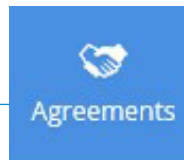


How to... View and send messages

From time to time our team will send you messages, for example; Disputed Invoice. You can respond directly to the sender from the Messages tab. You can also send messages to us.

1. Sign into your account.

If you have one agreement with us, once you have signed in you will be taken to your availability page. From any other page, click on the [Agreements](#) icon.



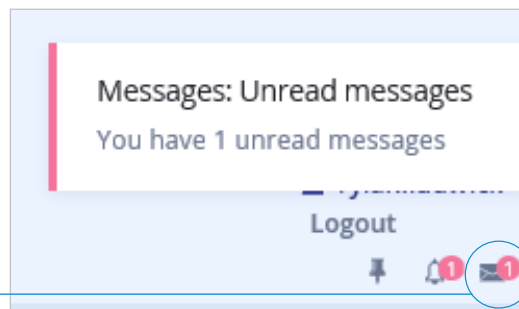
The screenshot shows the "Close Brothers" web application interface. The top navigation bar includes a home icon, the "Close Brothers" logo, and a "Selected Client" dropdown menu currently set to "No Agreement Selected". Below this is a table with two columns: "Agreement" and "Agreement Reference". The table lists three entries under the "Aggregation" sub-header:

| Agreement | Agreement Reference |
|--------------------------------------|------------------------|
| EFG GROUP | 0012345/001 GBP |
| <u>EFG Ltd</u> Non Recourse CHOC5 | <u>0012345/001 GBP</u> |
| <u>DJK Ltd</u> Non Recourse CHOC5 | 0012345/001 GBP |
| <u>GHI Ltd</u> Non Recourse CHOC5 | 0012345/001 GBP |

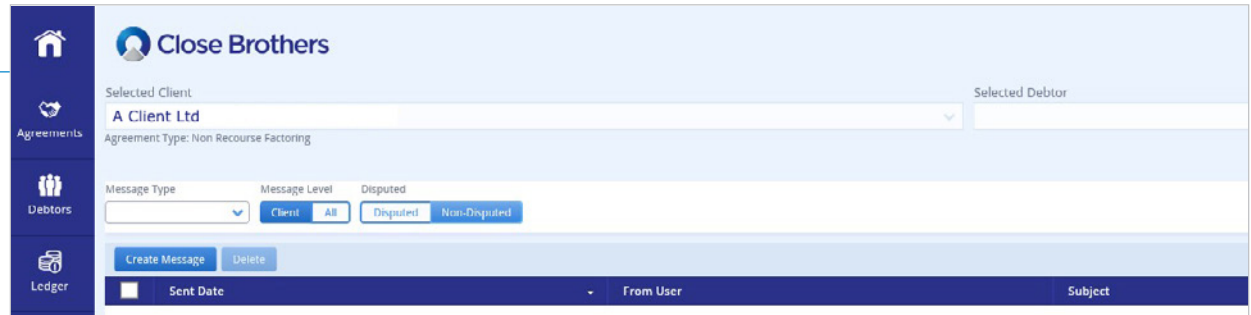
The left sidebar contains navigation icons for "Agreements", "Debtors", "Ledger", and "Data Exchange". A red circle highlights the "EFG Ltd" entry in the table.

2. If you have a group of agreements, select the account from the list that you wish to view by clicking on the name. You will then be taken to the [Agreement Summary](#) page.

3. If you have a new message, a pop-up window will advise you. Message alerts display as a red circle on an envelope icon at the top right hand side of the screen. Click on this to view your messages. In this example there is one new message showing.

