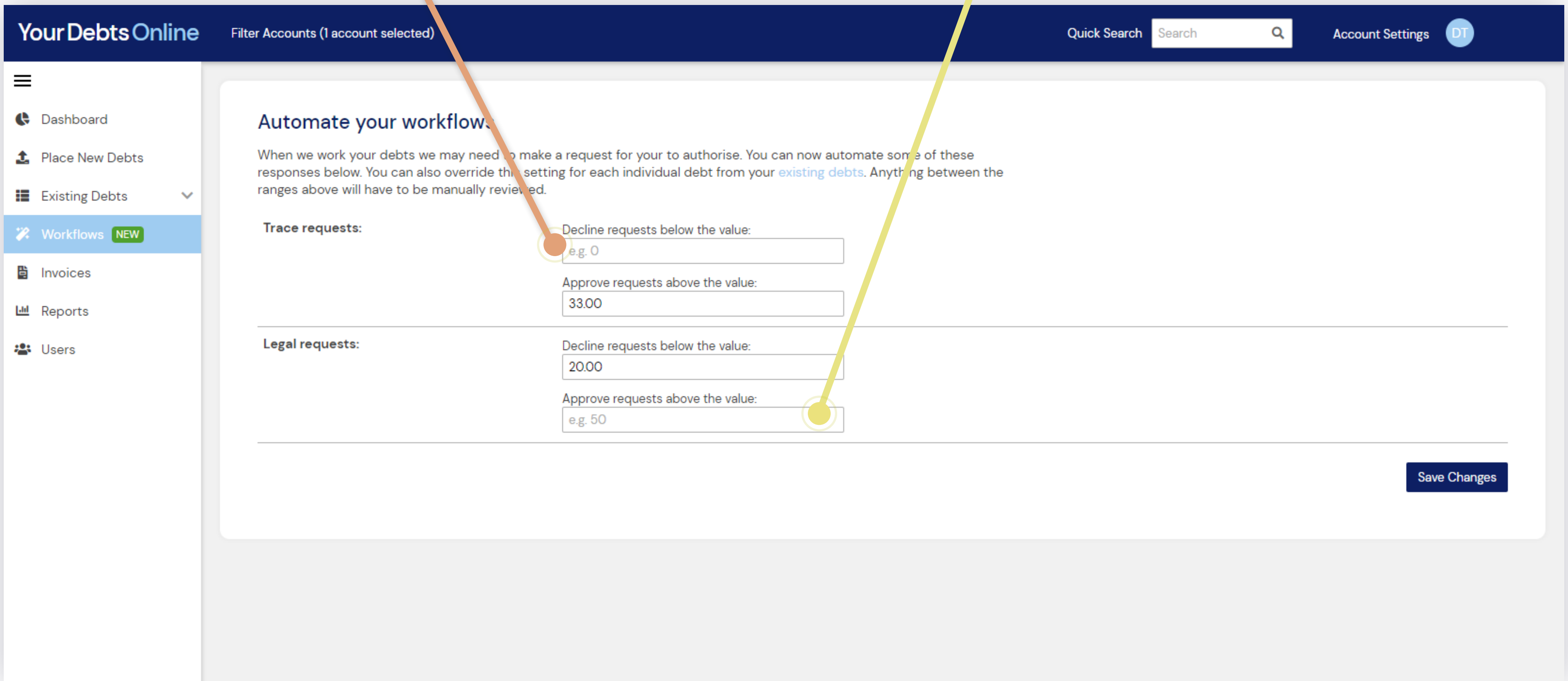
Workflows

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 requests for trace/legal action for debts below a certain balance threshold.

Enter values to automatically approve requests for trace/legal action for debts above a certain balance threshold.

Any debt value in between the two values you enter will need to be approved at the time of request before we proceed.

