

CUSTOMER PORTAL USER GUIDE



CONTENTS

01 Overview	3
02 Payment Tab	4
03 Income & Expense Tab	6
04 My Profile Tab	7
05 Administration & Alerts	9
06 FAQ	10



01 OVERVIEW

Congratulations on your first steps to becoming debt-free! Way Forward is here to help you consolidate and manage your debts with a simple, easy-to-use solution. In our Customer Portal you'll be able to:

Track your debt-repayment progress	View your income & expense summary	Share relevant documents with us	Update your contact details
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This document takes you through the components of the portal and how best to use them.

Step 1

Login with your assigned credentials at the following URL:

[CLICK HERE](#)

All "Tabs" referred to in this document can be found at the top of the screen:

The screenshot shows the Way Forward Customer Portal interface. At the top, there is a navigation bar with the logo on the left and three tabs: "Payment", "Income & Expense", and "My Profile". Below the navigation bar, a yellow alert banner states: "You have 19 missed payments, the last one was due on Oct 18, 2020. Please make payments as soon as possible or contact us." Below the alert, a summary table displays key metrics:

97 Remaining Payments	08/03/2020 Next Payment Date	\$470.00 Fortnightly Payment	\$44,830.00 Current Balance	112 Total Payments
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Below the table, a progress bar shows a total of \$55,640.00, with \$7,050.00 (13.59%) paid off. A note indicates: "Your remaining \$44,830.00 will be paid off by 03 Sep 2023". The final balance shown is \$0. A "Show All" link is located at the bottom of the summary section.

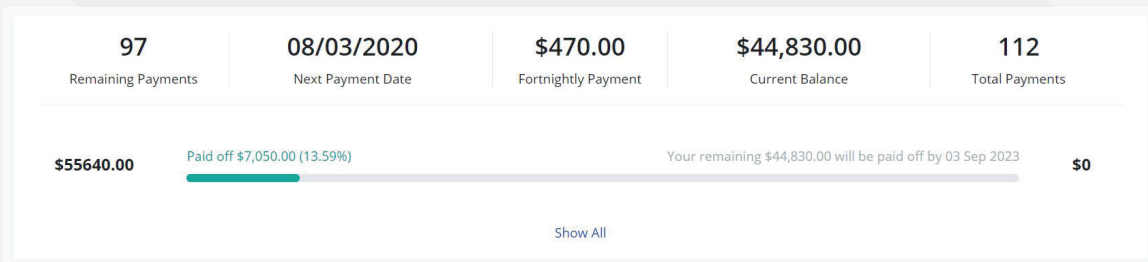
02

PAYMENT TAB

This is the landing page for of the portal. It displays a summary of your debts.

Dashboard

At the top you'll see your dashboard.



Remaining Payments: How many regular repayments you need to make until you a're debt-free, according to the established repayment plan	Next Payment Date: When your next direct debit will be taking place	Fortnightly Payment: The value and frequency of your regular direct debits	Current Balance: How much you still owe (all debts combined)	Total Payments: How many payments you've already made via Way Forward
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The progress bar is a visual representation of your repayments. You can also click "Show All" to display progress bars for each individual debt (if you have more than one).

Payment Schedule

This table displays all of your historical and future payments. This means, payments from the moment you started your plan to the day it is scheduled to befor completion.

Payment Number	Name	Amount	Status	Due Date
1	Repayment: Jun 09, 2019	\$470.00	Cleared	09/06/2019
2	Repayment: Jun 23, 2019	\$470.00	Cleared	23/06/2019
3	Repayment: Jul 07, 2019	\$470.00	Cleared	07/07/2019
4	Repayment: Jul 21, 2019	\$470.00	Cleared	21/07/2019
5	Repayment: Aug 04, 2019	\$470.00	Cleared	04/08/2019
6	Repayment: Aug 18, 2019	\$470.00	Cleared	18/08/2019
7	Repayment: Sep 01, 2019	\$470.00	Cancelled	01/09/2019
8	Repayment: Sep 15, 2019	\$470.00	Cancelled	15/09/2019
9	Repayment: Sep 29, 2019	\$470.00	Cleared	29/09/2019
10	Repayment: Oct 13, 2019	\$470.00	Cleared	13/10/2019

Search [input] Search Clear

1 2 3 4 5 ... 10 items per page 1 - 10 of 112 items

Search

You can search by any field displayed in the table e.g. if you're looking for your June payments, search "Jun" as you see it written in the table above.

Sort

You can sort the information from smallest to largest in any field e.g. if you want repayments in date-order, click the "Due Date" header. If you want to see them in their order of value, click the "Amount" header.

Status

Payments can be Missed, Approved, Cleared, Cancelled or Pending.

If you have any queries regarding the information in this table, don't hesitate to contact your Way Forward associate.

03

INCOME & EXPENSE TAB

This information is discussed and confirmed with you in order to establish a tailored repayment plan that is realistic and manageable. All incoming and outgoing moneys are entered and assessed to ensure you have enough funds day-to-day while repaying your debts.

Income and Expenses

OTHER	Amount (\$)	Frequency	OTHER TOTAL (\$) \$0.00 Fortnightly
Other			
INCOME	Amount (\$)	Frequency	INCOME TOTAL (\$) \$2150.00 Fortnightly
Your take-home pay	2150.00	Fortnightly	2150.00
Your partner's take-home pay			
Bonuses / overtime			
Centrelink benefits			
Family benefit payments			
Child support received			
Other			
HOME & UTILITIES	Amount (\$)	Frequency	HOME & UTILITIES TOTAL (\$) \$830.77 Fortnightly
Mortgage & rent	700.00	Fortnightly	700.00
Body corporate fees			
Council rates			

Category
This helps to ensure that we've covered all bases everything e.g. mortgage, car insurance, groceries etc.

