Dunning/Payment Overdue Email Template Example

Dunning Examples · https://learn.logisense.com/docs/819232865/

Summary

Email templates are used to notify account contacts and users when system events such as dunning, billing and invoicing activities occur (e.g. an email sent when payment is overdue). Email templates can be configured with variables to provide dynamic data in email messages (e.g. a contact's name, account id, account balance, etc.).

In this example, we will create an email template that sends email notifications to the billing contacts of accounts that are in a past due state.

For additional details on the fields presented on the email template screen see the Email Templates Screen screen help article.

Prerequisites

- SMTP settings must be configured in order for the system to send out emails

Sample Configuration

1. Log into the LogiSense Billing application
2. Click on the **Setup** menu, then **Extensibility**
3. Click on **Templates**, then **Email**
4. Under the **Email Templates** heading, click the icon to add an email template
5. Fill out the required fields. Be sure to select **Dunning** as the **Template Type** and check the **Active** box

6. In the **Body** portion of the template enter a greeting then drop down the **Variables** option, expand **Billing Contact** then select the **First Name** and **Last Name** variables.
7. Continue your message and select the **Account Overdue Balance** from the **Variables → Account** drop down to display the account's current balance due in notification email
8. Finish the body of the email with the rest of your notice. When you are done, click the **Save** button

You can now add a 'Send Notification' level to a dunning rule and select the new Overdue Account template on the level.

Setup / Finance / Dunning Process / Dunning Rules

When an account is overdue and the dunning rule above is applied to the account, the overdue email will be sent so long as the bill run that bills the account has the 'Run Dunning Process' setting enabled.

Next Steps

- **Optional**: Invoice Templates can be configured now or at a later time if desired. See the Invoice Templates Configuration Example page for a sample configuration
- Invoice Delivery settings need to be configured in order to define how an invoice is delivered and what invoice template is used. See the Invoice Delivery Configuration Example article for instructions