

# QCS Client Communication

Friday, May 13, 2022 2:29 PM

All client communication (other than legal) is now initiated from the Accounts tab in the debtor screen. **Do NOT use the Request Correspondence button for client correspondence.**

Debtor #931642 Unit: Manager (3) Cat: Dispute Last: 05/09/22 Next: 05/27/22

Debtor: TEST, DB III Phone: 7194240343 UnBlock Block Amt Listed (Act only): \$1,966.05  
Spouse: TEST, JOSEPHINE JR Cell Auth: 7194240343 UnBlock Block Principal Owing: \$1,965.05  
Add1: PO BOX 6 SCORE 999 Sen: 123-45-6789 Sp Sen: 333-33-3333 Interest: \$71.54  
Add2: Dob: 12/01/27 Sp Dob: Misc: \$0.00  
Csz: SOMEWHERE CO 98764 Employer: FRANKS LAUNDROMAT Legal Fees: \$0.00  
Email: brian@gateleydesigns.com Auth: [checked] Emp. Ph: 6083251234 UnBlock Block Check Fees: \$1.23  
Paid: \$41.68  
Curr Bal: \$1,446.14

Acct#	Client#	Client	Clt Ref #	List Date	Sts	List Amt	Pm Due	Curr Bal	CB
1	326	TEST CLIENT	1112223334444	01/05/04	DIS	\$1,000.05	\$1,000.05	\$1,014.14	N
547319	326	TEST CLIENT	111TEST-22222	04/18/08	DIS	\$65.00	\$50.00	\$60.43	N
547320	326	TEST CLIENT	222TEST	04/18/08	DIS	\$50.00	\$50.00	\$50.64	N
547322	326	TEST CLIENT	333TEST	04/18/08	DIS	\$200.00	\$209.00	\$217.71	N
547324	326	TEST CLIENT	444TEST	04/18/08	DIS	\$100.00	\$100.00	\$103.22	N
738034	326	TEST CLIENT	222est	03/30/11	DIS	\$550.00	\$550.00	\$0.00	N
838226	326	TEST CLIENT	555TEST	02/02/12	DIS	\$1.00	\$1.00	\$0.00	N

View PIF: [ ] CAN: [ ] Activ New Fwd Legal Jdgt Cl Jgt Disp PIF Can Select: \$0.00 Req I.S. Dispute Info->Clt Edit Cancel

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

[K] < > > > Add Note Request Correspondence Markup Dbtr Cred Repting Documents Add Pay Print Close

Steps:

1. Select the accounts you wish included in the correspondence. You can hold down the <CTRL> key and click each account you want included or click the first account, hold down the <SHIFT> key and click the last account to include all accounts between.
2. Click whichever of the three orange buttons at bottom right you need: Req I.S., or Dispute, or Info->Clt. This will open the Client Letter window:

Client Letter

This will email the Itemized Statement Request letter to the client

Client Name: TEST CLIENT  
Contact: Joe  
Email Address: brian@qfgnet.com  
Notes: [Empty text area]  
Attach File: [Button]  
Preview Send Cancel

3. Client are now all notated with a field indicating their preferred communication method, mail, email, fax, or FTP. The system will automatically use that method.
4. You can change the contact & email address (or fax number) but do not unless you are sure you need to.
5. Enter any extra notes you want the client to see.
6. Click Attach File if there are any files that need to be included.
7. You can click Preview to see what the letter looks like if you want.
8. Click Send.