

## DEBT COLLECTOR

Navigate to the **Setups** module.

Open the **Debt Collector** table.

Locate the Debt Collector assigned to the final accounts.

From the **Details Active** tab, review all accounts.

Verify the accounts transferred correctly as well as the number of accounts transferred.

*In the example, the Credit Control Final Reminders batch transferred/contained 44 accounts. Debt Collector Z had 3 accounts prior to the transfer. The batch now contains 47 accounts.*

Setups > Setups > Standard > Debt Collectors

Debt Collector Setup (BROWSE)

Debt Collectors

Debt collector: Z Description: 2020 TAX ROLL

Details Active Inactive CSV Print Transfer

Account Information (BROWSE)

1 of 47

Account No	Occ.	Name	Date In	Amount	Current Balance
122869	23	JOHN STAMOS	2019-10-25	215.38	0.00
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
104625	30	KRISTEN WIIG	2020-01-04	21.80	0.00
	32		2019-10-23	838.08	838.08
	24		2020-01-06	662.39	662.39
	29		2020-01-06	115.71	115.71
	23		2020-01-06	233.61	233.61
	38		2020-01-06	285.70	285.70
	43		2020-01-06	134.08	134.08
	21		2020-01-06	2.54	28.83
	42		2020-01-06	315.58	315.58
	39		2020-01-06	1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	37		2020-01-06	149.52	149.52
	33		2020-01-06	24.35	24.35
	22		2020-01-06	287.72	287.72

Ready

Ready

Remove any account with a \$0.00 balance.

Select the account with a \$0.00 balance.

Click the **Delete** icon to remove the account from the batch.

Debt Collector Setup (BROWSE)

Debt Collectors

Debt collector: Z Description: 2020 TAX ROLL

Details Active Inactive CSV Print Transfer

Account Information (BROWSE)

1 of 47

Account No	Occ.	Name	Date In	Amount	Current Balance
122869	23	JOHN STAMOS	2019-10-25	215.38	0.00
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
104625	30	KRISTEN WIIG	2020-01-04	21.80	0.00
	32		2019-10-23	838.08	838.08
	24		2020-01-06	662.39	662.39
	29		2020-01-06	115.71	115.71
	23		2020-01-06	233.61	233.61
	38		2020-01-06	285.70	285.70
	43		2020-01-06	134.08	134.08
	21		2020-01-06	2.54	28.83
	42		2020-01-06	315.58	315.58
	39		2020-01-06	1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	37		2020-01-06	149.52	149.52
	33		2020-01-06	24.35	24.35
	32		2020-01-06	287.72	287.72

Ready

Ready

A pop-up window will appear requesting confirmation to delete the yellow highlighted record.

Click **Yes**.

Repeat with each account where the current balance equals \$0.00.

Debt Collector Setup (BROWSE)

Debt Collectors

Debt collector: Z Description: 2020 TAX ROLL

Details Active Inactive CSV Print Transfer

Account Information (DELETE)

1 of 47

Browse Record Details History

Account No	Occ.	Name	Date In	Amount	Current Balance
13010090	23	KYLE WOXLAND	2019-10-25	215.38	0.00
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
104625				21.80	0.00
				838.08	838.08
				662.39	662.39
				115.71	115.71
				233.61	233.61
				285.70	285.70
				134.08	134.08
			2020-01-06	2.54	28.83
			2020-01-06	315.58	315.58
			2020-01-06	1.90	1.90
			2020-01-06	34.58	34.58
			2020-01-06	3.31	3.31
			2020-01-06	66.61	66.61
			2020-01-06	106.95	106.95
			2020-01-06	132.48	132.48
			2020-01-06	13.14	13.14
			2020-01-06	13.73	13.73
			2020-01-06	133.36	133.36
			2020-01-06	149.52	149.52
			2020-01-06	24.35	24.35
			2020-01-06	287.72	287.72

NorthStar

Are you sure you want to delete this record(s)?

Yes No

Ready

Ready

Using the updated Debt Collector batch, create the Final Reminder letters.

Click **Create Letters**.

Debt Collector Setup (BROWSE)

Debt Collectors

Debt collector: Z Description: 2020 TAX ROLL

Details Active Inactive CSV Print Transfer

Account Information (BROWSE)

1 of 45 OK Cancel CreateLetters deleteAll

Account No	Occ.	Name	Date In	Amount	Current Balance
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
	32		2019-10-23	838.08	838.08
	23		2020-01-06	233.61	233.61
	38		2020-01-06	285.70	285.70
	24		2020-01-06	662.39	662.39
	29		2020-01-06	115.71	115.71
	43		2020-01-06	134.08	134.08
	21		2020-01-06	2.54	28.83
	42		2020-01-06	315.58	315.58
	37		2020-01-06	149.52	149.52
	39		2020-01-06	1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	33		2020-01-06	4.32	4.32
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	39		2020-01-06	217.93	217.93
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	33		2020-01-06	24.35	24.35
	22		2020-01-06	287.72	287.72

Ready

Ready

A pop-up window appears.

Click **Yes** to 'Create Automatic Letters.'

The screenshot shows the 'Debt Collector Setup (BROWSE)' window. At the top, there are search and navigation icons, a page indicator '5 of 5', and 'OK' and 'Cancel' buttons. Below this is the 'Debt Collectors' section with 'Debt collector: Z' and 'Description: 2020 TAX ROLL'. A toolbar includes 'Details Active', 'Inactive', 'CSV', 'Print', and 'Transfer'. The main section is 'Account Information (BROWSE)', which has a search icon, a page indicator '1 of 45', and buttons for 'CreateLetters' and 'deleteAll'. Below this is a table with columns: Account No, Occ., Name, Date In, Amount, and Current Balance. A dialog box titled 'NorthStar' with a question mark icon and the text 'Create Automatic Letters?' is overlaid on the table, with 'Yes' and 'No' buttons. The status bar at the bottom shows 'Ready'.

Account No	Occ.	Name	Date In	Amount	Current Balance
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
	32		2019-10-23	838.08	838.08
	23			233.61	233.61
	38			285.70	285.70
	24			662.39	662.39
	29			115.71	115.71
	43			134.08	134.08
	21			2.54	28.83
	42			315.58	315.58
	37			149.52	149.52
	39		2020-01-06	1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	33		2020-01-06	4.32	4.32
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	39		2020-01-06	217.93	217.93
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	33		2020-01-06	24.35	24.35
	22		2020-01-06	287.72	287.72

A new pop-up window appears.

At **Select Letter**, use the dropdown menu to select the letter to generate.

Click **OK**.

