

CREDIT CONTROL: AUTOMATIC LETTERS

From **Credit Control**, open the **Automatic Letters** table.

Click **Add** to create a new batch.

At the **Batch ID** field, enter a description for the batch.

Click **OK** to save the batch.

Credit Control > Letters > Automatic Letters

Automatic Letters (BROWSE)

Batch ID: TEST AMI WATER Batch Number: 4 Created By: aenfelt

Automatic Letters Load (BROWSE)

General Criteria

Cycle: Route: Account Number: Customer: Credit Rating: Interval: Cable Account: Budget Account:

General Criteria

Service: Category: Bill Code: Start Date: Last Read Date: Final Date: Tax Exempt: Tax Exempt Expiry Date:

Flags

Deposits Reqd: 0.00 Credit Score: 0 Vacant Days: 0 Create Letter:

Ready OK Cancel

Move to the **Load** tab.

Click the **Edit** icon at the bottom of the page.

Enter the **General Criteria** to be used for generating the letters.

At the **Create Letter** field, under the Flags section, identify the letter to be created.

Click **OK** to run the Load process.

Automatic Letters (BROWSE)

Batch ID: TEST AMI WATER Batch Number: 4 Created By: aenfelt

Load Refresh Edit Transfer Print Remove Batch

Automatic Letters Load (FIND)

General Criteria

Cycle: []
Route: []
Account Number: 1100
Customer: []
Credit Rating: []
Interval: []
Cable Account: []
Budget Account:

General Criteria

Service: []
Category: []
Bill Code: []
Start Date: []
Last Read Date: []
Final Date: []
Tax Exempt: []
Tax Exempt Expiry Date: []

