



IQX Credit Control Statements

It is possible to email or print Statements from the Accounts menu, Credit Control Selector

Configuration

Contact IQX Support for assistance ensuring your configuration set up meets your requirements.

The report 'Credit Control Statement.rtm' must exist in your reports folder.

The Maintenance > Database Functions > Email Functions > Email Body for Statement must be completed with your agency details. In releases 2.16.4 and beyond this function is located in Maintenance > Database Functions > Communications inc. Email > Email Body for Statement

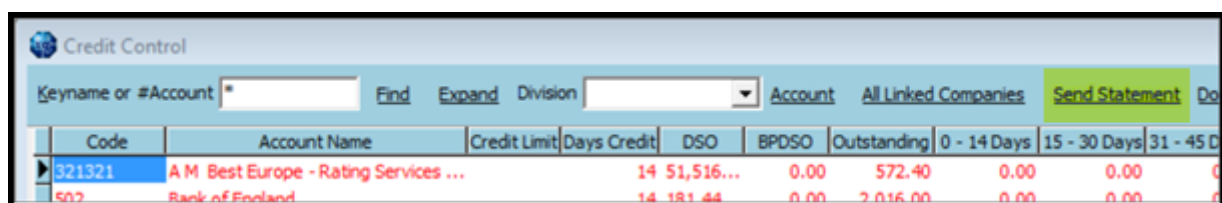
The Account Code record must have a Statement email address entered.

Use

In Accounts menu, select Credit Control.

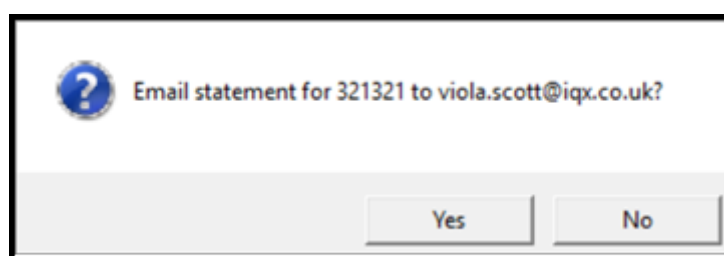
Use * to select all accounts, or # and the account code to select just one.

Click on the account to send out to (will be highlighted) and use the **Send Statement** button.



Code	Account Name	Credit Limit	Days Credit	DSO	BPDSO	Outstanding	0 - 14 Days	15 - 30 Days	31 - 45 D
321321	A M Best Europe - Rating Services ...		14	51,516...	0.00	572.40	0.00	0.00	0.00
502	Bank of England		14	181.44	0.00	2,016.00	0.00	0.00	0.00

You will be asked if you want to email the statement and the email address is shown.



If you click **Yes** you will be asked to enter the subject, then shown the default body for editing. The email will then be sent and you will be asked if you want to Print.

You will also find the **Send Statement** button on the Account Code record.



Account Code - 321321 A M Best Europe - Rating Services Ltd.							
	Save And Close	Abandon	Update	Send Statement	Reports		
Miscellaneous	Type	Our Ref.	Their Ref.	Date	Amount	Outsta	Start Date

Bulk Emailing

It is possible to have an xml job written to dispatch statements by email in bulk. Please contact IQX Support. This will use the Accounts Statement Frequency settings.

Invoice E-mail	
Statement E-mail	viola.scott@iqx.co.uk
Override Invoice Layout	

Contact IQX support if you require such an xml job. This may be chargeable.

From:

<https://iqxusers.co.uk/iqxhelp/> - **iqx**

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