

Reminders

Settings

You can find the dunning process in PC CADDIE under **Sales/Print.../Dunning notices**. There are essentially 4 concise points to note here:

Reminder

Layout **1**

With manual selection
Note reminder in account
Reminder time 1.: 30 Days
2.: 45 Days
3.: 60 Days

Edit...

Persons group **2**

All persons

Order

Alphabet (Names)

Define...
From-To...
Edit... **4**

☒ Due date from . . to 08.04.19
Amount only from 5.00 to 1000000.00

WITH and WITHOUT direct-debit Define...

☐ Families together separate invoice, extra

Print F8

Reminder list **3**

☐ filter for Booking

Note

Quit

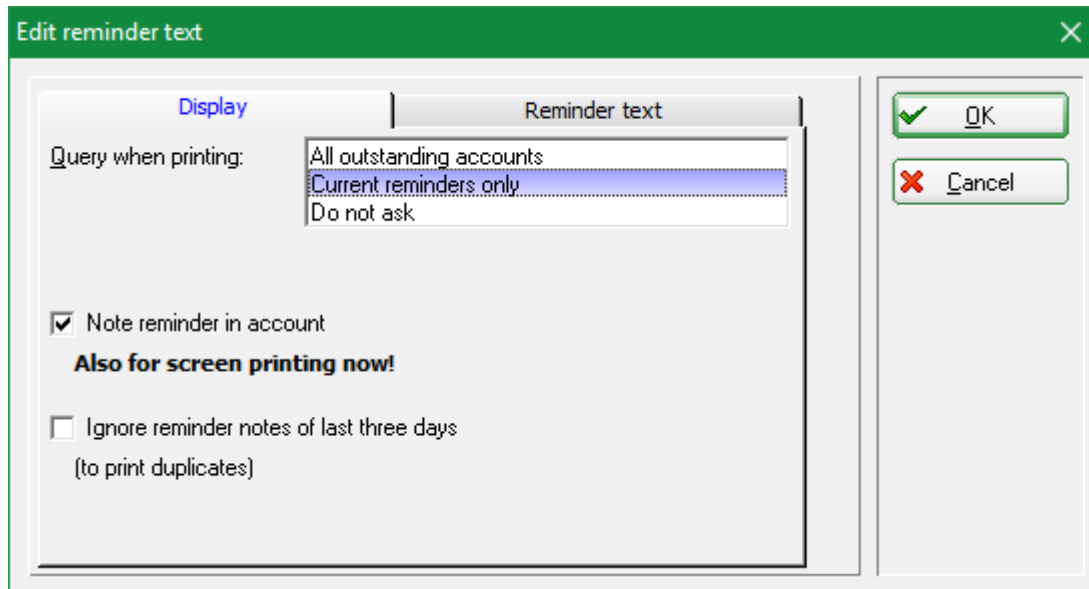
1. Edit layout
2. Basic settings
3. Dunning list
4. Note

Edit layout

Click on the button **Edit**, button to access the query and the dunning level texts.

Query/remark

In the tab **Output** tab, you can control the query and the note.



- The query is stored by default. The **query when printing** of „Only due“ is very useful, as you can now decide separately whether the reminder should be created or whether you want to wait another 14 days.
- The reminders can be noted in the account. The reminder note looks like this in the account:

Information	Date	Time	S	Net	Brutto	OK
cash Cash - Payment	15.11.18	14:34	z	-250.00	250.00	✓
cash Cash - Payment	15.11.18	14:34	z	-250.00	250.00	✓
EnA Entry fee adults	05.02.19	14:31	N	500.00	500.00	💡

- Ignoring the dunning notices of the last 3 days can be very helpful if you want to create the dunning notices again, e.g. because the text still needs to be changed.


Dunning texts/dunning periods



The **dunning texts and dunning periods** can be found in the tab next to **Output**.

TIP Standard templates for the texts are stored in PC CADDIE. In most cases, the settings in these templates are suitable. These can be changed according to your requirements.

Here you can see an example of a reminder layout. The command <SALDO> determines the total debt, <RECHNUNGEN> lists the invoices concerned with invoice number, amount, date and dunning level.

Format editor

Name:  Define new format

12/0 (0)  Line  Tab

.....|.....10.....|.....20.....|.....30.....|.....40.....|.....50.....|.....60.....|.....71

<SEITENZÄHLER>
<ABSENDER>
<ADRESSE_MIT_DATUM>

1. Reminder
|

<ANREDE>

You probably overlooked the due date for the club contribution
in the following amount: € <SALDO>

<RECHNUNGEN>

Please transfer this amount to our account as soon as possible.