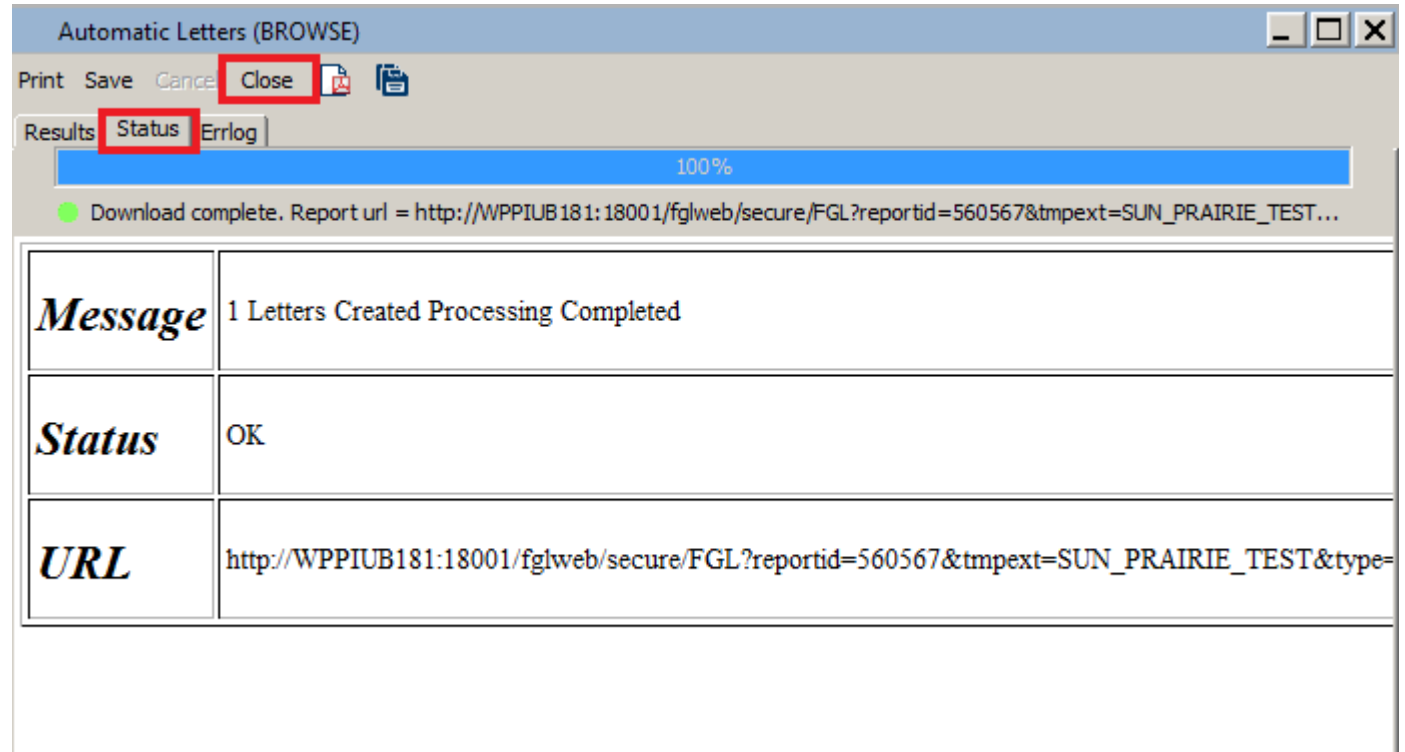
Flags

Deposits Reqd: []
Credit Score: []
Vacant Days: []
Create Letter: 250 [] AMI W1 MM

Please enter the cycle OK Cancel

When the Load process completes, a message will appear indicating the Status.

Click **Close** to return to the Batch.



The screenshot shows a dialog box titled "Automatic Letters (BROWSE)". The menu bar includes "Print", "Save", "Cancel", and "Close" (highlighted with a red box). Below the menu is a tabbed interface with "Results", "Status" (highlighted with a red box), and "Errlog" tabs. A blue progress bar is at 100%. Below the progress bar, a green dot indicates "Download complete. Report url = http://WPPIUB181:18001/fglweb/secure/FGL?reportid=560567&tmpext=SUN_PRAIRIE_TEST...". A table with three rows is displayed below:

Message	1 Letters Created Processing Completed
Status	OK
URL	http://WPPIUB181:18001/fglweb/secure/FGL?reportid=560567&tmpext=SUN_PRAIRIE_TEST&type=

Move to the **Edit** tab.

Review the accounts loaded into the batch.

If an account loaded in error, delete it by clicking the 'X' under the Letter Edit section.

In the **Letter Edit Details** section, the tokens used in the letter appear on the left and the account data shows on the right.

Automatic Letters (BROWSE)

Batch I.D: TEST AMI WATER Batch Number: 4 Created By: aenfelt

Load Refresh **Edit** Transfer Print Remove Batch

Letter Edit (BROWSE)

Account: 1100 11 FREDDY KRUEGER

Letter: 250 AMI W1 MM

Customer: 654123

Letters Edit Details (BROWSE)

Token No	Description	Data
1	today	November 11, 2019
2	name	FREDDY KRUEGER
3	account mail address 1	
4	account mail address 2	679 BLOOD BATH LN
5	account mail address city	SUN PRAIRIE
6	account mail address state/province	WI
7	account mail address postal/zip code	53590-2940

