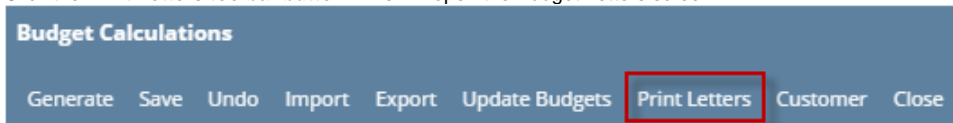
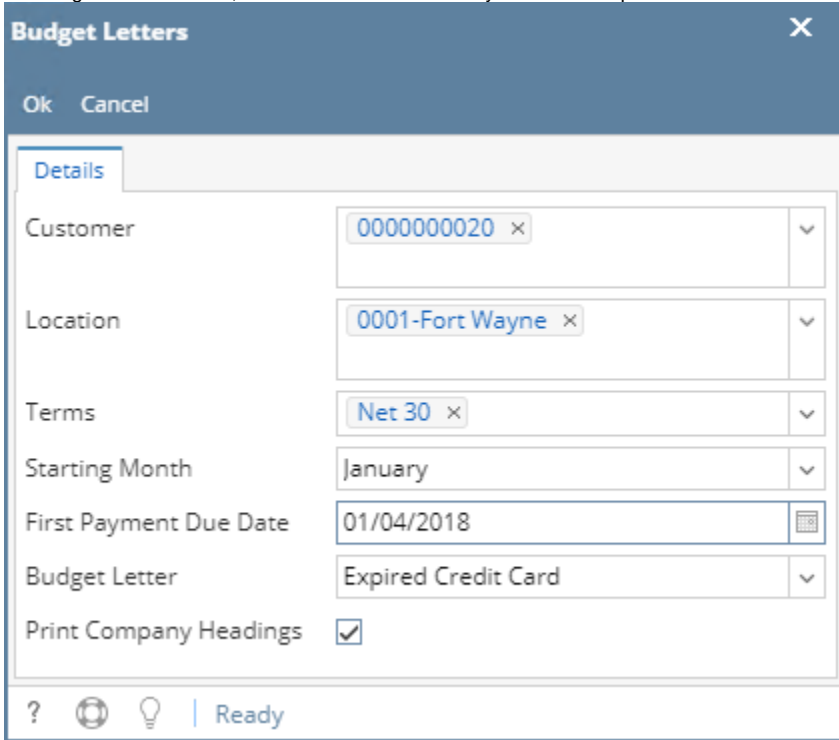


How to Print Budget Letters

1. On the Menu panel, click **Budget Calculation menu**. This will open the Budget Calculation screen.
2. Click the **Print Letters toolbar button**. This will open the Budget Letters screen.



3. On Budget Letters screen, fill out the customer details you want to be printed.

A screenshot of the 'Budget Letters' form. The form has a blue header with the title 'Budget Letters' and a close button (X). Below the header are 'Ok' and 'Cancel' buttons. The form is divided into a 'Details' tab and a 'Summary' tab. The 'Details' tab is active, showing the following fields: 'Customer' (0000000020), 'Location' (0001-Fort Wayne), 'Terms' (Net 30), 'Starting Month' (January), 'First Payment Due Date' (01/04/2018), 'Budget Letter' (Expired Credit Card), and 'Print Company Headings' (checked). The 'Summary' tab is also visible, showing 'Total Budget' (0.00) and 'Total Due' (0.00). The form has a status bar at the bottom with a question mark, a refresh icon, a lightbulb icon, and the text 'Ready'.

4. Click the **Ok toolbar button**. The Report Viewer will display containing the details of the customer. Below are the details of the report:
 - **First Row:** Shows the Company details which includes the Company Name, Address, City, State and Zipcode. This will display based on the option **Print Company Headings**.
 - **Second Row:** Shows the Customer details which includes the Customer Name, Address, City, State and Zipcode.
 - **Third Row:** Shows the customer's Budget Payment amount and the payment's due date.
 - **Fourth Row:** Shows the description of the selected letter from Budget Letter field.

