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.

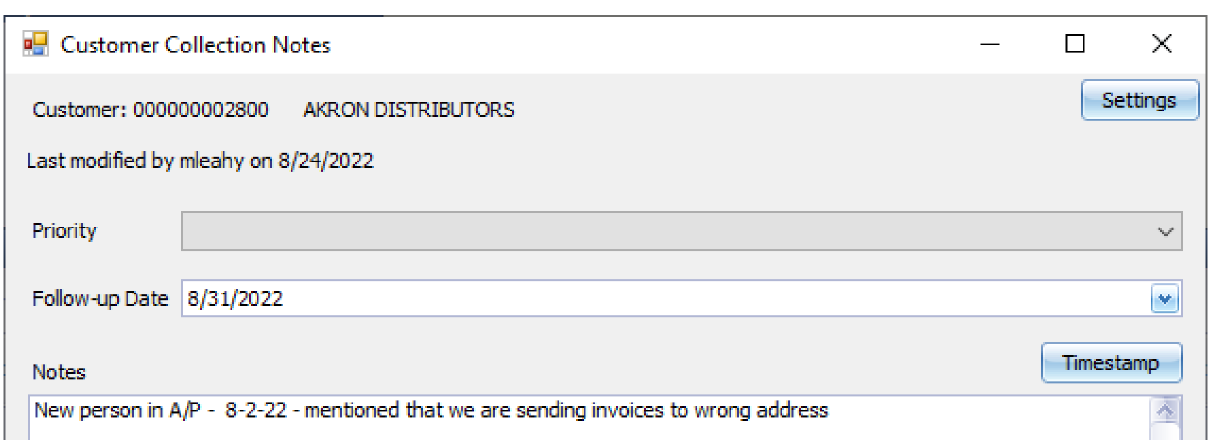
The PUSLE Dashboard & Analysis software makes your job easier by including collection notes and follow-up dates on the Accounts Receivable Detail Aging report. Feel free to call our support desk at (513) 723-8095 for set-up assistance, to give feedback, and to offer suggestions for improvements.

Features:

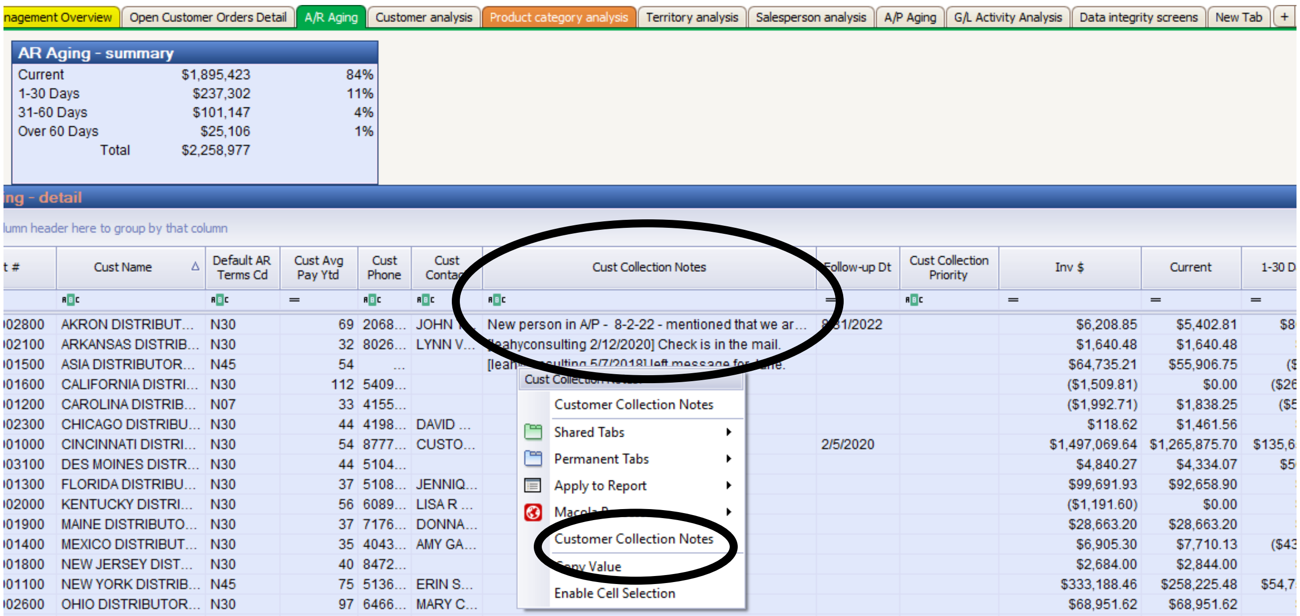
- Collection notes – You can key in unlimited-length free-form notes for both customers and invoices. These can be modified or deleted at any time.
- Follow-up dates – You can set a follow-up date for any item.
- Collection Priority code – You can key in collection priorities and codes to meet your unique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

Getting started:

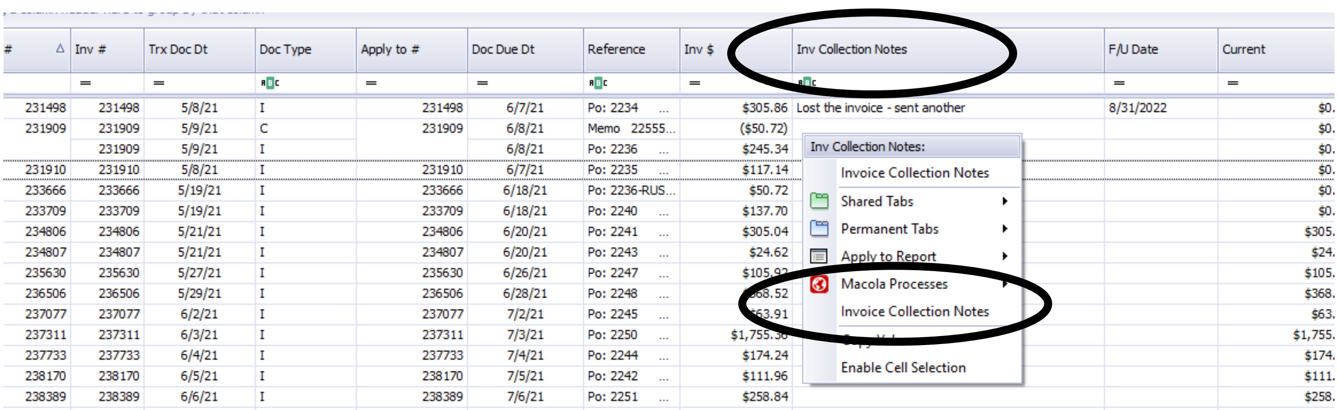
- Add the following columns to your A/R Aging Detail screen:
    - Cust Collection Notes
    - Follow-up Date, and
    - Collection Priority
- Right-click on the 'Cust Collection Notes' column to add a collection note.
- The notes screen will display. You can key in an unlimited number of notes and optionally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



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



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



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

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Developer of Pulse Dashboard software