



Due soon

With this sub module of the EuroFib reminder management you are able to remind your customers by e-mail about invoices which will be due in a few days.

Requirements:

Basic data => Accounts data => Debtors
tabpage „reminder management“

Activate the check „due soon invoices“ on the desired debtors and enter an e-mail address.

The screenshot shows the 'Debtors data' window with the 'Reminder management' tab active. The 'due soon invoices' checkbox is checked. The 'eMail' field is filled with 'tn@schmidhuber.com'.

Debtors data			
Address			
account no.	20000	name	Testkunde Vorname
customer no.	x	address	AT 1220 Wien
		phone	01/123456789

reminder informations

reminder	<input checked="" type="radio"/>	reminder charges	<input type="checkbox"/>	interval	
account statement	<input type="radio"/>	interest on arrears	<input type="checkbox"/>	last reminder	01.01.2013
rem.blocked	<input type="radio"/>	due soon invoices	<input checked="" type="checkbox"/>	language code	1

interest invoice curr.acc.

interest invoice	<input checked="" type="checkbox"/>	interest on arrears ta	1	
pre-balance hrs	<input checked="" type="checkbox"/>	consider	<input checked="" type="checkbox"/>	00.00.0000

interest invoice OI

interest invoice	<input checked="" type="checkbox"/>	interest on arrears tab	1	Tolerance	
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reminder type

print	<input type="radio"/>	netdays	30	
fax	<input type="radio"/>	discount days1	8	3,00 %
eMail	<input checked="" type="radio"/>	discount days2	14	2,00 %

Remind => Reminder => Options
tabpage „Crystal Reports“

Enter the desired layout (Crystal Reports) for the due soon reminder.
This layout can be different from your default reminder management layout.

The screenshot shows the 'Options reminder management' window with the 'Crystal Reports' tab active. The 'Report (due soon invoices)' column is highlighted.

Options reminder management		
no. of reminders		
3		
printout version		
Crystal Reports		
print fix		
<input type="checkbox"/>		
from level		
settings		
Options		
Collection expenses		
Voucher types		
Crystal Reports		
colors		
client		
Archive		
<input checked="" type="checkbox"/>		
C:\temp		
Sprache	Report	Report (due soon invoices)
Deutsch (1)	G:\Crystal\SES\Mahnwesen\Mahnung_DE.rpt	G:\Crystal\SES\Mahnwesen\Mahnung_DE.rpt
Englisch (2)	G:\Crystal\SES\Mahnwesen\Mahnung_DE.rpt	G:\Crystal\SES\Mahnwesen\Mahnung_DE.rpt
test (3)		



Remind => Reminder => Headings

In the bottom area you are able to prepare a subject / text for your e-mails.

Remind => Reminder => Texts

Here you are able to enter a header/footer for each language.



Remind => Reminder => Selection

Choose type „due soon invoices“ and enter the due date you want to check.

e.g. check on 15.06.2016 for the upcoming days 15.06.2016 – 19.06.2016

Selection

type: due soon invoice

debtors / creditors: debtors

selection: new selection

date input

date/reminder: 14.06.2016

due to: 14.06.2016

payments considered till: 14.06.2016

due date: 15.06.2016 – 19.06.2016

Start the selection with execute [F11].

Remind => Reminder => Edit

Here you see the selected debtors/invoices and can edit them before you send them by e-mail (activate/deactivate).

Edit

date/reminder: 14.06.2016 / payments considered till: 14.06.2016 / due: 15.06.2016 - 19.06.2016 / account: 1/1

account	surname	cou.	pcode	place	amount	fcc	rLevel	d	P	D	F	E
20000	Testkunde	AT	1220	Wien	1.200,00		0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

account: 20000 / Position: 1/1

voucher date	begin valuta	valuta	net day	voucher type	voucher number	ext voucher number	amount owed	fcc	rem level	C
01.05.2016	01.05.2016	19.06.2016	49	AR	123456	123456	1.200,00			<input type="checkbox"/>



Remind => Reminder => Print out

In the top right area you see the number of debtors, which will get an e-mail. Start the process with execute [F11].

	created	not created	Total
Print			
fax			
email		1	1

Options

Number of reminder levels: 3
reminder level: increase
remind in: customers
print reminder level 0: ☐

Remind => Reminder => Update

With F11 you delete the selection.

account	reminder total	lection expens	active	nactive	name
reminder level: 0			1		
EUR	1.200,00		1		