



How to Guide: Send Bulk Statements.

Sept 2019



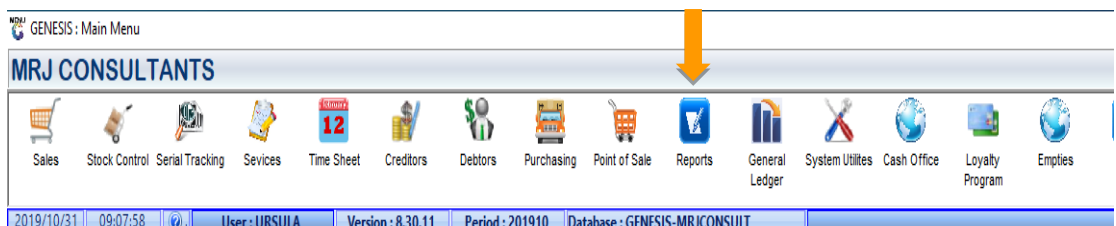
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How to send bulk statements.

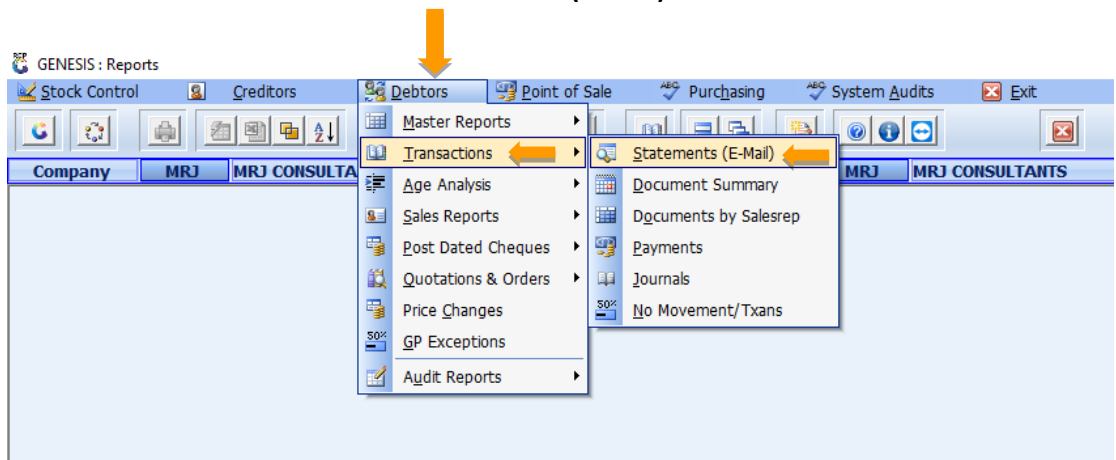
1. Log into 'Genesis Menu'.



