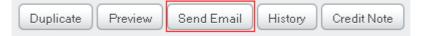## How to Email out Customer Invoices & Statements from within SortMyBooks Online.

SortMyBooks Online has the facility to email out Invoices and Statements to customers from within the software itself. Just follow the steps below:

1. Before you can use this feature you need to make sure that the customers have an E-Mail address specified in their records. To do this go to "Sales – Customers" and look at the email column to see which ones don't have an email address.

Name	Type	Total Due	Email	Telephone
Test	Customer	3872.00		
Test Customer 1	Customer	3016.27	test@testcompany.com	01 2345678
Test Customer 2	Customer	15335.86		

2. To email out an invoice, go to "Sales – Invoices" and click on the Invoice you wish to email. When it opens up you will see 5 buttons on the bottom – the middle one says "Send Email".

Click on this button and a pop-up message will appear asking if you're sure you want to send the email – click "OK" and the system will email the invoice to the customer and take you back to the main invoice overview screen when it's done. This will email the invoice to the customer as a PDF document.

3. To email out a statement go to "Sales – Customers" and click on the customer you wish to send a statement to. When it opens you will see 2 buttons on the bottom – the one on the left says "Send Statement".

Click on this button and a pop-up message will appear asking if you're sure you want to send the email – click "OK" and the system will email a statement from the current accounting year to the customer and take you back to the main customer overview screen when it's done. This will email the statement to the customer as a PDF document.