



Peachtree Tip: How to record your collection efforts

If you spend time making collection calls but don't have any record of them in your system, consider using the following method to document your efforts.

Method One (Customer by Customer):

1. Click on the Analysis drop down menu and choose Collection Manager. Then click on Bracket and set the As of Date as shown.

Age	Name	Ref	Document Date	Due Date	Total Amount	Letter
18	Aldred Builders, Inc.	10332	3/4/09	4/3/09	129.97	
35	Aldred Builders, Inc.	10129	2/15/09	3/17/09	5,426.94	
27	Archer Scapes and Ponds	10209	2/23/09	3/25/09	7,374.69	
18	Archer Scapes and Ponds	10329	3/4/09	4/3/09	59.98	
7	Archer Scapes and Ponds	10317	3/15/09	4/14/09	49.99	
7	Archer Scapes and Ponds		3/15/09	4/14/09	-49.99	
28	Armstrong Landscaping	10120	2/22/09	3/24/09	5,554.08	
23	Armstrong Landscaping	10212	2/27/09	3/29/09	7,374.69	

Total: 9,172,737.75

2. If you want to display only invoices over a certain amount, click on select and set the limit.

Collection Selections

Include Customers

All Customers

Range:

From:

To:

Type Mask:

Include Balances

All

Greater Than:

Less Than:



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3. Click Source to drill down to one customer's invoices, then double click on an invoice to see the invoice.

The screenshot shows two overlapping windows from a software application. The top window is titled "Customer Detail" and displays information for "Chapple Law Offices", including contact details and terms. The bottom window is titled "Sales/Invoicing" and shows an invoice for the same customer. The invoice includes a "PAST DUE" warning, a table of items, and a total amount of \$35.00. Red circles and arrows highlight the "Source" and "Detail" buttons in the top window's toolbar, and a double-click action on an invoice line item in the bottom window.

Age	Ref	Doc Date	Dis
8	10341	3/14/09	3/2
7	10313	3/15/09	3/2

Quantity	Item	U/M	Description	Unit Price	Tax	Amount	Job
	Misc Fee			0.00	1	35.00	

4. Close the invoice then using the phone information displayed, call the customer and click on Event.

The screenshot shows the "Create Event" window. It contains fields for "Type" (Customer/Prospect), "ID" (CHAPPLE), and "Date" (Apr 21, 2009). Below these are radio buttons for "Event Type" with options: Call From, Call To, Meeting, Letter From, Letter To, Comment, Other, and System. A "Note" field contains the text: "Spoke to Francis about outstanding bills. Emailed #10341 and 10313 to him." At the bottom, there are checkboxes for "Display in Action Items" and "Completed on" (Apr 21, 2009).



5. Record the notes from the phone call. Be sure to mark the task completed.
6. If you need to email the invoices, you can do so by double clicking on them and clicking the email button. If you need to print a collection letter, click on the letter button.

Method Two (Invoice by invoice):

1. Under Tasks / Action Items,
2. Click Options (first time only) and make sure that under the transactions tab, you are creating and displaying events for Customer Invoices Due.
3. Double click the invoice you are calling about and enter notes. As long as that invoice is open, the notes can be added to.

The screenshot shows the 'Action Items' window with a toolbar containing buttons for Close, Print, Delete, Recycle, Options, E-mail, Event, Alert, and Help. The 'Options' button is circled in red. Below the toolbar is a date field set to 'Apr 21, 2009' and a dropdown menu set to 'All To Do's and Events'. The main area displays a list of activities under the 'Events' tab for 'Tuesday, April 21, 2009'. An 'Action Items and Event Log Options' dialog box is open, showing the 'Transactions' tab. The dialog box contains a table with columns for 'Event Type', 'Create Event', 'Display in Action Items', and '# of Days'. The 'Create Event' and 'Display in Action Items' checkboxes for 'Customer Invoices Due' are circled in red.

Event Type	Create Event	Display in Action Items	# of Days
Quotes Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 before the event date
Quotes Expiring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 before the event date
Sales Orders to Ship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0 before the event date
Invoices Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 before the event date
Customer Invoices Due	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0 before the event date
Customer Credit Memos	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 before the event date