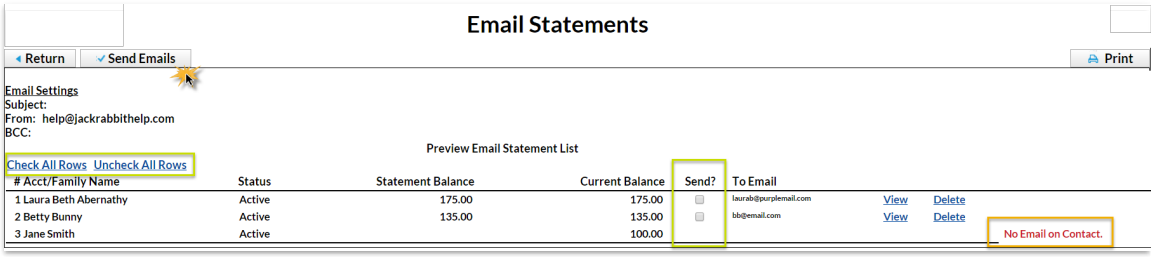
Email Multiple Statements / Invoices

Last Modified on 11/03/2020 12:33 am EST

1. Go to the **Reports** (menu) > **Find Reports** > **Email/Text/Marketing** (left menu) > **Email** (tab) and click **Statements - Email**.
2. Use the *Family/Account Search Criteria* to select the families whose statements you want to email.
3. Use *Transaction Search* to narrow down the types and dates of transactions you want to appear on the statement.
4. Use the *Format Options* section to create the 'look' of the statement by selecting which family and transaction information to include. Logo, header and footer settings are also customized here. Tip: If you regularly use the same Statement Header and /or Footer, you can create defaults in *Gear (icon) > Settings > General > Statements*. If you need to change the default for one set of statements only, you can edit the header / footer while on the *Statements - Email* screen.
5. Define reply and blind copy email addresses in the *Email Information* section of the *Format Options*. A *Reply To Address* is required. An email subject and header can also be added here.
6. Scroll back to the top and click **Preview Email Statements List**. This is a preview only. No emails are sent until you click *Send Emails*.
7. Review the statement list. Note that families / accounts that have no *home* email address listed under the contact that has *Billing Contact=Yes* will display but with no checkbox to send.
   - Click the **View** link to review specific statements.
   - Click the **Delete** link to delete a specific statement.
   - Determine which statements to email by either selecting **Check All Rows** or checking specific family / account **checkboxes.**



8. To email statements, click **Send Emails**.
9. When email statements has completed, a pop-up window will indicate *Finished. Sent x email(s).* Click **OK**.

Create Favorites for frequently used statement settings. See **Favorites (Report Criteria Templates)** for instructions.

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For:
Mama Jackrabbit
15 McGregor Street
Garden, NC 28270

Example of an emailed statement

This is the statement header.

Account Summary

Previous Balance as of July 18, 2015	53.75
+ Fees	65.00
- Payments	- 53.75
Balance as of September 16, 2015	**65.00**
Current Balance	**65.00**

Transaction Summary July 18, 2015 - September 16, 2015

Date	Type	Payment Method	Student	Class/Event	Orig Amt	Discount	Tax	Amount	Paid	Balance
07/18/15	Previous Balance									53.75
08/13/15	Payment	Cash						-53.75	08/13/15	.00
09/16/15	Tuition Fee - September		Zippy Jackrabbit	Tumbling 101 Tu 9:30a	65.00			65.00		65.00

This is the statement footer.

This is an additional statement footer.



Save this as a frequently used report! Click the heart (icon) ♡ next to a report name, the heart will change to red ♥ and the report will be listed under the *Reports (menu)* > ***My Reports*** for quick and easy access!