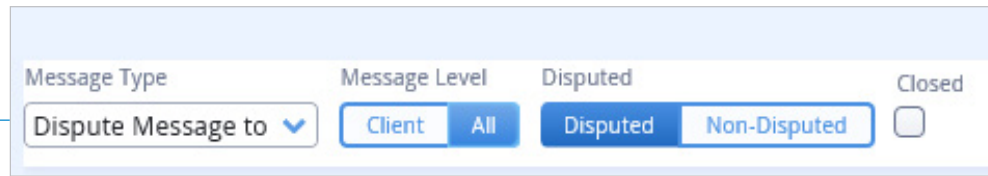


4. Once you click on the envelope icon, the following screen will load.

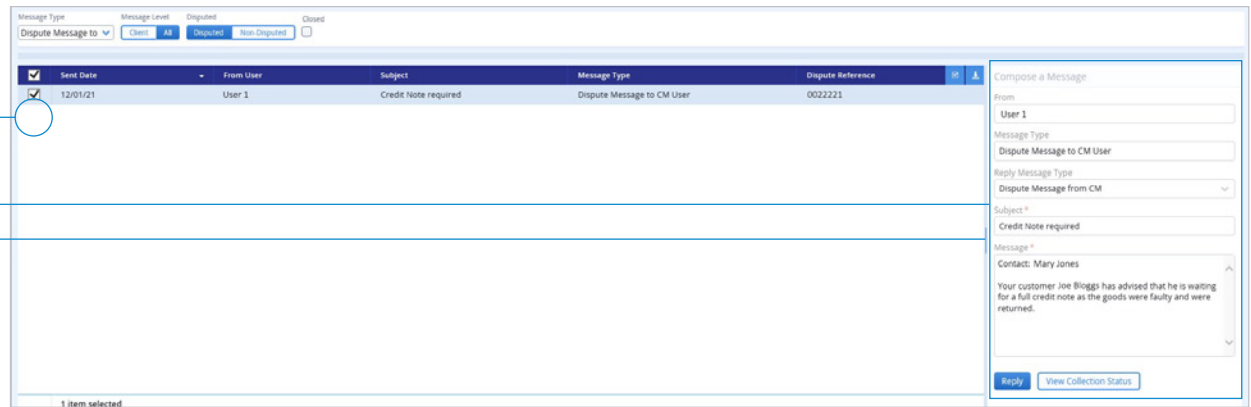


5. To view your new message, select *Dispute message to CM User* in the **Message Type** field and click on **Message Level All**.

If the message is not about a dispute, click on the **Non-Disputed** button.

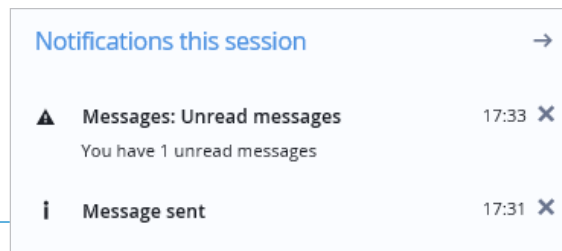
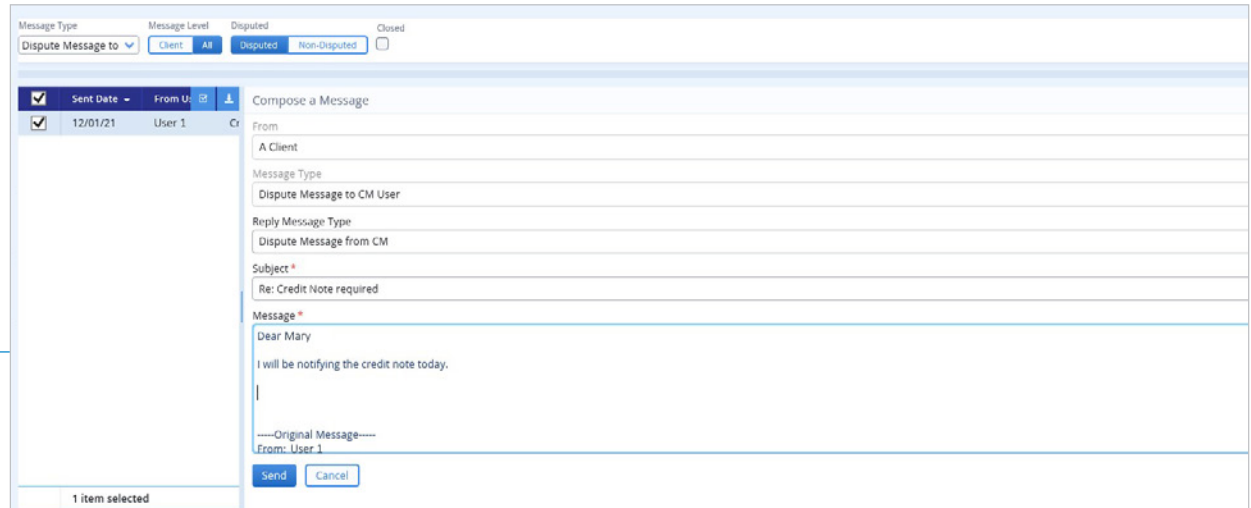


