

Correspondence

Monday, April 5, 2021 8:58 AM

In this revised version, letters, emails, faxes, and eventually texts, will be combined in the "Request Correspondence" button and the "Correspondence" tab on the debtor window:

Debtor #931642 Unit: Manager (3) Cat: Payment Plan Last: 04/05/21 Next: 04/30/21

Debtor: TEST, DB III Phone: 9208855536 UnBlock Block List Amt: \$2,140.00
 Spouse: TEST, JOSEPHINE JR Cell Auth: UnBlock Block (Active only): \$2,070.00
 Add1: PO BOX 100 Add2: SCORE 999 Sen: 123-45-6789 Sp Sen: 333-33-3333 Interest: \$2,227.44
 Add2: Dob: 12/01/27 Sp Dob: 01/01/00 Misc: \$200.00
 Caz: BEAVER DAM TX 53916 Employer: FRANK'S GARAGE AND LAUNDROMAT Legal Fees: \$0.00
 Email: brian@qfgnet.com Auth: Emp. Ph: 6083251234 UnBlock Block Check Fees: \$0.00
 Answering Machine Script QFGI.COM Paid: \$102.01
 Curr Bal: \$4,460.44

Type	Letter #	Letter	Date	Sent/Printed	Using	Cancelled
E	552	ACH NSF	4/5/2021 9:38 AM	04/05/21	E	
E	545	List of Accounts	4/5/2021 9:40 AM	04/05/21	E	
I	516	Itemized Statements	4/5/2021 9:41 AM	04/05/21	P	
I	509	Envelope	4/5/2021 9:53 AM	04/05/21	R	
E	541	ACH Reminder	4/5/2021 3:27 PM	04/05/21	E	
E	550	Email Authorization Request	4/6/2021 8:10 AM	04/06/21	E	
E	550	Email Authorization Request	4/6/2021 8:34 AM	04/06/21	E	
E	550	Email Authorization Request	4/6/2021 12:11 ...	04/06/21	E	
E	550	Email Authorization Request	4/6/2021 12:18 ...	04/06/21	E	
E	550	Email Authorization Request	4/6/2021 12:20 ...	04/06/21	E	
E	550	Email Authorization Request	4/6/2021 12:40 ...	04/06/21	E	

View All View Letter Change Date Delete

Notes Accounts Payments Speedpays ACH Payments Credit Cards Payment Plan Correspondence Legal Forwarding/CCC Skip-Tracing

Add Note Markup Dbltr Cred Reprinting Add Pay Print Close

Note: Email address functions are now selected from the Email button to the left of the email address field. Click on it to add a new email address, send an authorization request, check for a reply to that request, un-authorize the email, or delete the email address.

Note: Office policy has now changed regarding email authorizations. If a debtor has given you his/her email address over the phone or in a letter or email, we can assume that they are authorizing use of that email address. Therefore, when you click on the Email button and Add Email Address, it will prompt you for the address and then ask if it is authorized. Click Yes if you got the email address from the debtor using a communication method that can be retrieved, which includes recorded phone calls, letters, and emails. Click No if you got the address from skip-tracing or some other source. Make SURE that you have the email address correct!

Click Request Correspondence to send any kind of correspondence

Correspondence

Send to: Debtor Client Employer Attorney Using: Printed Letter Email Fax

Category: Collect Payment Validatn Legal Other

Name

- ACH NSF
- ACH Reminder
- Broken Promise
- Credit Card Declined
- Credit Card Reminder
- NSF
- Payment Default
- Payment Late
- Payment Plan Confir...
- ▶ Payment Plan Remin...
- Payment Receipt
- Postdate Reminder
- Settlement In Full Offer
- SIF Offer Per Phone ...

Amt Due 100.00
(numbers only: 1234.56 NOT \$1,234.56)

Payment Due Date 3/31/2021
(date: mmddy OR mm/dd/yy)

Next Cancel

In the top panel select who the correspondence you wish to send will go to and how you want to send it (Printed, Email, or Fax). If it is a letter to the Debtor, click on a Category item to list a subset of available debtor letters:

- Collect: Letters such as the Please Call and Demand that ask the debtor for payment.
- Payment: Letters such as reminders, receipts, or NSFs regarding payments that have been or will be made.
- Validation: Validation letters
- Legal: Letters requested when the debtor is being considered for or is in the process of pursuing legal.
- Other: Miscellaneous letters such as Envelope or List of Accounts.

As you make those selections, the list of available letters will change accordingly. Select the letter you want, fill in the Variables in the right panel (if any), and click Next. Note that variable amounts should be entered with JUST the numbers (for example 1234.56, NOT \$1,234.56) and dates can be entered either as mmddy (040121) or mm/dd/yy (04/01/21).

Printed Letters

If you have selected a Printed letter and if it is valid for Regular mail only, it will prompt you for a delay before sending, just click OK to send it in the next run.

If the letter you selected requires a list of accounts, you will be shown the Account List window:

Select	Acct #	Clt #	Client	Clt Ref #	Status	List Date	Last Pay	Curr Bal
<input checked="" type="checkbox"/>	1	326	TEST CLIENT	111222333	LJE	01/05/04		3225.8700
<input checked="" type="checkbox"/>	547320	326	TEST CLIENT	222TEST	LJE	04/18/08	06/14/11	82.8800
<input checked="" type="checkbox"/>	1369121	326	TEST CLIENT	123456-789	LJE	10/12/18	03/28/19	1130.2100
<input checked="" type="checkbox"/>	1427435	835	NSF AND/OR CREDIT CARD FEES	555555	LJE	01/27/20		21.1900

Select All Select None View: All Active Status: Client #: Include Agency Fees (Jmt, NSF, etc.) OK Cancel

In the bottom panel you can Select All or Select None of the accounts showing as well as change which accounts are showing by selecting View All, Active, a particular Status, or a particular Client. You can also click Include Agency Fees to include NSF or Legal fee accounts. Once you have selected the accounts you wish to include, click OK.

If it is an Inhouse letter and you are working in the office, you will be asked if you want to print it now. Otherwise it will add a letter request for the next Regular or Inhouse letter batch.

Emailed Letters

The debtor must have an authorized email address in order to request an email to the debtor. Emails to the Client, Employer, or Attorney will prompt you for an address. After selecting a letter to email, you will get the Account List window as shown above if that email requires it.

Fax Letters

As with printed letters and emails, this will prompt you for the accounts to include if necessary. It will then bring up the Fax window:

Fax #: (Numbers only, no spaces, dashes, or parentheses)

To: From:

Subject:

Notes:

Enter the fax number and if necessary add/change any other fields, then click Fax

Correspondence Tab

The Correspondence Tab shows a list of previously requested letters, emails, etc.

TYPE			USING	
R	Regular		R	Requested (will be printed with weekly regular mail or daily inhouse mail)
I	Inhouse		P	Printed
E	Email		E	Emailed
F	Fax		F	Faxed

Un-check the View All checkbox to view only correspondence that has not been printed yet.

Click View Letter to view the actual letter that was sent (this will only work if you are working in the office).

Click Change Date to change the date a future letter will be printed.

Click Delete to delete a future letter.