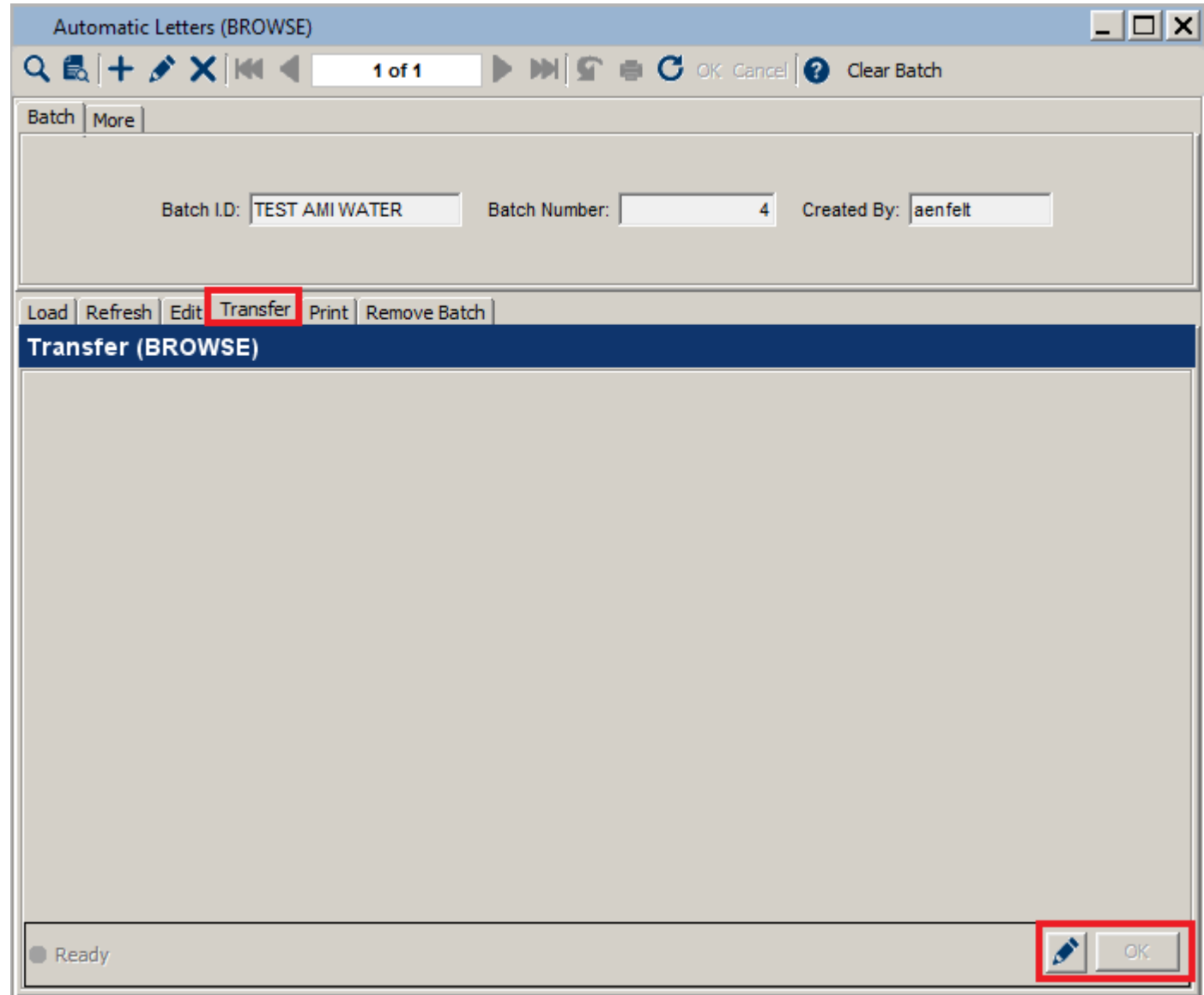
Ready

Click on the **Transfer** tab.

Click the **Edit** icon at the bottom of the table.

Then click **OK** to run the transfer process.

This process transfers the letters to the Letter History table in Account Gateway.



Click **Close** when the Transfer process completes.