2. Click on 'Reports'.



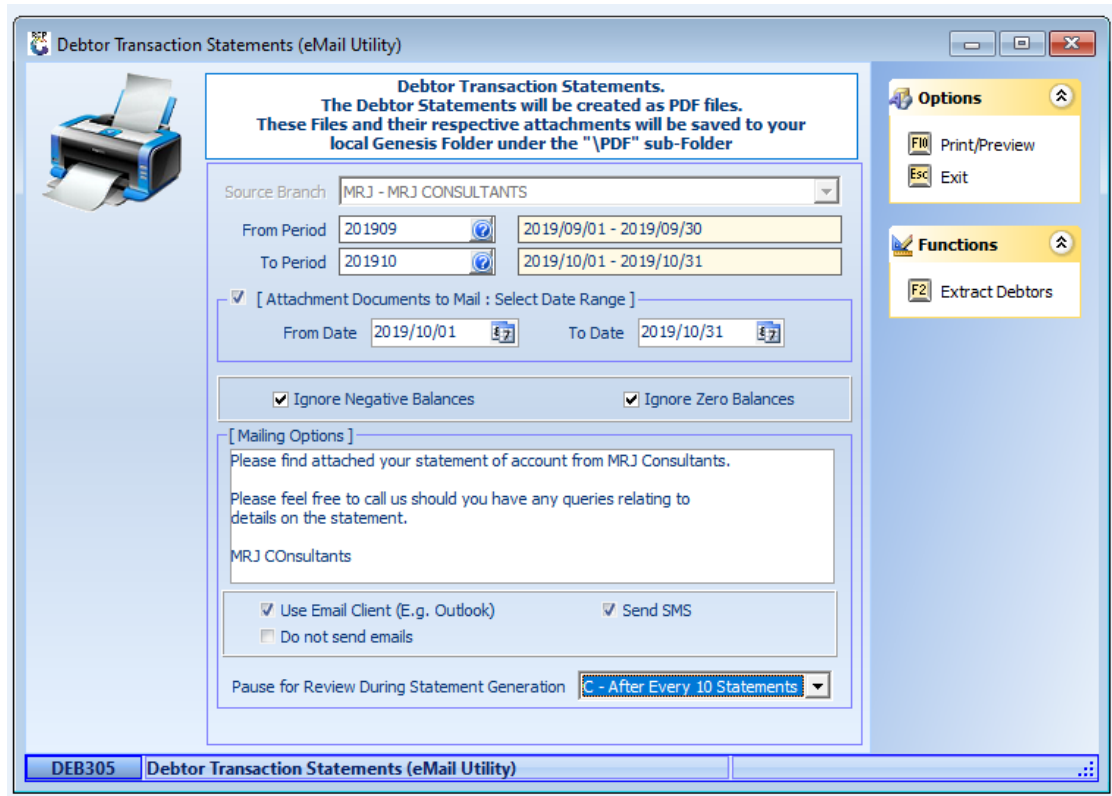
3. Go to 'Debtors' > 'Transactions' > 'Statements (E-Mail)'.



4. On this screen you need to select the **'From Period'** and the **'To Period'**.
 - You can choose to attached all Documents, Invoice and Credit notes for the same period or select a From and To date. *(All documents within that date will be sent with the statement).*

- You can avoid sending statements if the account balance is in a negative or have a zero balance. If you want to do this you need to tick on the tick boxes.
- Under mailing options, you can type in a message, see example below on the screenshot.
- Then we recommend that you tick the tick box that says **'Use Email Client (E.g. Outlook)'** and **'Send SMS'**.

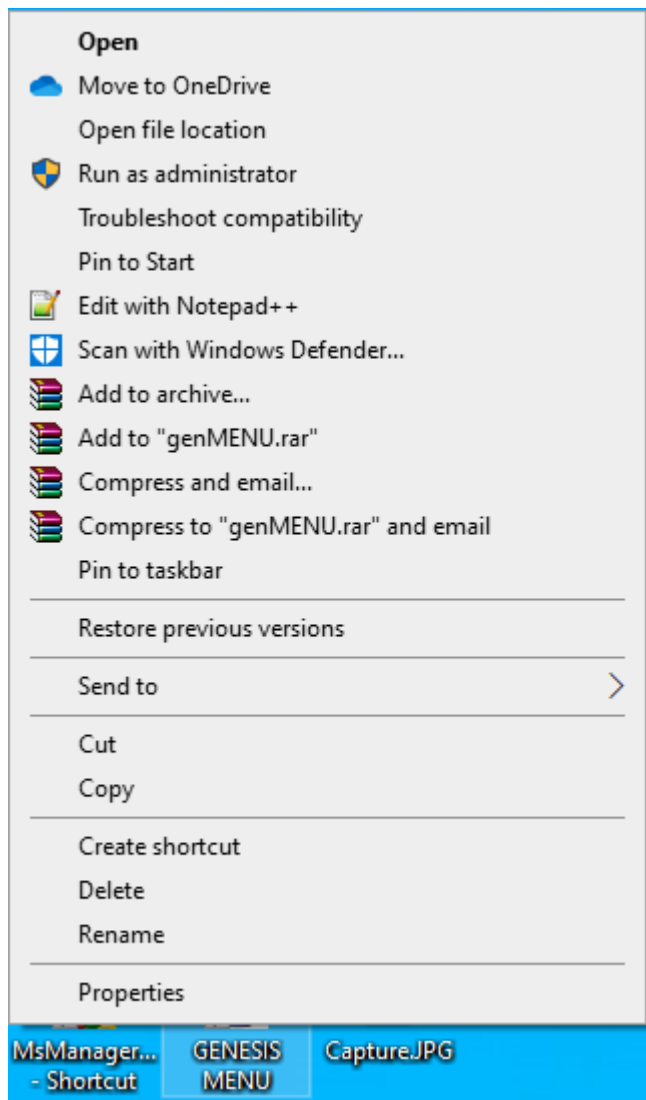
(This option will generate the pdfs and attach it to your email and send the mail. Send SMS will send your Customer an SMS with his account balance.)



