



BROWN & JOSEPH

OpenAccess

Instruction Manual

Table of Contents

Logging In.....page 3

Welcome Screen.....page 5

Reports.....page 5

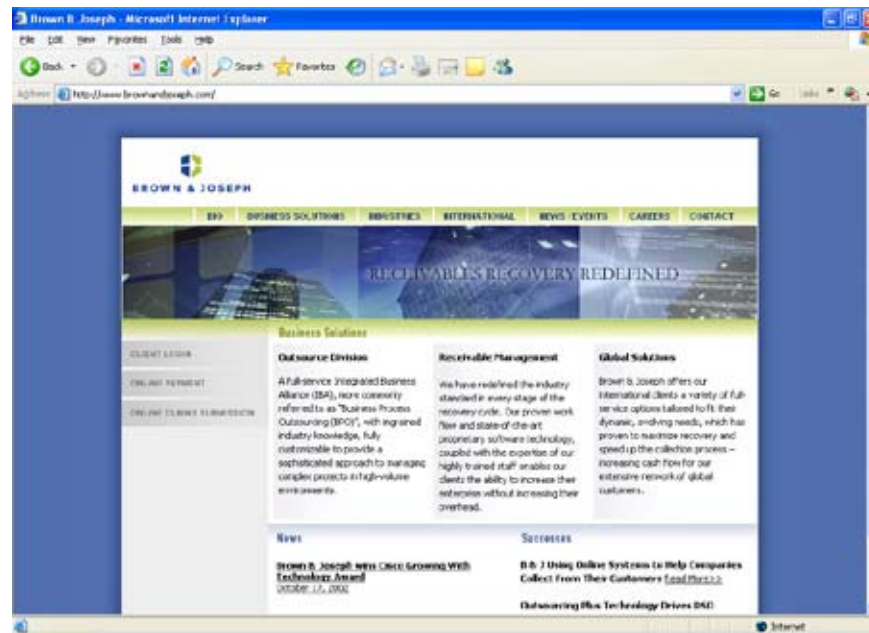
Debtors.....page 6

Contact Us.....page 8



Logging In

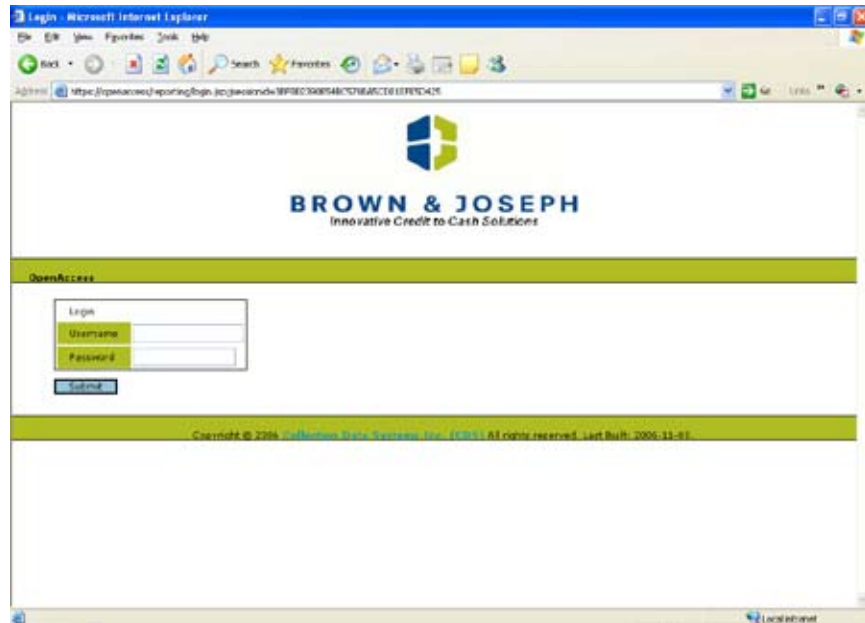
- You can log in by going to www.brownandjoseph.com and click on "Client Login" on the left side of the screen.



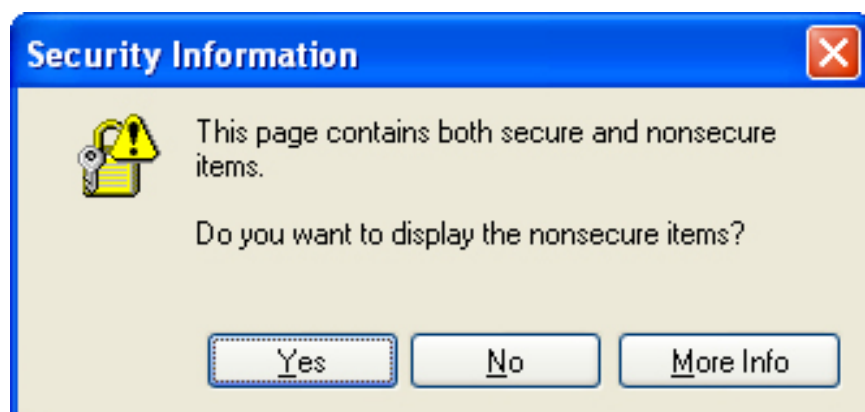
- When you go to the first page to log in, you will be asked 2 security information questions. Answer yes to both.