The screenshot shows the 'Debt Collector Setup (BROWSE)' window. At the top, there are search and navigation icons, a page indicator '5 of 5', and 'OK' and 'Cancel' buttons. Below this is the 'Debt Collectors' section with a 'Debt collector:' dropdown set to 'Z' and a 'Description:' text box containing '2020 TAX ROLL'. A toolbar includes 'Details Active', 'Inactive', 'CSV', 'Print', and 'Transfer' buttons. The main section is 'Account Information (BROWSE)', which has its own search and navigation icons, a page indicator '1 of 45', and 'OK', 'Cancel', 'CreateLetters', and 'deleteAll' buttons. Below this is a table with columns: 'Account No', 'Occ.', 'Name', 'Date In', 'Amount', and 'Current Balance'. The table contains multiple rows of data, including one for 'BRADLEY COOPER' with a date of '2020-01-06' and an amount of '255.19'. A 'Letters' pop-up dialog is overlaid on the table, featuring a 'Create Letters' section with a 'Select Letter:' dropdown menu set to '120' and 'Ok' and 'Cancel' buttons. The dialog is highlighted with a red border. At the bottom of the window, there are two 'Ready' status indicators.

Account No	Occ.	Name	Date In	Amount	Current Balance
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
	32		2019-10-23	838.08	838.08
	23			233.61	233.61
	38			285.70	285.70
	24			662.39	662.39
	29			115.71	115.71
	43			134.08	134.08
	21			2.54	28.83
	42			315.58	315.58
	37			149.52	149.52
	39			1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	33		2020-01-06	4.32	4.32
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	39		2020-01-06	217.93	217.93
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	33		2020-01-06	24.35	24.35
	22		2020-01-06	287.72	287.72

A third pop-up window opens.

Click **Yes** to generate letters for ALL accounts found.

Debt Collector Setup (BROWSE)

Debt Collectors

Debt collector: Z Description: 2020 TAX ROLL

Details Active Inactive CSV Print Transfer

Account Information (BROWSE)

1 of 45 CreateLetters deleteAll

Account No	Occ.	Name	Date In	Amount	Current Balance
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
	32		2019-10-23	838.08	838.08
	23			3.61	233.61
	38			5.70	285.70
	24			2.39	662.39
	29			5.71	115.71
	43			4.08	134.08
	21			2.54	28.83
	42			5.58	315.58
	37			9.52	149.52
	39		2020-01-06	1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	33		2020-01-06	4.32	4.32
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	39		2020-01-06	217.93	217.93
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	33		2020-01-06	24.35	24.35
	22		2020-01-06	287.72	287.72

NorthStar

Generate Letters for ALL Accounts found?

Yes No

A confirmation pop-up window appears indicating the number of letters generated.

Click **OK**.

Debt Collector Setup (BROWSE)

Debt Collectors

Debt collector: Z Description: 2020 TAX ROLL

Details Active Inactive CSV Print Transfer

Account Information (BROWSE)

1 of 45

OK Cancel CreateLetters deleteAll

Account No	Occ.	Name	Date In	Amount	Current Balance
102173	37	BRADLEY COOPER	2020-01-06	255.19	255.19
	32		2019-10-23	838.08	838.08
	23			233.61	233.61
	38			285.70	285.70
	24			662.39	662.39
	29			115.71	115.71
	43			134.08	134.08
	21			2.54	28.83
	42			315.58	315.58
	37			149.52	149.52
	39		2020-01-06	1.90	1.90
	35		2020-01-06	34.58	34.58
	35		2020-01-06	3.31	3.31
	33		2020-01-06	4.32	4.32
	30		2020-01-06	66.61	66.61
	33		2020-01-06	106.95	106.95
	39		2020-01-06	217.93	217.93
	40		2020-01-06	132.48	132.48
	31		2020-01-06	13.14	13.14
	32		2020-01-06	13.73	13.73
	24		2020-01-06	133.36	133.36
	33		2020-01-06	24.35	24.35
	33		2020-01-06	287.77	287.77

Ready

Ready



## AUTOMATIC LETTERS

Return to the **Credit Control** module.

Open the **Automatic Letters** table.

Click **OK** to display current batches.

Locate the Debt Collector Letters batch created from the Debt Collector table.

*Credit Control > Letters > Automatic Letters*

Automatic Letters (BROWSE)

Batch I.D: DebtCollectorLS    Batch Number: 29    Created By: aenfelt

Automatic Letters Load (FIND)

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:   
Credit Score:   
Vacant Days:   
Create Letter:

Ready

Use the navigation buttons to browse records

Although the letter has loaded into the batch, the tokens must also be loaded to the letter.

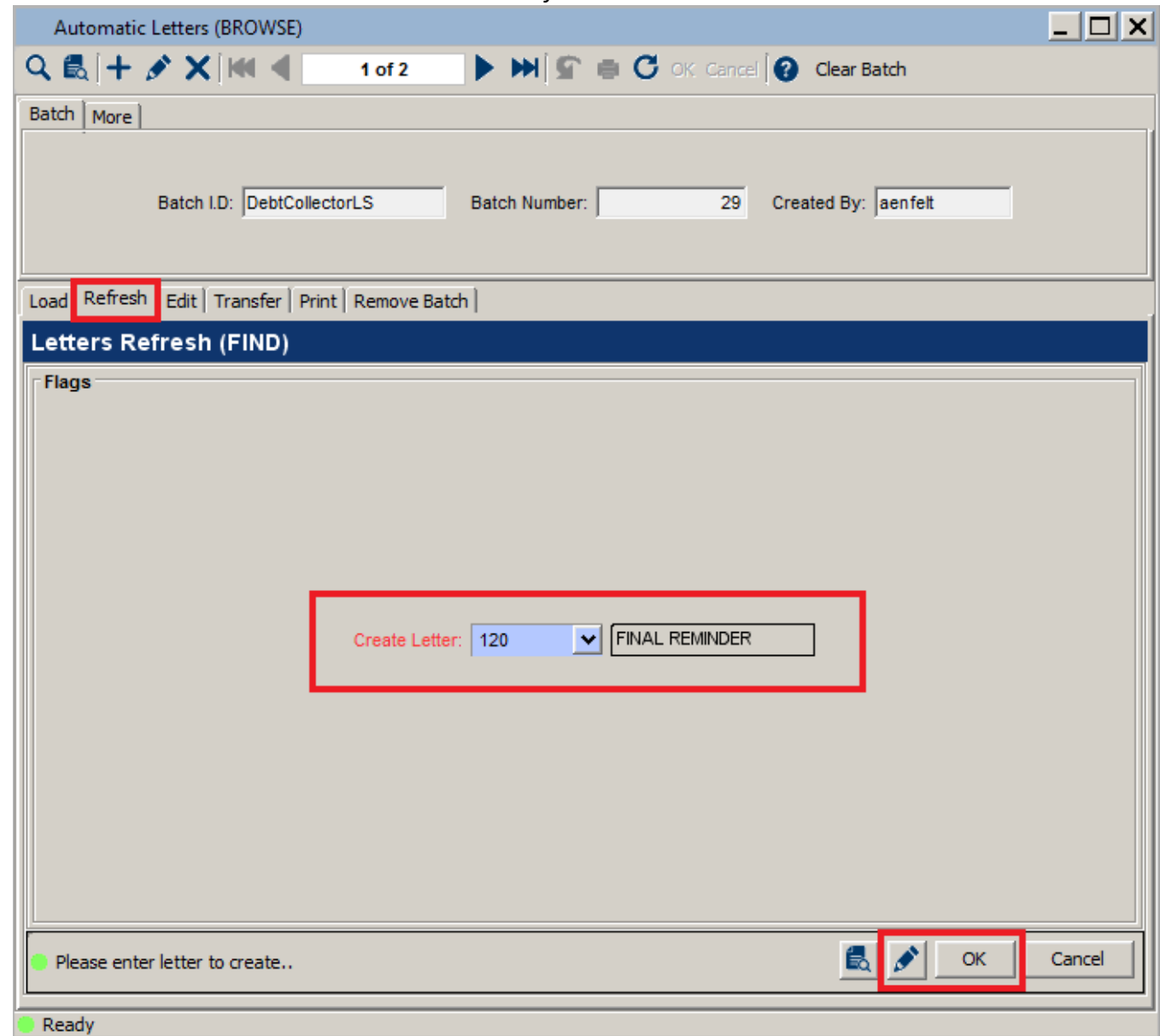
Move to the **Refresh** tab.

