SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Preview Dunning Letter

The Preview Dunning Letters feature enables you to preview a dunning letter, edit the text and delete a dunning letter.

Steps to complete:

- Step 1: View the Letter Preview page
- Step 2: View and Edit the Letter on the Letter Editing tab
- Step 3: Delete the Dunning Letter (Optional)

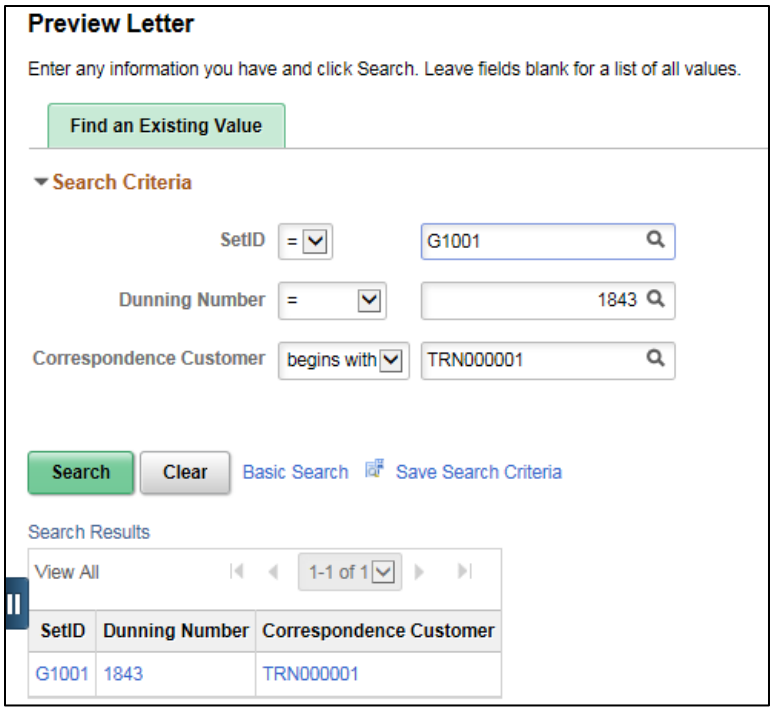
Step 1: View the Letter Preview page

1. Navigate to the *Preview Letter* page using the instructions below.

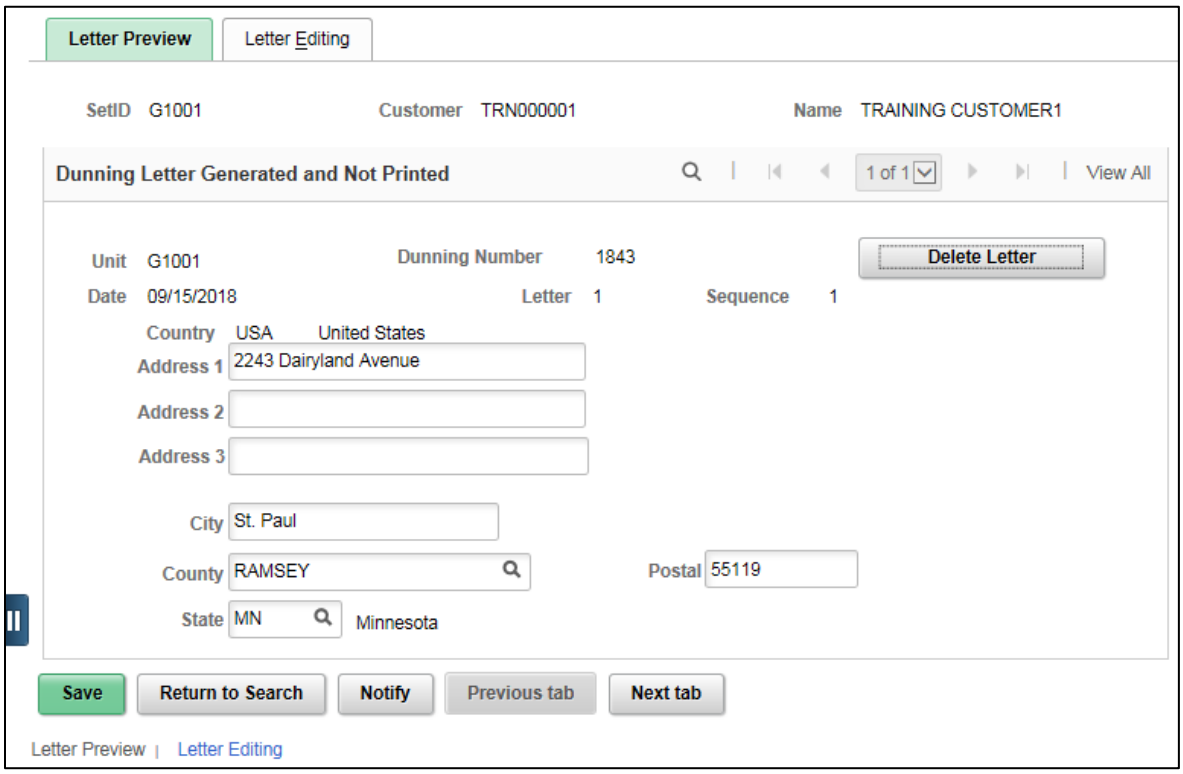
Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, left-menu, Dunning Letters, Preview Letter.