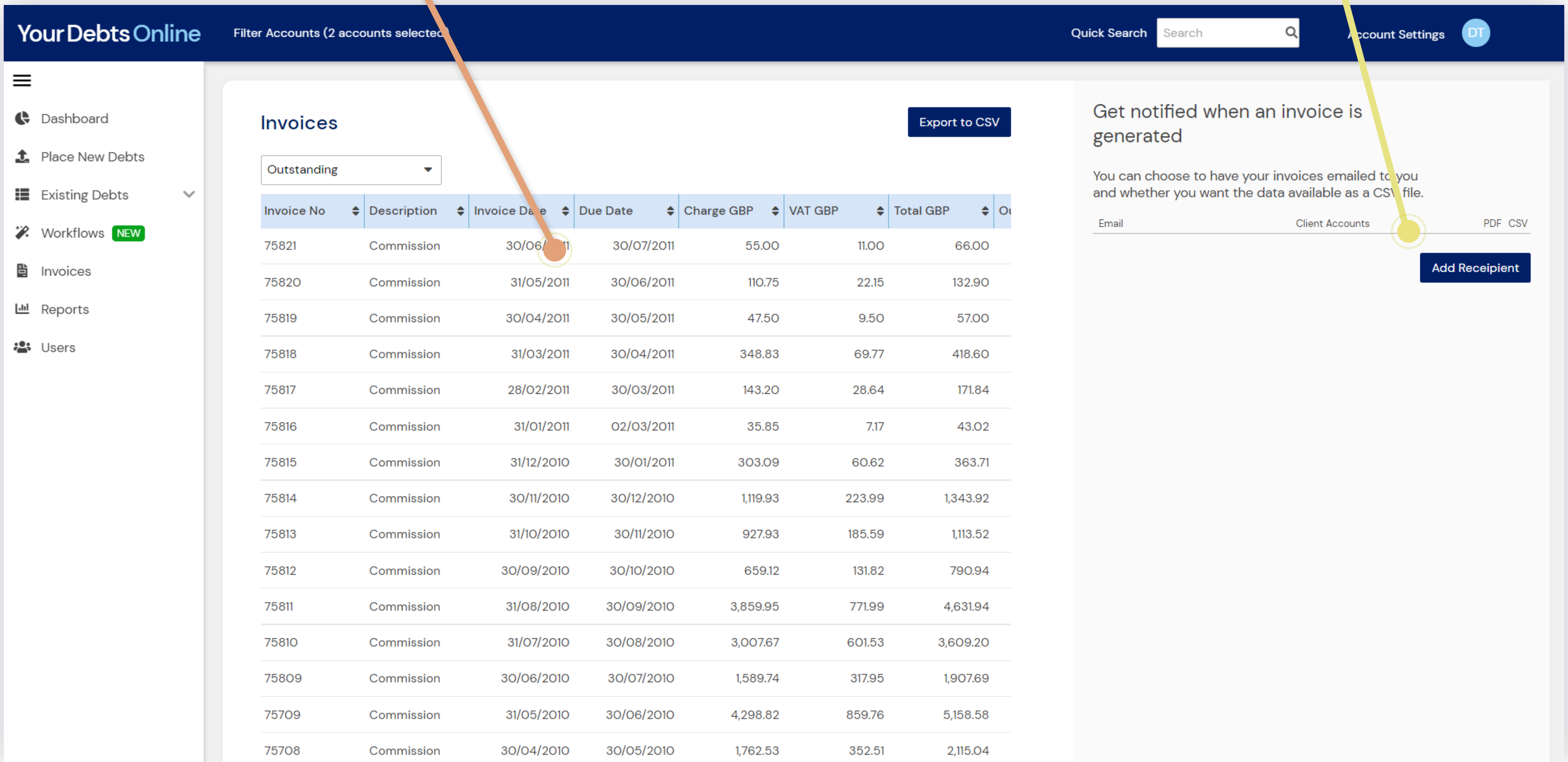


Invoices

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.