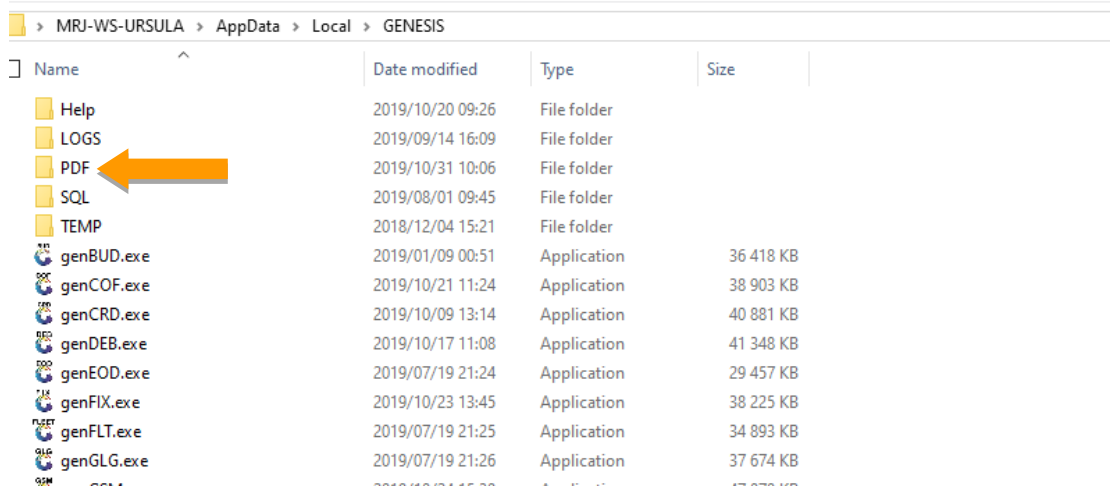
-**'Do not send emails'** will only generate the pdfs under this location of you Pc.

MRJ-WS-URSULA > AppData > Local > GENESIS > PDF				
Name	Date modified	Type	Size	
UB001_STMT_201909-20191031.PDF	2019/10/31 10:06	Adobe Acrobat D...	32 KB	

