



USER
GUIDE 2.0

NATIONAL CERTIFICATE IN CREDIT
ADMINISTRATION (CREDIT CONTROL LEVEL 3)



USER GUIDE

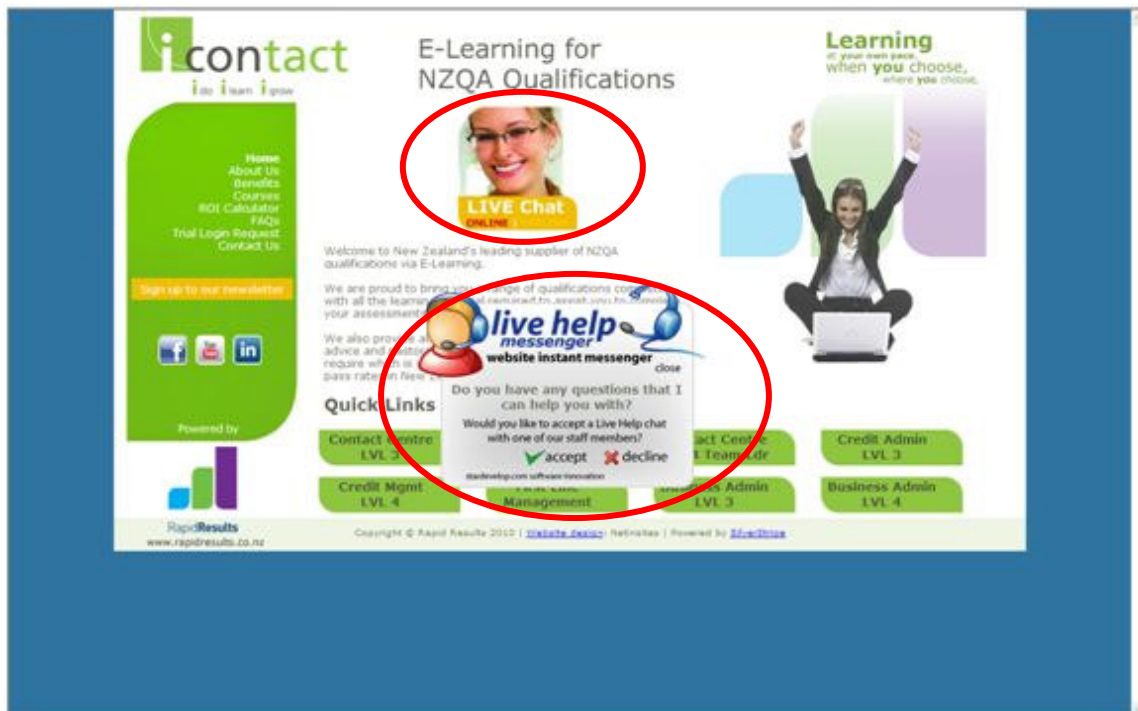


User Guide V 2.0 | icontact is a division of Rapid Results

National Certificate in Credit Administration (Credit Control Level 3)

User Guide for Learners

If you get stuck at any time, you can use the LIVE CHAT option now available from any icontact screen before you get to the login page. Just click on the Live Chat icon or respond if the live help messenger pop up appears. If we're not available at the time, the 'Away' symbol will be shown and you can opt to send a message:



Step One: Logging on

A. Visit the website www.icontact.co.nz and click on the Credit Admin LVL 3 Course Link:



The screenshot displays the icontact website homepage. The header features the icontact logo with the tagline 'i do i learn i grow' and the text 'E-Learning for NZQA Qualifications'. A 'LIVE Chat ONLINE!' button is visible. The main content area includes a navigation menu on the left, a central text block welcoming visitors, and a 'Quick Links For Courses' section. The 'Credit Admin LVL 3' link is highlighted with a red circle.

icontact
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Welcome to New Zealand's leading supplier of NZQA qualifications via E-Learning.

We are proud to bring you a range of qualifications complete with all the learning material required to assist you to complete your assessments.

We also provide all assessments, assessment support and advice and pastoral care to ensure you get all the support you require which is why we have some of the highest completion pass rates in New Zealand.

Quick Links For Courses

- Contact Centre LVL 3
- Contact Centre LVL 3 Senior
- Contact Centre LVL 4 Team Ldr
- Credit Admin LVL 3**
- Credit Mgmt LVL 4
- First Line Management
- Business Admin LVL 3
- Business Admin LVL 4

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B: Click on the LOG IN to Course Tab:



The login page will open a new window. Keep the original window open in case you need to use the Live Chat option or go to another course.

