

Receivable Reminders

Document #:	3072	Product:	CenterPoint [®] Accounting	
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The Receivables Reminder will check for Accounts Receivable invoices that are due for a specific company either on the receivable due date, or on a set number of days prior to the receivable due date, or on a set number of days after the receivable due date.

Create a Receivables Due Reminder

The Receivables Reminder will check for Accounts Receivable invoices that are due for a specific company/fund either on the receivable due date, on a set number of days prior to the receivable due date, or on a set number of days after the receivable due date.

- 1. On the Setup menu, click Reminders. Click New.
- 2. In the **Message** box, enter up to 50 characters of a required message that will display in the Message column in the Reminders Due window when this reminder is due.
- 3. In the **Type** box, select Receivable Reminders.
- 4. In the **Description** box, enter a detailed description about the reminder.
- 5. Click the **Receivables** tab.

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List	Detail	Filter	Reports										
Acct	Accts Rec Invoices Due												
General Payables Receivables Conditional Scheduled													
Reminder Details													
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					Prior to D		Days Befor	e Due Date					
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	Con	npany 🗄	lpine Sports			P							
	Action No Action Taken												
		60011	110 Acta	on rake									
	Creation	remind	ere of this !	une will	automaticallu disni	au the celecter	d report when	this reminder is a	stiusted The				
	Creating reminders of this type will automatically display the selected report when this reminder is activated. The report might be reminder notices, statements or a receivable activity report												
	Save		Cancel						Close 🕜				

- 6. Under **Reminder Details**, select **On Due Date** to be reminded when an Accounts Receivable invoice is due, or select **Prior To Due Date** to be reminded prior to when Accounts Receivable invoices are due, or select **After Due Date** to be reminded after the Accounts Receivable invoices are due.
 - If you selected Prior To Due Date, in the Days Before Due Date box, enter the number of days prior to when Accounts Receivable invoices are due that you want to be reminded.
 - If you selected After Due Date, in the Days After Due Date box, enter the number of days after the Accounts Receivable invoices are due that you want to be reminded.
- 7. In the **Company/Fund** box, click and select the company/fund you want this reminder to display for.
- 8. If you want to automatically perform an action when this reminder is due, click Action, clear the No Action Taken check box and select the menu selection you want to perform. For example, you may want to select Processes > Sales > Receipts or Reports > Reports for an Accounts Receivable reminder that is due.
- 9. Click **Save** to save the reminder and return to the List tab, or click **Close** to save the reminder and close the Reminders screen.