5. To get to this location. Right click on 'Genesis Menu'.
 - Select 'Open file location.'

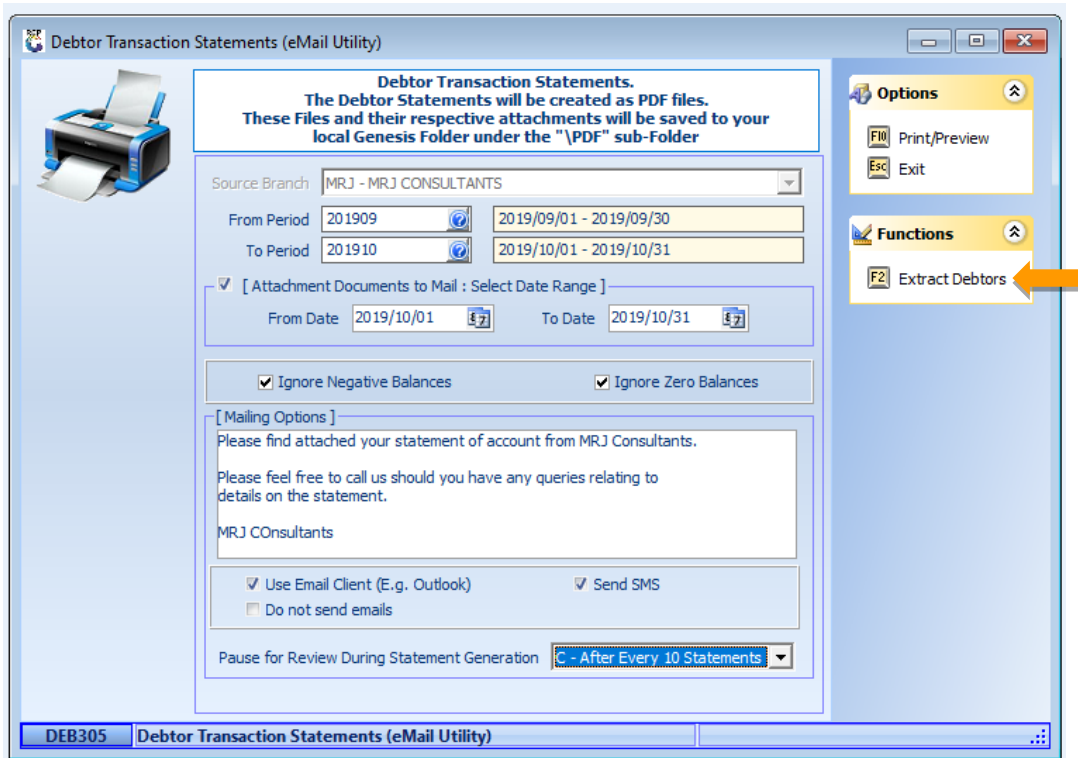


6. Then go to the Pdf Folder.

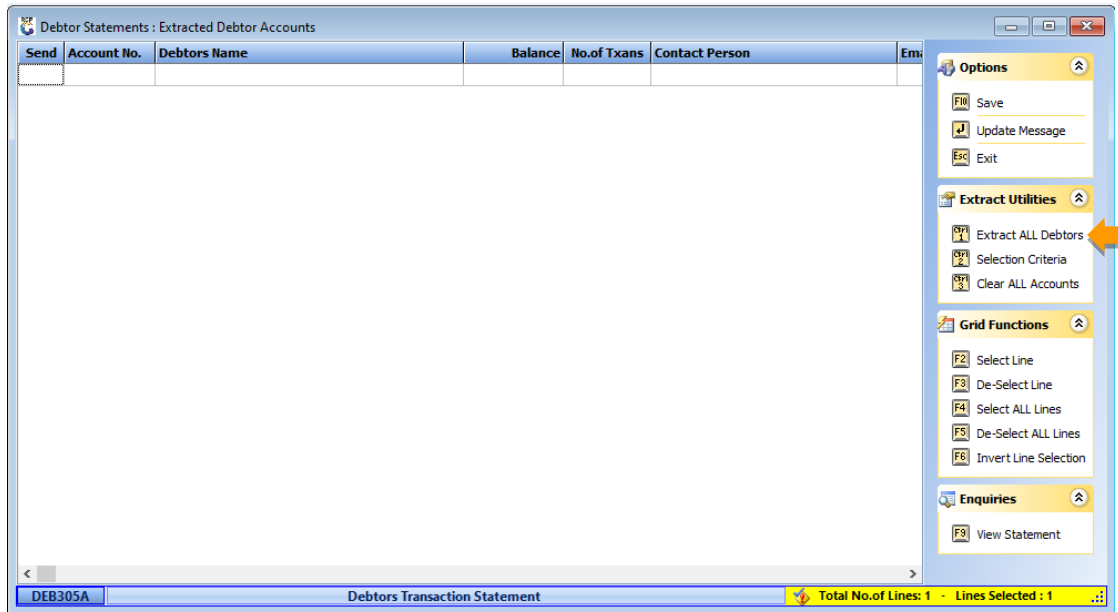


