Tutorial – Upload Debtors using an Excel Spreadsheet

Kinum has the provision to submit a batch of accounts using Microsoft Excel spreadsheet. Fields in red are mandatory. However, we suggest providing maximum information for the optional fields as well.

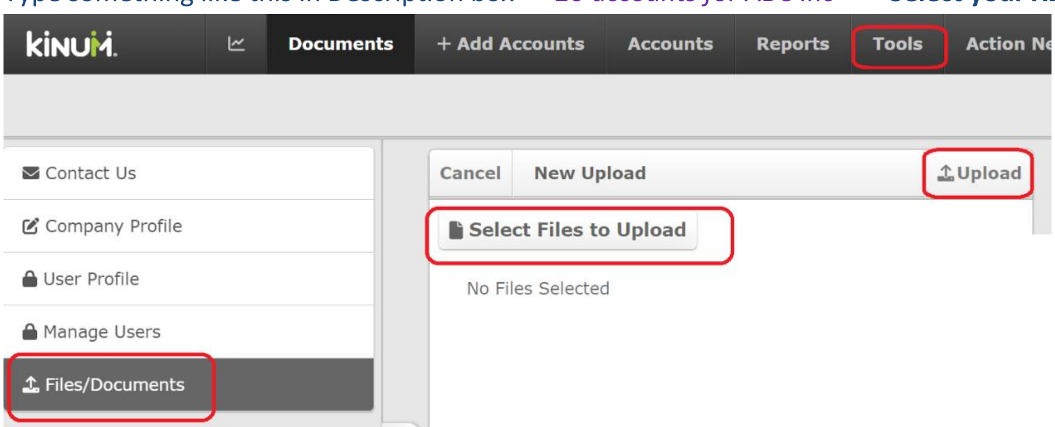
- Each file has sample data on the top followed by instructions. After reviewing the contents of the sample excel file, remove the instructions and sample data, and fill your own data.
- **Notes field** is used to briefly explain us the nature of debt, say 1-3 lines for each debtor. Our debt collector should be able to understand your notes, and briefly explain the case to your debtor/ guarantor / patient.

Now carefully download one the following sample excel files applicable to you:

Standard Clients :	https://kinumorders.com/new/Upload_Step_2_Standard.xlsx (**Step 2** Fixed fee) https://kinumorders.com/new/Upload_Step_3_Only_Standard.xlsx (**Step 3** Contingency)
Medical Clients with patient's information	https://kinumorders.com/new/Upload_Step_2_Medical.xlsx (**Step 2** Fixed fee) https://kinumorders.com/new/Upload_Step_3_Only_Medical.xlsx (**Step 3** Contingency)

Once your file is ready, simply upload it on our client portal:

Tools >> Files/Docs > New Upload >> Select "New Assignments – (Step 2 or Step 3)" *(as applicable)* >> Type something like this in Description box - *"20 accounts for ABC Inc"* >> **Select your XLS file & Upload.**



Thats it. All done for now. If you have multiple Clients/Subs with us, mention the relevant Client# in each row

Kinum will need you to provide the following information later:

Backup Documents: Please keep all documentation handy that prove validly of the debt, and provide us when requested. "Attach Documents" button is located on debtor details page.
Reporting Payments: If you receive any payments from the debtor after you submit accounts for collections, you must report them promptly. ("Payments" button is located on debtor details page)