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

At **Create Letter**, select the letter number to be printed.

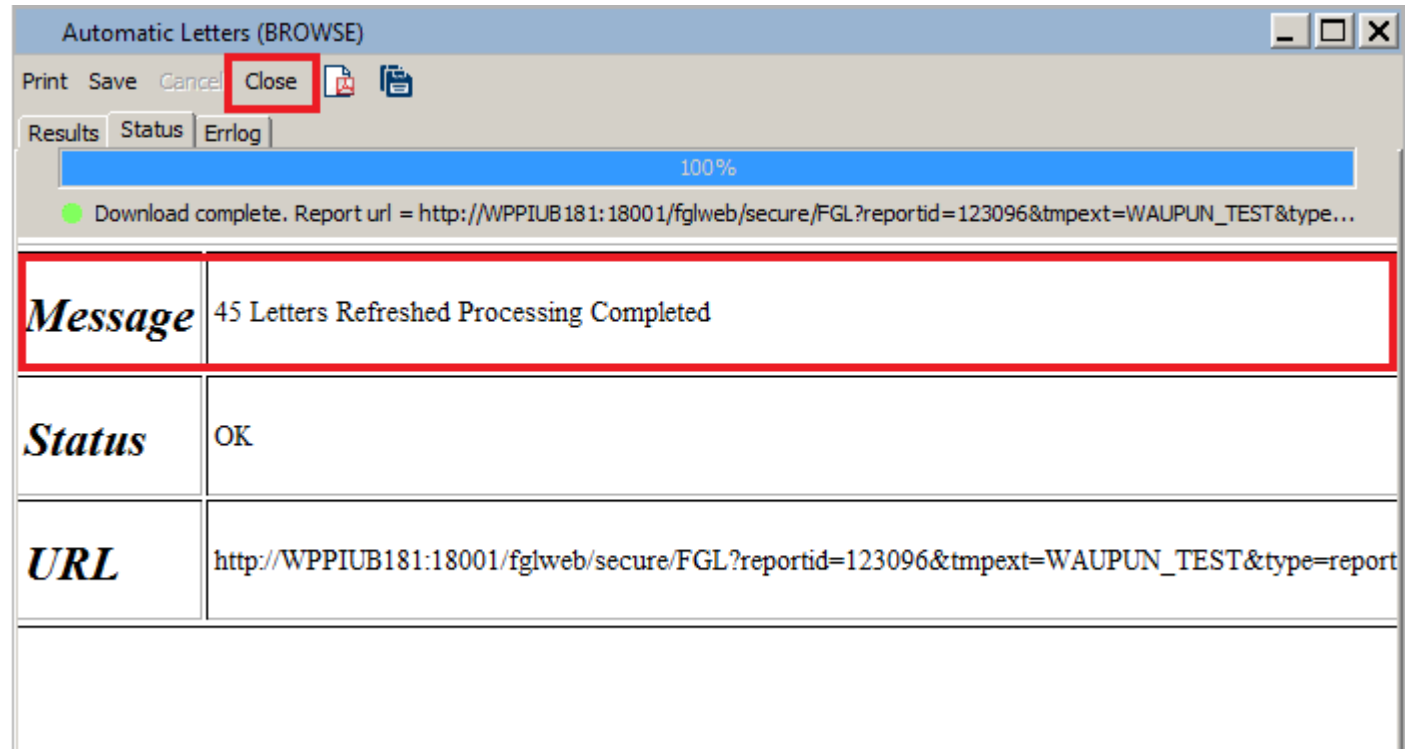
Click **OK** to load the letter tokens.

*Credit Control > Letters > Automatic Letters > Refresh tab*





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

*Note: The processing completed message confirms the number of letters created.*



Automatic Letters (BROWSE)

Print Save Cancel **Close**  

Results Status Errlog

100%

Download complete. Report url = [http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123096&tmpext=WAUPUN\\_TEST&type...](http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123096&tmpext=WAUPUN_TEST&type...)

<b>Message</b>	45 Letters Refreshed Processing Completed
<b>Status</b>	OK
<b>URL</b>	<a href="http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123096&amp;tmpext=WAUPUN_TEST&amp;type=report">http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123096&amp;tmpext=WAUPUN_TEST&amp;type=report</a>

Navigate to the **Edit** tab.

The batch now shows the individual accounts to receive the letter. Each account displays the associated tokens and corresponding data.

*In the example, the Letter Edit section indicates 45 letters created. The Letters Edit Details displays 11 variable tokens for each account's letter.*

*Credit Control > Automatic Letters > Edit tab*

Automatic Letters (BROWSE)

Batch I.D: DebtCollectorLS    Batch Number: 29    Created By: aenfelt

Load Refresh **Edit** Transfer Print Remove Batch

Letter Edit (BROWSE)

Account: 102173 37    BRADLEY COOPER

Letter: 120    FINAL REMINDER

Customer: 9835

Letters Edit Details (BROWSE)

Token No	Description	Data
1	name	BRADLEY COOPER
2	account mail address 1	
3	account mail address 2	337 EASY WAY RD
4	account mail address city	SLACKER TOWN
5	account mail address state/province	WI
6	account mail address postal/zip code	56545
7	account number	13010270
8	occupant	37
9	Account Balance	\$255.19
10	today	01/08/2020
11	account service address (house no. thru	721 CATCHFLY LN BROWN