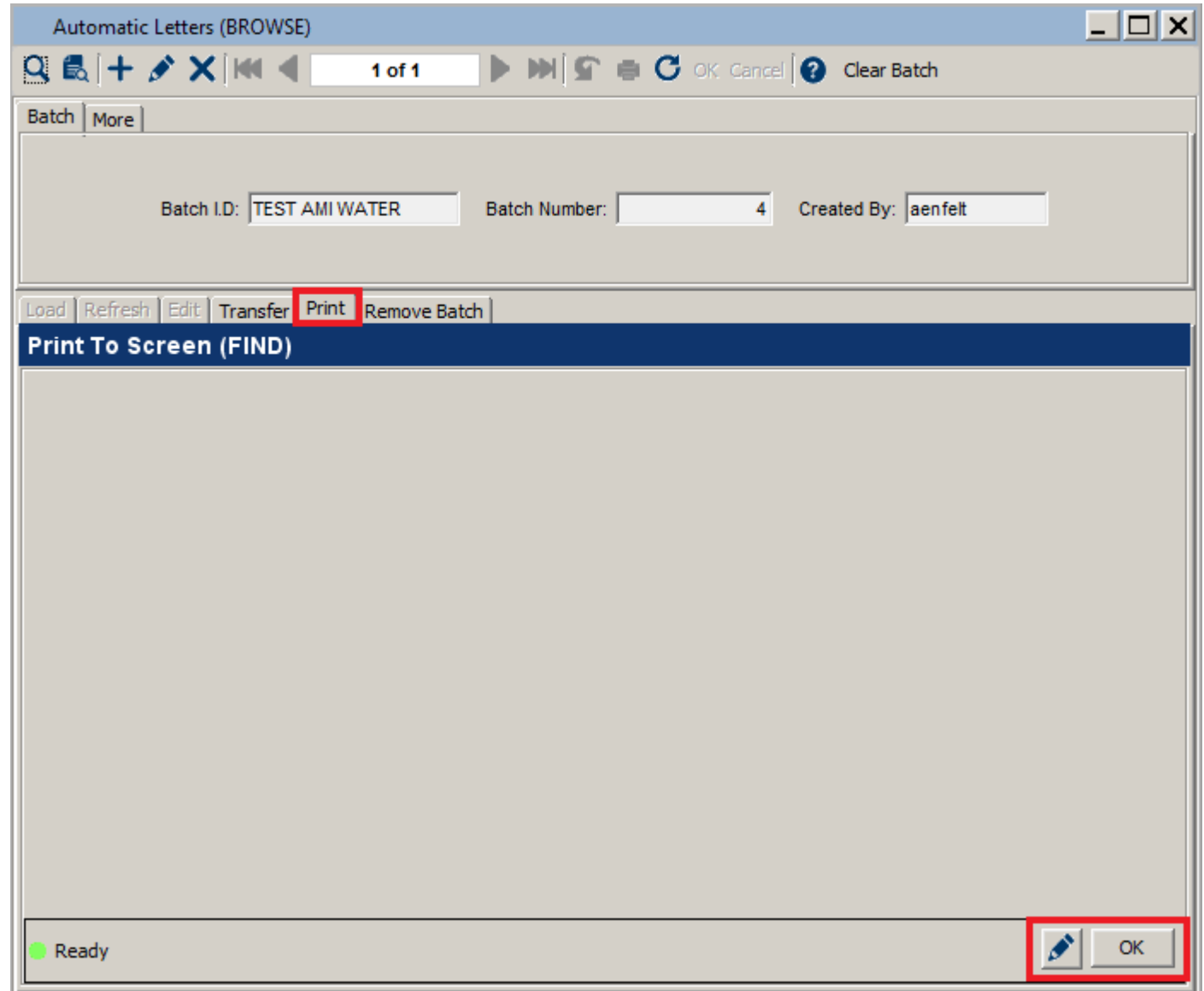
The screenshot shows a window titled "Automatic Letters (BROWSE)". The menu bar includes "Print", "Save", "Cancel", and "Close" (which is highlighted with a red box). Below the menu bar are tabs for "Results", "Status", and "Errlog". A blue progress bar is at 100%. Below the progress bar, a green dot indicates "Download complete. Report url = http://WPPIUB181:18001/fglweb/secure/FGL?reportid=560568&tmpext=SUN_PRAIRIE_TEST...". A table below contains the following information:

<i>Message</i>	Transfer Completed
<i>Status</i>	OK
<i>URL</i>	http://WPPIUB181:18001/fglweb/secure/FGL?reportid=560568&tmpext=SUN_PRAIRIE_TEST&type=

Select the **Print** tab.

Click the **Edit** icon to activate the Print tab.

Click **OK** to print the letters.



Click **Close** when the Print processing completes.