< >




Fields (F2)
Commands
Fonts (F6)
Save format (F11)
Delete format (F5)
File (F9)
Test (F8)
Quit

By default, PC CADDIE proposes the shown **dunning times** shown. These can be changed.
The periods in days refer to the last invoice or the last reminder noted in the account.

Edit reminder text

Display Reminder text

Select the reminder level for which you want to edit the text

1st reminder: 
2nd reminder: 
3rd reminder: 

Reminder time: 1st Reminder: days or days
2nd Reminder: days days
3rd Reminder: days days
...after invoice ...after previous reminder

OK
Cancel

Once you have edited the dunning level texts, query and dunning periods, you can close the window with **OK** to close the window.

Basic settings

Reminder

Layout

With manual selection

Note reminder in account

Reminder time 1.: 30 Days
2.: 45 Days
3.: 60 Days

Persons group

All persons

Define...

Order

Alphabet (Names)

From-To...

Edit...

☒ Due date from . . to 08.04.19

Amount only from 5.00 to 999999.99

WITH and WITHOUT direct-debit

Define...

☐ Families together separate invoice, extra

Print F8

Reminder list

☐ Filter for Booking

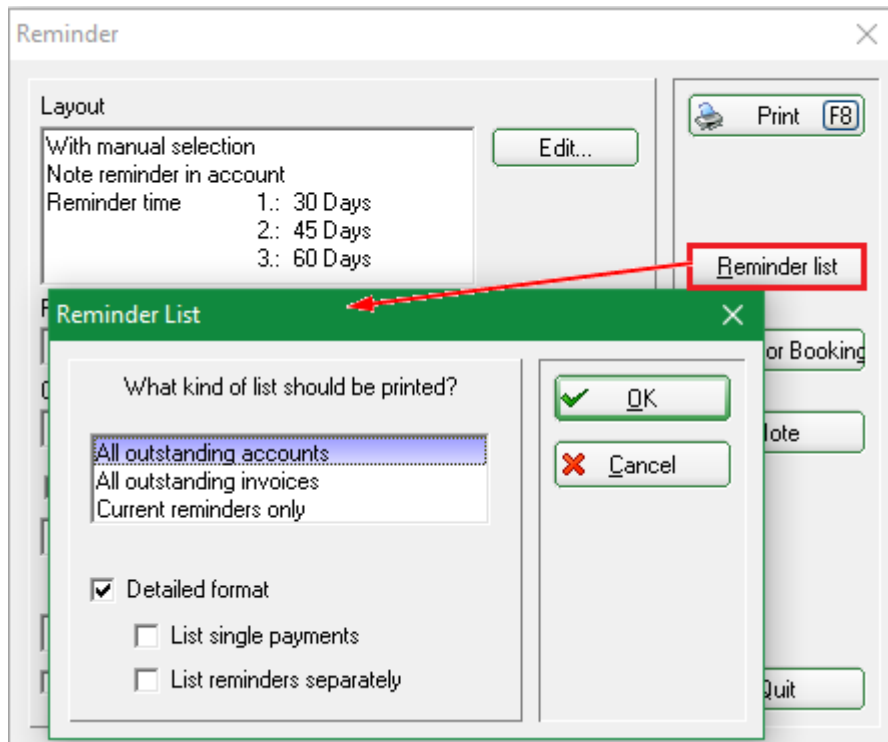
Note

Quit

You can leave the basic settings as the default settings. Changes can be made. The **person group** should be kept as general as possible so that PC CADDIE can suggest a reminder for all persons who have open items in the account and fit into the reminder period.

Reminder list

The button **Dunning list** button can be found on the right-hand side of the window and opens the following intermediate dialogue:



Ideally, select „All open accounts“ here, confirm with **OK** and then click on Print screen.

Reminder List - 08.04.19 **CLUB**

Something is missing in the invoice since no invoice number is provided here

Printed: 25.03.19, 14:40 h

No.	Name, First name	ID	Outst/€	Invoice	Date	Amount/€	Reminder Level
1	Ackermann, Günter		1250,00				
2	Friedrichs, Kay		500,00				
3	Fritz, Franz		2999,97				
4	Frohemuth, Heribert		1250,00				
5	Maier, Sepp		3750,00				
6	Schmedding Software Syst		500,00				
7	Schmedding Software Syst		1750,00				
8	Tester, Timo		1250,00				
Total			8500,00				

2

1->2 = Current reminder level is 1 (meaning one reminder was printed), the new reminder will be printed at level two!
 * = The selected invoice was not taken into account, because the last reminder or invoice has just been printed recently!

