

# Training Document

## How to Print/Email Customer Statements



In this lesson you will learn about using the Accredo system.

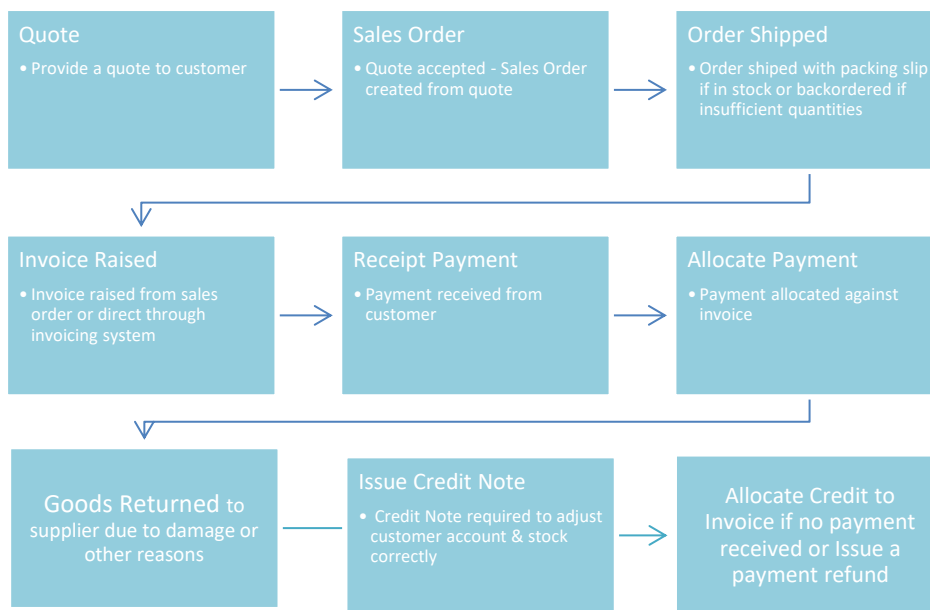
After completing this lesson you will be able to:

- Email Customer Statements

# Contents

Process flow .....	2
Printing/Emailing Statements .....	3
Print Statements .....	3
Emailing Statements .....	4
Contact .....	6

