

[Home](#) [FAQ](#)

## **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**

## Send\_Bulk\_E-mails

- 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.