Emailing Statements and General Emailing

Emailing Statements is a two-step process. Add client email addresses to the Clients Screen. Select Email Statements in the Statements/Create Statements Screen. (If you forget to email statements or want to re-email all or selected statements you can do that from the Statements/Billed Statements Screen.

Adding Email Addresses (Clients Screen):

Go to the client's screen. In the left panel, search for and select the client to whom you want to add an email address. Bottom main panel under Email Addresses Click Add for each email address you want. If you do not want the email address to receive a statement, deselect it. Save.

Selecting to email Statements (Statements/Create Statements Screen or Statements/Billed Statements Screen):

When you are ready to bill, select Email Statements in Yellow on the Statements/Create Statements Screen. When you click the Green button, Bill Selected Statements, a popup screen listing all statements and email addresses will display for emailed and non-emailed statements. Statements with incorrectly formatted email addresses will be noted and not emailed. Click Create and Email Statements or Cancel.

On the Statements/Billed Statements Screen the date and time email will be displayed. If Not Emailed in Red that means the client is set up for emailing but no email was sent. If **Not Emailed** in black the client is not set up for emailing.

If a client does not receive an emailed Statement, ask the client to check their junk folder and move email to inbox which will make sure future statement emails will go into their inbox.

You can send up to 30 general emails to clients from the Setup Screen, Email Tab.

End