Emailing Billing Statements

Document #:	3232	Product:	CenterPoint® Accounting

CenterPoint allows you to e-mail your customer billing statements. The statement is attached to an e-mail as a PDF file using the selected form design.

P r e r e q u i s i t e

The **Email Setup** preference (**File** > **Preferences** > **Email Setup** > **Email Setup** > **Database** tab) is a required part of the configuration needed to send emails from CenterPoint. See the Email Setup topic for additional information.

Step 1: Define a Default Subject and Message for Emailed Billing Statements (Optional Setup)

Step 2: Customer Email/Print Defaults

Step 3 - Sent From and Optional E-mail Addresses

Step 4: Emailing Billing Statements

Step 1: Define a Default Subject and Message for E-mailed Billing Statements (Optional Setup)

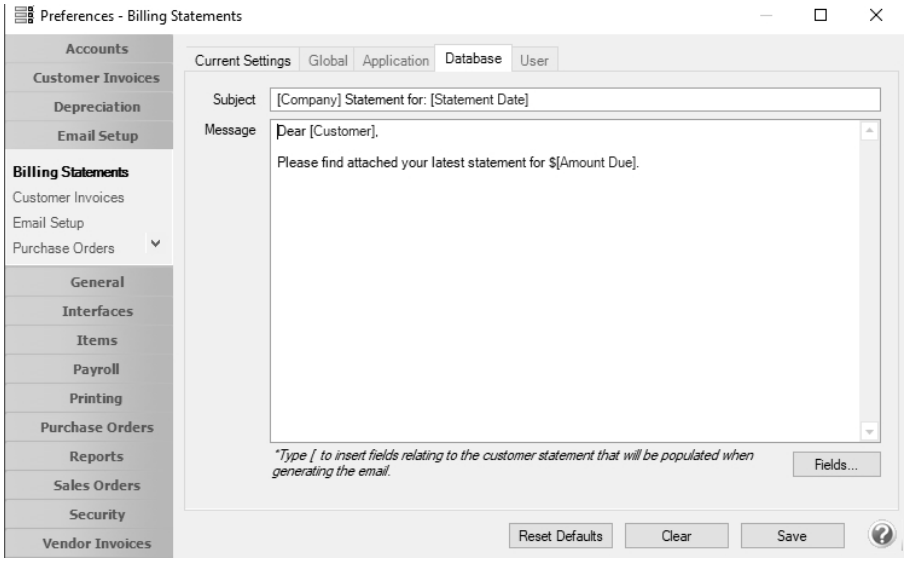
If you'd like to use the same e-mail Subject, Message, and Form each time you -email a billing statement, it can be added to this preference. This preference also allows you to add Form Fields from the billing statement transaction data to the default Subject line or Message text.

1. Select **File > Preferences > Email Setup > Billing Statements**.
2. Select the **Database** tab at the top.
3. Enter a default **Subject** and **Message**. If you want to insert Form Fields into the Subject or Message of the email, click the **Fields** button or press **[** at the location the form field should be inserted. The available Form Fields for customer billing statements are:

Amount Due	Company	Company Address 1	Company Address 2	Company City, State, Zip
Company Contact	Company Email	Company Fax	Company Phone	Company Web
Customer	Customer Abbreviation	Statement Date		

   - For example, you can customize the default Subject and Message for emailed billing statements to include data fields from the billing statement data along with default text:
     - In the **Subject** box, click **Fields** or type **[**, and then select **Company**, type **Statement for**, click **Fields** or type **[,** and then select **Statement Date**.
     - In the **Message** box, type **Dear**, click **Fields** or type **[**, select **Customer Name**, and then type a **comma**, press **Enter**.

» In the **Message** box, type **Please find attached your latest statement for $**, click **Fields** or type **[**, and then select **Amount Due**.



Note: To create paragraphs, press your Ctrl and Enter keys at the same time.

4. Click **Save**.

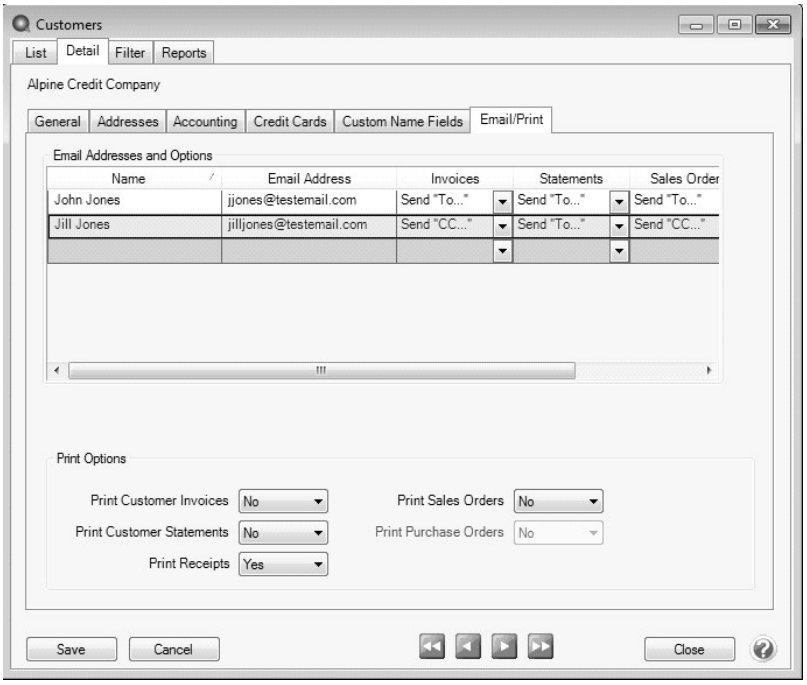
Step 2: Customer Email/Print Defaults

Prior to e-mailing a billing statement to a customer, the customer file must include an e-mail address and e-mail form options on the Email/Print tab.