The dunning list shows you in advance which customers are affected and what dunning status they have.

1. These customers have already received an invoice. PC CADDIE suggests dunning level 1.
2. PC CADDIE explains the declaration here.

Dunning fees

You can also enter commands directly in the layout for the reminder that add reminder fees to the dunning fees to the dunned amount as a percentage. This has advantage that you only post the fee to the person's account after receiving the payment. the person's account. If you are interested in this, please contact PC CADDIE Support.

Note

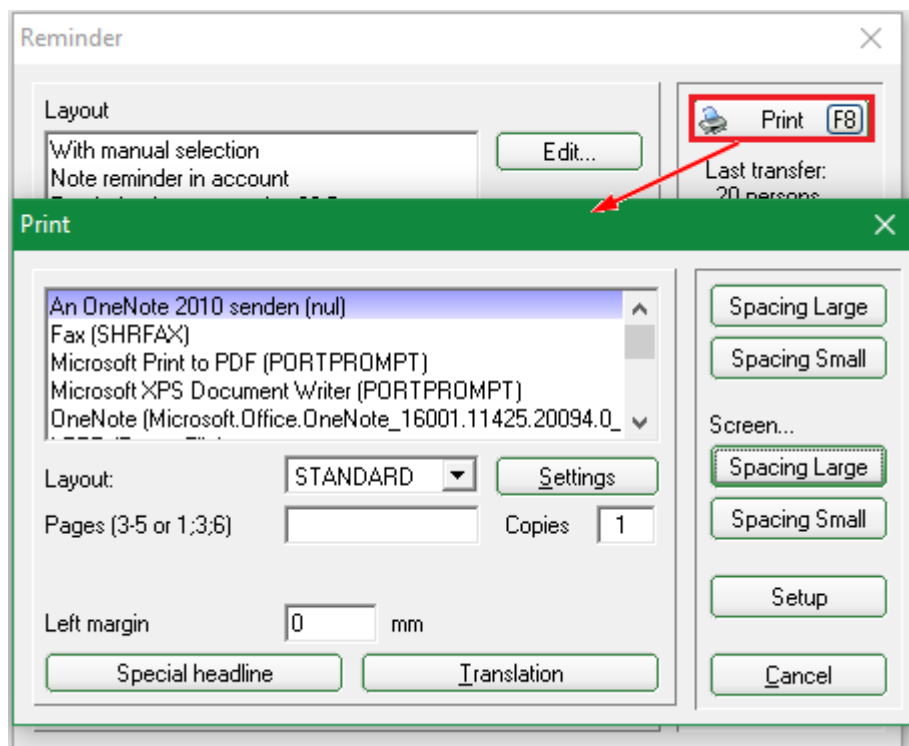
This point is unnecessary for reminders, as the reminder level is noted on the invoice in the sales account.

TIP Only with the module [CRM\DMS](#) do you have the option of storing the printed reminders directly with the persons. You can automate this and save the reminders as a PDF for the persons. If you want the reminders to be stored in [CRM\DMS](#) as well, please contact PC CADDIE Support. Read more detailed information about the PC CADDIE module [CRM\DMS](#) here.

If you have not licensed this module, you can set the number of printouts to 2 when printing the reminders. The customer receives one and you can file one. This means you have a copy in case of legal disputes.

Print reminders

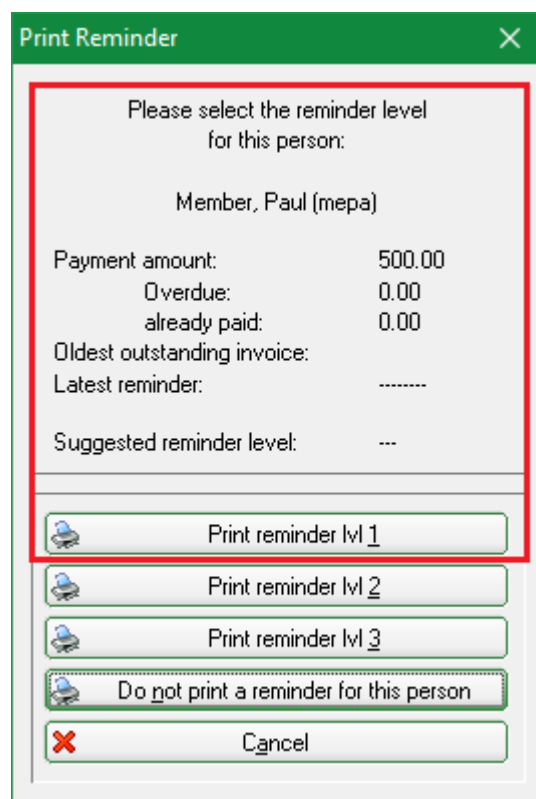
Once you have made all the settings, you can now print the reminders. **Print.**



