



## **Emailing Customer Statements**

Software Development  
RIMSS Business Systems Technology

Company Confidential

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In lieu of printing customer statements to white paper and mailing them, there is an email feature in the statement process. There is no additional setup involved on the WinNetStar side like there is with emailing invoices. All that is required is that you are using Microsoft Outlook on your PC and it is running prior to starting the email process. The first step is to prepare the customers one at a time that you wish to email statements. Each customer must have an email address set up in the Email and Internet section of their customer master. You can send the statement to multiple recipients by putting a semicolon and a space after each recipient (e.g. [john@abcco.com](mailto:john@abcco.com); [frank@abcco.com](mailto:frank@abcco.com); etc) Be sure to click Save before going to next step.

The screenshot shows the 'Customer' master record for 'TRAVIS'. The 'E-Mail and Internet' section is highlighted, showing the 'Business Email' field with the address 'john@abcco.com; frank@abcco.com'. A small 'Email Form' dialog box is open over the 'Phone and Fax Numbers' section, showing the same email address in the 'E-Mail Address' field.

Once the address is set up in the section above, click on the Details tab. Check the box that reads Email Statement. In the box to the right, click the drop down for the email address and choose the email address you wish to use. If you wish to include invoices in the email, also check the box in that same section that reads Include Invoices on Customer Statements. Click Save and Close once you have completed these steps.

The screenshot shows the 'Details' tab for the 'Customer' master record. The 'Other Options' section is highlighted, showing the 'Include Invoices on Customer Statements' and 'Email Statement' checkboxes checked. The 'Email Statement' dropdown menu is open, showing the selected email address 'john@abcco.com; frank@abcco.com'.

To email statements click Customer → Customer Statements to bring up the customer statement screen. Enter your statement period and click Fetch.

Statement Period: Last Month, From Date: 1/1/2017, To Date: 1/31/2017

Do Not Create Statements:  With a Zero Balance,  With No Account Activity,  With a Credit Balance

Selected	Customer Name	Customer Ref ID	Location	Inactive	Bill To Address	Activity	Balance	Include Invoices	Email Statement	Statement Email Address
<input type="checkbox"/>	10 PT NCDA & CS / ACCOUNTS PA...	8941	WILLIAMSTON	False	1001 MAIL SERVICE CENTER, RALEIGH, NC, 27699	False	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	20 GROUP FALL MEETING	8723	WILLIAMSTON	False		True	\$3,307.45	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	2012 RECONCILE A/R	6452	WILLIAMSTON	False		False	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	47 TRUCKING	5209	GATES	False	369 BARFIELD ROAD, EURE, NC, 27935	False	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	A & A ATLANTIC INC	5040	ROCKY MOUNT	False	PO BOX 816, MANTEO, NC, 27954	False	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	A & E TRANSPORTS	240	WILLIAMSTON	False	523 SPRUILL RD, ROPER, NC, 27970	False	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	A & F TRUCKING	4293	WILLIAMSTON	False	207 WOODHAVEN RD, GREENVILLE, NC, 27858	False	\$1,502.83	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	A & G ENTERPRISES INC	3543	GATES	False	12227 WASHINGTON HIGHWAY, ASHLAND, VA, 23005	False	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	A & S ENGINEERING	3661	WILLIAMSTON	False	203 MAIN STREET, HWY 258 S, SCOTLAND NECK, NC, 27874	False	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Filter your list on just the customers with the Email Statement box checked by clicking the filter in the right corner of the Email Statement box and choose the Checked option. This will bring up just those customers that you have opted to email statements. Click on the Select All box then click Email Selected Statements.

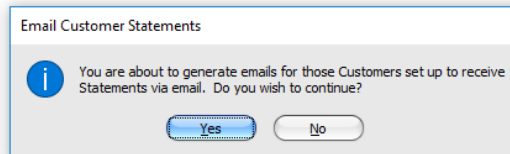
Statement Period: Last Month, From Date: 1/1/2017, To Date: 1/31/2017

Do Not Create Statements:  With a Zero Balance,  With No Account Activity,  With a Credit Balance

Select All

Selected	Customer Name	Customer Ref ID	Location	Inactive	Bill To Address	Activity	Balance	Include Invoices	Email Statement	Statement Email Address
<input checked="" type="checkbox"/>	ADVANCE CONCRETE LLC	5535	SCOTLAND NECK	False	PO BOX 74, GREENVILLE, NC, 27835	False	(\$160.42)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	ADVANTAGE ELECTRIC	6492	ROCKY MOUNT	False	PO BOX 7171, ROCKY MOUNT, NC, 27804	False	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	ALBOR TRUCK & REPAIR	4400	ROCKY MOUNT	False	200 BEARPOND ROAD, HENDERSON, NC, 27537	False	\$29,099.87	<input type="checkbox"/>	<input checked="" type="checkbox"/>	calbor@rimss.com
<input checked="" type="checkbox"/>	AMERICAN TRUCK AND AUTO	1420	WILLIAMSTON	False	PO BOX 209, WINTERVILLE, NC, 28590	False	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	wanda@americant...
<input checked="" type="checkbox"/>	ANDERSON & COMPANY INC	2125	WILLIAMSTON	False	197 THORN HILL LANE, TARBORO, NC, 27886	False	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	dawn@andersonco...
<input checked="" type="checkbox"/>	ASHLEY FURNITURE HOME STORE	6009	ROCKY MOUNT	False	ULTIMAX GROUP LLC, 3361 DAVID H MCLEOD BLVD, FLORENCE, ...	False	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	perry.hunter@parr...
<input checked="" type="checkbox"/>	ASHTON LEWIS LUMBER CO	50344	WILLIAMSTON	False	PO BOX 25, GATESVILLE, NC, 27938	False	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	lindsey@ashton-le...
<input checked="" type="checkbox"/>	ASHTON LEWIS TRUCKING CO. INC.	7840	GATES	False	P O BOX 25, GATESVILLE, NC, 27938	False	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	lindsey@ashton-le...
<input checked="" type="checkbox"/>	ATLANTIC DIESEL SERVICE INC	794	WILLIAMSTON	False	116 OLD US 17 ROAD, HERTFORD, NC, 27944	True	\$0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ads27944@yahoo....
<input checked="" type="checkbox"/>	ATLANTIC SEWAGE	5880	GATES	False	P O BOX 2560, KITTY HAWK, NC, 27949	False	\$3,488.79	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	jan@atlanticsewag...

You will receive the following message. Click Yes to continue or No to return to the previous screen



Once processing has finished you should receive the message below. You can check your Sent box in Outlook for the emails that were sent. Click OK and the process is finished. You may then close the Customer Statement tab or change your filter to Unchecked on the Email Statement column and print the remaining statements. The print process can also be done prior to the email process.

Selected	Customer Name	Customer Ref ID	Location	Inactive	Bill To Address	Activity	Balance	Include Invoices	Email Statement	Statement Email Address
<input type="checkbox"/>	trav							<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	TRAVIS OUTLAND	5353	GATES	False	156 KELLOGG FORK ROAD, SUNBURY, NC, 27979	False	\$2,981.85	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	tlec@rimss.com
<input type="checkbox"/>	TRAVIS S WHITEHURST	4729	WILLIAMSTON	False	P O BOX 244, CONETOE, NC, 27819	False	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	