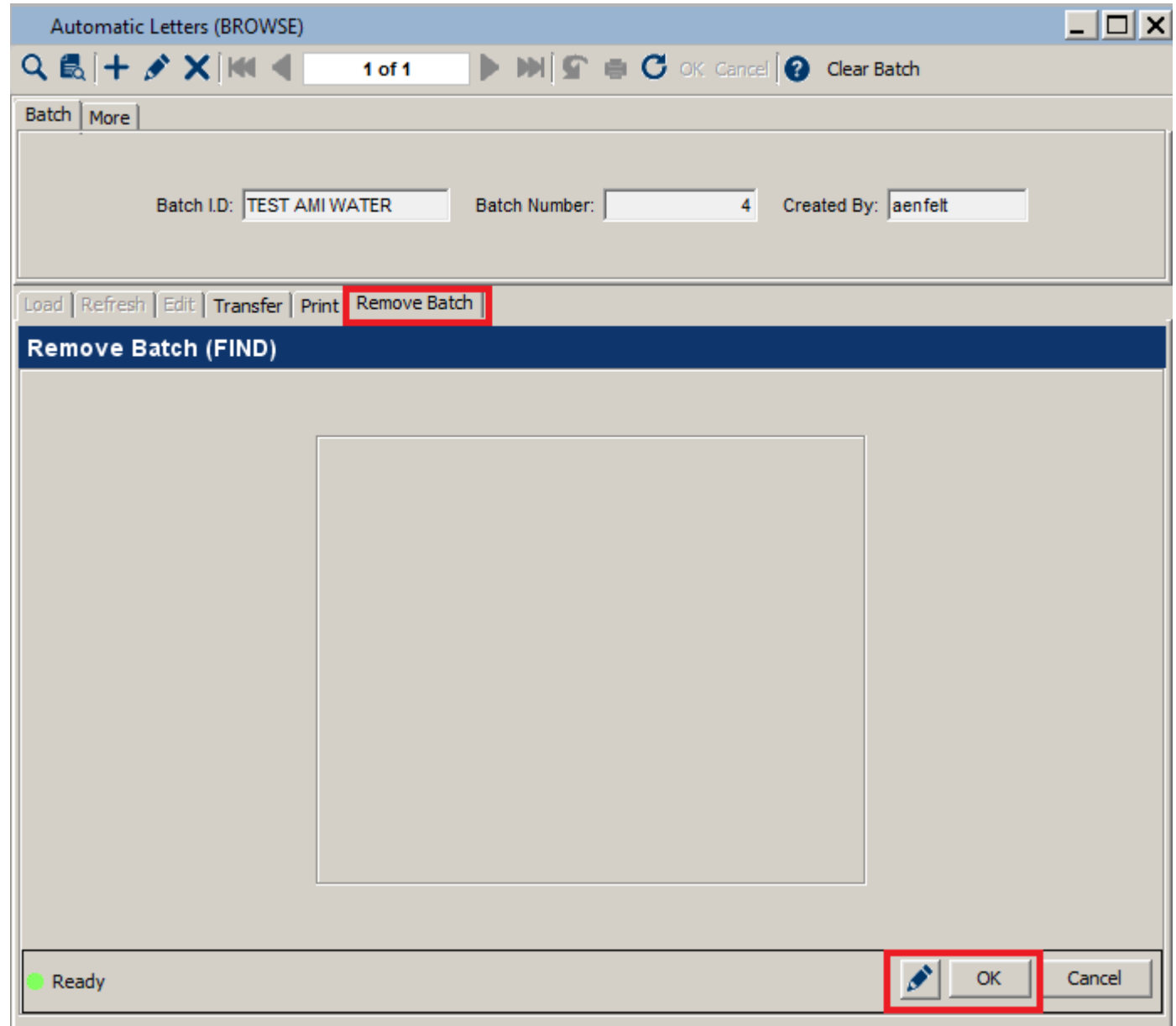
The MS Word Letter document opens.

Print the letters per regular utility procedure.