- Type in your username and password, then click submit.
- **Please note, username and password must always be in ALL CAPS.**

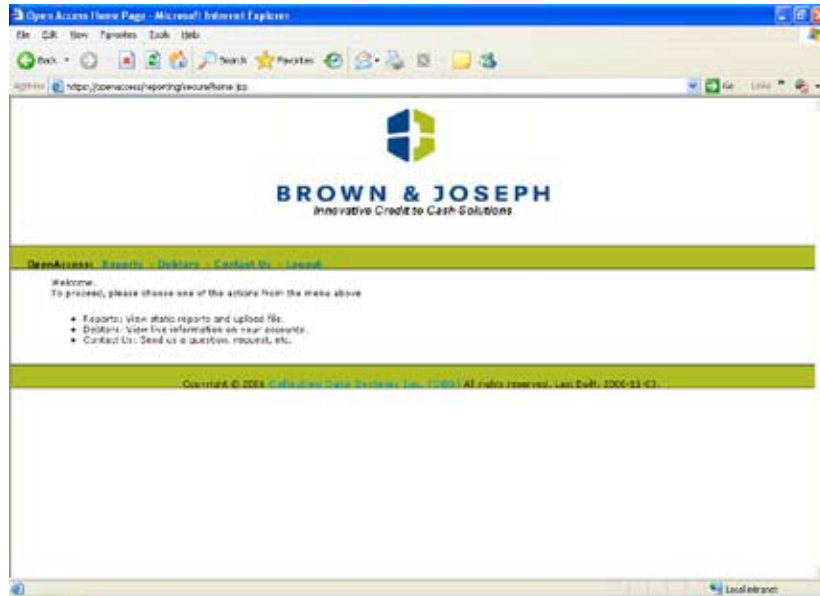


- Keep answering yes to as security information screens while using OpenAccess.



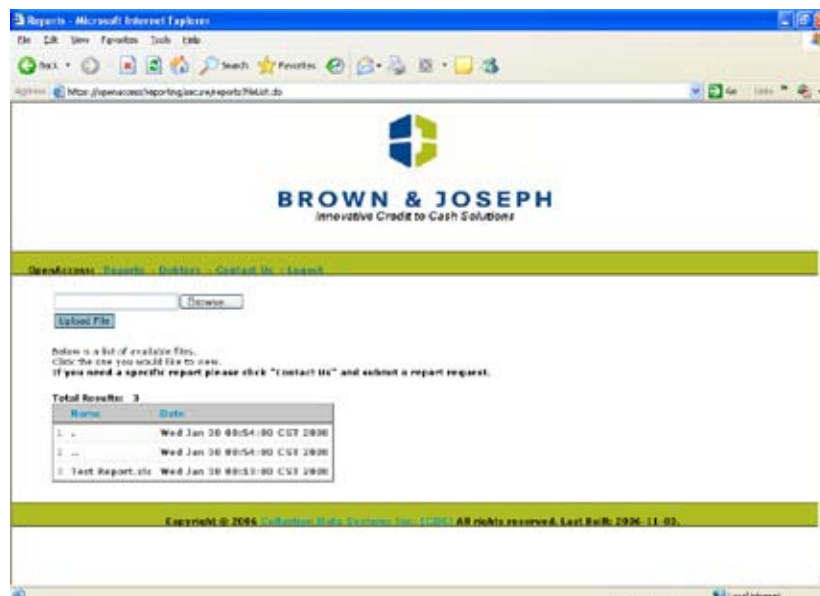
Welcome Screen

- The welcome screen will give you a short synopsis of all the links.