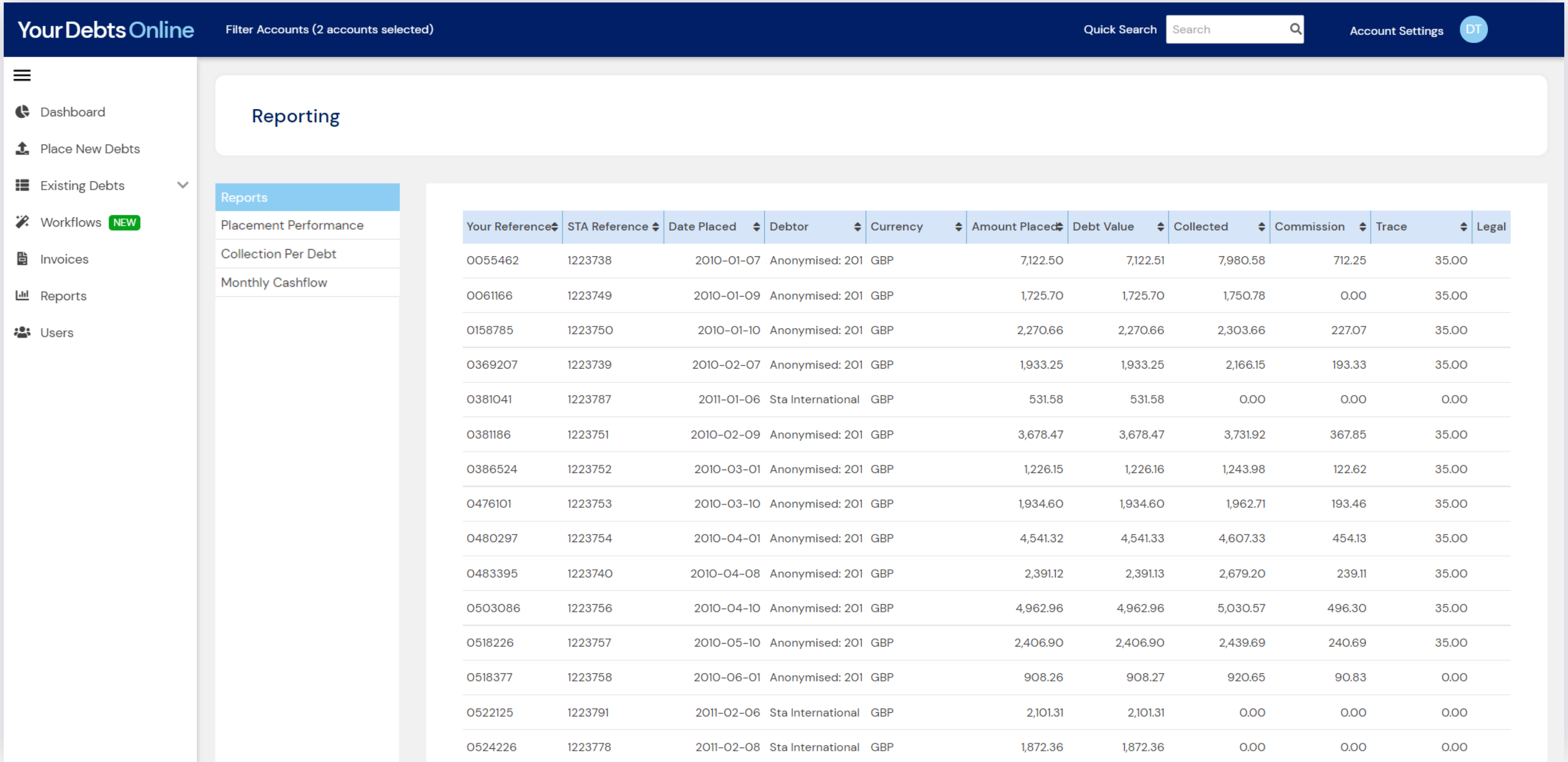
Click on the invoice line to see a full breakdown of the charges, and download PDF or CSV copies.

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.



Reports

A suite of useful reports on our collection success, fees we've raised for each debt, and more.



