



Simplified Dunning Letters for NetSuite

Scale **1**pps
BY SCALENORTH



Dunning for NetSuite is the ideal solution for sending late payment reminders to your clients. Perfect for businesses that use a recurring billing model, dunning helps your business collect outstanding debt, reduce manual labor, and improve the customer experience.

Easily manage and customize late payment notifications with the Dunning for NetSuite ScaleApp.

Key Benefits

- Customize the dunning notification schedules and cadence.
- Create client groups that receive different messages depending on which category they're in.
- Automate the collections process.

ScaleApp's Dunning for NetSuite will help your business collect on bad debt, streamline collection efforts, and ensure customers don't lose access to your products or services.



Informative:

- Include PDF copies of the invoices as email attachments.
- Add previews with clickable links to the online invoices.

ORACLE NETSUITE

Search

Activities Payments Transactions Lists Reports Analytics Documents Setup Customization

Email | Phone | Address

EMAIL: jgutierrez@scalenorhadvorsors.com OFFICE PHONE

ALT. EMAIL: MOBILE PHONE

MAIN PHONE: HOME PHONE

FAX: FAX

LAST MODIFIED DATE: 1/7/2021 LAST SALES ACTIVITY

Relationships Communication Address Marketing Support System Information extendFiles

Messages • Activities Eiles User Notes

VIEW: Default

Email Attach Letter PDF Fax Refresh View History Customize View

#	VIEW	DATE ▼	AUTHOR	PRIMARY RECIPIENT	SUBJECT
1	View	1/14/2021 10:00 am	Fiona Bustamante	JP Gutierrez	Dunning Customer - Delinquent invoice
2	View	1/14/2021 10:00 am	Fiona Bustamante	JP Gutierrez	Dunning Customer - Invoice severely p
3	View	1/14/2021 10:00 am	Fiona Bustamante	JP Gutierrez	Dunning Customer - Delinquent invoice
4	View	1/13/2021 7:45 am	Fiona Bustamante	JP Gutierrez	Dunning Customer - Delinquent invoice
5	View	1/12/2021 9:06 am	Fiona Bustamante	JP Gutierrez	Dunning Customer - Delinquent invoice
6	View	12/28/2020 11:30 am	Fiona Bustamante	JP Gutierrez	Dunning Customer - Invoice past due

Reply Reply to All Forward Cancel Preview

DATE & TIME: 1/14/2021 10:00 am

Recipients Message Attachments Read Receipts

SUBJECT: Dunning Customer - Delinquent invoices (past 30 days)

MESSAGE: Dear JP Gutierrez,

At this time, we still have not received your payment for the severely past due invoices on your account. Your account now has open invoices 21 days old and you owe a total of \$610.00.

I regret to inform you that **unless we receive payment in full or agree to a mutually acceptable payment plan THIS WEEK**, we will have to **turn your invoice over to a collection agency and/or our attorney.**

Invoice Date	Terms	Due Date	Age from Due Date	Invoice #	Total	Paid	Balance
9/25/2020	Net 60	11/24/2020	51	15	\$120.00	\$0.00	\$120.00
10/31/2020	1% 10 Net 30	11/30/2020	45	14	\$10.00	\$0.00	\$10.00
11/23/2020	Net 15	12/8/2020	37	13	\$120.00	\$0.00	\$120.00
12/11/2020	Due on receipt	12/11/2020	34	12	\$150.00	\$0.00	\$150.00
12/15/2020	Due on receipt	12/15/2020	30	11	\$30.00	\$0.00	\$30.00
1/4/2021	Due on receipt	1/4/2021	10	17	\$30.00	\$0.00	\$30.00
1/8/2021	Due on receipt	1/8/2021	6	16	\$150.00	\$0.00	\$150.00
							\$610.00

UchiWire Information
XYZ Bank
223 Hood Avenue San Diego, CA 92121



Customizable:

- Edit the verbiage to fit your business and its clientele.
- Dynamically insert customized fields such as recipient name, account name, amount to be paid and more.

Message Content

** List of available custom tags that source information from dunning and invoice records:

- {customer} - Customer or company name
- {recipient} - Recipient name
- {dunconfig.aremialaddress} - Accounts receivable email from the dunning configuration record
- {msgconfig.noofdays} - Number of days from the dunning message configuration record
- {invoice.totalcount} - Total number of invoices
- {invoice.totalremaining} - Total remaining amount
- {invoice.httotalcount} - Total number of highlighted invoices
- {invoice.httotalremaining} - Total highlighted remaining amount

SUBJECT LINE *

{customer} - Statement of Open Invoices

MESSAGE BODY - INTRODUCTION *

Dear {recipient},

Automated:



- Trigger the first email in the series when a past due event occurs.
- Control the cadence and messaging of all subsequent follow up emails.
- Designate the date and time that each message can be sent out based on the end-user's time zone.

Message configuration		System Notes	
EDIT	OPT IN	TYPE	SUBJECT LINE
Edit	Yes	Message 1 - Statement of Open A/R Invoices	(customer) - Statement of Open Invoices
Edit	Yes	Message 2 - Notice of Invoices Coming Due	(customer) - Invoices coming due
Edit	Yes	Message 3 - Past Due Notice	(customer) - Invoice past due notice
Edit	Yes	Message 4 - Severe Past Due Notice	(customer) - Invoice severely past due notice

Schedule		System Notes	
DAY OF THE WEEK*	HOUR OF THE DAY*		
Monday	6:00 pm		
Tuesday	6:00 pm		
Wednesday	9:00 am		
Thursday	9:00 am		
Friday	9:00 am		
Saturday	9:00 am		
Sunday	9:00 am		

Segmentable:



- Assign different dunning strategies to different customer types and segments.
- Create different logic and cadence for each customer group type.

Dunning event

Configuration

DUNNING CONFIGURATION TYPE
Global

MESSAGE TYPE
Message 5 - Reminders of Delinquent Invoices

Event details

CUSTOMER
7 Dunning Customer

RECIPIENT
7 Dunning Customer : JP Gutierrez

ATTACH PDF COPY OF STATEMENT

SCHEDULED - DAY OF THE WEEK
Thursday

SCHEDULED - HOUR OF THE DAY

Interested in Learning More?
www.scalenorth.com/scaleapps-for-netsuite