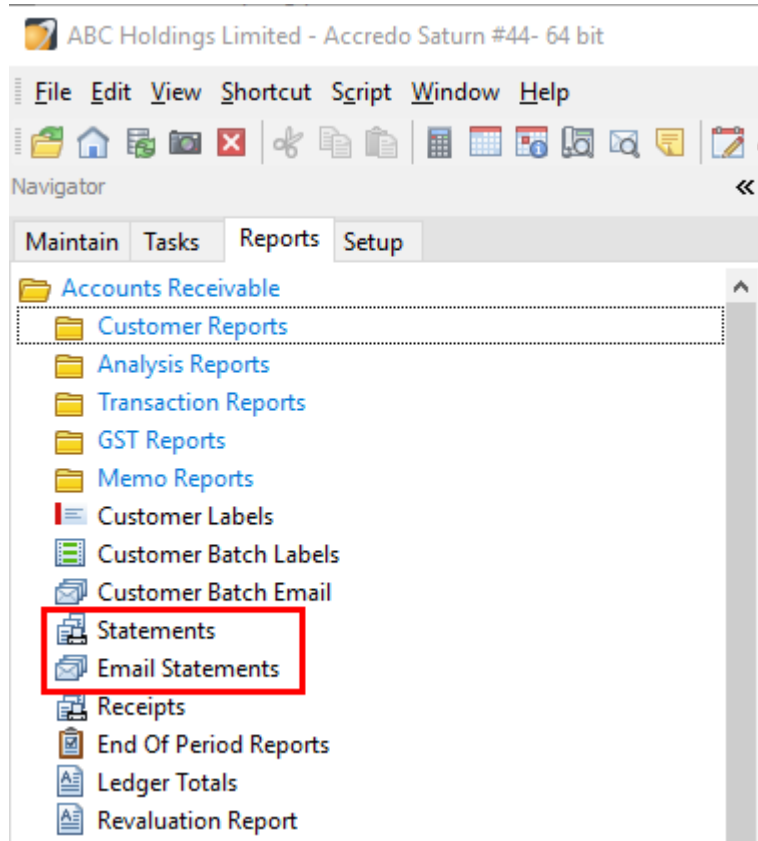
## Process flow



# Printing/Emailing Statements

## Print Statements

To print statements go to Reports – Accounts Receivable – Statements

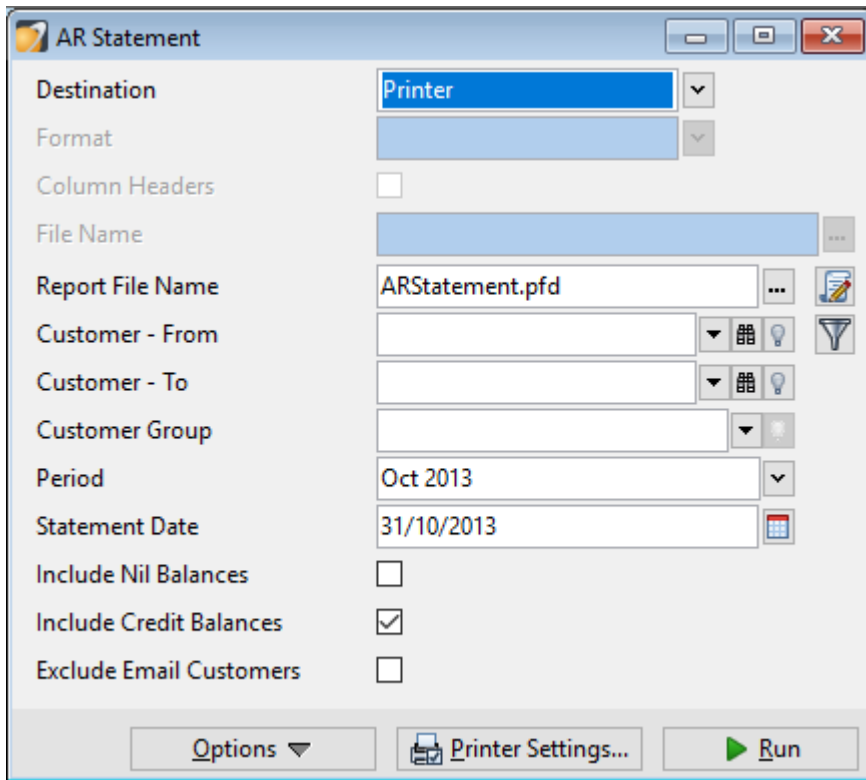


Specify the range of customers and period

Only tick include Nil balances if you specifically want them!

Tick exclude email customers if you are going to send these via email

Click on Run



## Emailing Statements

To email statements go to Reports – Accounts Receivable – Email Statements

Choose the Customer Range and Period etc.

**Note:** the statements will be emailed to the address specified in the Maintain – Customer – Contacts Tab – Email Document section

**AR Email Statements**

Selections: HTML Email Editor | Attachments

Format: Adobe PDF

Column Headers:

Report File Name: ARStatement.pfd

Customer - From:

Customer - To:

Customer Group:

Period: Oct 2013

Statement Date: 31/10/2013

Include Nil Balances:

Include Credit Balance:

Use SMTP mailing:

Log SMTP Session:

Request Read Receipt:

**Run**

**AR Customer Maintenance - ASHENG - Asheng Engineering Ltd**

Select Customer: ASHENG | Asheng Engineering Ltd | NZD

Customer | Contacts | Banking/Delivery | Links | Memos | Balances | Graph | Documents | Transactions

Full Name	Role	Phone No	Fax No	Mobile No	Email Address
Donna	Accounts	546 7908	546 7900	021-589 900	donna@asheng.co.nz

**Email Documents**

Statements	info@asheng.co.nz	<input type="checkbox"/>
Invoices	info@asheng.co.nz	<input type="checkbox"/>
Quotes	info@asheng.co.nz	<input type="checkbox"/>
Packing Slips	info@asheng.co.nz	<input type="checkbox"/>

# Contact

For further information or for assistance with Accredo please do get in touch with us.

## *Offices*

### **New Zealand (+64)**

Tauranga..... 07 544 4488

Wellington..... 04 282 1534

Email ..... [Helpdesk@ZealSystems.co.nz](mailto:Helpdesk@ZealSystems.co.nz)

### **Australia (+61)**

Melbourne..... 03 9016 3410

Sydney..... 02 9098 0996

Brisbane..... 07 3088 4989

Email ..... [Helpdesk@ZealSystems.com.au](mailto:Helpdesk@ZealSystems.com.au)