

Email Multiple Statements / Invoices

Last Modified on 10/17/2022 10:25 am EDT

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:
 - o 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.
 - o Select Families Enrolled in Class (search for a specific class).
 - o 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.
 - o 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.
 - o Click the **View** link to review specific statements.
 - o Click the **Delete** link to delete a specific statement.
 - o Determine which statements to email by either selecting **Check All Rows** or checking specific family/account **checkboxes**.

Email Statements

[← Return](#) [✓ Send Emails](#) [Print](#)

Email Settings
 Subject:
 From: cb@jackrabbittech.com
 BCC:

Preview Email Statement List

[Check All Rows](#) [Uncheck All Rows](#)

# Acct/Family Name	Status	Statement Balance	Current Balance	Send?	To Email	
1 Holly Ager	Active	530.50	530.50	<input type="checkbox"/>	hollyager41@gmail.com	View Delete
2 Karsen Bowden	Active	265.00	265.00	<input type="checkbox"/>	kbowden@email.com	View Delete
3 Janice Brown	Active	95.00	95.00	<input type="checkbox"/>	jbrownsemail@email.com	View Delete
4 Katherine Campbell	Active	200.71	200.71	<input type="checkbox"/>	kcampbell@email.com	View Delete
5 Alane Clements	Active	261.25	261.25	<input type="checkbox"/>	aclements@email.com	View Delete

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

STATEMENT

From:
 Main
 9820 Northcross Ct
 Huntersville, NC 28078
 www.jackrabbittech.com
 (704) 895-4034
 Tax ID: 16-9999999

For:
 Tara Agar
 234 Eldridge Lane
 Huntersville, NC 28078

Sample Email Statement

[Click here to log into your Customer Portal!](#)

Statement of Account

Account Summary



Previous Balance as of September 29, 2023	-50.00
Fees	150.00
Payments/Credits	- 50.00
Balance as of November 28, 2023	50.00
Current Balance	50.00

Transaction Summary September 29, 2023 - November 28, 2023

Date	Type	Payment Method	Student	Class/Event	Orig Amt	Discount	Amount	Balance
09/29/23	Previous Balance							-50.00
10/01/23	Tuition Fee		Whitney Agar	Guitar - Hannah - Wed - 3pm	50.00		50.00	.00
10/28/23	Payment	Visa					-50.00	-50.00
11/01/23	Tuition Fee		Whitney Agar	Guitar - Hannah - Wed - 3pm	50.00		50.00	.00
12/01/23	Tuition Fee		Whitney Agar	Guitar - Hannah - Wed - 3pm	50.00		50.00	50.00

Balance Due Upon Receipt



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!
