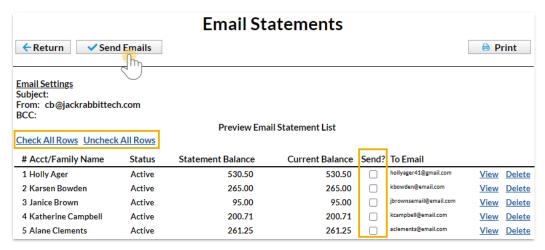
## **Email Multiple Statements / Invoices**

Last Modified on 11/30/2023 8:05 am EST

Use this report to customize statements and email them to multiple families at once. This may include using the Search Criteria to generate statements by **Enrollment Status** and by Category 1, 2, or 3 as needed.

*Note:* Select one or more Categories, Students, Transaction Types, and Sub-types by holding down the CTRL key.

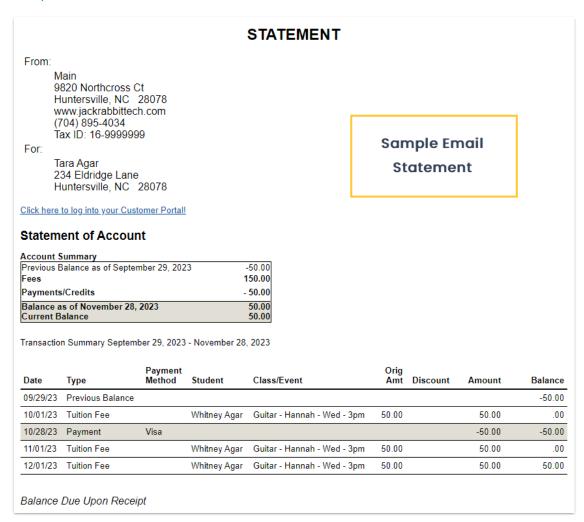
- 1. Go to the Families menu > Family Reports > Statements Email.
- 2. Use the Family/Account Search Criteria to select the families whose statements you want to email. If you leave all the criteria blank (with Enroll Status = Currently Enrolled), you will get a complete list of enrolled families. You can narrow down the selection:
  - Select Single Family Account with the option to select one or more students when you
    check off Email Statement by Student(s) and select the students from the drop-down list.
  - Select Families Enrolled in Class (search for a specific class).
  - Select Families Enrolled with Instructor (select an instructor from the drop-down list).
- 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.
  - If you regularly use the same Statement Header and/or Footer, you can create defaults in Gear (icon) > Settings > General > Statements (left menu). 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. Click the **Preview Email Statements List** button (top left). 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. Click **Send Emails** to email the statements.
  - When email statements have been completed, a pop-up window will indicate Finished. Sent x email(s). Click **OK**.

Create Favorites for frequently used statement settings. See**Favorites - Save Your Report Criteria Selections** for instructions.

## Sample Email Statement





Save this as a frequently used report! Click the Heart icon  $\bigcirc$  next to a report name, the heart will change to red  $\bigcirc$  and the report will be listed under the Reports menu > My Reports for quick and easy access!