

Statements, Debt Reports, and Reminder Emails

Accounts Receivable | Office staff and managers

Use FlintPOS to track customer balances, generate statements, send reminder emails, and stay on top of on-account collections.

What This Guide Helps You Do

- Choose between a statement, payment-link email, and automated reminder.
- Generate collections-oriented views without leaving FlintPOS.
- Keep overdue balances visible without creating extra manual work.

WHY FLINTPOS KEEPS COLLECTIONS INSIDE THE WORKFLOW

Collections break down when balances, emails, and follow-up live in different places. FlintPOS keeps orders, balances, statements, and reminder emails together so staff can see the balance and the communication history in one system.

WHEN TO USE EACH TOOL

- Use a customer statement when the goal is a formal summary of open activity and recent account movement.
- Use a payment-link email when you want the customer to pay now by card or ACH without calling the office.
- Use reminder automation when you want collections to happen on a repeatable schedule instead of relying on memory.

CREATING A DEBT-MANAGEMENT ROUTINE

- Review customers with open balances on a regular cadence, not only when they call.
- Send statements and reminders consistently so customers know what to expect.
- Track due dates, net terms, and follow-up status inside FlintPOS so staff does not keep private side lists.

BEST PRACTICES FOR HEALTHIER RECEIVABLES

- Keep customer email addresses current so reminders and statements reach the right person.
- Use clean notes and customer names so statements are easy to understand when they reach the customer.
- Pair collections review with reporting so you can see who is buying more, who is paying slower, and where risk is growing.

SET A COLLECTIONS ROUTINE

- Review open balances on a fixed day each week.
- Send statements from one place instead of ad-hoc messages from personal inboxes.
- Pair reminders with a payment-link option when the customer can pay immediately.

WHEN TO USE WRITE-OFF INSTEAD OF ANOTHER REMINDER

Use a write-off only when the business has decided the balance will not be collected and management wants the loss reflected in the system. A write-off is not a substitute for a slow follow-up.

Keep Going

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at </quickstart/payment-email.html> when you want a screen-by-screen visual refresher.