Your Reference	STA Reference	Date Placed	Debtor	Currency	Amount Placed	Debt Value	Collected	Commission	Trace	Legal
0055462	1223738	2010-01-07	Anonymised: 201	GBP	7,122.50	7,122.51	7,980.58	712.25	35.00	
0061166	1223749	2010-01-09	Anonymised: 201	GBP	1,725.70	1,725.70	1,750.78	0.00	35.00	
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	

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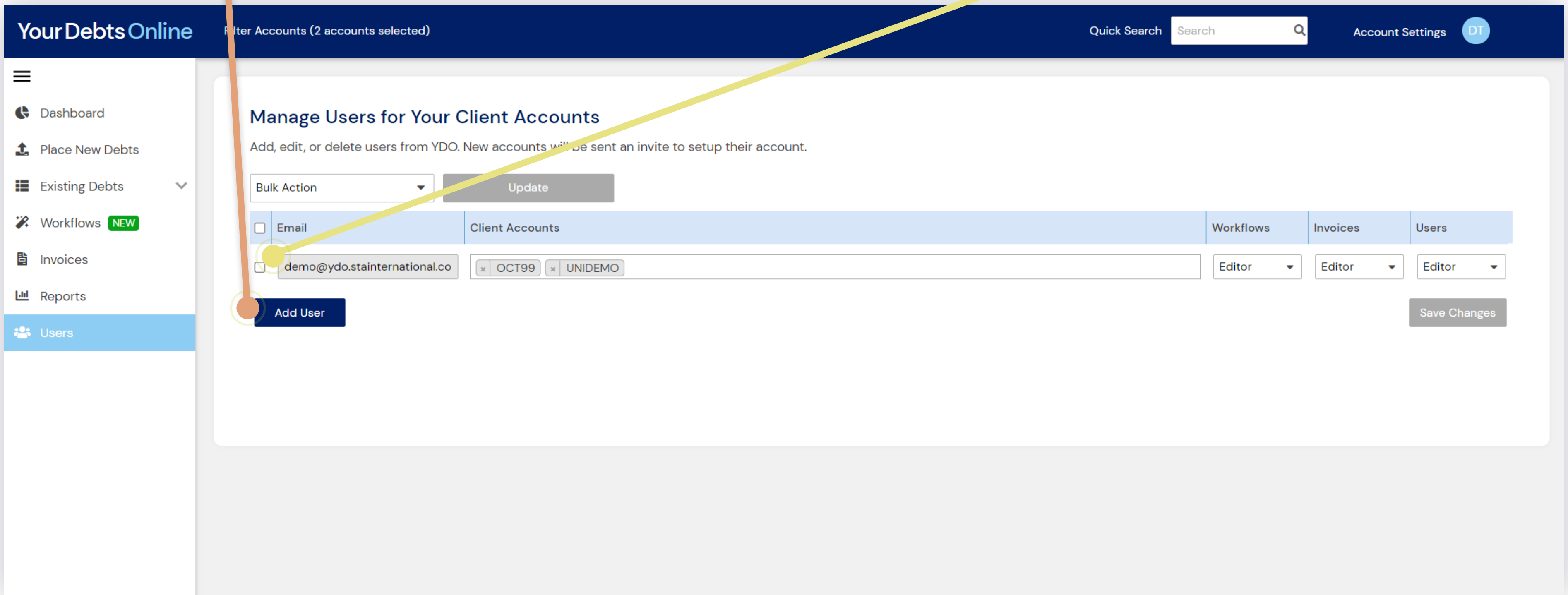
Use the feedback button on the site to request other useful reports.

User Admin

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.