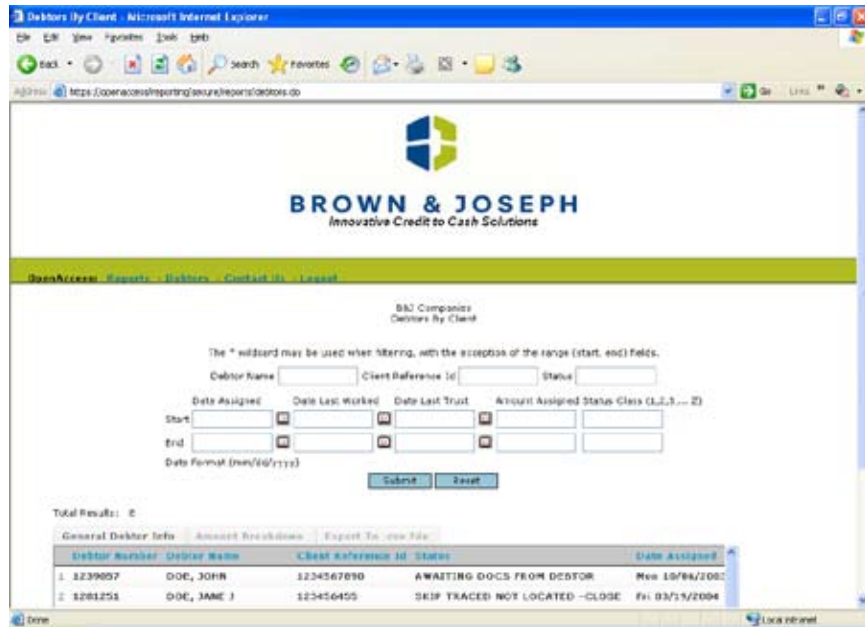
Reports Link

- Click on the "Reports" link at the top. Here you can review reports or add your own. Click on "browse" to find your file and click on "upload file" to add it to the report list.
- To remove a file, contact Brown & Joseph.

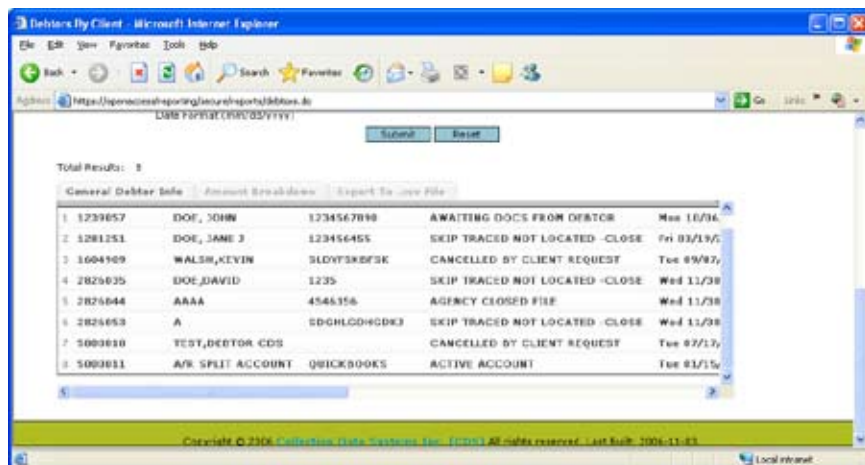


Debtors

- The first thing you will see on the debtor screen is all the different ways you can sort the information. You can sort by client name, client reference ID, or status, to name a few.

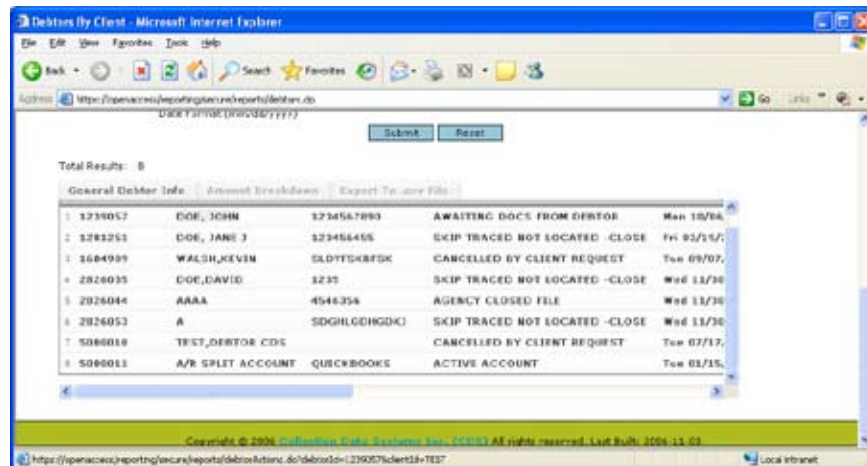


- Scroll down to see more information. There are three tabs and three ways to view the information: General Debtor Info, Amount Breakdown and Export to .csv File.