6. Click the tick box next to the message and view it on the right of the screen.

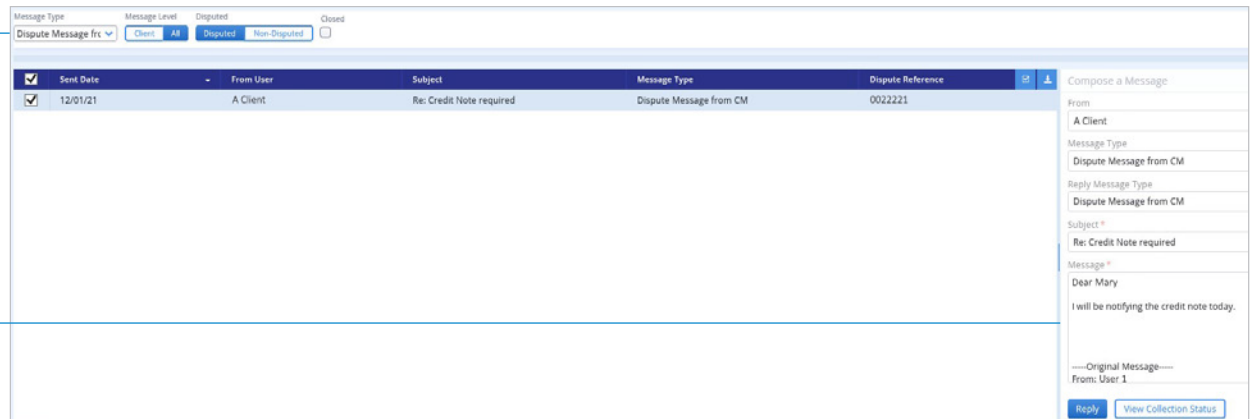


Please note: You can extend the message box size by moving the margins. Hover your cursor over the line then left click and drag the screen until it is the size you want it.

7. This extended message box example shows the reply window. Once you click the **Send** button, confirmation of delivery will show in your notifications page.