Budget Letter

iRely LLC
4242 Flagstaff Cove
Fort Wayne IN 46815

Customer:	Customer C 1234 Main Street Fort Wayne IN 46815
-----------	---

Budget Payment:	358.00
First Payment Due:	04/29/2017

Dear Customer,

This is a sample Budget Letter.

Thank you,

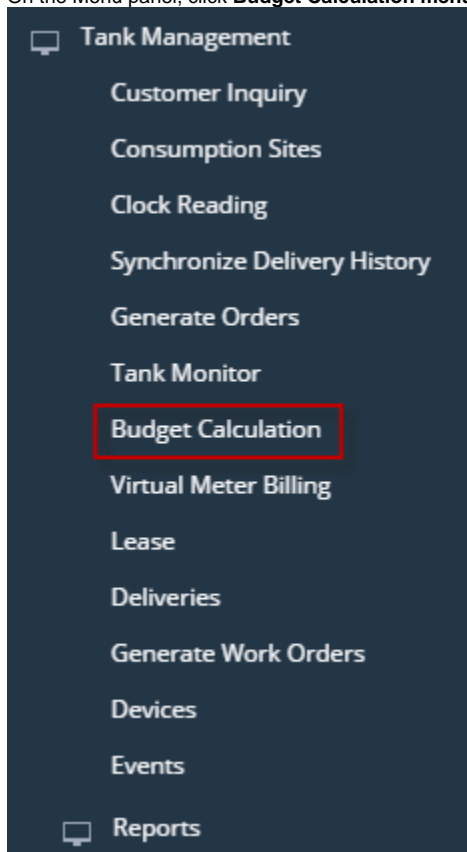
iRely



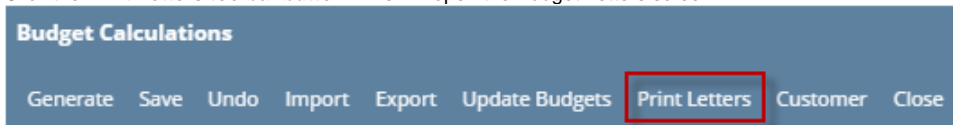
Note

To print a specific budget letter, letter should be setup first from **System Manager > Letters**.

1. On the Menu panel, click **Budget Calculation menu**. This will open the Budget Calculation screen.



2. Click the **Print Letters toolbar button**. This will open the Budget Letters screen.



3. On Budget Letters screen, fill out the customer details you want to be printed.

A screenshot of a dialog box titled "Budget Letters". It has "Ok" and "Cancel" buttons at the top left. Below the title bar is a tab labeled "Details". The dialog contains several input fields: "Customer" (empty), "Location" (filled with "0001 - Fort Wayne"), "Terms" (filled with "Net 30"), "Starting Month" (empty), "First Payment Due Date" (filled with "4/29/2017"), "Budget Letter" (filled with "Letter1"), and "Print Company Headings" (checked). Each text field has a dropdown arrow on its right side. At the bottom of the dialog is a status bar with a question mark icon, a globe icon, a lightbulb icon, and the word "Ready".

4. Click the **Ok toolbar button**. The Report Viewer will display containing the details of the customer. Below are the details of the report:

- **First Row:** Shows the Company details which includes the Company Name, Address, City, State and Zipcode. This will display based on the option **Print Company Headings**.
- **Second Row:** Shows the Customer details which includes the Customer Name, Address, City, State and Zipcode.
- **Third Row:** Shows the customer's Budget Payment amount and the payment's due date.
- **Fourth Row:** Shows the description of the selected letter from Budget Letter field.

Budget Letter

iRely LLC
4242 Flagstaff Cove
Fort Wayne IN 46815

Customer:	Customer C 1234 Main Street Fort Wayne IN 46815
------------------	---

Budget Payment:	358.00
First Payment Due:	04/29/2017

Dear Customer,

This is a sample Budget Letter.