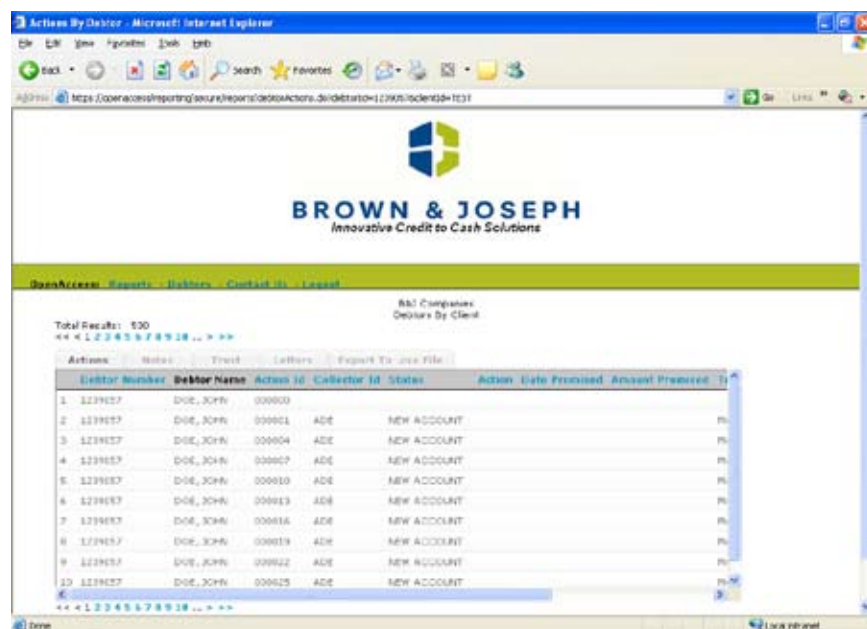


- Please note that some screens may take a while to load. Brown & Joseph recommends that you do not export more than 500 records at a time into a .csv file. The more data you export, the longer it takes to finish.

- To see more information on a specific debtor, highlight the debtor name or debtor number with the cursor and click.



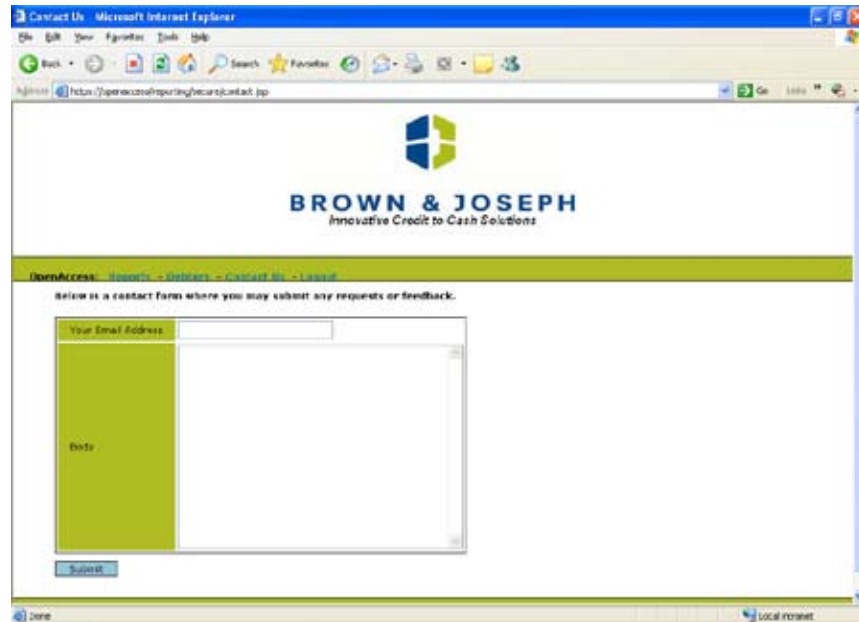
- The next screen will give you 5 tabs: Actions, Notes, Trust, Letters and Export to .csv File. The first screen is the "Actions" screen. Scroll the bottom bar to the right to see more information, such as if there are notes (it will say yes or no). The other tabs are similar, scroll the bottom bar to the right to see more information.



- When you export a file from this screen, it will take from what ever tab you are under. For example, if you want to export "Notes," click on the notes tab first, then the "Export to .csv File."

Contact Us

- If you have any questions or need assistance, please feel free to fill out "Contact Us." All we need is your e-mail, and your question. All inquiries are sent to clientservices@brownandjoseph.com.



The screenshot shows a Microsoft Internet Explorer browser window. The title bar reads "Contact Us - Microsoft Internet Explorer". The address bar shows the URL "http://www.brownandjoseph.com/contact.jsp". The page content includes the Brown & Joseph logo, which consists of a stylized 'B' and 'J' in blue and green, followed by the text "BROWN & JOSEPH" and "Innovative Credit to Cash Solutions". Below the logo is a navigation menu with links for "Home", "About Us", "Contact Us", and "Services". The main content area contains a heading "Below is a contact form where you may submit any requests or feedback." and a form with two input fields: "Your Email Address" and "Body". A "Submit" button is located at the bottom of the form. The status bar at the bottom of the browser window shows "Done" and "Local intranet".