Ready

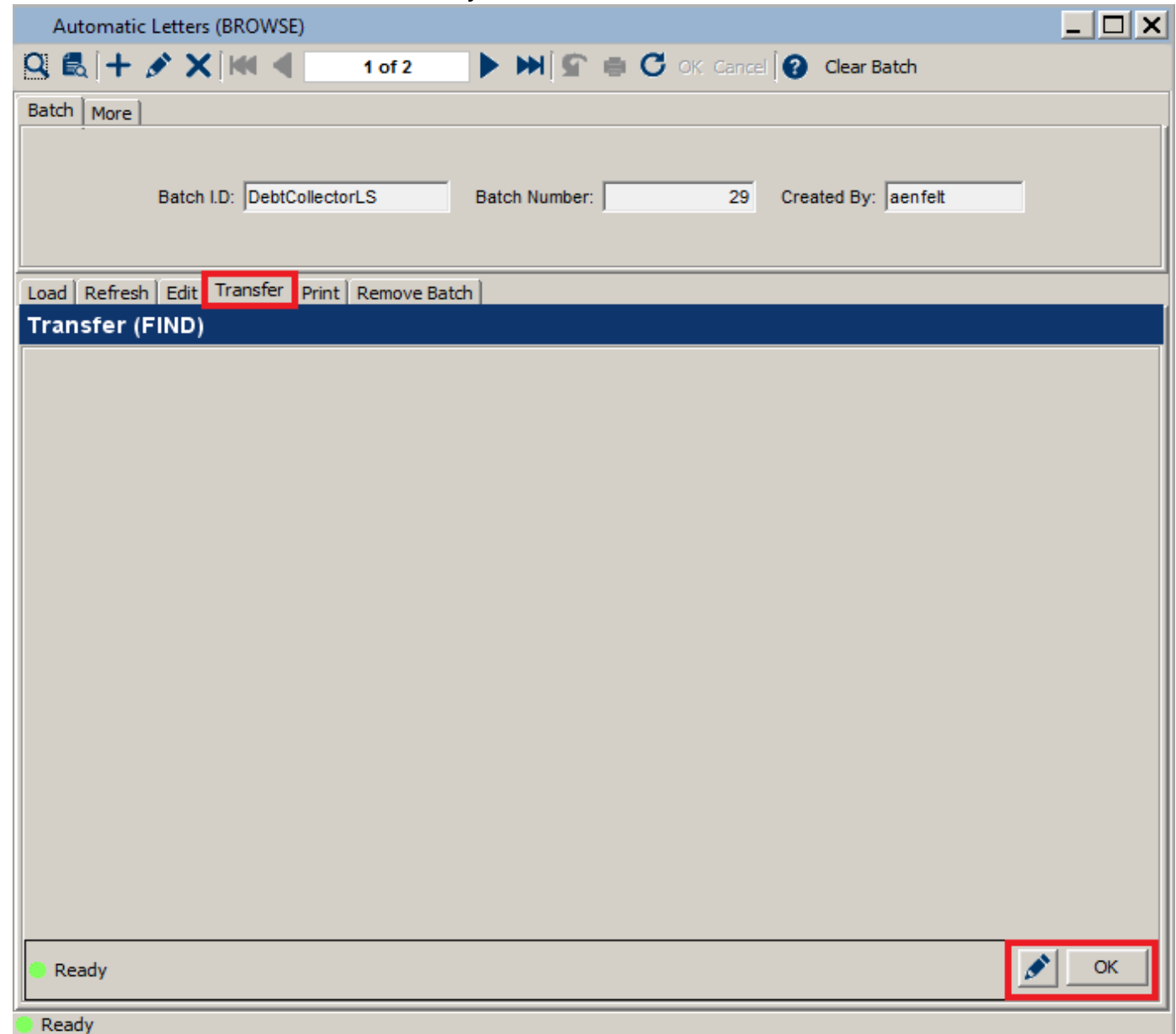
The Automatic Letter process does not automatically transfer letters to the Letter History table in Account Gateway.

Navigate to the **Transfer** tab.

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

Click **OK** to initiate the letter transfer process.

*Credit Control > Automatic Letters > Transfer tab*



Click **Close** when the letter transfer process completes.

The screenshot shows a web browser window titled "Automatic Letters (BROWSE)". The window has a menu bar with "Print", "Save", "Cancel", and "Close" (the "Close" button 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=123123&tmpext=WAUPUN\_TEST&type...". Below this is a table with three rows:

<b>Message</b>	Transfer Completed
<b>Status</b>	OK
<b>URL</b>	http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123123&tmpext=WAUPUN_TEST&type=report

Letter transferred to Account Gateway  
> Letter History

The screenshot shows a web browser window titled "Letter History (BROWSE)". The window has a menu bar with "Browse", "Record Details", "Letter Details", and "Add Letter Process". Below the menu bar are navigation icons and a "Print Letter" button. A table displays the letter history:

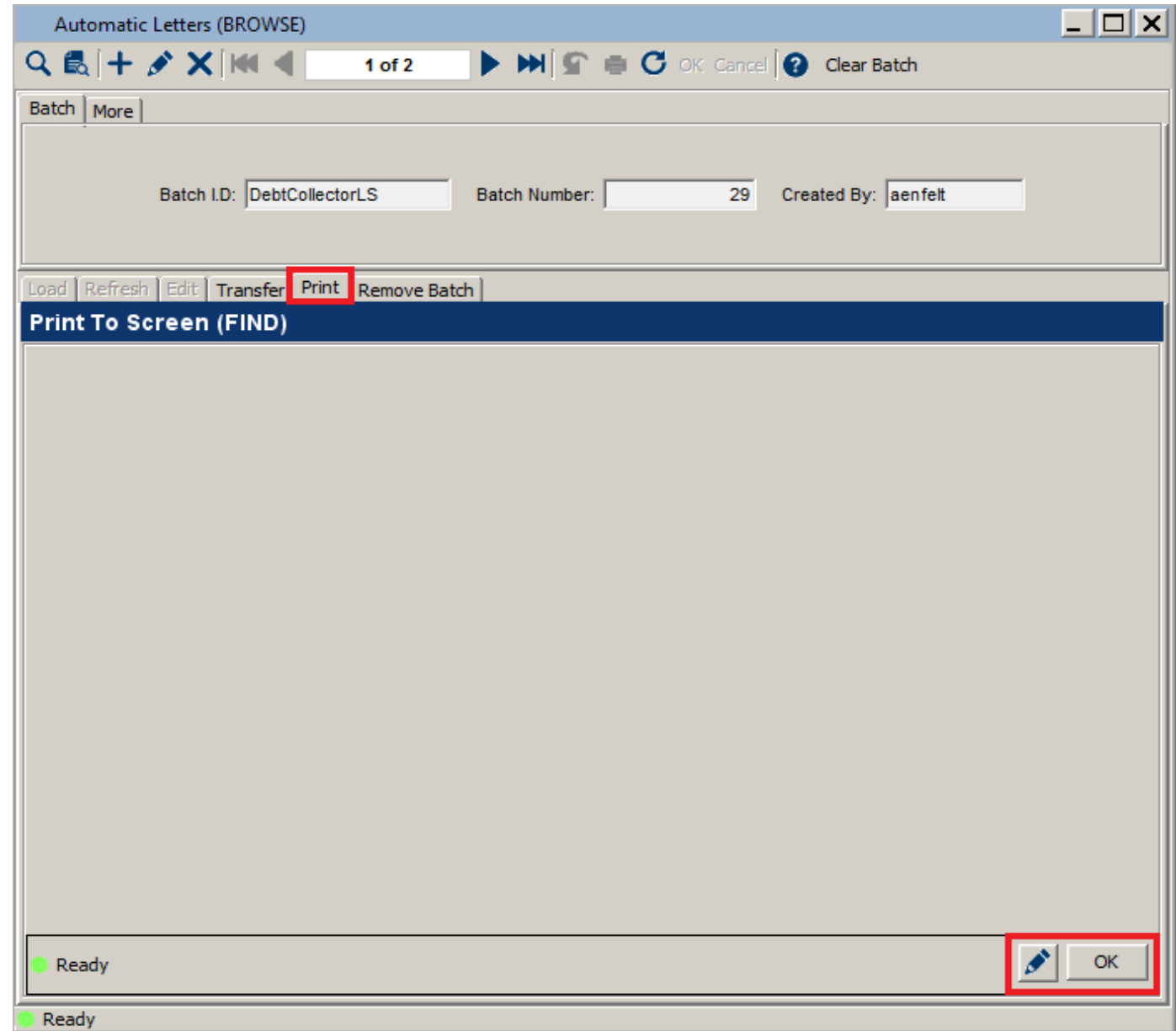
Letter Type	Description	Created On	Created By	Printed On
120	FINAL REMINDER	2020-01-09	aenfelt	2020-01-09
100	DISCONNECTION NOTICE	2019-08-29		2019-08-29
100	DISCONNECTION NOTICE	2019-07-30		2019-07-30
100	DISCONNECTION NOTICE	2019-06-12		2019-06-12