C: Type in your USER ID and Password



Step Two: Learning

Here you can view your progress so far

Your Progress

Module	100%
Course	44%

COURSE MODULES

- 16757 Credit Administration
- 16758 Administer financial collection processes
- 16759 Demonstrate telephone techniques for debt collection
- 16760 Demonstrate knowledge of debt Resolution Processes
- 16761 Demonstrate Knowledge of the repossession of goods in accordance with the Credit (Repossession) Act
- 21415 Demonstrate knowledge of legislation applicable to credit control
- 21416 Administer credit control
- 21760 Describe and operate a personal computer system
- Customer service excellence

COURSE ADMIN

- Student Administration
- Using the Learning Engine

COURSE TOOLS

- Using the Course
- Search the Course

MODULE 2
16758 Administer financial collection processes

Module Objectives

- 1 US 16758 Learning objectives ✓
- 2 Introduction ✓
- 3 Risk ✓
- 4 Stages in the recovery process ✓
- 5 Stages in the recovery process...cont. ✓
- 6 Bad debt - Now what? ✓
- 7 Collection methods ✓
- 8 Methods of notification and collection ✓
- 9 Letter formats ✓
- 10 Letter formats.....Cont. ✓
- 11 Text messaging and telegrams ✓
- 12 Personal collection visits ✓
- 13 Effectiveness of collection methods ✓

Your Tools

- Send Email
- Progress Details
- Your Details

Preview the iContact Survey
16758 Unit Assessment

These are some tools for using the site – including edit details, overall progress etc

Whichever module you click on the left hand column, the course pages will appear on the right. Click on any of those pages to enter the module

Here you can search for topics in the whole course



Unit Standard: 16757
Determine an Applicant's Suitability for Credit

NEW ZEALAND NATIONAL CERTIFICATE CREDIT ADMINISTRATION (LEVEL 3)

Learning Outcomes:



Upon completion of this unit, you will be able to:

List the benefits / functions of a credit application
Describe the elements that form the 2 main

types of credit applications:

- The Standard Credit Application
- The Combined Sales and Credit Agreement
- List the various pieces of information that must be elicited from the applicant, viz.
 - General information
 - Information specific to business entities
 - Other data
- Describe how the following affect the credit application:
 - Privacy Act
 - Consumer Guarantees Act
- Identify situations where a credit interview is required.
 - Come up with an interview plan.
 - Describe the various methods of eliciting information from the applicant, viz.,
 - open-ended questions,
 - closed questions,
 - paraphrasing,
 - interrogatives,



In working through this unit you will be able to gain application assessment skills.

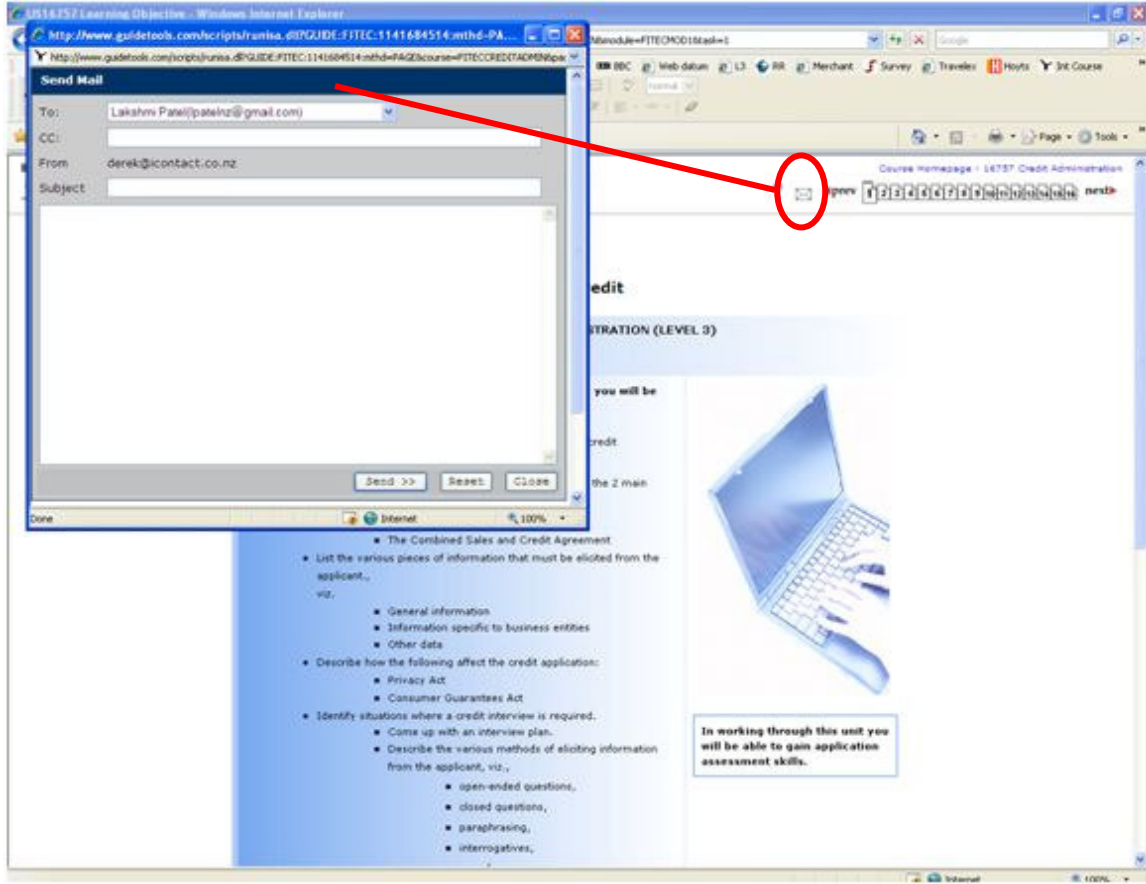
The search function allows you to search for topics or words throughout the course. Once you click search, a list of relevant pages will appear and you can click on the page link to take you directly to that page.