7. Now you need to select your debtors before you can send.

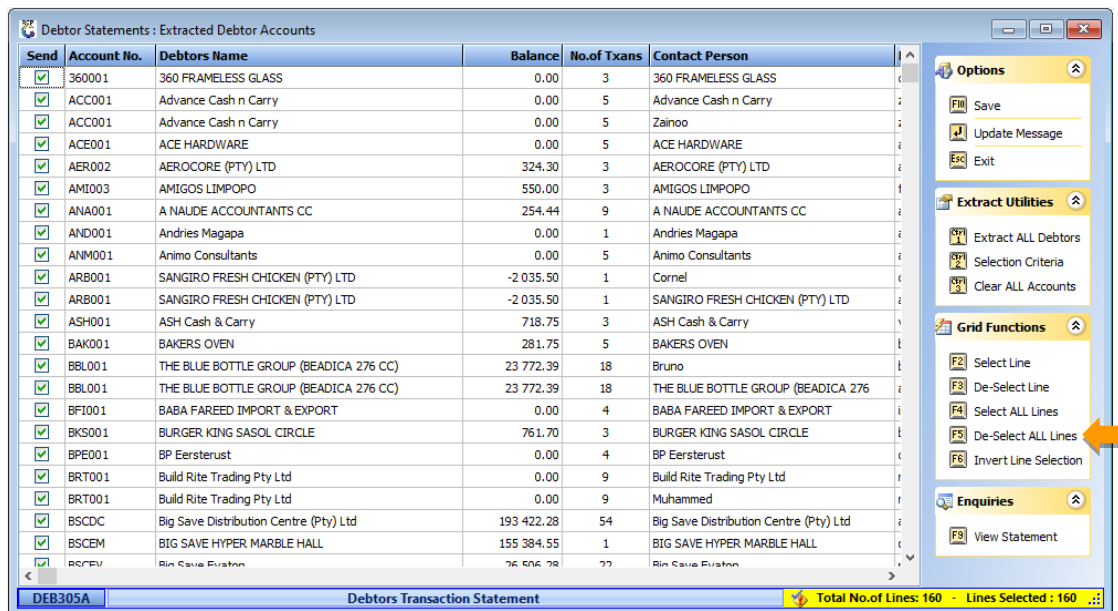
- Click on **'Extract Debtors'** or Press F2.



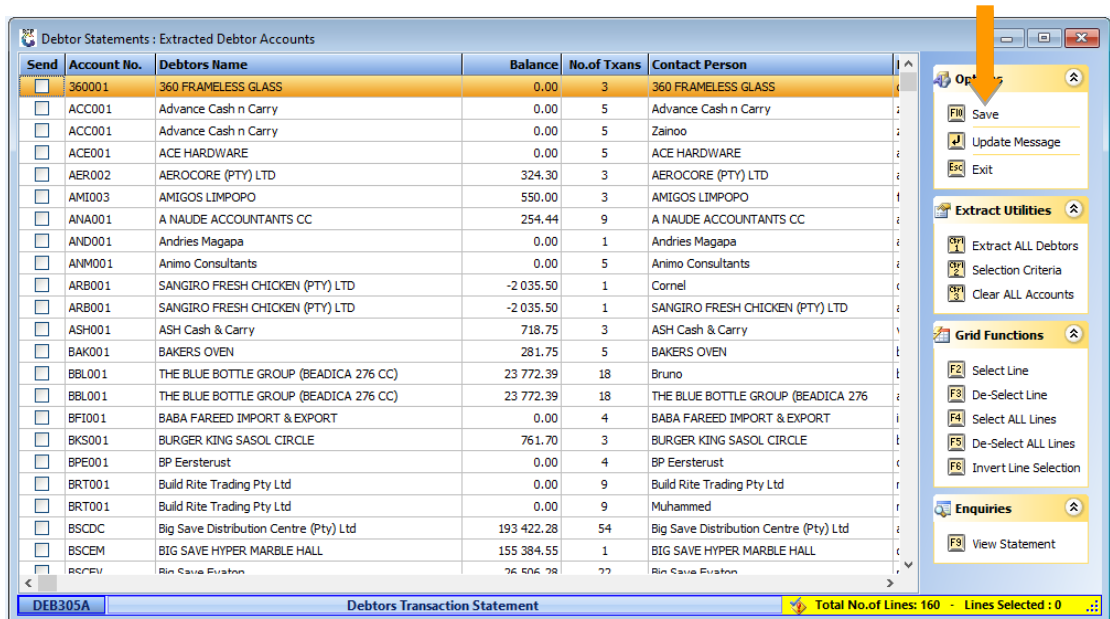
- Click on **'Extract ALL Debtors'**, this will Extract all your Debtors.



