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## SBE Manual V7.5

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### Special Forms

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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 indicators (for Records Mode make them additional one-character records):

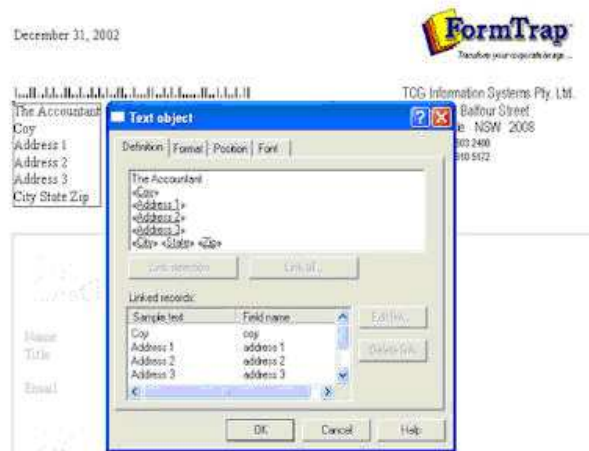
Letter Type – indicates the text required and variables to be inserted – done in Form Design rather than here as part of the record/variable.

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.

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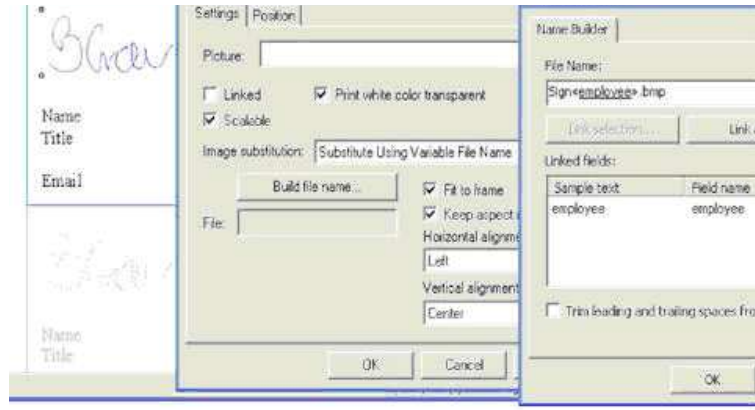
### Form Design

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:

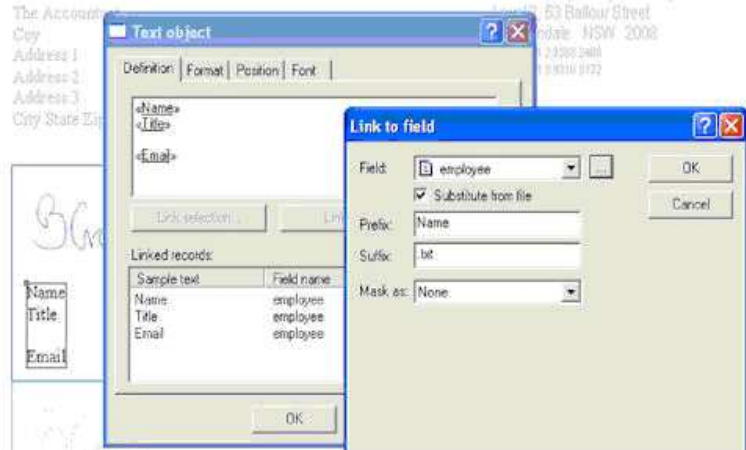


The "Closure" Detail Lines contain just the Employee field and get their data from substitution files, where you can set up new employees without changing the FormTrap form, or even set up "dummies" for certain letter events – like the threat to pass their details to a credit agency.

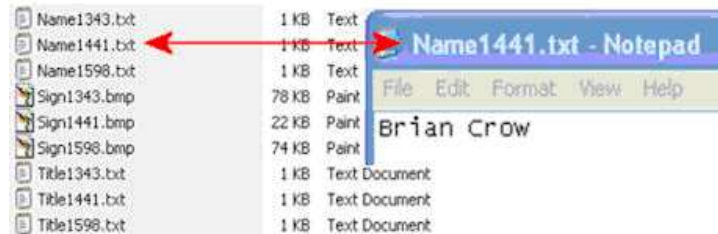
This is a typical "Closure" Detail Line:



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



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:



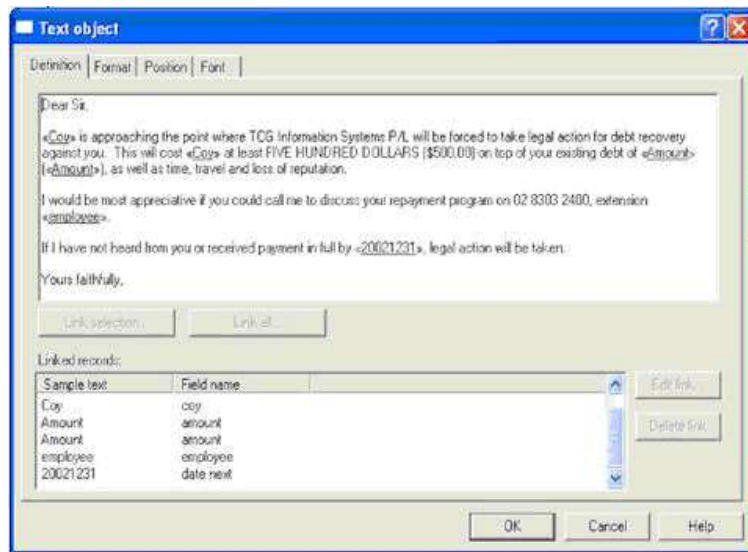
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Letter Texts:

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.



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).



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, 2009



The Accountant  
 Dullard and Slow, Inc.  
 555 Smith street  
 Suite 100  
 Amnityville MN 22222 3333 44

TCG Information Systems Pty. Ltd.  
 Level 3, 53 Barbur Street  
 Chippendale NSW 2008  
 Tel: +61 2 9523 2400  
 Fax: +61 2 9370 5172

Dear Sir,

Dullard and Slow, Inc. is approaching the point where TCG Information Systems P/L will be forced to take legal action for debt recovery against you. This will cost Dullard and Slow, Inc. at least FIVE HUNDRED DOLLARS (\$500.00) on top of your existing debt of THREE THOUSAND DOLLARS ONLY (\$3,000.00), as well as time, travel and loss of reputation.

I would be most appreciative if you could call me to discuss your repayment program on 02 8303 2400, extension 139.

If I have not heard from you or received payment in full by May 31, 2009, legal action will be taken.

Yours faithfully,

Bruce M. Matheson  
 Credit Manager, AR

[Bruce.Matheson@FormTrap.com](mailto:Bruce.Matheson@FormTrap.com)



May 1, 2007

 Parapher pour signature email

The Accountant  
Trans Tasman Railway Company  
53 Balfour Street  
Chippendale NSW

TCG Information Systems Pty. Ltd.  
Level 3, 53 Balfour Street  
Chippendale NSW 2008  
Tel: +61 2 8033 2000  
Fax: +61 2 8010 5172

Dear Sir,

TCG Information Systems P/L has handed your debt to a debt collection agency and will deal with Trans Tasman Railway Company only on a cash with order basis.

Trans Tasman Railway Company has been included on a number of data bases used by credit controllers to vet companies prior to the issuance of credit facilities.

Yours faithfully,



Geraldine A. Hungerford  
Credit Supervisor

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