Navigation:

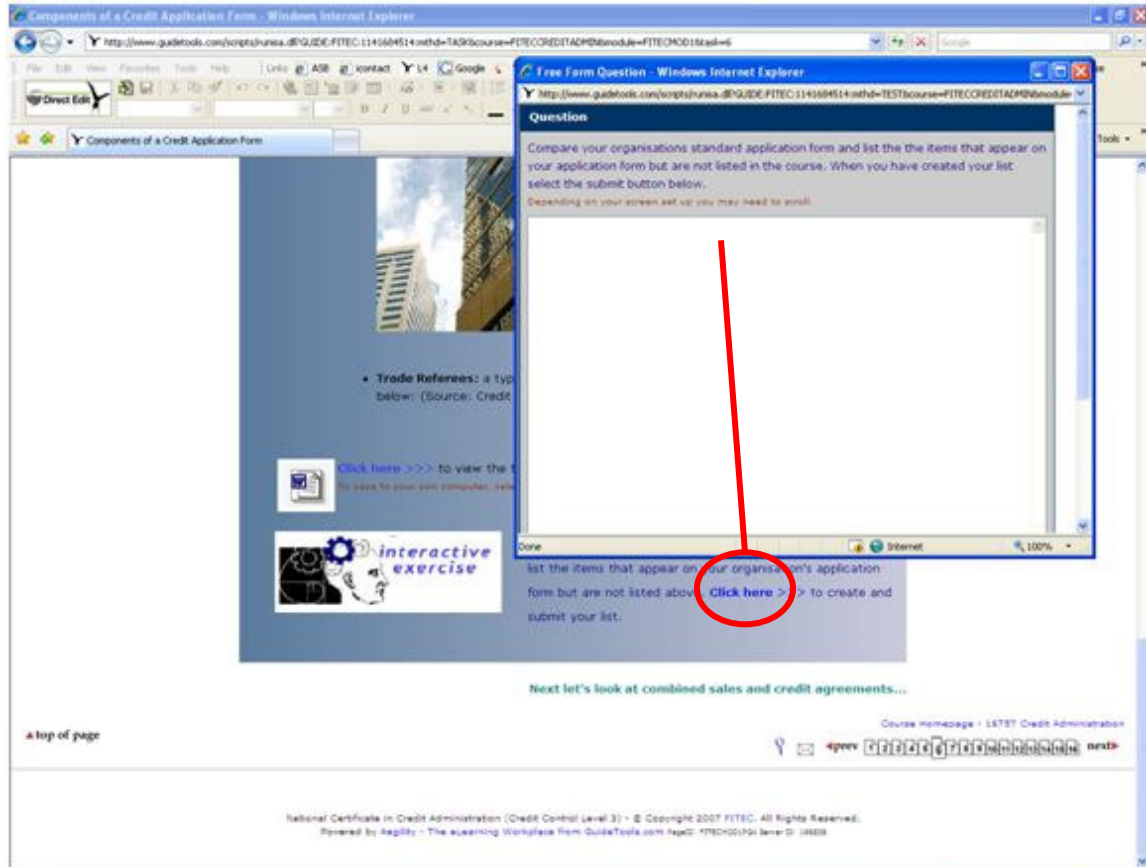
To move from page to page, just click on the page number you require or click on the previous or next buttons located at the top and bottom of each page.