Thank you,

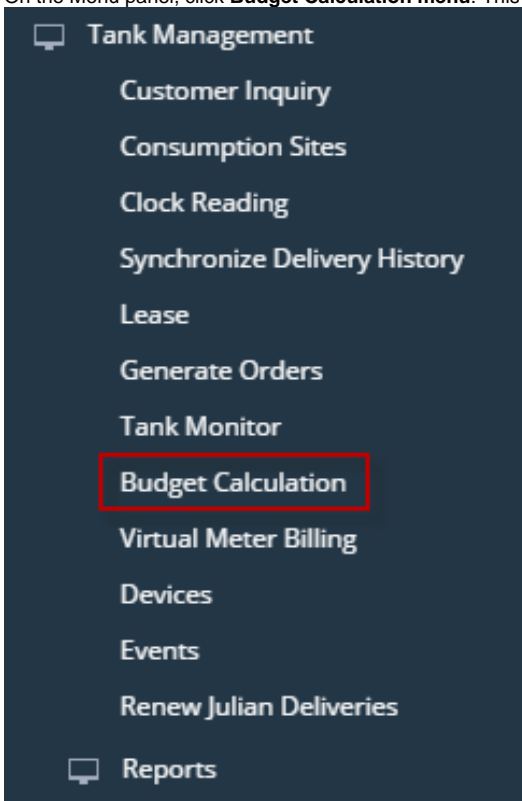
iRely



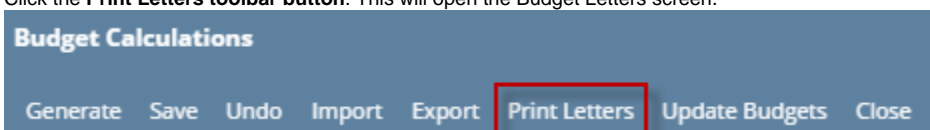
Note

To print a specific budget letter, letter should be setup first from **System Manager > Letters**.

1. On the Menu panel, click **Budget Calculation menu**. This will open the Budget Calculation screen.



2. Click the **Print Letters toolbar button**. This will open the Budget Letters screen.



3. On Budget Letters screen, fill out the customer details you want to be printed.

Budget Letters

Ok Cancel

Details

Customer: 0001005079 x 0001005080 x

Location: 0001 - Fort Wayne x

First Payment Due Date: 05/01/2016

Budget Letter: Letter 1

Print Company Headings: ☒

? Ready

4. Click the **Ok** toolbar button. The Report Viewer will display containing the details of the customer. Below are the details of the report:

- **First Row:** Shows the Company details which includes the Company Name, Address, City, State and Zipcode. This will display based on the option **Print Company Headings**.
- **Second Row:** Shows the Customer details which includes the Customer Name, Address, City, State and Zipcode.
- **Third Row:** Shows the customer's Budget Payment amount and the payment's due date.
- **Fourth Row:** Shows the description of the selected letter from Budget Letter field.

Report

Archive Close

Page 1 of 2 Pdf

Budget Letter

I21 Demo Setup Company(Source)
4242 Flagstaff Cove
Fort Wayne IN 46815

Customer:	Customer A 1234 Main St Fort Wayne IN 46801
Budget Payment:	0.00
First Payment Due:	2016-06-29T16:0

This is a sample letter 1.

