

Accounts Receivable Collection Notes Enhancement

If your company calls customers to ensure timely payment, you know how tedious it can be to document a collections phone call and know when to call back if payment was not made.

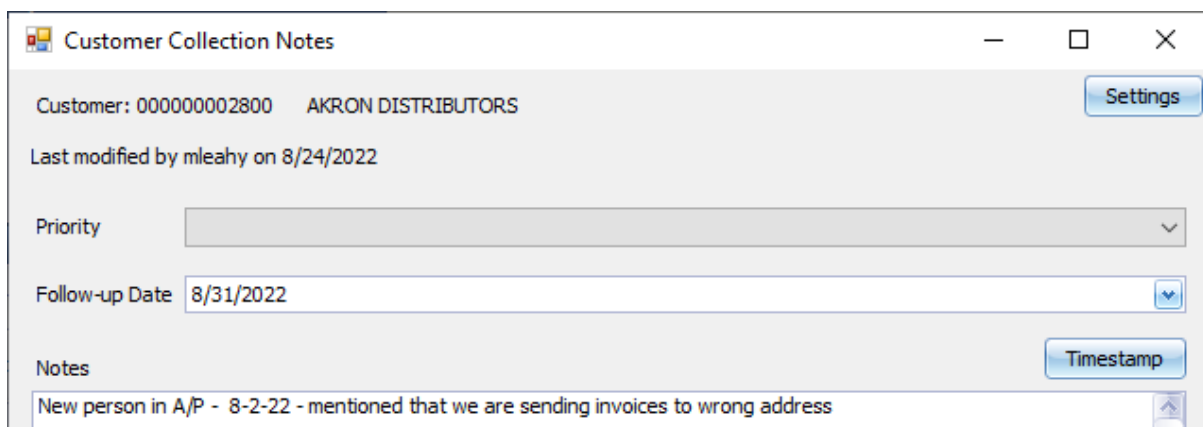
The PUSLE Dashboard & Analysis software makes your job easier by including collection notes and follow-up dates on the Accounts Receivable Detail Aging report. Feel free to call our support desk at (513) 723-8095 for set-up assistance, to give feedback, and to offer suggestions for improvements.

Features:

- Collection notes – You can key in unlimited-length free-form notes for both customers and invoices. These can be modified or deleted at any time.
- Follow-up dates – You can set a follow-up date for any item.
- Collection Priority code – You can key in collection priorities and codes to meet your unique needs.
- Statement – You can email a statement to the customer during a collections phone call.

Getting started:

- Add the following columns to your A/R Aging Detail screen:
 - Cust Collection Notes
 - Follow-up Date, and
 - Collection Priority
- Right-click on the 'Cust Collection Notes' column to add a collection note.
- The notes screen will display. You can key in an unlimited number of notes and optionally timestamp each one.



The screenshot shows a software window titled "Customer Collection Notes". At the top, it displays "Customer: 000000002800 AKRON DISTRIBUTORS" and a "Settings" button. Below this, it says "Last modified by mleahy on 8/24/2022". There are three main input fields: "Priority" (a dropdown menu), "Follow-up Date" (a date field with "8/31/2022" entered), and "Notes" (a text area). A "Timestamp" button is located to the right of the Notes field. The Notes field contains the text: "New person in A/P - 8-2-22 - mentioned that we are sending invoices to wrong address".

Below is an example of adding a customer collections screen when you right-click on the "Cust Collection Notes" column.

The screenshot shows the PULSE software interface. At the top, there are navigation tabs: Management Overview, Open Customer Orders Detail, A/R Aging, Customer analysis, Product category analysis, Territory analysis, Salesperson analysis, A/P Aging, G/L Activity Analysis, Data integrity screens, and New Tab. Below the tabs is an "AR Aging - summary" table:

Category	Amount	Percentage
Current	\$1,895,423	84%
1-30 Days	\$237,302	11%
31-60 Days	\$101,147	4%
Over 60 Days	\$25,106	1%
Total	\$2,258,977	

Below the summary is the "AR Aging - detail" table. A context menu is open over the "Cust Collection Notes" column, with "Customer Collection Notes" selected. The table columns include: t #, Cust Name, Default AR Terms Cd, Cust Avg Pay Ytd, Cust Phone, Cust Contact, Cust Collection Notes, Follow-up Dt, Cust Collection Priority, Inv \$, Current, and 1-30 D.

The following is an example of adding a collection note to an individual invoice.

The screenshot shows the PULSE software interface displaying a list of invoices. A context menu is open over the "Inv Collection Notes" column, with "Invoice Collection Notes" selected. The table columns include: #, Inv #, Trx Doc Dt, Doc Type, Apply to #, Doc Due Dt, Reference, Inv \$, Inv Collection Notes, F/U Date, and Current.

For more information or a demonstration on any aspect of our PULSE Dashboard & Analytics software, call (513) 723-8091

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