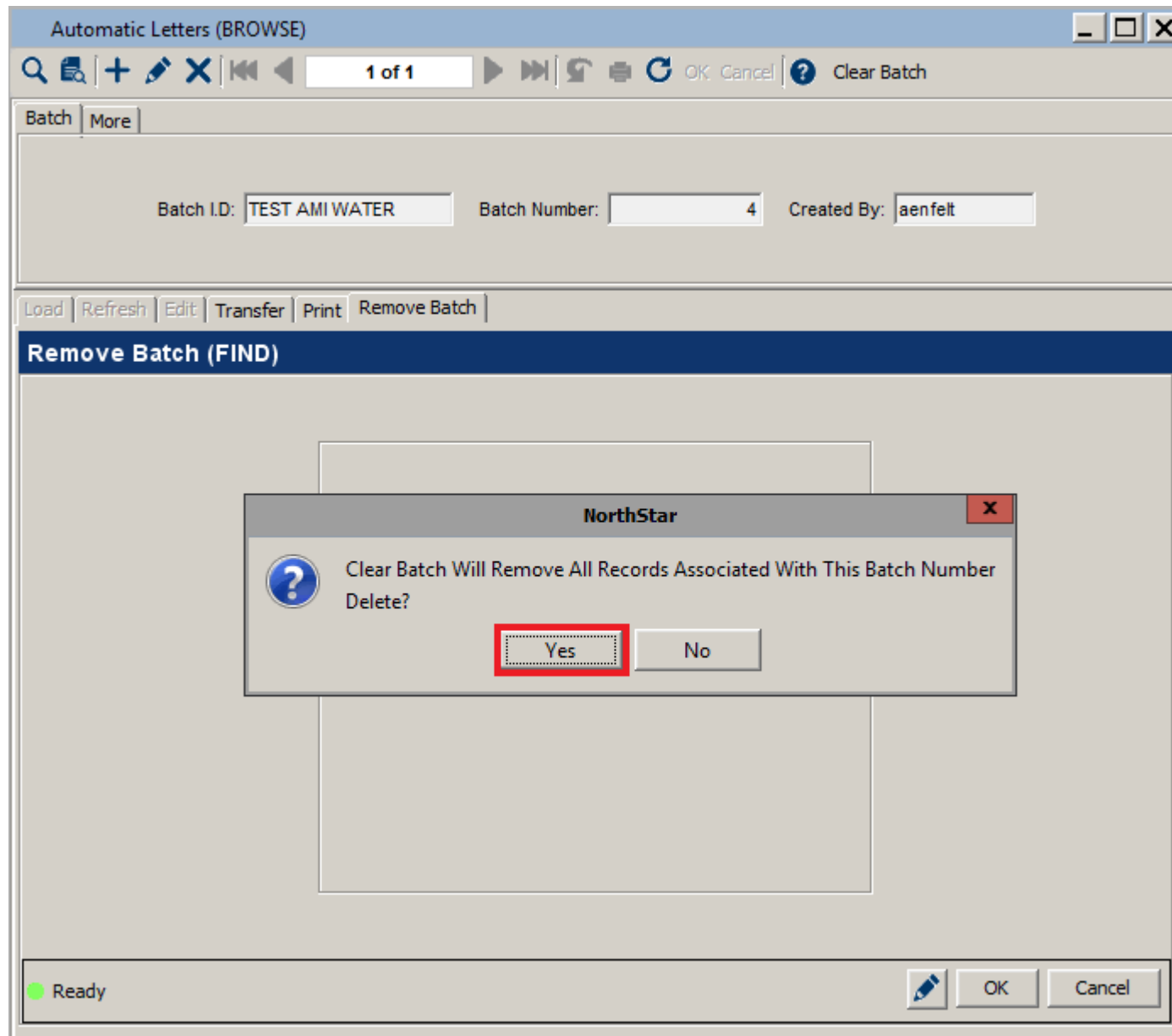
Close the documents when complete.

From the **Remove Batch** tab, click the **Edit** icon.

Click **OK** to run the remove process.



At the pop-up window, click **Yes** to verify the removal of the batch.



Another pop-up window appears.

Click **Yes** again as the final verification to remove the batch.

