Eleven customers — unapplied credit notes

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Fictional document — demonstration example

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Fictional document, produced for demonstration. **No accounting offset is performed.** An offset is a transaction, it may require both parties' agreement, and it belongs to the accountant.

Customer	Owes you	You owe them	Real balance	Chaser already sent?
A	**€4,200**	**€3,800**	**€400**	No
B	€9,100	€2,400	**€6,700**	**Yes**
C	€1,800	**€2,200**	**− €400**	**Yes**
D	€6,400	€1,100	€5,300	No
E	€3,300	**€3,300**	**€0**	**Yes**
F to K	€28,000	€21,200	€6,800	No
Total	**€52,800**	**€34,000**	**€18,800**	**3**

Customers C and E are the two most awkward cases: one owes nothing, the other is in credit — and both received a chaser.

The letter proposed for customer A

Order of elements	Content
1	**Confirmation of the credit note of 12/06**
2	Summary of the two invoices
3	**Balance requested: €400**

The letter starts from the credit note, not from the debt. The amount demanded becomes beyond dispute, and the customer has no reason to reply with anything but a payment.

What this cross-check required

Source	Role
Aged balance	What customers owe
Credit notes issued	**What the company owes**
Allocation records	Checking no credit note was already applied

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