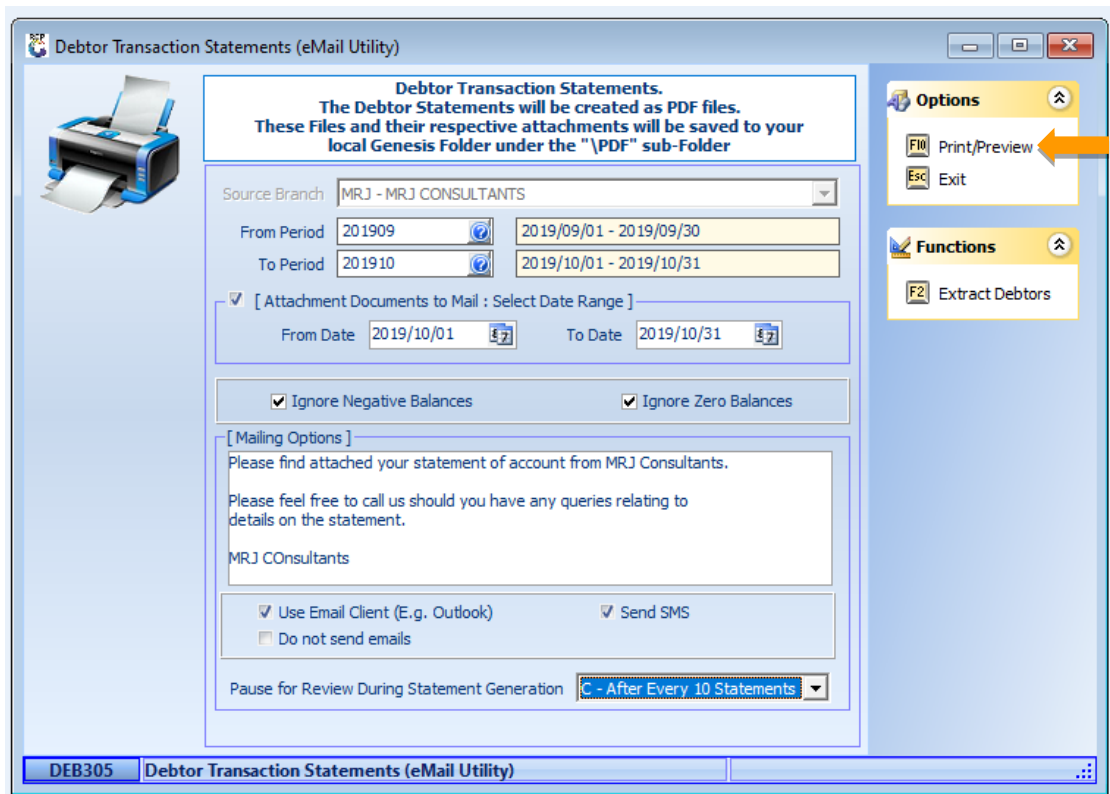
- If you don't want to send a statement to all of them, then you can click on **'De-Select ALL Lines'** or Press F3.



10. You can now select only the debtors you want to send a statement too.
After you have done your selection you must click on **'Save'** or Press F10.

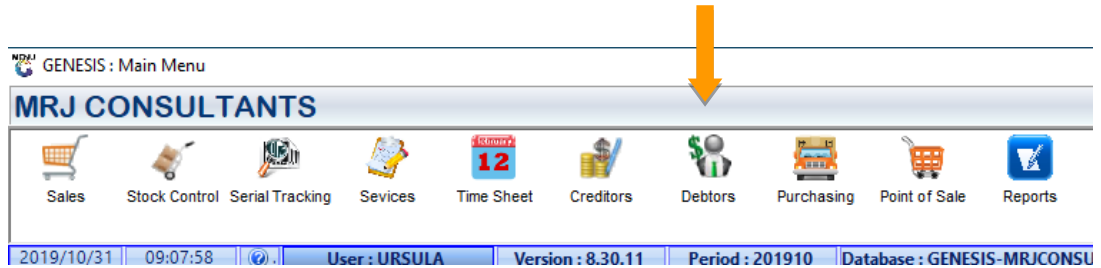


11. After the previous step, you will be back on this screen and you can click on **'Print/Preview'** or press F10. Your statements will be sent.

