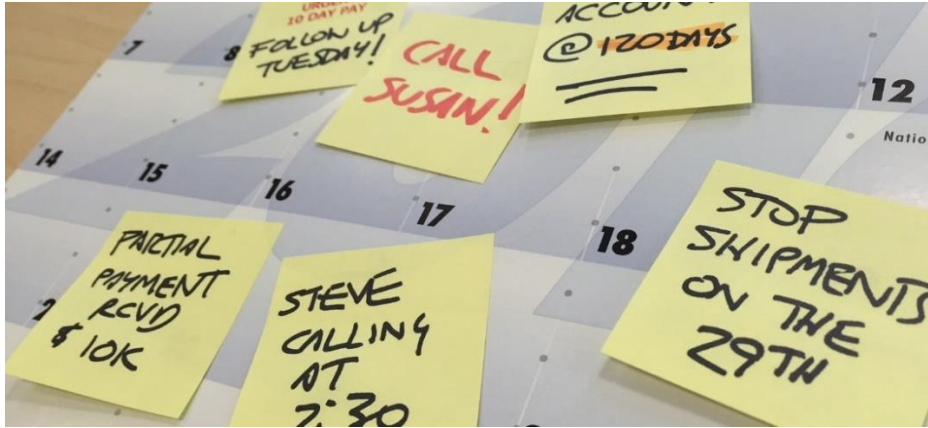


## Accounts Receivable Collection Notes Enhancement



When calling 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. Call our support desk at (513) 723-8095 for set-up assistance.

### Features:

- Collection notes – You can key in unlimited-length free-form notes for 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 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.

A screenshot of the "Customer Collection Notes" software interface. The window title is "Customer Collection Notes". It shows a form with the following fields: "Customer: 00000002800 AKRON DISTRIBUTORS" with a "Settings" button; "Last modified by mleahy on 8/24/2022"; "Priority" with a dropdown menu; "Follow-up Date" with a date field set to "8/31/2022" and a calendar icon; "Notes" with a text area containing "New person in A/P - 8-2-22 - mentioned that we are sending invoices to wrong address" and a "Timestamp" button.

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

**AR Aging - summary**

Current	\$1,895,423	84%
1-30 Days	\$237,302	11%
31-60 Days	\$101,147	4%
Over 60 Days	\$25,106	1%
<b>Total</b>	<b>\$2,258,977</b>	

#	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	1-30 D
02800	AKRON DISTRIBUT...	N30	69	2068...	JOHN T...	New person in A/P - 8-2-22 - mentioned that we ar...	8/31/2022		\$6,208.85	\$5,402.81	\$8
02100	ARKANSAS DISTRIB...	N30	32	8026...	LYNN...	[leahyconsulting 2/12/2020] Check is in the mail.			\$1,640.48	\$1,640.48	
01500	ASIA DISTRIBUTOR...	N45	54	...	...	[leahyconsulting 5/7/2018] Left message for Jap...			\$64,735.21	\$55,906.75	(\$)
01600	CALIFORNIA DISTR...	N30	112	5409...	...	Cust Collection Notes:			(\$1,509.81)	\$0.00	(\$26
01200	CAROLINA DISTRIB...	N07	33	4155...	...	Customer Collection Notes			(\$1,992.71)	\$1,838.25	(\$5
02300	CHICAGO DISTRIBU...	N30	44	4198...	DAVID ...				\$118.62	\$1,461.56	
01000	CINCINNATI DISTR...	N30	54	8777...	CUSTO...		2/5/2020		\$1,497,069.64	\$1,265,875.70	\$135,6
03100	DES MOINES DISTR...	N30	44	5104...	...				\$4,840.27	\$4,334.07	\$5
01300	FLORIDA DISTRIBU...	N30	37	5108...	JENNIQ...				\$99,691.93	\$92,658.90	
02000	KENTUCKY DISTRIB...	N30	56	6089...	LISA R ...				(\$1,191.60)	\$0.00	
01900	MAINE DISTRIBUTO...	N30	37	7176...	DONNA...				\$28,663.20	\$28,663.20	
01400	MEXICO DISTRIBU...	N30	35	4043...	AMY GA...				\$6,905.30	\$7,710.13	(\$42
01800	NEW JERSEY DIST...	N30	40	8472...	...				\$2,684.00	\$2,844.00	
01100	NEW YORK DISTRIB...	N45	75	5136...	ERIN S...				\$333,188.46	\$258,225.48	\$54,7
02600	OHIO DISTRIBUTOR...	N30	97	6466...	MARY C...				\$68,951.62	\$68,951.62	

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

#	Inv #	Trx Doc Dt	Doc Type	Apply to #	Doc Due Dt	Reference	Inv \$	Inv Collection Notes	F/U Date	Current
231498	231498	5/8/21	I		231498	6/7/21	Po: 2234 ...	Lost the invoice - sent another	8/31/2022	\$0.
231909	231909	5/9/21	C		231909	6/8/21	Memo 22555...			\$0.
	231909	5/9/21	I		231909	6/8/21	Po: 2236 ...			\$245.34
231910	231910	5/8/21	I		231910	6/7/21	Po: 2235 ...			\$117.14
233666	233666	5/19/21	I		233666	6/18/21	Po: 2236-RUS...			\$50.72
233709	233709	5/19/21	I		233709	6/18/21	Po: 2240 ...			\$137.70
234806	234806	5/21/21	I		234806	6/20/21	Po: 2241 ...			\$305.04
234807	234807	5/21/21	I		234807	6/20/21	Po: 2243 ...			\$24.62
235630	235630	5/27/21	I		235630	6/26/21	Po: 2247 ...			\$105.93
236506	236506	5/29/21	I		236506	6/28/21	Po: 2248 ...			\$68.52
237077	237077	6/2/21	I		237077	7/2/21	Po: 2245 ...			\$63.91
237311	237311	6/3/21	I		237311	7/3/21	Po: 2250 ...			\$1,755.36
237733	237733	6/4/21	I		237733	7/4/21	Po: 2244 ...			\$174.24
238170	238170	6/5/21	I		238170	7/5/21	Po: 2242 ...			\$111.96
238389	238389	6/6/21	I		238389	7/6/21	Po: 2251 ...			\$258.84
239482	239482	6/10/21	I		239482	7/10/21	Po: 2252 ...			\$749.38

**For information on any of our PULSE family of Macola® add-on software products, call (513) 723-8091**

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