

Credit Letters

Last Modified on 11/10/2023 11:01 am CST

If using the *Credit Management* feature, collection form letters may be set up at *Setup / A/R / Credit Letters*.

Edit a Credit Letter - 60 Day Reminder

Letter Name: 60 Day Reminder

Top Margin: 0 Left Margin: 0 Right Margin: 0

Select Address Information

First Name Last Name Font Name: Arial
 Address 1 Font Style: Regular
 Address 2 Font Size: 10
 Address 3
 City State Zip Font
 Customer ID

Balance To Print

Aging Font Name: Arial
 Total Balance Font Style: Regular
Font Size: 10 Font

Salutation

Salutation: Font Name: Arial
Font Style: Regular
Font Size: 10 Font

Body Font

Your account is now 60 days past due. You should remit payment as soon as possible. In accordance to our credit terms, your credit limit may be reduced if payment is not submitted immediately.

If you have any questions about the above noted balance, please contact Shirley Jones at 217.774.9999 any time between 8 a.m. and 5 p.m. Monday through Friday.

Sincerely,

Robert Ellis

Print Save Cancel

These letters can then be sent to the customers based on aging calculations and automatically log a credit action on the customer account. These letters are available for printing in *Reports / Accounts Receivable / Credit Reports*.

A/R Credit Reports

Credit Action Report
Print Credit Letter
Over Credit Limit Invoices
Credit Override Log
Days To Pay Report
Current Credit Line
Customer Credit Analysis
Print Book Credit Letter

Print
 Preview

Load Set Save Set
OK Cancel

Report Criteria
Select Letter 60 Day Reminder

Top Margin 0 Bottom Margin
Left Margin 0 Right Margin 0

Select Customers All Select Cust. Class.

Include Customers with AR Balances
 Deferred 31 - 60 Include older balances
 Current Over 60
 1 - 30 Greater Than \$

Display all AR Balances Invoice Due Date
 Create a credit action log entry for each letter with a follow-up date of
Exclude customers with payments after 11/10/2023
 Exclude customers that have received this credit letter since