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SBE Manual V7.5

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Special Forms - Writing Letters

Dunning and follow-up letters are a key part of managing your financial exposure, especially in hard times like right now. FormTrap is an effective and excellent letter writing tool, allowing a variety of letters of different tones from a very simple data file.

This is how it's done:

Data Extract from your DB

For most letters, this is all of the information you'll require, printed as a small document or as a records mode file in the Base Page record:

Company Name and Address Person being written to (or a standard title like "The Accountant") Amount outstanding Date of last action Date of next action Employee Number In addition, you'll require these two indictors (for Records Mode make them additional one-character records):

Letter Type – indicates the text required and variables to be inserted – done in Form Design rather than here as part of the record/variable.

Closure type – allow for a signature, Name and Title only format, plus the above with an Email address. Again, done in the form design, with just an indicator/record letter here.

Тор

Form Design

There are two simple design elements, being the Base Page and the one or two Closure Detail Records. Base page contains the date and customer address and looks as below:

	المساء ايات السايطانيات	-blabil		dormation Systems Ph
The Accountant Cov	Text object		21	Ballour Street e NSW 2008
Address 1 Address 2	Definition Format Position Form			103 2490 110 5172
Address 3 City State Zip	The Accounters Gare eddatas. eddatas. eddatas. Gate eddatas.	D+		
	1475-1675-167	Link al.		
	Linked records:			
	Sample text	Field name	Edition 1	
Name Title	Coy Address 1 Address 2 Address 3	ooji addrote 1 addrote 2 addrete 3	Deveran .	
	0	A CALLER AND A CALL		

The "Closure" Detail Lines contain just the Employee field and get their data from substitution files, where you can set up new employees without changing the FormTrap form, or even set up "dummies" for certain letter events – like the threat to pass their details to a credit agency.

This is a typical "Closure" Detail Line:

. What	Picture		Fée Name:	
Name		color transparent	Sign< <u>employee</u> >.bmp	
Title	Scalable Image substitution: Substitute Us	ing Variable File Name	len gelenter	Link
Email	Build file name	Fit to frame	Unked fields: Sample text	Field name
Hat	Fie:	✓ Keep aspect i Horizontal alignme [Left	employee	employee
Marne		Vertical alignment Center	Trins leading and to	aing spaces fr
Title	OK	Cancel		OK.

All of the information (in the above, the signature and below, employee details), are Substitutions based on Employee, here are the text substitutions:

				Comment of the second	Definition Format F	dress 2
?		ïeld	Link to f		« <u>Name</u> » «Litte»	kleess 3 19 State Zip
OK		employee	Field		≪ <u>£na</u> l≫	
Cancel	<u> </u>	Name	Prefix:	i i i i i i i i i i i i i i i i i i i	Link refection :	Gr.
		bg	Suffix		Linked records:	Jun
		-	14.2	Field name	Sample text	to and
	1	Twone	- mask 63.	employee employee employee	Name Title Email	litle
		None.	Mask, as:	employee employee	Name Title	Name Title Email

The above produces the file name "**NameXXXX.txt**" with employee number replacing the XXXX. The **data** from the matching file name in the Substitutions folder is inserted. These are a few of the substitution files with an example:



Тор

Letter Texts:

These are again just detail lines, which can incorporate data and use the special **Advanced** tab to define themselves as **Variable height** and to allow **Whitespace** after the final line.

Implicit header:			-
Growing and sh			
Whitespace:	1.00	÷	

Data from the Base page is incorporated into the letter text as are required substitutions (see **«employee»** used to substitute this person's extension number).

DearSir,		
against you. This w		nformation Systems P/L will be forced to take legal action for debt recovery # HUNDRED DOLLARS (\$500.00) on top of your existing debt of e <u>dmount</u> s # reputation.
I would be most app « <u>employee</u> ».	precialize il you could call	I me to discuss your repayment program on 02 8303 2400, extension
	tom you or received paww	nent in full by «20021231», legal action will be taken.
It i have not heard i		
	a sent de la canada sera de la se	na z nakola konnen eu "Cumenta nakola k en eu tarek kolanda a prosisio den en al antika matuka.
	anan Sana na Janan Sana Kalina	
	Part	
Yours faithfully, Link selection	Part	
Yours faithfully, Link selection, Inked records:	Part	
Yours faithfully,	Leik et	

Your Data Extract program then simply needs to provide for the correct letter type and closure to print a large variety of letters. Financial institutions can use this to direct personalized and sophisticated letters from a simple "extract" source to provide letters that look individually written and can direct their replies to a person or function within the company.

This document is available (Version 7) with appropriate substitutions and data file from Downloads, Tutorials.

Samples follow:

May 1, 2007	Dientern yne zagonia mage
kublalduhlaldudlalkolludludladhudludludludludl The Accountant Dullard and Slow, Inc. 555 Smith street Suite 100 Annuityville MN 22222 3333 44	TCG Information Systems Pty. Ltd. Lavel 3, 53 Baffor: Street Chypendale NSW 2008 Ter 417 2855 280 Fax 417 3050 3172
Dear Sir,	
Dullard and Słow, Inc. is approaching the point where TC take legal action for debt recovery against you. This will HUNDRED DOILLARS (\$500.00) on top of your existin ONLY (\$3,000.00), as well as time, travel and loss of rep	cost Dullard and Slow, Inc. at least FIVE g debt of THREE THOUSAND DOLLARS
I would be most appreciative if you could call me to discu extension 139.	ass your repayment program on 02 8303 2400,
If I have not heard from you or received payment in full h	by May 31, 2009, legal action will be taken.
Yours faithfully,	
12M Maskewm Bruce M. Mathewon	
Credit Manager, AR	
Bruce.Matheson@FormTrap.com	

May 1, 2009	Therefore your companies insur-
bolladadladadaladadladadladadladadladadl	TCG Information Systems Pty-Ltd. Lavel 3, 53 Barfour Street Oroppendale NSW 2008 Tel: 417 2035 2000 Fau: 417 2035 2000
Anytown CA 12345 6789 12	
Dear Sir,	
Aardvark Associates Inc. has ignored our last request data TCG Information Systems P/L will pass this account to a of next month if we have not been contacted by you befor	debt collection agency effective the start
The amount outstanding is ONE HUNDRED FIFTEEN I will increase by court costs of at least another FIVE HUN Information Systems Pty. Ltd, will place you on a nationa may find difficulty in obtaining credit for a number of yea	DRED Dollars. In addition, TCG I list of poor payers and your company
Again, I would be most appreciative if you could call me extension 120.	to discuss your situation on 02 8303 2400,
This is your last opportunity to deal with TCG Informatio agency who are much less polite than we have been.	n Systems Pty. Ltd. instead of a collection
Yours faithfully,	
Block	
Brian Crow Chief Accountant	
Brian.Crow(@FormTrap.com	

May 1, 2009	Triendow pipe signal or
The Accountant Trans Tasman Railway Company 53 Balfour Street Chippendale NSW	TCG Information Systems Pty, Ltd. Level 3, 53 Balfour Street Chippendale: NSW 2008 Te - 4812-8003 200 Fax - 4912-8010-972
Dear Sir,	
TCG information Systems P/L has handed your de Trans Tasman Railway Company only on a cash w	bt to a debt collection agency and will deal with ith order basis.
Trans Tasman Railway Company has been include to yet companies prior to the issuance of credit faci	d on a number of data bases used by credit controllers lities.
Yours faithfully,	
CA Hubble	
Geraldine A. Hungerford Credit Supervisor	
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