2. Enter your search criteria on the *Preview Letter* page.

Field Name	Field Description
***SetID**	Enter a *SetID* (usually your Business Unit).
***Dunning Number**	Enter the *Dunning Number* (available from the Message Log of the Dunning Letter Process) Also called the *Dunning ID*.
Correspondence Customer	Enter a *Correspondence Customer ID* to run the process for the Correspondence Customer.



3. Click on the **Search** button.
4. If more than one entry displays in the **Search Results** section, click on the link for the Dunning Letter you want to preview. The *Letter Preview* page displays.

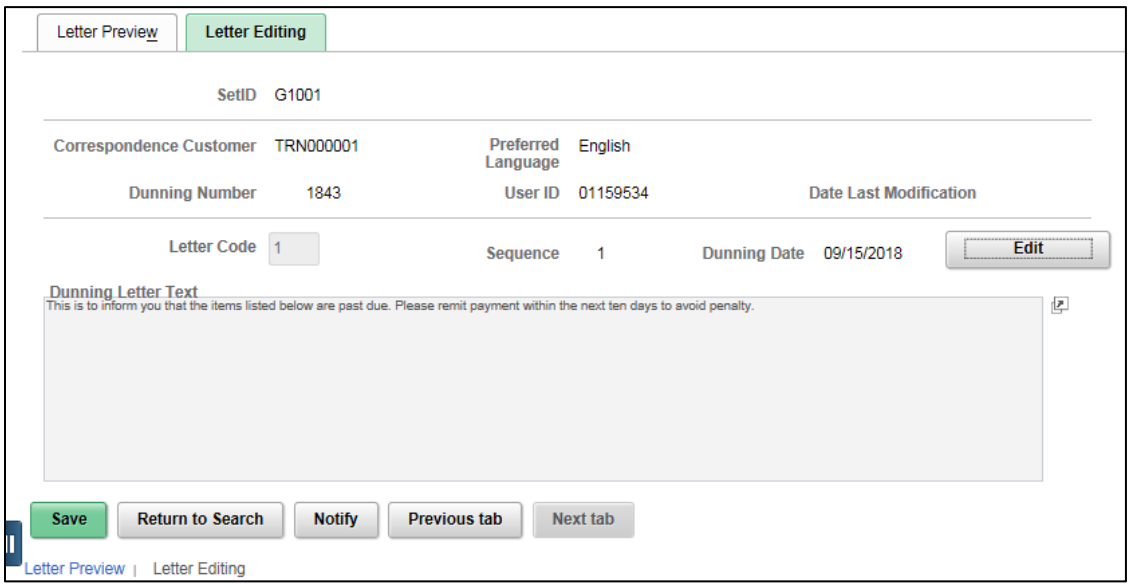


5. View Customer Information on the *Letter Preview* page including *SetID*, *Customer ID* and *Name*, the *Dunning Number*, *Date*, *Letter Code*, *Sequence* and customer address information.

   Note: Sequence refers to the order of dates the letters were generated.

Step 2: View and Edit the Letter on the Letter Editing tab

1. Click the **Letter Editing** tab.



   - View additional information including the *Date Last Modified* which indicates whether the letter has been modified and the date it was modified. In this example, the letter has not been modified previously.

2. Optionally, click on the **Edit** button and the *Dunning Letter Text* field becomes available for editing. You can edit the default text or create new text.