To return to the course homepage, click on the link at the top or bottom of any page.

Clicking on the envelope icon will open an email window to contact your assessor



During the learning, there will be a number of exercises to complete, links to try out, and items to open as you go through. Some interactive exercises will require you to open a box and type and submit an answer. For example – this exercise here:



Clicking on the “click here” link will open the free form question box for you to type in your answer and hit submit. Your assessor will be able to see your submissions.

Once you are confident in the knowledge of the unit standard module, you can be assessed. The instructions for this are on the last page of each module.

Step Three: Assessment and Verification

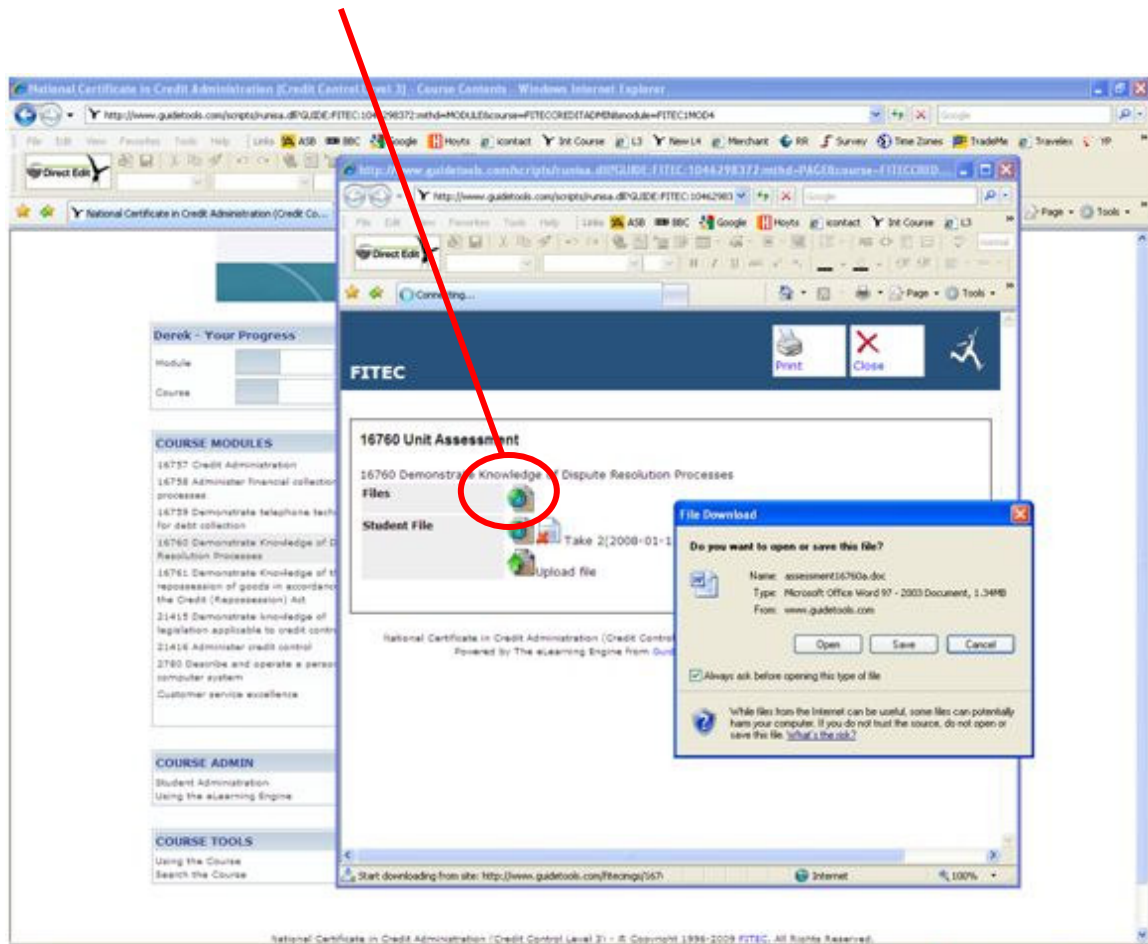
Follow the steps as described on the last page of each unit standard for completing your assessment.

