



Debtors Adding Comments in bulk

To record Debtors comments in bulk e.g. you may have sent out an email or want to make a note on a lot of families accounts.

Path: Debtors > Quick Family Accounting

OPTION 1

You can tag the families under the Family Update – but this will stay tagged see e.g. or

Famkey >>	Acc title	Tag	Watch lis...	Status	Suspend	Late Ex...	Nil Disc >>	Vol E
BEECH01	Mr D and Mrs K Beech	<input type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		
BELL01	Mr C Ryan and Ms K Vert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		
BENWE01	Mr D and Mrs S Benwell	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		
BERRY01	Mr D Berryman and Ms D	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		
BERRY02	Mr G Berryman	<input type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		
BIER01	Miss V Matthews	<input type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		
BLEAK01	Mr M and Mrs V Bleakley	<input type="checkbox"/>	<input type="checkbox"/>	M	<input type="checkbox"/>	<input type="checkbox"/>		

OPTION 2

Quick Family Accounting Information

1 Family Update | 2 Family Child Scan | 3 Discount Calc % | 4 Discount Calc \$ | 5 Watch Listed | 6 Merge File | 7 Export

Output Type
 RTF Email
 HTML Printer

Default Email: Send To All

Use Tag Set
 Tag Set: [1]

Export to eMerge

Comment Category for Debtor Comment
 General

Letter Description
 Type your message in here

Exit ViewEsc

1. Select - Tab 7 Export
2. Select - Tagset -
 - If you have a tagset already saved of the families to email use this or
 - create a tagset from Individual Families and add

3. Return All In Grid
4. Select from the drop down box: General, etc
5. Letter Description: Type your message in here
6. Select GO Export to eMerger
7. Exit out and go into Debtors Masterfile – Tab #9 Comments

Check the comments under Debtor Masterfile – as follows:

Family Key: ALLAN01		Receives Accounts: Father Only		Father: Geoff		Mother: Christine	
Acc Title: Mr G Allan		Ph - Home: 49999999		Ph - Home: 49999999			
Acc Address: PO Box 1196		Business: 49888888		Business:			
Acc Town: ELSEWHERE		Mobile: 0411111111		Mobile: 0422222222			
2000 NSW Account Ph: 49999999		Email CGive 1 (CGive 3 Below): christine@pcschool.net		Email CGive 2: christine@pcschool.net			
Family Members This School: 3		Contact (Email) Option: Father		christine@pcschool.net		Tender: FRI WK A - DIRECT D	
Family Members at Assoc Schools: 2							

1 General	2 Bursary	3 Inv.	4 Rec.	5 Sundries	6 Hold Dep.	7 Vol P/ments	8 Stud Disc.	9 Comments	0 Rebates	1 Split Bill	2 Pay
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Date >>	Type >>	User	Balance	Comment	File Location
19/11/2015	GEN	PCSC-	212.50	Type your message in here	
25/08/2015	FOLLOW	PCSC-	247.50	Rang and asked for money	
24/08/2015	COMMIT	PCSC-	247.50		
09/07/2015	FOLLOW	PCSC-	3447.50	Miŋ yeai iettei jelt	
10/02/2012	COLLECT	PCSC-	6684.60		

Type your message in here test test testtest test