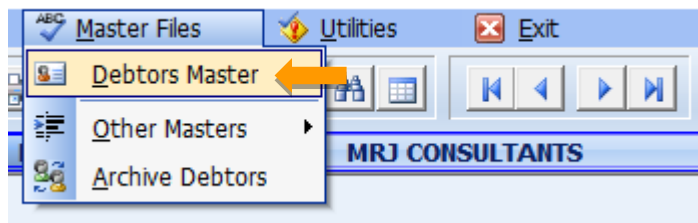


In order for this to work, you need to make sure there is a contact loaded on the debtor with a valid Email address and Cellphone number

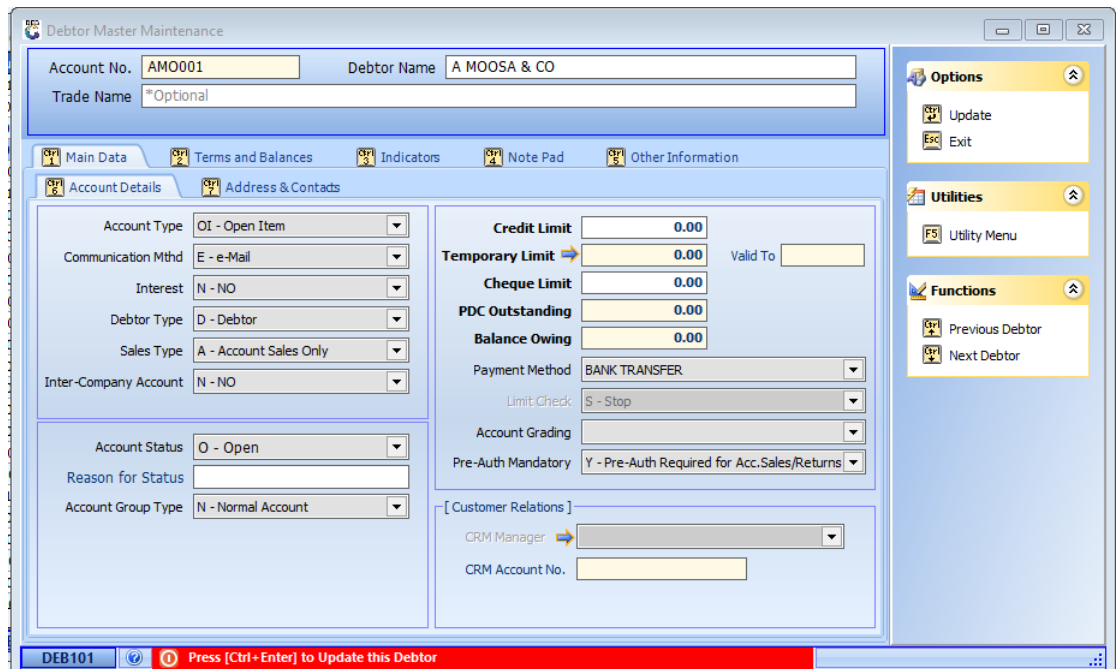
- I. To do this, you have to go to **'Debtors'**.



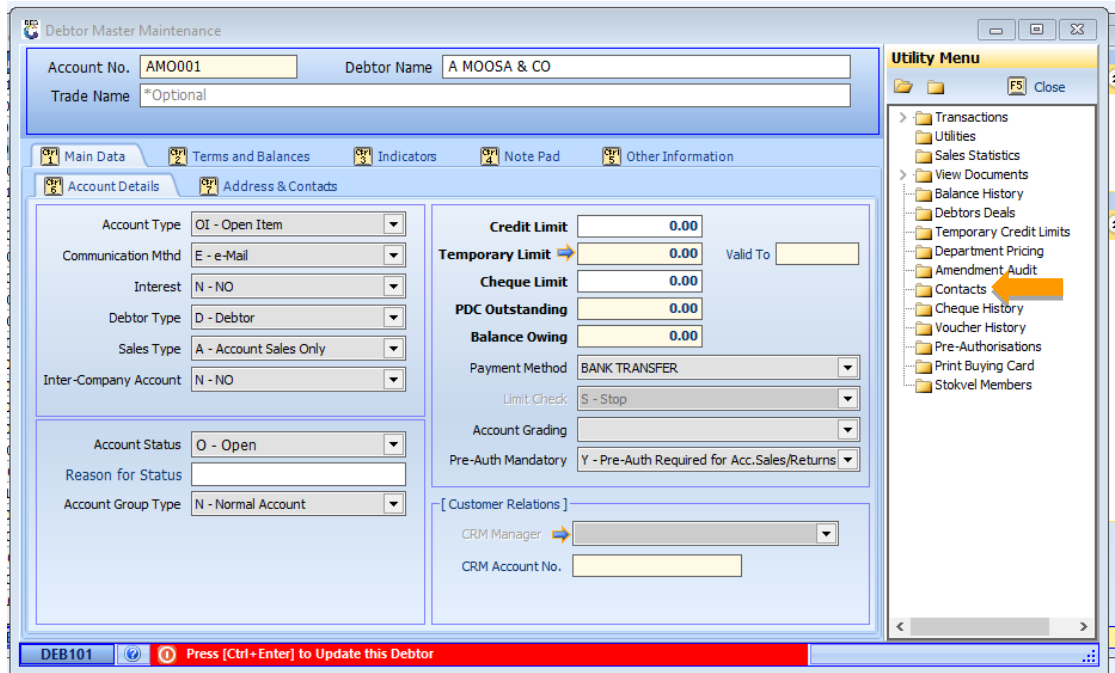
- II. Then go to **'Master Files' > 'Debtor Master'**.
Module



