

Email from Debtors

24/07/2025 11:02 am 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" and a checkbox "No Statement when Balance is zero"; "Invoice Type" with a dropdown menu set to "None" and a checkbox "Multi-Invoice"; and "Communication Type" with a dropdown menu set to "Contractual". At the bottom right, there are three buttons: "Email & Print" (with an envelope icon), "Print" (with a printer icon), and "Cancel" (with a red X icon).

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'.

The screenshot shows a dialog box titled "Document Management". It features a search bar and a "Create Blank" button. Below is a table with three rows of document templates. The first row is "Debt Letter.docx", the second is "Period 1 Balances.docx", and the third is "Period 2.docx". Each row has a green "DOCX" icon to its right. At the bottom, there is a pagination bar showing "Page 1 of 1" and "Displaying 1 - 3 of 3". Below the pagination bar are three buttons: "Preview", "Generate", and "Cancel".

File Name	
Debt Letter.docx	DOCX
Period 1 Balances.docx	DOCX
Period 2.docx	DOCX

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:

Deselect All

Email	Client Name	Email
<input checked="" type="checkbox"/>	Allen, B	ballen@test.co.uk
<input checked="" type="checkbox"/>	Ambery, A	amberyA@test.co.uk

No Email Options

Print Statement/ Invoices

Print Letters

Email Options

Email

Close

- For clients with no email address registered (or deselected Clients), select 'Print Statement/Invoices' and 'Print Letters' to generate chase up letters.
- For clients with email addresses registered, select 'Email'.
- 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.