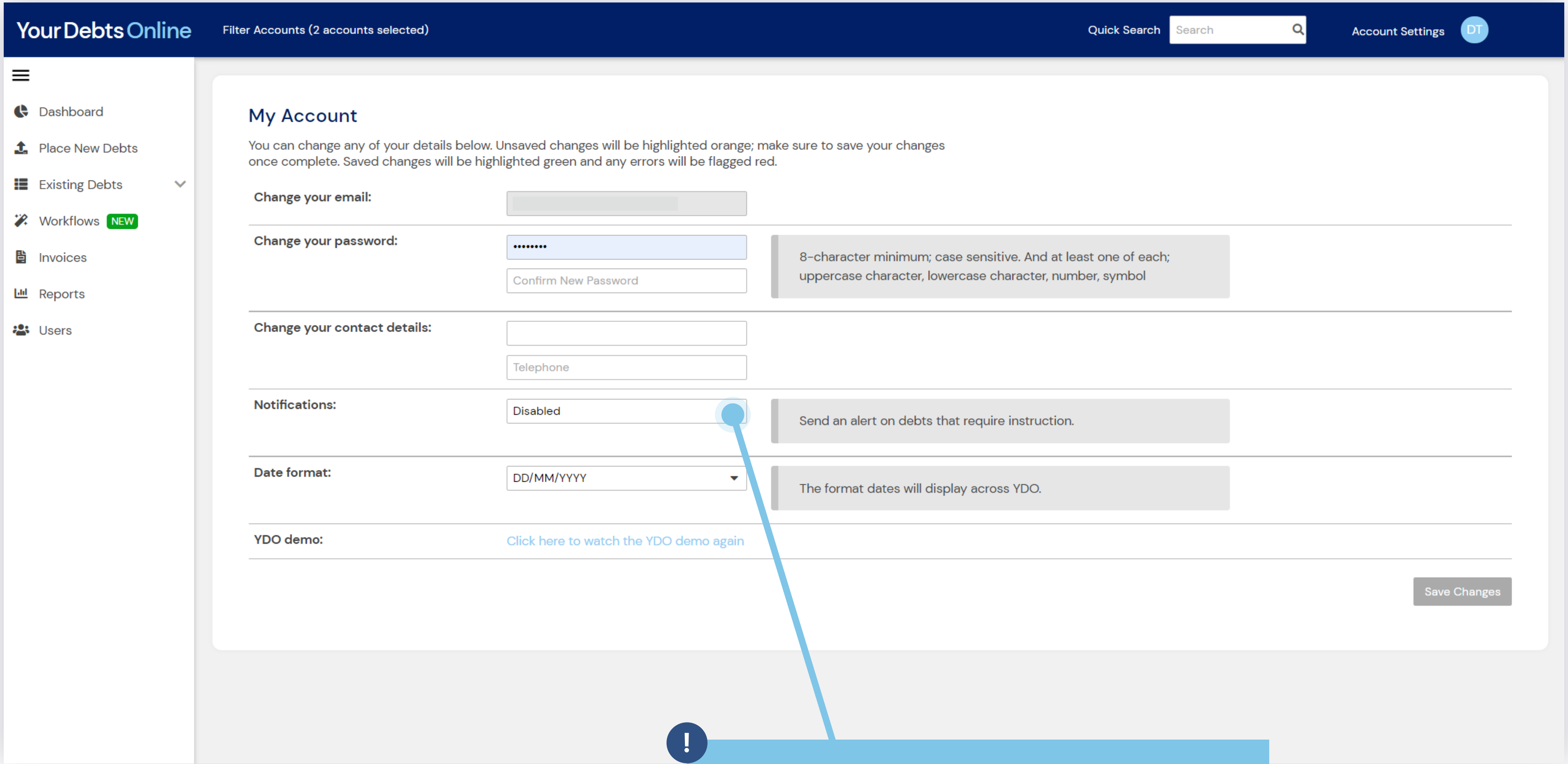
Click Add User to set up a new YDO user. Enter their email address, select the account(s) they will be able to view. Their access levels can be defined by choosing either ‘No Access’, ‘View Only’ or ‘Editor’ from the relevent drop-down menus.

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



Account Settings

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



Choose how often you'd like to be emailed with notifications on debts where we're awaiting your instruction to proceed with our collections process.

Please note that the default notification setting is Daily

Need assistance?

Any questions, comments or issues, please either contact your Account Manager, call us on 01622 600921, or email sales@staonline.com

Ideas for additional features or reports? Use the feedback function on the site to let us know!