Return to the main page and click on the assessment link:

The screenshot displays a user interface for a course titled "National Certificate in Credit Administration (Credit Control Level 3)". At the top, there is a header with a banner image and the course title. Below the header, the user's name "Derek" and progress information are shown. The main content area is divided into several sections: "COURSE MODULES" with a list of module numbers and titles, "COURSE ADMIN" with links for student administration and the learning engine, and "COURSE TOOLS" with links for using and searching the course. The "MODULE 4" section is expanded, showing "Module Tasks" and "Module Objectives" with a list of 13 items. A red circle highlights the "16760 Unit Assessment" link at the bottom of the module content, and a red line points from this link to the text "Return to the main page and click on the assessment link:" above the screenshot.

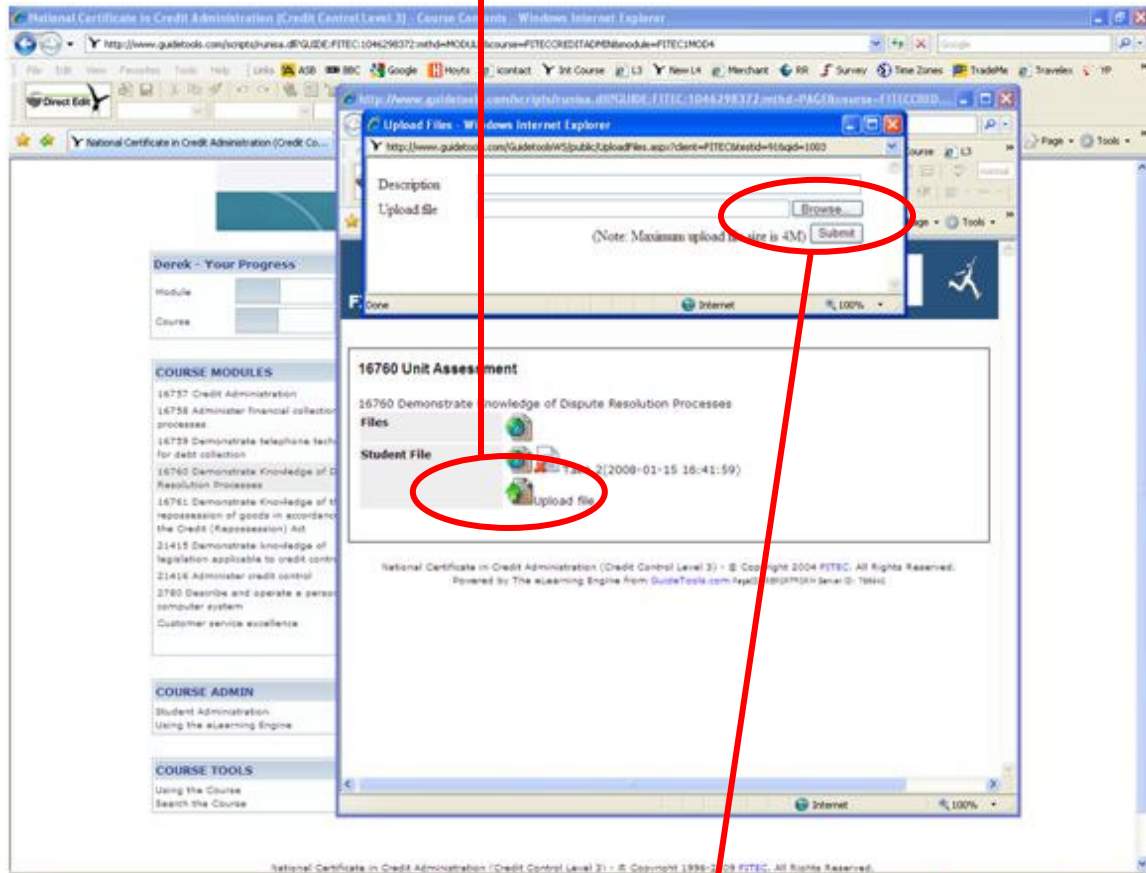
This will open up a new window.

Then click on the top file icon which will allow you to save the assessment document to your hard drive. Save it in a place that is easily retrievable.