If you first view the reminder on the screen, PC CADDIE will not note the reminder level sent in

the person's account and will therefore suggest the same reminder level for the next reminder. Here it is important to send the reminders directly to the printer. Or you can deliberately look at the screen beforehand and cancel the process completely before sending the reminders directly to the printer.

PC CADDIE will conduct the following dialogue with you, provided that you have previously **Query when printing** beforehand:



Print Reminder

Please select the reminder level for this person:

Member, Paul (mepa)

Payment amount: 500.00
Overdue: 0.00
already paid: 0.00
Oldest outstanding invoice:
Latest reminder: -----
Suggested reminder level: ---

Print reminder lvl 1
Print reminder lvl 2
Print reminder lvl 3
Do not print a reminder for this person
Cancel



For each individual reminder, you can decide on a case-by-case basis whether to create the reminder or not. **Do not print reminder for this person** select.

Dunning stop

Here we show you how to remove individual invoices from the automatic dunning run. To do this, please first call up the sales account of the person whose outstanding invoice is not to be dunned.

Turnover-Account - CLUB
×

Happy, Hellen (hah1)
Golfclub USGA

☐	Information	Date	Time	S	Net	Brutto	OK
	cash Cash - Payment	15.11.18	14:34	z		-250.00	✓
	cash Cash - Payment	15.11.18	14:34	z		250.00	✓
	EnA Entry fee adults	05.02.19	14:31	N	500.00	500.00	
☐	Invoice 20160036	25.03.19	15:05	M	1000.00	1095.00	🔔

ani0

ANNF_Taster Year 1

25.03.19

15:05

M

1000.00

1095.00

▼

0.00
0.00
1500.00

0.00
0.00
1595.00

◀
🖨️
▶

🔍

🖨️ Select fee [F2]

🔍 Edit fee [F7]

🔴 Change

❌ Reversal [F5]

🔧 Sorting

👛 Payment

🖨️ Print [F8]

❌ Quit

Happy, Hellen (hah1)

Golfclub USGA

Information	Date	Time	S	Net	Brutto	OK
cash Cash - Payment	15.11.18	14:34	z		-250.00	✓
cash Cash - Payment	15.11.18	14:34	z		250.00	✓
EnA Entrv fee adults	05.02.19	14:31	N	500.00	500.00	
Invoice 20160036	25.03.19	15:05	M	1000.00	1095.00	👤


ani0	ANNF_Taster Year 1	25.03.19	15:05	M	1000.00	1095.00	
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0.00	0.00
0.00	0.00
1500.00	1595.00

 Select feed **F2** Edit free F7 Change

✖ Reversal F5

Sorting

 Payment Print F8

Double-click on the invoice number line to open the document details.

Invoice details

Receipt number: 20160036

Date: 25.03.2019

Total

Due

Net-Amount: 1000,00

1000,00

Gross-Amount: 1095,00

1095,00

Payment / Reminder

Single bookings

Payment: 0,00

Uncleared 1095,00

Dunning Level: 0

Date of Reminder: 26.03.2019

Block reminder: . .

Delete reminder F5

Status: Invoiced

Print duplicate of Receipt F8

Reverse, take back or copy receipt

OK

Cancel

Now enter the following in the **Dunning stop** field, enter the desired date up to which the invoice should not be reminded.

Invoice details

Receipt number: 20160036

Date: 25.03.2019

Total

Net-Amount: 1000,00

Gross-Amount: 1095,00

Due

1000,00

1095,00

Payment / Reminder

Single bookings

Payment: 0,00

Uncleared 1095,00

Dunning Level: 0

Date of Reminder: 26.03.2019

Block reminder: 01.06.2019

Delete reminder F5

Status: Invoiced

Print duplicate of Receipt F8

Reverse, take back or copy receipt

OK

Cancel

A blue question mark appears as the booking status in the sales account, to the right at the end of the invoice number line.