Navigate to the **Print** tab.

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

Click **OK** to initiate the print process.

*Credit Control > Automatic Letters > Print tab*



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

*Sample Letter*

The MS Word Letter document opens.

**ALWAYS ON UTILITIES**  
123 Hot Wire Drive  
Edison WI 54566  
608-769-3787

Print the letters per regular utility procedure.

ACCOUNT NUMBER: 102173-37

Close the documents when complete.

PAST DUE CHARGES: \$ 255.19

DATE: 01/08/2020

BRADLEY COOPER  
337 EASY WAY RD  
SLACKER TOWN, WI 56545

**PAST DUE STATEMENT ON FINALED ACCOUNT**

SERVICE ADDRESS: 721 CATCHFLY LN BROWN

ACCOUNT NUMBER: 102173-37

AMOUNT DUE: \$ 255.19

ALWAYS ON UTILITY WOULD LIKE TO REMIND YOU THAT AS OF THE DATE OF THIS NOTICE, YOUR FINAL BILL REMAINS UNPAID. A LATE PAYMENT CHARGE OF 1% PER MONTH IS APPLIED TO THE TOTAL UNPAID BALANCE FOR UTILITY SERVICE, INCLUDING UNPAID CHARGES. IF YOU HAVE RECENTLY SUBMITTED PAYMENT ON THIS ACCOUNT AND THE NOTICE AND PAYMENT HAVE CROSSED IN THE MAIL, PLEASE DISREGARD THIS NOTICE. IF NOT, PLEASE REMIT YOUR PAYMENT OR CONTACT US TO REVIEW YOUR ACCOUNT STATUS.

IF YOU HAVE ANY QUESTIONS ON THIS NOTICE, PLEASE CONTACT OUR OFFICE AT 608-769-3787 BETWEEN THE HOURS OF 8:00 AM AND 4:00 PM.