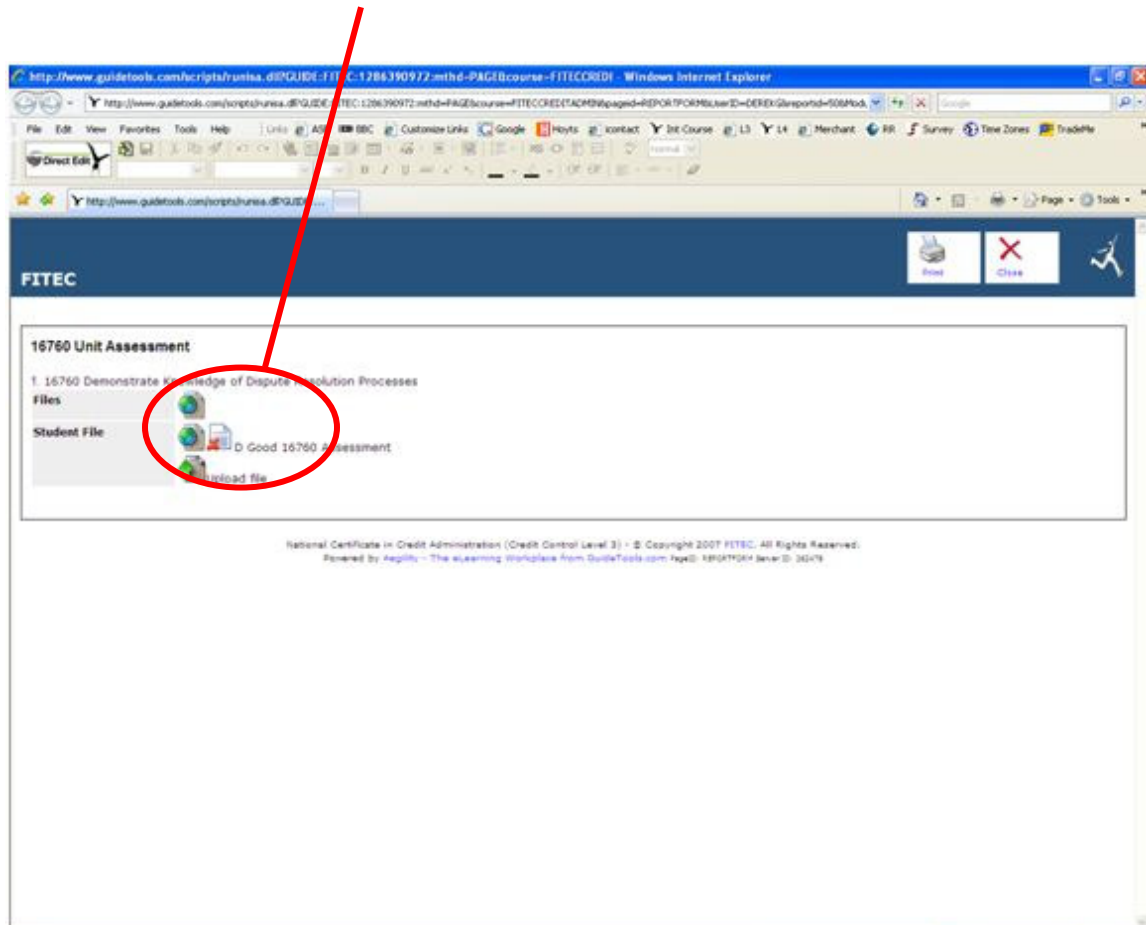
You can then work on that document in your own time and save any changes you make.

When you have completed the assessment, you can upload it to the system. You do this by returning to this page (ie – the assessment page above) then click on Upload File:



This pop up box will appear where you can browse for your saved completed assessment. Once you have located the correct document, insert a brief description in the box shown and click submit.

Once submitted, your screen will look like this. You will notice that you can delete the file if you uploaded the wrong one by clicking on the red 'x'. You can view the file by clicking on the file icon next to the red 'x' document. Your assessor can also view the file for assessment.



Once you have completed an on-line assessment, ***please email the assessor*** from within the course to let them know (See Page 6).

Your assessor is Lakshmi Patel and can be reached on:
lpatelnz@gmail.com

Step Four – Assessor marks the submissions

At this stage, your work is done and unless the assessor has any need to ask any further questions which will be highly unlikely if you have completed the tasks assigned. On successful assessment completion, the credits are registered on your framework, you will receive notification from the assessor and your qualification will be issued when all units are complete.

For questions on these processes or issues with the iconcontact system, please contact us:

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