Amount & Frequency
How much you're paying or receiving

Fortnightly totals
This calculates the field value according to your preferred repayment frequency (weekly, fortnightly or monthly)

04

PROFILE TAB

In this section you will be able to view, maintain and share information required for Way Forward to help manage your debts

Profile

Click "Profile". Here you can update your contact details. Make sure you click "Save Changes" when complete.

My Profile

Profile	Documents
First name David	Last name King
Address 330 Collins St	Suburb MELBOURNE
State VIC	Postcode 3000
Email davidking@simbyte.com.au	Contact Number 0414210983
Save Changes	

Documents

Click “Documents”. Here you can upload requested files such as your driver’s license.

My Profile

Profile
Documents

Drag and Drop File

Please ensure each document / artifact is uploaded as an individual file

Document Type

Title

[Attach Document](#)

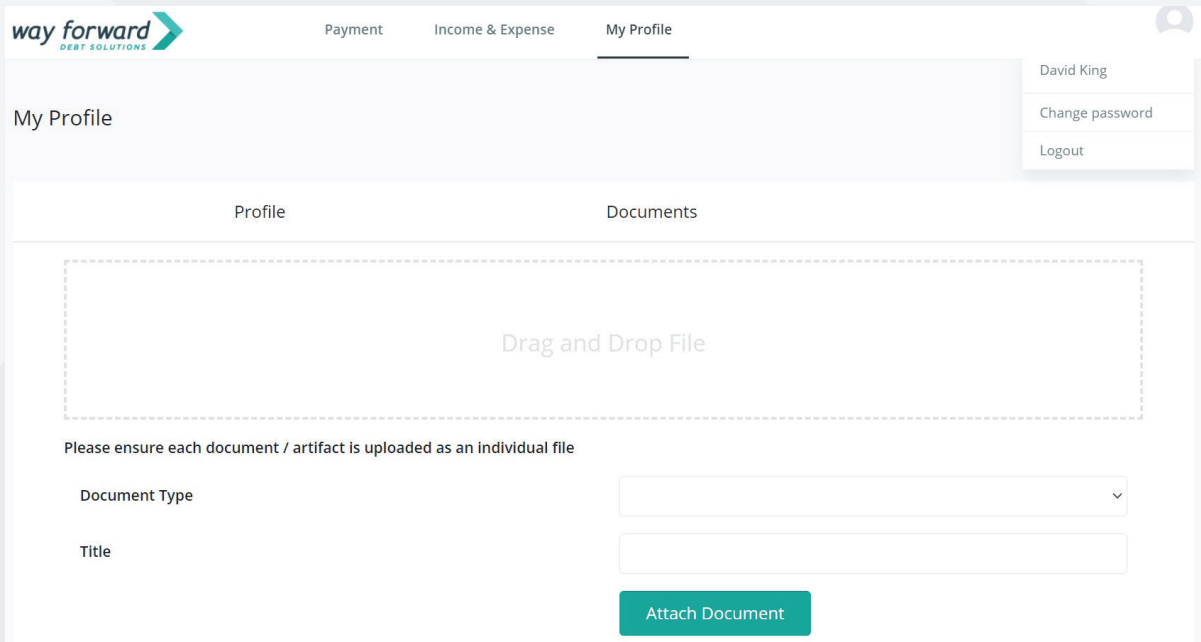
File Name	Document Type	Type	Notes	Verified
Drivers licence for David King.docx	ID	Word Document	Drivers licence	Yes
Signed LOA for David King.pdf	Signed LOA	PDF		Yes
Medical_certificate_-_Captain_Haines.docx	Other - Personal	Word Document	Medical certificate	Yes
Drivers_licence_for_David_Ki...	ID	Word Document	Drivers licence	Yes
ID.txt	ID	Text	My ID	Yes
Medical_cert.docx	Other - Personal	Word Document	Medical certificate	Yes
test.txt	Other	Text	Test ID	No

05

ADMINISTRATION & ALERTS

Account

In the top right corner of the interface there is a profile icon. Clicking this will allow you to change your password or logout. Where possible, avoid logging in to your portal on shared devices to avoid unwanted access by other people. If you must use a shared device, ensure the computer does not save your password by browsing in “incognito” mode. All popular browsers have this option. If unsure about this, please call your Way Forward associate.



Alerts

Alerts may appear at the top of the Payment Tab. These are to indicate ifd you have missed paymentspayments, or you have a change in your regular repayment cycle coming up. These are for information only.

06

FAQ

1. I'd like to contact Way Forward for more information

Please call us any time on 1300 045 502 or leave us a message via the portal.

2. I can't login

If you can't remember your password, click "Forgot your password" on the login screen and follow the prompts. If you believe your password is correct, please try clearing cookies from your browser or rebooting the computer as information stored on the computer may be interfering with the login process.

3. My debt information isn't correct

If any of your financial information looks incorrect, please contact your Way Forward associate with the appropriate documentation so we can update our records.

T 1300 045 502
E admin@wayforward.org.au
W wayforward.org.au

WAY FORWARD DEBT SOLUTIONS LIMITED

A Company Limited by Guarantee

ABN 20 628 702 821

way forward 
FREE DEBT SOLUTIONS