THANK YOU,

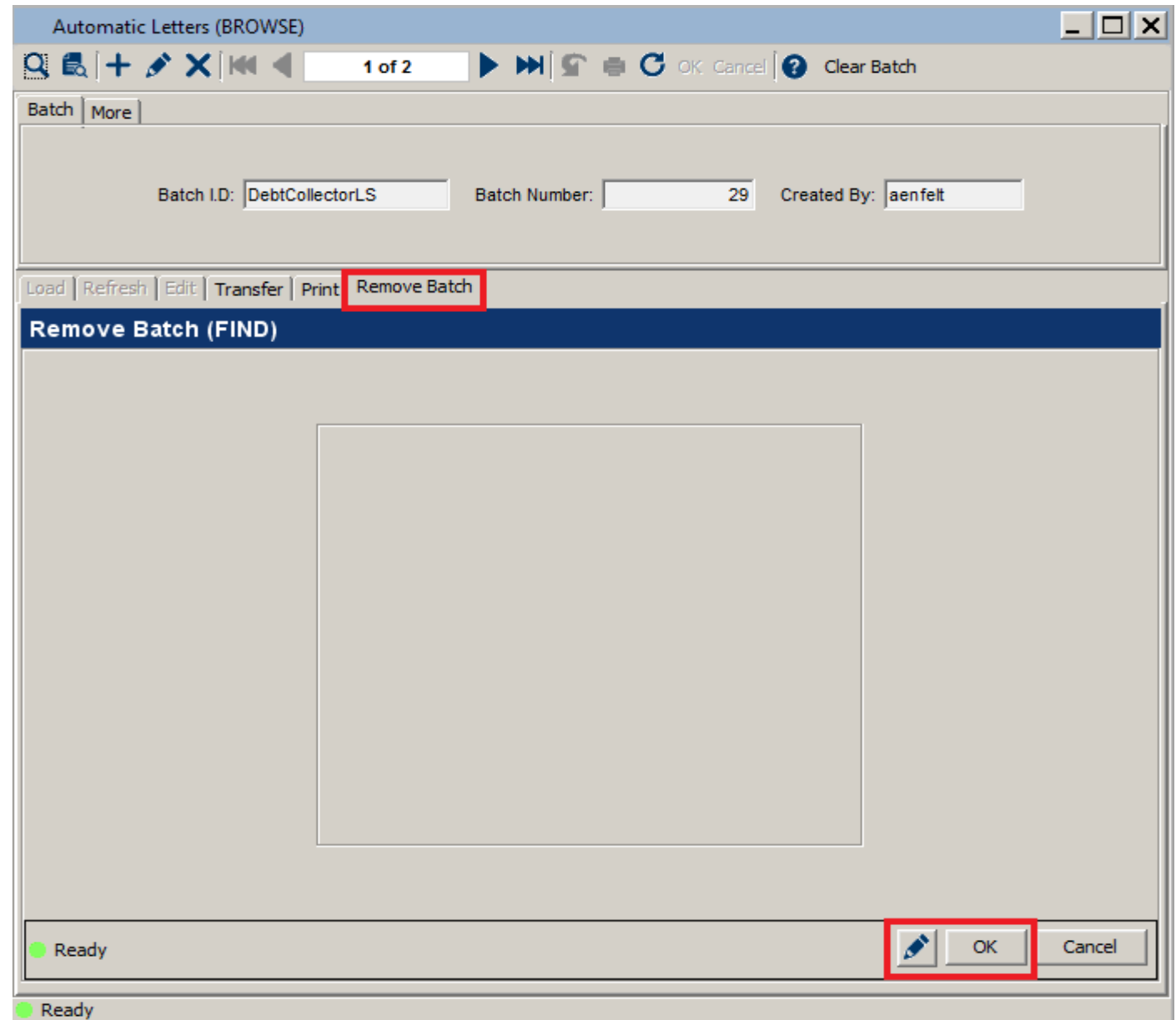
ALWAYS ON UTILITIES



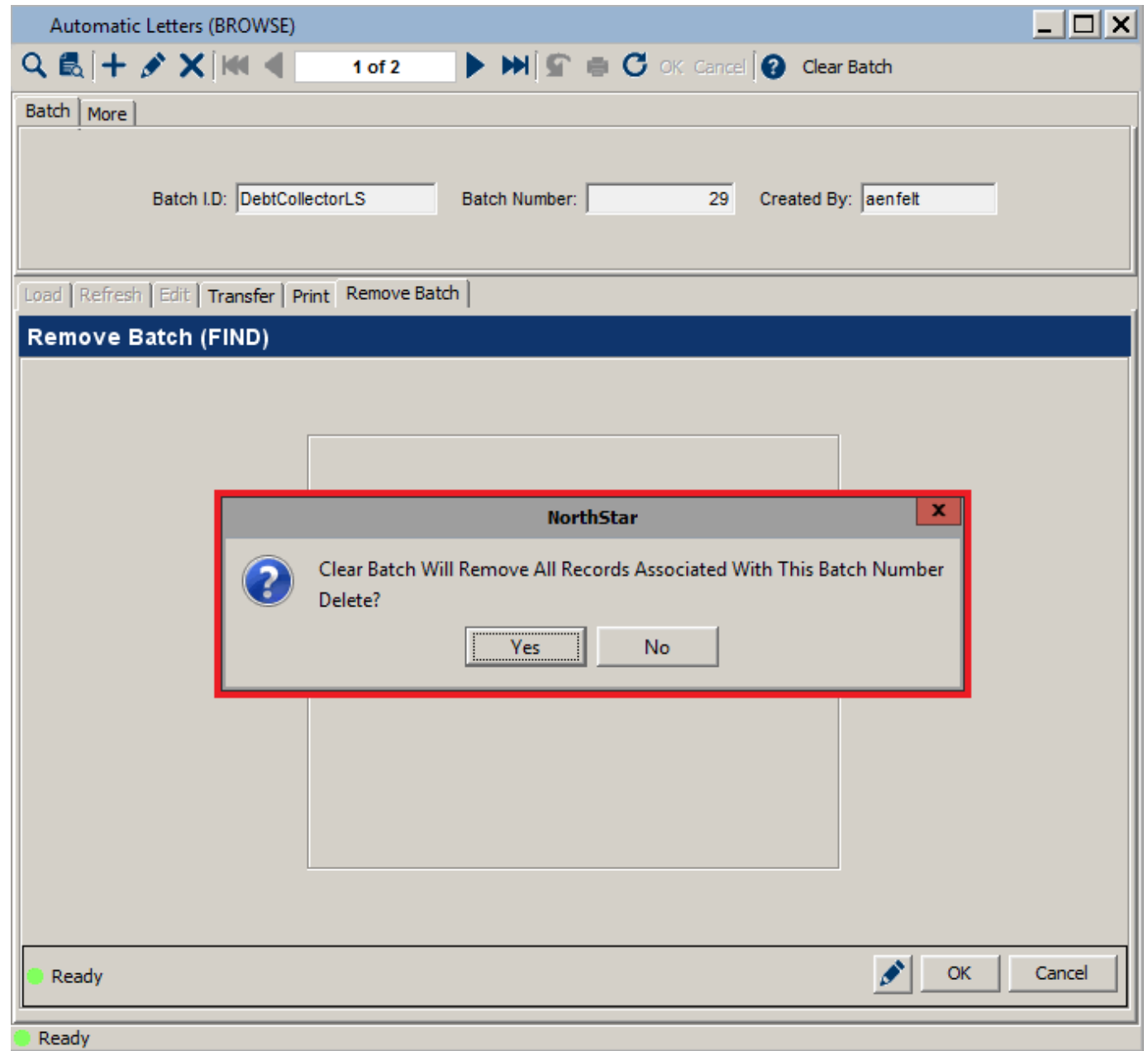
From the **Remove Batch** tab, click the **Edit** icon.

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

*Credit Control > Automatic Letters > Remove Batch*

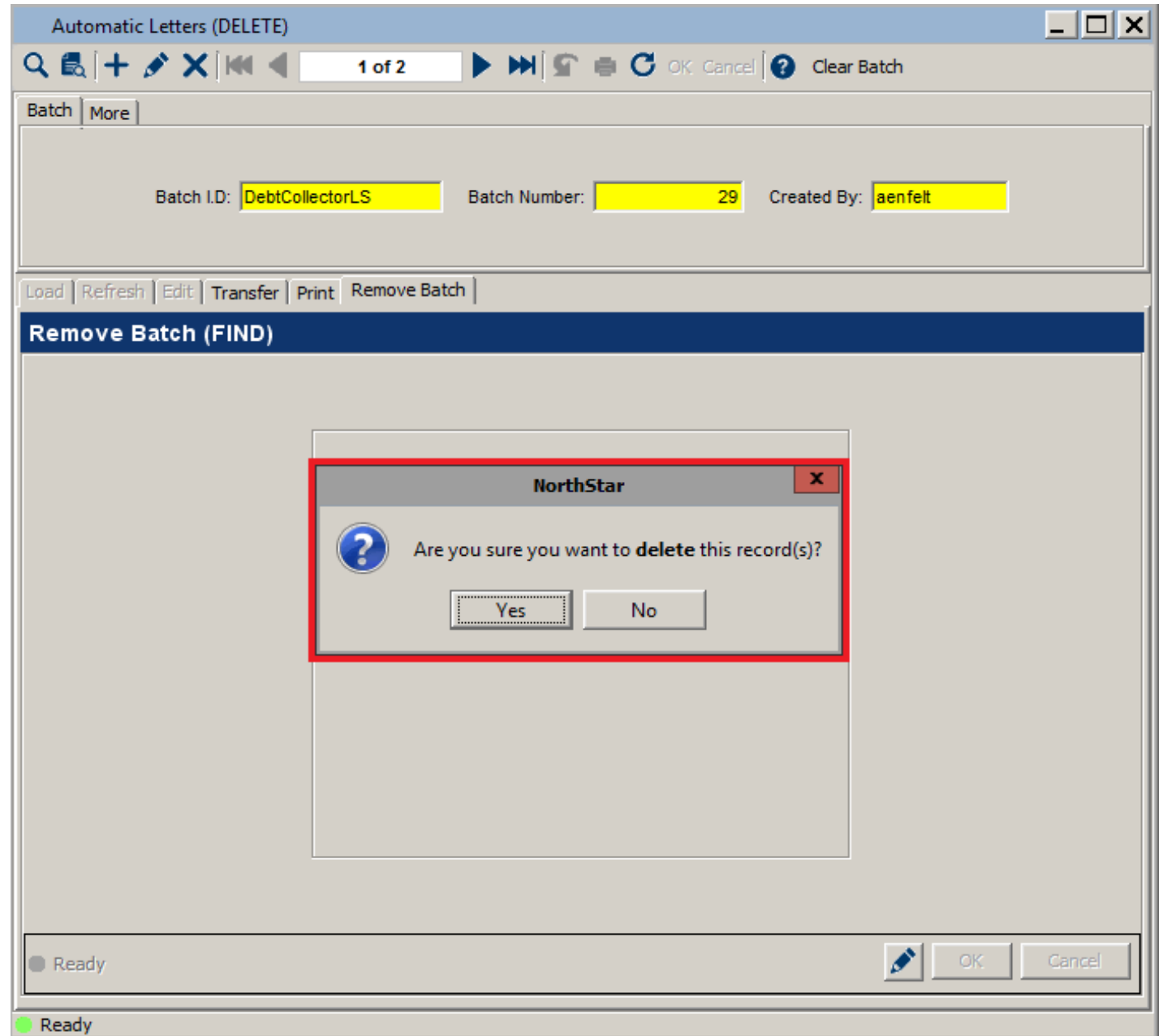


At the pop-up window, click **Yes** to verify the removal of the batch.



