



AR Teammate E-Mailer 3.5

**Send your Customer Invoices and Statements
via e-mail rather than Snail Mail!**

IT TAKES ALMOST NO TIME!

Is the physical mailing address of your customers harder to keep current than their e-mail address?






Are you losing money, or spending too much time and money collecting it?

Do you spend a lot of time on the tasks of printing and stuffing envelopes?

Do the expenses of postage, paper, envelopes, and ink to support your customer statements seem to be getting out of control?

AR TEAMMATE E-MAILER IS THE ANSWER.

With AR Teammate E-Mailer, you create the *invoices and statements* in handsome PDF files that can include your organization's logo(s). And you can include UDF content as well as traditional data.

-  You select the date range, and several text fields for both the invoices, statements, and the e-mail subject and body.
-  You can generate invoices and statements without sending them to make spot checks for correctness before dispatching a very large number of them.
-  Optionally copy yourself so that you receive a copy of each one sent. You choose to use either the Billing Address or the Service Address.
-  With the Document Designer you can create invoices and statements with unique features for different contexts. Then select which ever one you wish when sending the e-mails.
-  Enjoy the security of our special tracking feature for "missed" customers.



Social Service Agency

Prepare an Accounts Receivable statement emailing. Select a MIP statement, select dates and other parameters, then generate a recipient list.

Statement Information

Select statement: Annual Statements

Include transactions from: 12/31/2007 through: 12/29/2008

Statement header: Monthly Statement

Statement Date: 04/29/2011 Starting Number: 1007

Invoice comment: Comment for Statement setup in MIP.

Remit-to address: Social Services Agency
313 Anderson Lane
Austin, TX 76752

Send to: Billing contact email Service contact email

Generate recipient list

Send to Recipients

Select recipients and send
This list includes all the customers eligible for this statement. Select recipients, provide the email subject and body text, and send.

Include/Exclude all recipients

Include?	Customer name	Email address	Customer ID
<input checked="" type="checkbox"/>	ABC Home Health S...		ABC Health
<input checked="" type="checkbox"/>	Austin Community ...		Austin
<input checked="" type="checkbox"/>	Central Board of Ed...		Education
<input checked="" type="checkbox"/>	First Customer		First
<input checked="" type="checkbox"/>	Parent Help Agency		Parent

Email message text

Subject: Monthly Statement from SSA

Body: Attached is the statement of your account on March 31, 2011. If you have any questions, please phone or e-mail us.

Send BCC copy to self (QJohnson@TeamNFP.com)

Create and send statements

Statement folder: C:\Users\Robert Q Johnson\Desktop

Create without sending Create and send

Generate statements Edit Stmt Format Close