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Sample procedure to create an e-mail template and send it to customers with overdue balances

Step 1: Create Email Template with a Template Type of ?Customer?

- Go to <Configuration ? System ? Email Templates>
- Edit an existing template or create a new one ([+ New])
- If you are creating a New template, enter a brief description so you can reference the e-mail (e.g. "http://wiki.smartbilling.caOverdue balance, 1st notice"http://wiki.smartbilling.ca)
- Select Template Type = Customer
- Click the [Save] button
- Click on one or more of the 'Language' tabs and enter the desired e-mail Subject text and Body text and click [Save] again.

Step 2: Prepare an import list of clients to send

- For this particular case (Overdue invoices):
    - Produce an aging report ? Filters for clients over 30 days ? extract customer account numbers from the .csv export file
    - If desired, repeat the above step for clients over 60 days, again for over 90 days, and finally for over 120 days & combine the results. (Note that you might want to send a different e-mail template for clients that have older outstanding balances)

Step 3: Prepare an Import file in .csv format

no header row
Column A: Customer #
Column B: 1 to send to the general email
Column C: 1 to send to the invoicing email
Column D: 1 to send to the e-mail addresses for each contact

Example:

The following row value will send an e-mail to the Customer e-mail address on file for Customer ?C0001?:	?C0001?,1,,
The following row value will send an e-mail to the Invoicing e-mail address on file for Customer ?C0002?:	?C0002?,,1,
The following row value will send an e-mail to the e-mail address on file for each Contact associated with Customer ?C0003?:	?C0003?,,,1

Step 3: Generate an Email Run

- Go to <Accounts ? Customer>. On the Overview tab, click the [More] button & select ?Send a Document?
    - ♦ Select the appropriate Email template (i.e. the one you created with the ?Customer? Template Type)
    - ♦ Browse to upload the .csv file you prepared
    - ♦ Click the [Send] button.