Another pop-up window appears.

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



## CREDIT CONTROL

Return to the **Credit Control** table.

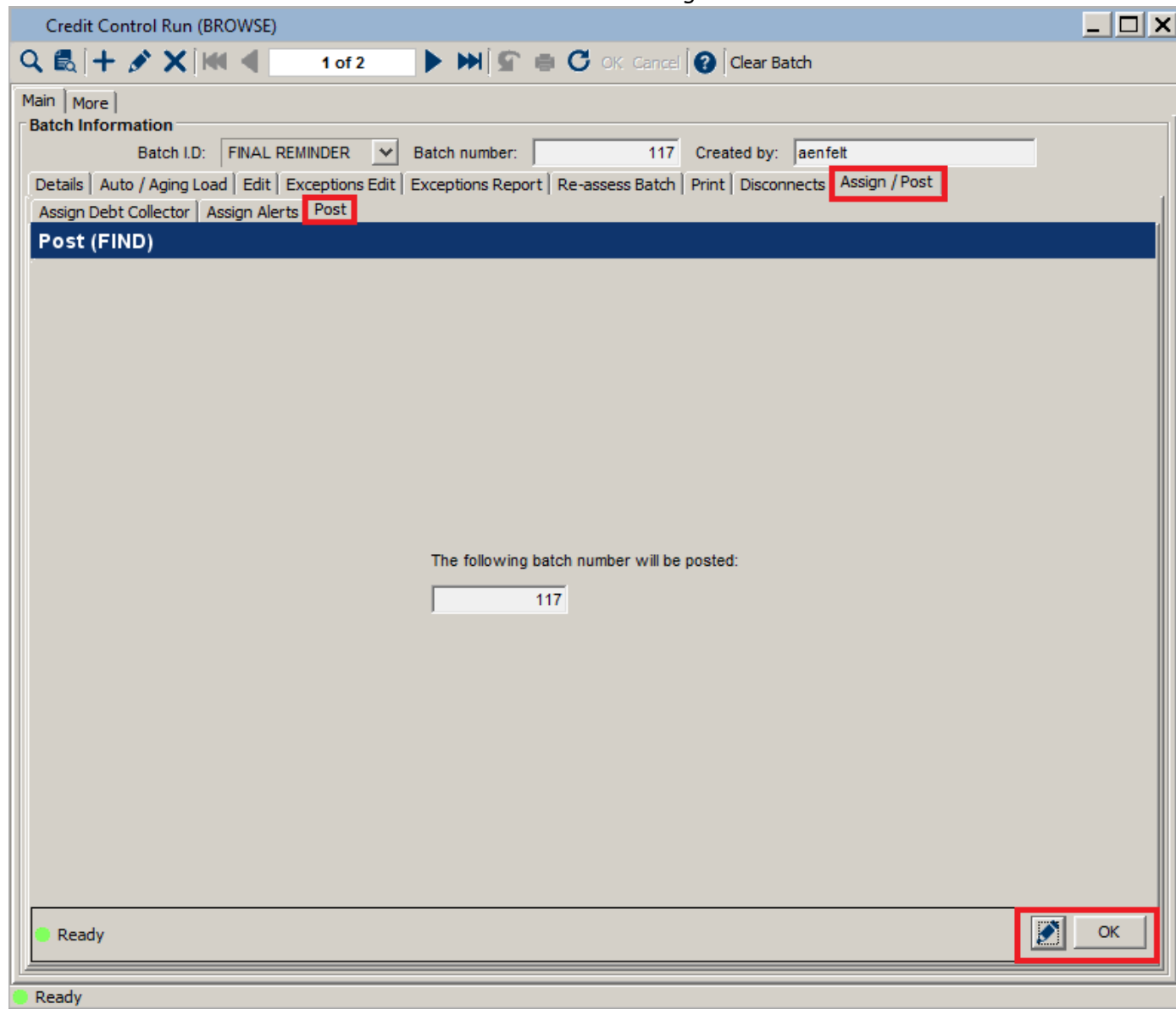
Click on the **Assign/Post** tab.

Select the **Post** tab.

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

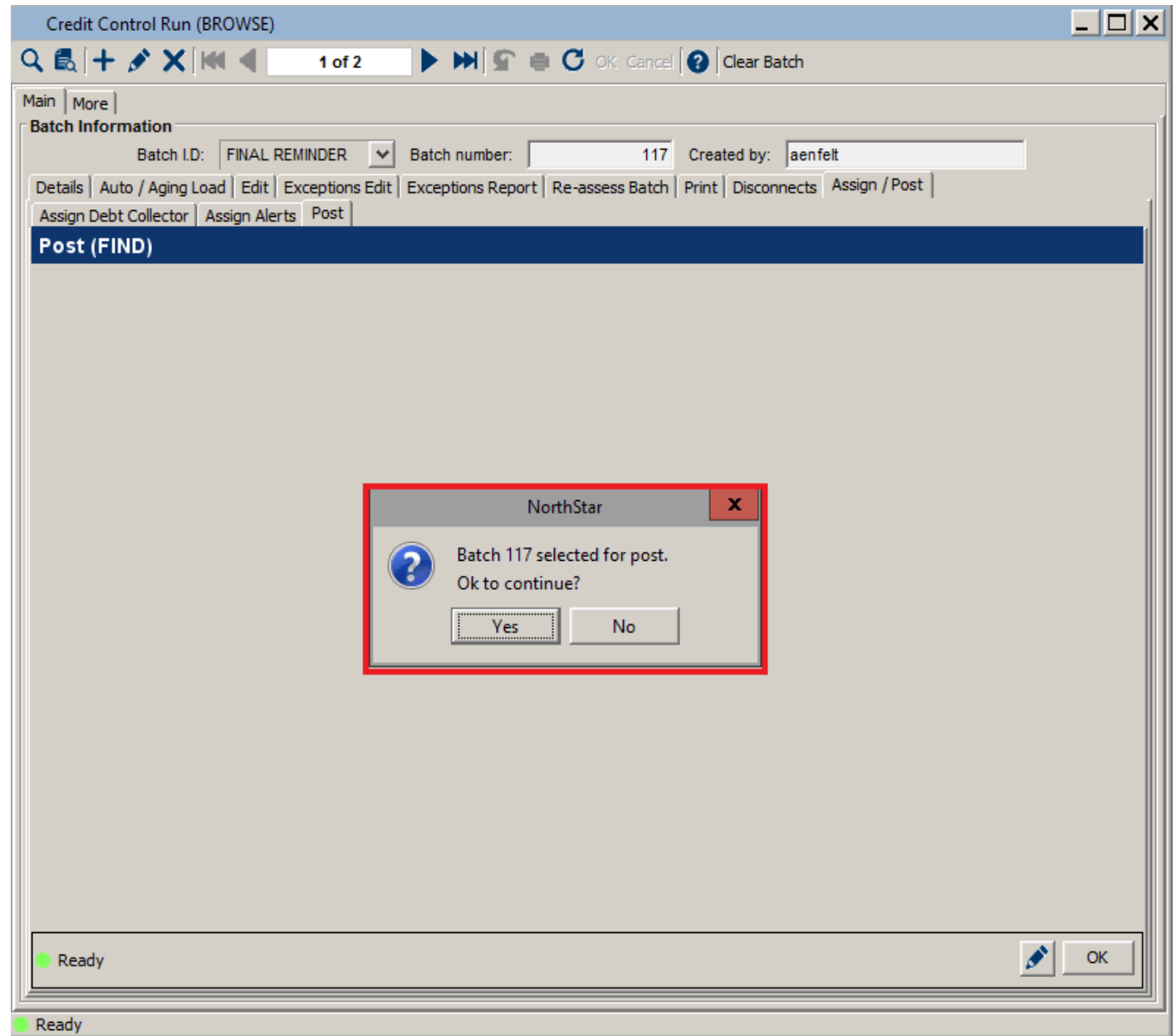
Click **OK** to initiate the posting process.