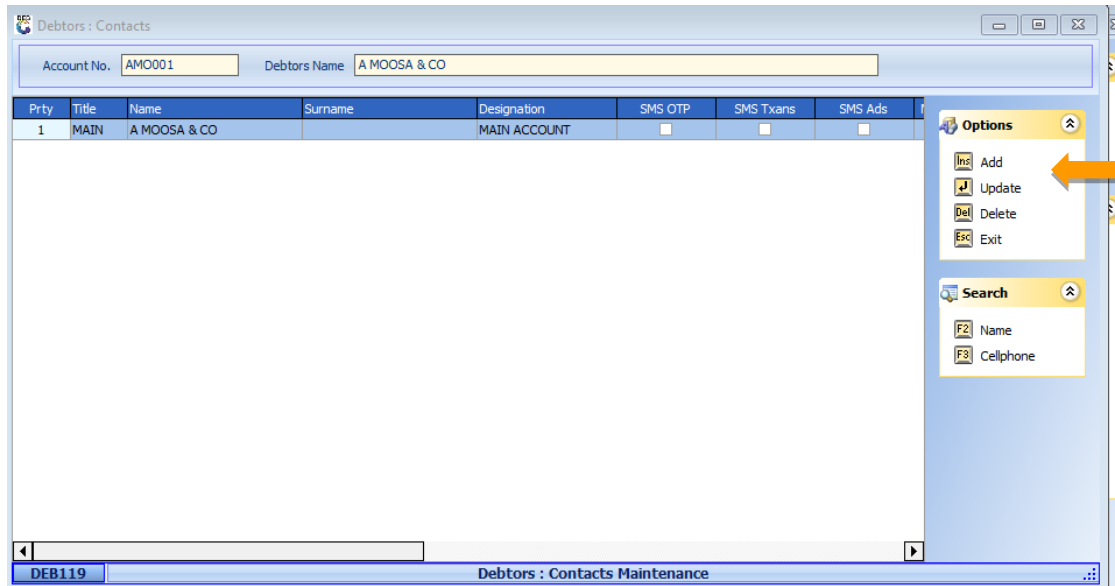
- III. Select a **Debtor** and double click.



IV. Click on **'Utility Menu'** and then on **'Contacts'**.



V. Now you can **'Add'** or **'Update'** a contact.



12. Fill in the contact information and make sure the Email address and Cellphone number are correct.
13. If you want this person to receive statements and SMS's, you need to tick the tick boxes that says 'Email statements' and 'SMS Txan Notifications'.

Debtors: Contacts Maintenance

Account No. AMO001 A MOOSA & CO

Priority Seq. 1 Title MAIN

First Name A MOOSA & CO

Surname

Designation MAIN ACCOUNT Department

Birth Date

Telephone #1

Telephone #2 0123708000

Email Address amoosanco@gmail.com

Website

Fax

Cellphone

[Residential Contact Details]

Telephone #1 0123708000

Telephone #2

[Last Updated]

Date 2019/07/17

Time 17:04:10

Machine ID MRJSQSVR

User Code SYSTEM

[Communication Options]

Email One-Time-PIN SMS One-Time-PIN

Email Statements SMS Txan Notifications

Email Quotes/Invoices SMS Marketing

Options

F10 Save

Esc Exit

DEB119A Debtors Contacts Maintenance

That concludes the User Guide.