How Do I Use Customer or Invoice Collection Notes?

The ability to enter and maintain notations in Pulse Dashboard to enter and maintain detailed notes at the Customer Level and also at the Invoice Level may not be available in an ERP software package and therefore not available for use in Pulse Dashboard.

As part of the A/R Aging Report in PULSE Dashboard, this ability has been added. Customer and Invoice Collection Notes, Priority Codes and Follow-up Dates are available to be added and maintained by the User as part of the report.

A/R Aging Report Columns
- Customer Collection Notes – Notes that pertain to the Customer.
- Customer Collection Modified Date – Date the Collection Note was last changed.
- Customer Collection User Name – Name of the User making the last change.
- Customer Collection Follow-Up Date – Date assigned for Follow-Up.
- Collection Priority – User defined codes that define importance.
- Invoice Collection Notes – Notes that pertain to a specific Invoice.*
- Invoice Collection Follow-up Date – Date assigned for Follow-Up on the Invoice.*

* Note: The Invoice Number column must be added to the report to use of this column.

Using Collection Notes

Customer or Invoice Collection Notes may be added to the A/R Aging Report drill-down screen if using the report in Summary mode (Setup/Red Wrench icon). If you are using the report in Detail mode, Notes may be added to both the primary and drill-down screens.

Use the Column Chooser to add the Customer or Invoice Collection Notes columns to the A/R Aging Report. At the same time, you may want to also add the Follow-up Date, Modified Date, Collection Priority and/or Collection User Name columns to the report.

Adding / Maintaining Collection Notes

After the Customer or Invoice Notes field has been added to the report for a Customer or Invoice, right-click on the Notes field for the specific Customer or Invoice. From the drop down menu select Customer Collection Notes or Invoice Collection Notes:
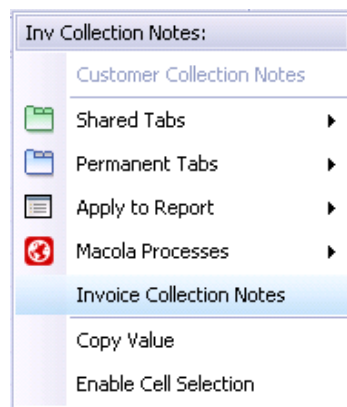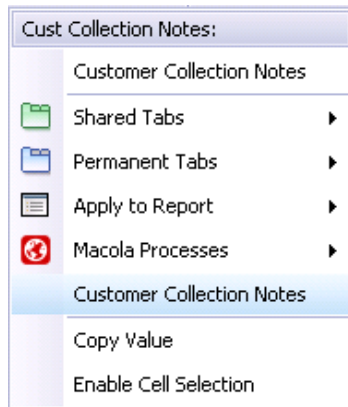
When the Customer or Invoice Collection Notes has been selected a screen similar to this will be displayed:
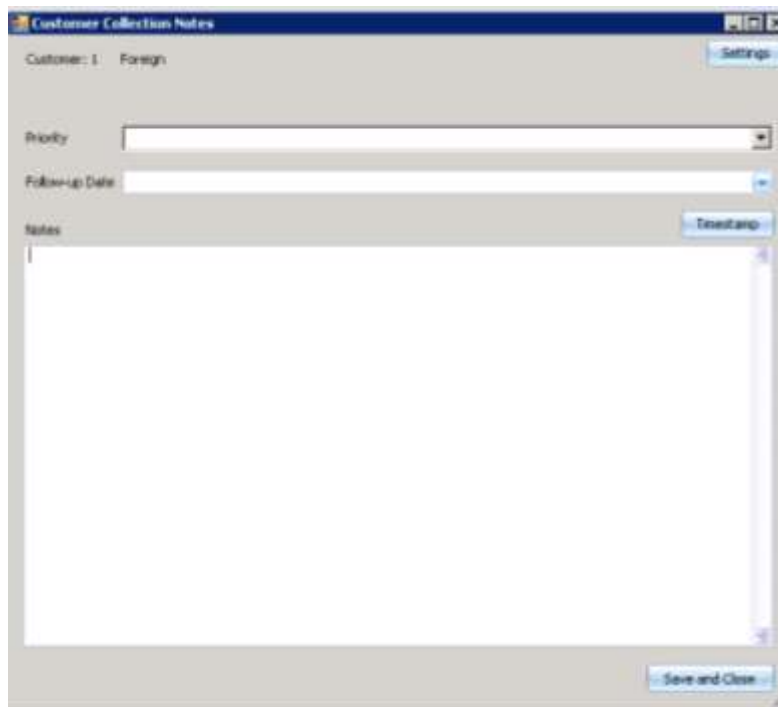
A Timestamp button is available to insert a name and time stamp into the Notes field where all Customer specific or Invoice specific information may be entered and stored.

The Follow-up Date may be entered to allow you to sort on this column for later follow-up.

The Priority field may have a predefined value entered into it to describe the importance of this information. This value may correspond to a code that you develop and can also be sorted. For example, these values may be High/Med/Low or 1/2/3/4/5 and are developed in the Settings screen.

Selecting the Settings button will allow you to develop an optional Priority Code for use on all collection and invoice notes.

Use the Add and Delete buttons to create new values and the Save button when completed. Once established these codes may be used on customer or invoice notes.
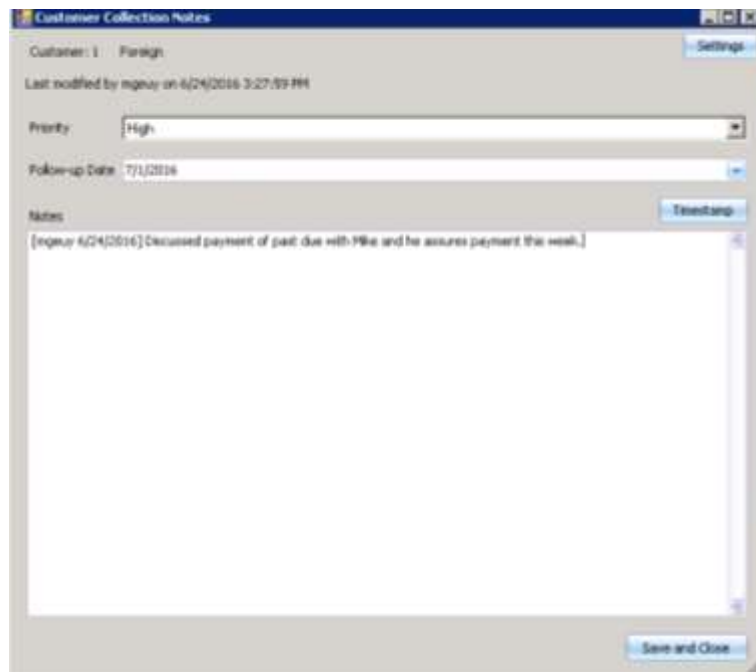
When finished select the Save and Close button at the bottom of the screen and refresh the report.

Please call our PULSE support desk us with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

We encourage phone calls with suggestions for making our software function better for your organization. We also offer custom modifications, and if your suggestion is applicable to other users, it may be made at no charge.

Visit www.PULSEDashboard.com