*Credit Control > Credit Control Run > Credit Control Run > Assign Post tab > Post tab*

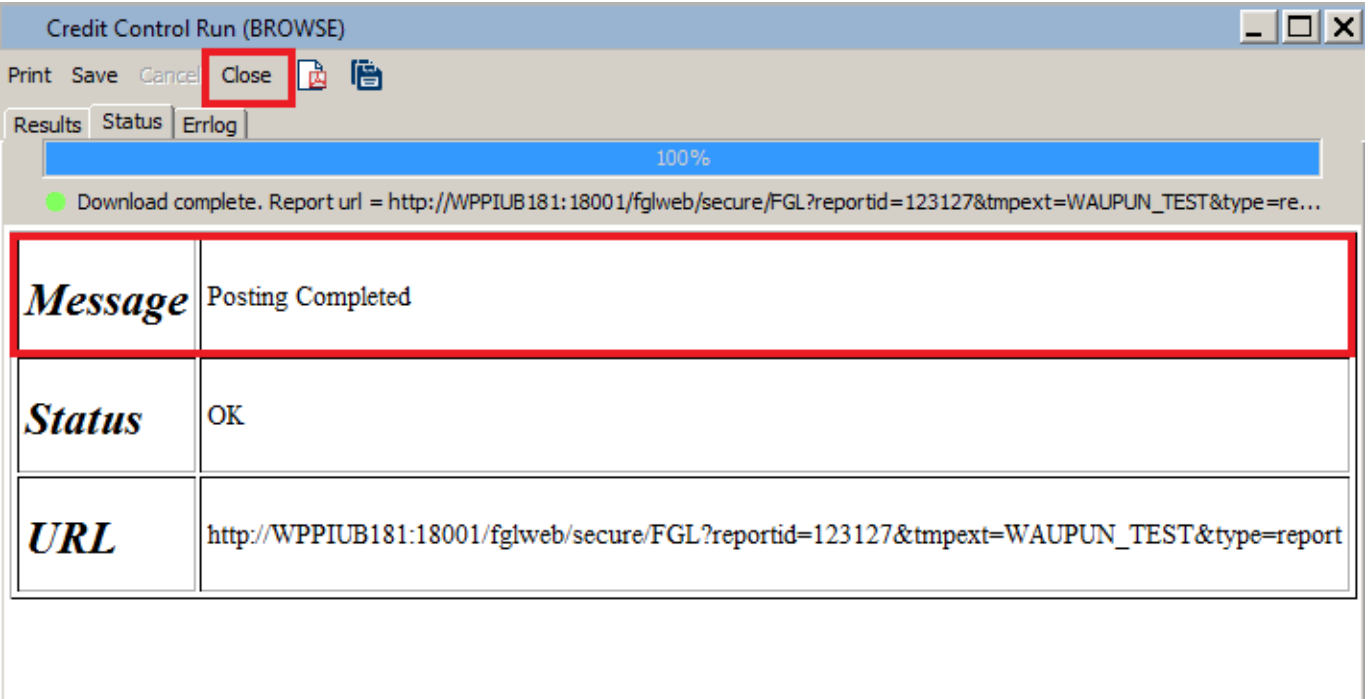


A pop-up window appears requesting confirmation to post the selected batch.

Click **OK**.



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



Credit Control Run (BROWSE)

Print Save Cancel **Close** [Print Icon] [Save Icon]

Results Status **Erlog**

100%

Download complete. Report url = [http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123127&tmpext=WAUPUN\\_TEST&type=re...](http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123127&tmpext=WAUPUN_TEST&type=re...)

<b>Message</b>	Posting Completed
<b>Status</b>	OK
<b>URL</b>	<a href="http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123127&amp;tmpext=WAUPUN_TEST&amp;type=report">http://WPPIUB181:18001/fglweb/secure/FGL?reportid=123127&amp;tmpext=WAUPUN_TEST&amp;type=report</a>

## ACCOUNT GATEWAY

Return to the **Account Gateway** module and open the **Service Details** table to review the updated notice levels.

Service Details open to the Main tab.

Click on the **Additional** tab to view the updated Notice levels.

The posted Credit Control batch updates the Levels. The Levels are set as shown below.

- Current Level 1 = **S**
- Current Level 2 = **S**
- Current Level 3 = **Y**
- Last Level 1 = **S**
- Last Level 2 = **S**
- Last Level 3 = **S**

Each Level's date changes to the date used in the Credit Control batch.

Every account from the Credit Control batch will pull in the following month and receive another final reminder letter.

*Account Gateway > Main Selections > Service Details > Main tab > Additional tab*

Service Details (BROWSE)

1 of 5

Main | Detail | Balances / Aging | Screen Audit

Billing Information

	Total	Current	Overdue	Interest	Late Charge
ELECTRIC	142.72	60.45	82.27	0.00	0.00
	255.19	105.33	149.86	0.00	0.00

Main | **Additional**

Notices

	Due Date	Level 1	Level 2	Level 3
Current:	2019-11-16	S	2019-11-18	S
Last:	2019-10-17	S	2019-11-18	S

Notice Details

Last sent:	6	Late charge:	0.81
Last notice date:	2019-11-18	Overdue interest:	1.14
Exempt:	N	Overdue date:	2019-01-10
Expiry date:			