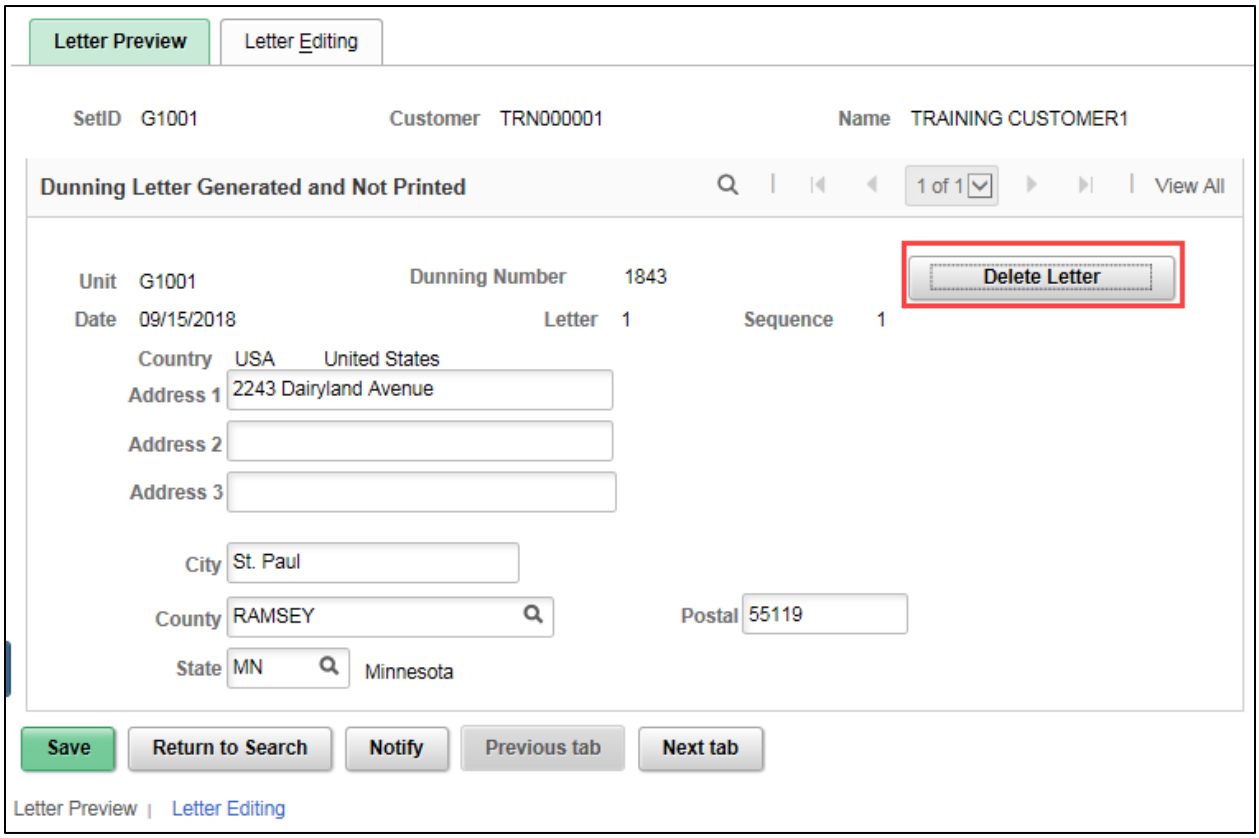
3. In Edit mode, you can click on the *Letter Code* **Lookup** to select a different Letter. Options include:

Letter Code	Letter Name	Default Text
1	First Letter	This is to inform you that the items listed below are past due. Please remit payment within the next ten days to avoid penalty.
2	Second Letter	Please be advised that your account is now in a delinquent status and further action could be taken if a payment from you is not received in the next ten days.

Letter Code	Letter Name	Default Text
3	Last Letter	Please be advised that we have not received any correspondence from you regarding your delinquent account after repeated notifications, therefore we have turned your account to a collection agency.
F	Follow Up Letter	User-defined text.

4. Click the **Save** button.
   Note: the *Date Last Modification* field is updated after you save.

Step 3: Delete a Dunning Letter (Optional)

You can optionally, delete a Dunning Letter.

1. From the **Letter Preview** tab, click on the **Delete Letter** button.