If your customers don't currently have e-mail addresses on the Email/Print tab in their record, use the following steps to update their records individually.

1. Select **Setup > Names** or **Setup > Customers**.
2. Find the appropriate customer and click **Edit**.
3. Enter the appropriate information in the **E-mail** field.
4. Click the **Email/Print** tab.
5. The Email Addresses and Options fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor or a customer. Use these options to set up multiple e-mail addresses where invoices, statements, sales orders, and purchase orders can be sent for this customer. You can also select how each e-mail is to be sent, **No Email**, **Send "To..."** (directly to the recipient), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (as a blind carbon copy, for example, the person sending the email may want to enter their own e-mail address so they have an audit trail of emails sent). The Email Addresses and Options settings will be used to set the default image on the Email button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. An envelope image with a check mark on it will mean the form will be emailed and an Envelope image with a cross-through on it will mean the form will not be emailed.

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.



The **Print Options** fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor a customer. The available fields are: **Print Customer Invoices**, **Print Customer Statements**, **Print Receipts**, **Print SalesOrders**, and **Print Purchase Orders**. Use these options to determine if invoices, statements, sales orders, and purchase orders should be printed for this customer. The Print Options settings will be used to set the default image on the Print button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. A printer image with a check mark on it will mean the form will Print and a Printer image with a cross-through on it will mean the form will not print.

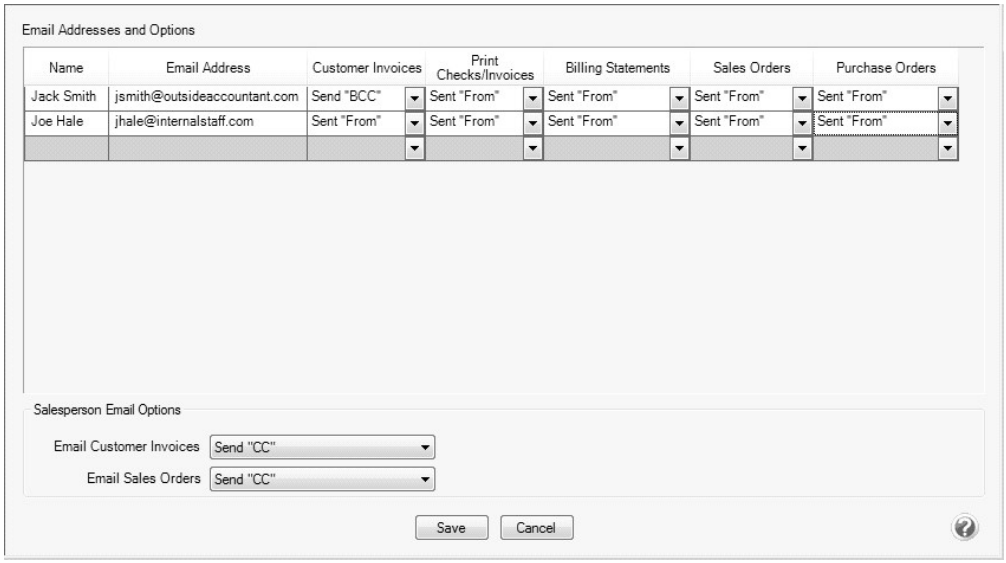
6. Click **Save**.

Step 3 - Sent From and Optional E-mail Addresses

The Setup > General > Email Addresses menu selection is used to set the name and e-mail address customer invoices and print checks/invoices (when you e-mail a group of invoices) are sent from. This menu allows you to select other Sent From e-mail addresses for the different forms that you send via e-mail.

You can optionally add e-mail addresses where messages and attached documents can be sent to; including the salesperson that was selected when the invoice is entered and saved, internal staff, outside accountants, or other addresses that are not related to the customer the transaction is entered for. You can also select how each e-mail is to be sent, directly to the recipient, as a carbon copy, or as a blind carbon copy or set a default "From" email address for each document type (invoice or print checks/invoices).

1. Select **Setup** > **General** > **Email Addresses**.



2. Enter the **Name**, the **Email Address**, and select how **Billing Statements** should be sent, **No Email**, **Send "From..."** (the default e-mail address the customer invoice or print checks/invoices is sent from), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (blind carbon copy).
3. Click **Save**.

Step 4: Emailing a Billing Statement

When processing billing statements, the E-mail/Print button will process e-mailed and printed statements at the same time. It will e-mail statements to customers who are setup to e-mail and will print copies for those that are setup for printing.

1. Select **Processes > Sales > Billing Statements**.
2. Choose the appropriate **Billing Statement** and **Billing Statement Selections**.
3. Click **E-mail/Print**.
4. The default **E-mail Billing Statements** form will be displayed. Modify if needed and click **Continue**.
5. Then select the printer for the statements that need to be printed and click **OK**.

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