

# Email from Debtors

23/10/2024 4:26 pm BST

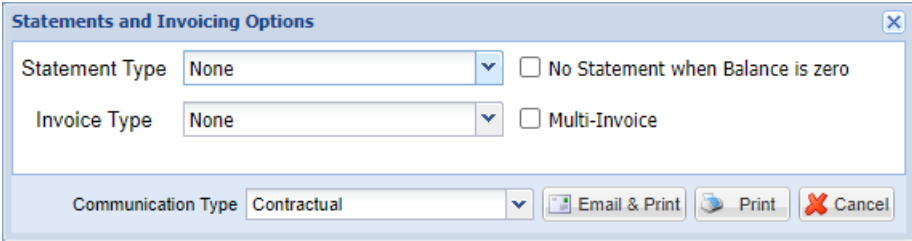
## Summary

From the Debtors Screen (Finance > [Debtors](#)) Statements and Invoices can be printed and/or emailed to clients.

## Details

Sending Statements and/or Invoices

1. [Run Debtors](#)
2. Select '**Statement and Invoicing Options**'.
3. Once selected, the below window will open:



The screenshot shows a dialog box titled "Statements and Invoicing Options". It contains three main sections: "Statement Type" with a dropdown menu set to "None", "Invoice Type" with a dropdown menu set to "None", and "Communication Type" with a dropdown menu set to "Contractual". To the right of the "Statement Type" dropdown is a checkbox labeled "No Statement when Balance is zero". To the right of the "Invoice Type" dropdown is a checkbox labeled "Multi-Invoice". At the bottom right, there are three buttons: "Email & Print", "Print", and "Cancel".

4. Select a **Statement Type** (format of statement you wish to send) from the drop-down list.
5. Select an **Invoice Type** from the drop-down option. **'No Statement when Balance is zero'** A zero balance on a debtors list indicates that the full account balance has been paid, however, it has not been allocated to the outstanding balance. Select **'Multi Invoice'** to compile invoices for the same client (rather than an individual invoice for each invoice number).
6. Select '**Email & Print**' (If you don't want to email, select '**Print**').
7. Select the Chase up letter template you wish to send and Select **Generate**'.

**Document Management**

Search

File Name	
Debt Letter.docx	DOCX
Period 1 and 2 Balances.docx	DOCX
Period 1 Balances 1.docx	DOCX
Period 1 Balances.docx	DOCX
Period 2.docx	DOCX
Test chase up.docx	DOCX
Test Debt letter.docx	DOCX

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8. An 'Email to Debtors' window will appear with a list of debtors with valid email addresses. All emails will be selected by default, but it is possible to deselect certain clients or 'Deselect All':

**Email to Debtors**

List of debtors to send email:

Email	Client Name	Email
<input checked="" type="checkbox"/>	Adams, Ali	testemail@gmail.com
<input checked="" type="checkbox"/>	Baxter, Janice	test@vetspace.com
<input checked="" type="checkbox"/>	David, White	test@gmail.co.uk

**No Email Options**

**Email Options**

9. For clients with no email address registered (or deselected Clients), select '**Print Statement/Invoices**' and '**Print Letters**' to generate chase up letters.
10. For clients with email addresses registered, select '**Email**'.
11. The clients will now have been emailed their statements/invoices/chase up letters and an entry added to their Communications tab.

**Note - The chase up letter becomes the body of the email, with the invoice and statement as PDF attachments.**

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