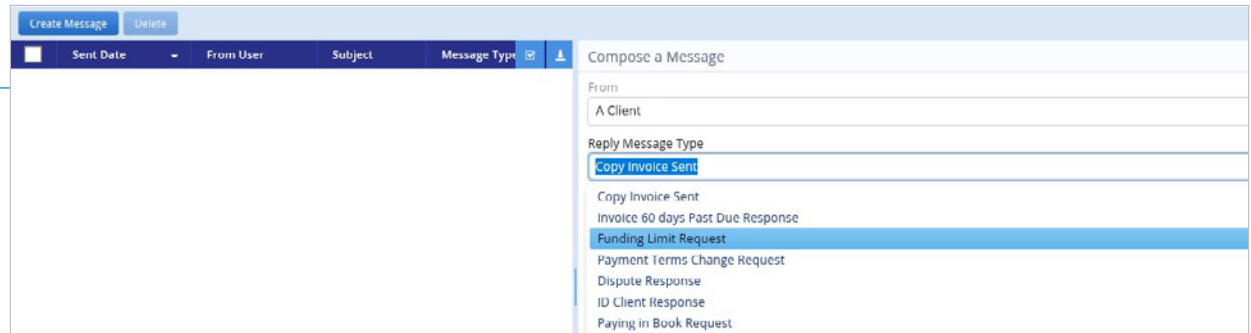


8. You can also view your sent messages from the message screen. This time, choose *Dispute Message from CM* from the **Message Type** field, click on the **Disputed** button, check the tick box next to the message and view it on the right of the screen.



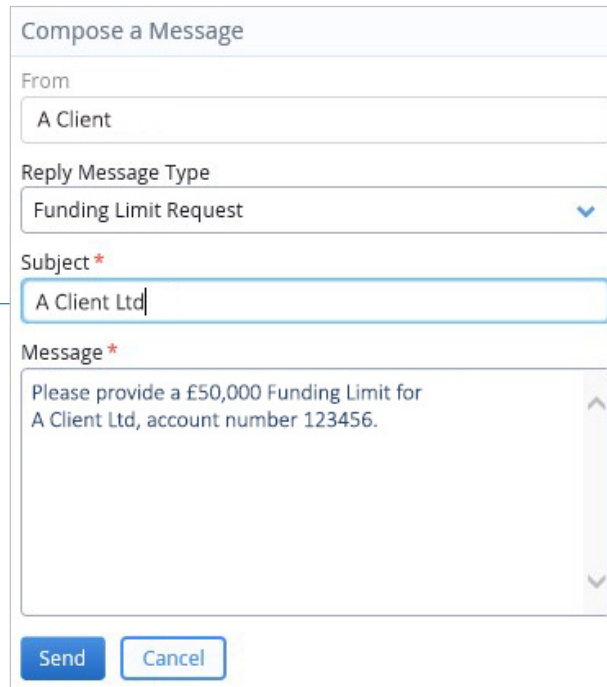
Sending a message:

9. You can use this message system for a variety of reasons. This example shows a **Funding Limit** request. Click on **Create Message** and select **Funding Limit Request** as your **Reply Message Type**.



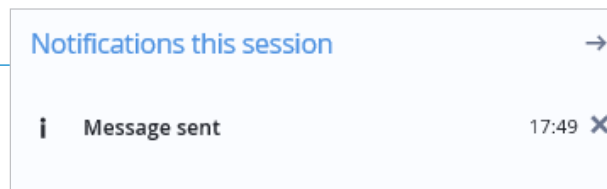
The screenshot shows the 'Compose a Message' interface. At the top, there are buttons for 'Create Message' and 'Delete'. Below these are tabs for 'Sent Date', 'From User', 'Subject', and 'Message Type'. The 'Message Type' dropdown is open, showing a list of options: 'Copy Invoice Sent', 'Invoice 60 days Past Due Response', 'Funding Limit Request' (highlighted in blue), 'Payment Terms Change Request', 'Dispute Response', 'ID Client Response', and 'Paying in Book Request'. The 'From' field contains 'A Client'.

10. Include a subject, value required, account name and number and click **Send**.



The screenshot shows the 'Compose a Message' form with the following fields filled out: 'From' is 'A Client', 'Reply Message Type' is 'Funding Limit Request', 'Subject' is 'A Client Ltd', and 'Message' is 'Please provide a £50,000 Funding Limit for A Client Ltd, account number 123456.' There are 'Send' and 'Cancel' buttons at the bottom.

11. Your notification screen will confirm that the message was sent.



The screenshot shows a notification screen with the title 'Notifications this session' and a right-pointing arrow. Below the title, there is a notification message: 'Message sent' with an information icon on the left and a close icon on the right. The time '17:49' is displayed next to the message.