

Legal Handover

Legal handover is when you have started legal process of a customer for non-payment.

Tick the box for legal handover.

Edit Debtor

Debtors Details

Attachment

Memo

Create Reminder

Debtor Enquiry

View Attachments

Functions

Standard

Alerts

Close

Code : **ABC007**Debtor Name : **ABD Company**Outstanding Balance: **68 571.77**

Details

Address

Contacts

Account Details

Gen Details

Statutory

Info

Custom Fields

Activity

Ti

Default Currency:Rand South Africa

Price Level:Default

Discount:0

Discount Matrix:Group discount 1

Rating:

Statement Type:Standard

Exclude From Bank Exports:

Over Due:87 728.46

Last Payment & Date:2023-07-27300.00

Last Invoiced & Date:2023-07-101 110.90

Ageing:Date Of StatementDate Of Invoice

Account Terms:20Day Of Month 1

Forex Tax Type Override:

Payment Terms:

On Hold:☒

On Hold Reason:Payments are delayed.

Enforce Credit Limit:☒

Credit Limit:500000

T/C Invoice:STD Terms

T/C Credit Note:STD Terms

Legal Hand Over:☒

Hand Over Details

Legal Hand Over Detail

This is where you complete the legal law firm details and file number for a debtor/ customer you want to handover

Edit Debtor

Debtors Details

Attachment Memo Create Reminder Debtor Enquiry View Attachments Functions Standard Alerts Close

Code : **TSI001** Debtor Name : **Tsile Test** Outstanding Balance: **2 096 082.23**

Debtor Legal Hand Over

Legal Hand Over Grid

Legal Hand Over Detail

Create Reminder Attachments Memo

Att

1

Legal Firm: OL Test Name: **OL TEST**

Active: ☒ View Firm Details

Reference No.: 125

Hand Over Amt.: 100,000.00

Hand Over Date: 2023-11-01 Date Activated: 2023-11-01 11:49:20

Follow Up Date: 2023-11-30 Activated By: Otsile Loate

Save Close

Close

Statement Stationery: Credit Note Template: Stationery/CreditNote_AT2000257.xsl

Delivery Note Template:

Delivery Note 2 Template:

Save and New Save and Close Save Close

Legal Firm	Select the legal firm from drop down
Active	Put a tick on if active and to deactivate you need to put the tick off
View Firm Details	Click view details to see all details of the firm
Reference Number	Enter reference number
Hand Over Amount	Enter the amount that should be collected by the handover firm
Hand Over Date	Enter handover date
Follow-up Date	Enter handover follow-up date
Name	The name of the firm will populate after you click save
Activated Date	The date the legal handovers were activated

Activated By	The name of the person who activated the handover
---------------------	---

Revision #5
Created 19 July 2023 13:20:16 by Paige
Updated 4 October 2024 21:57:05 by Otsile