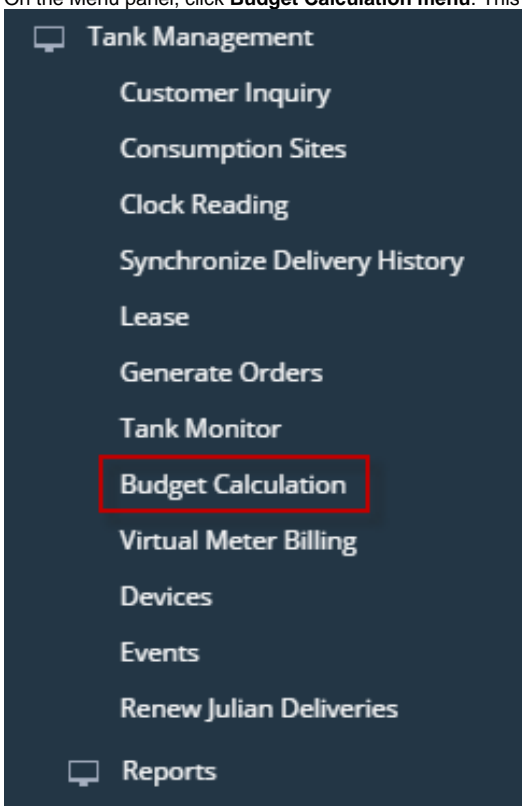
? Ready



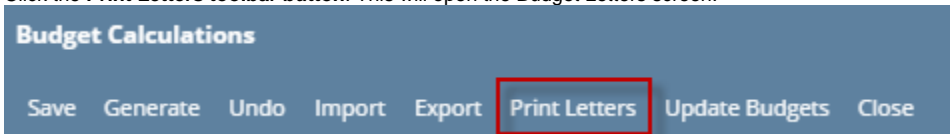
Note

To print a specific budget letter, letter should be setup first from **System Manager > Letters**.

1. On the Menu panel, click **Budget Calculation menu**. This will open the Budget Calculation screen.



2. Click the **Print Letters toolbar button**. This will open the Budget Letters screen.

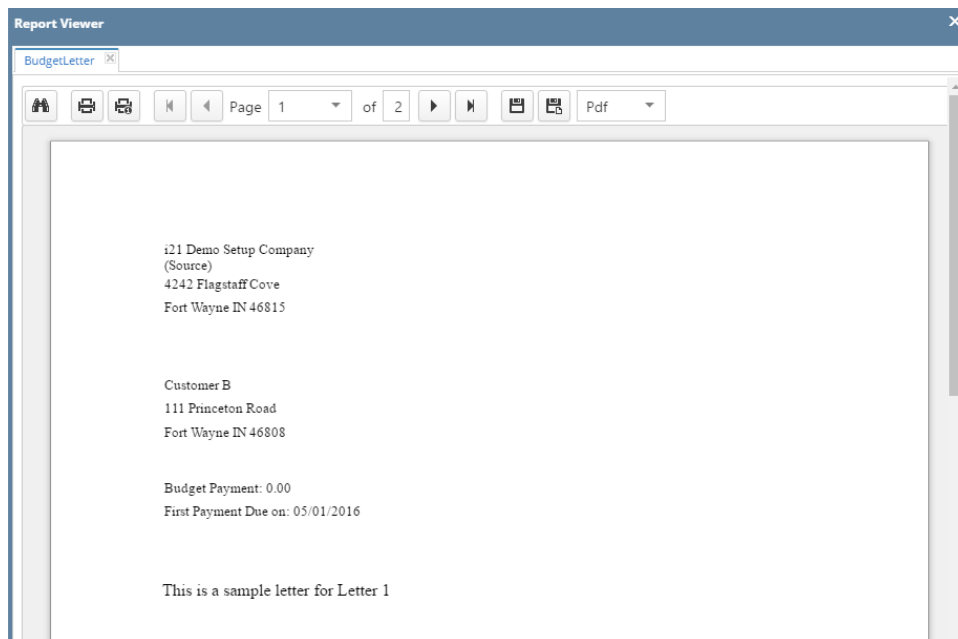


3. On Budget Letters screen, fill out the customer details you want to be printed.

A dialog box titled 'Budget Letters' with 'Ok' and 'Cancel' buttons at the top. It has a 'Details' tab selected. The form contains the following fields: 'Customer:' with two input boxes containing '0001005079' and '0001005080'; 'Location:' with a dropdown menu showing '0001 - Fort Wayne'; 'First Payment Due Date:' with a date field set to '05/01/2016'; 'Budget Letter:' with a dropdown menu showing 'Letter 1'; and 'Print Company Headings:' with a checked checkbox. At the bottom, there are icons for help, refresh, and a lightbulb, followed by the word 'Ready'.

4. Click the **Ok toolbar button**. The Report Viewer will display containing the details of the customer. Below are the details of the report:

- **First Row:** Shows the Company details which includes the Company Name, Address, City, State and Zipcode. This will display based on the option **Print Company Headings**.
- **Second Row:** Shows the Customer details which includes the Customer Name, Address, City, State and Zipcode.
- **Third Row:** Shows the customer's Budget Payment amount and the payment's due date.
- **Fourth Row:** Shows the description of the selected letter from Budget Letter field.



Note

To print a specific budget letter, letter should be setup first from **System Manager > Letters**.