

MYOB EXO tip of the week

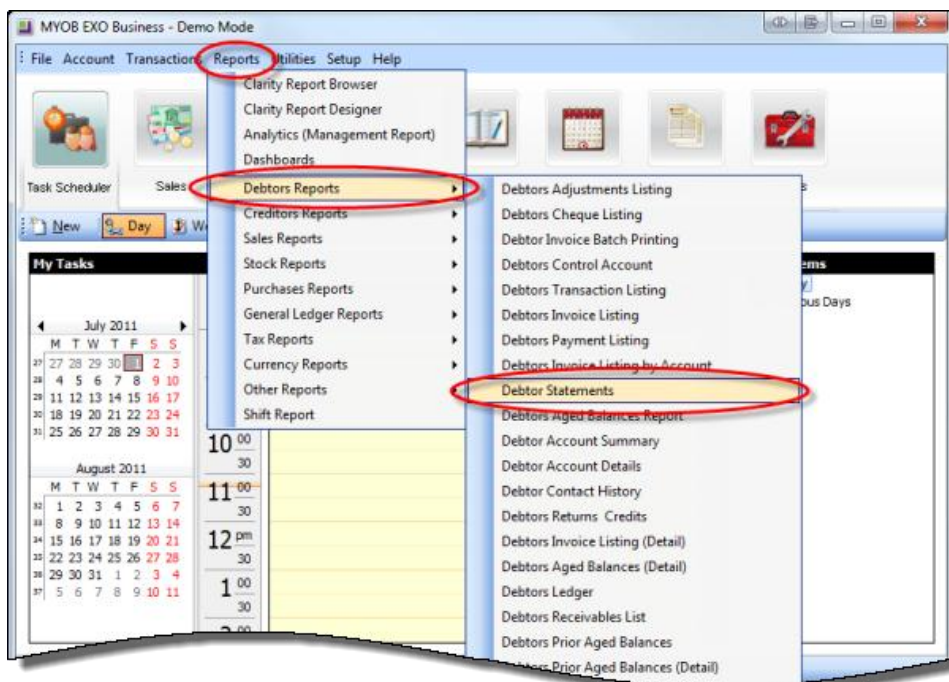
Emailing Statements in MYOB Exo Version 8.2

Sending out statements to Debtors can be very time consuming and costly. Emailing statements can speed up the process and make them more affordable.

MYOB has introduced in Version 8.2, the ability to email Debtor statements by using Mailshot which has made the mass emailing more robust.

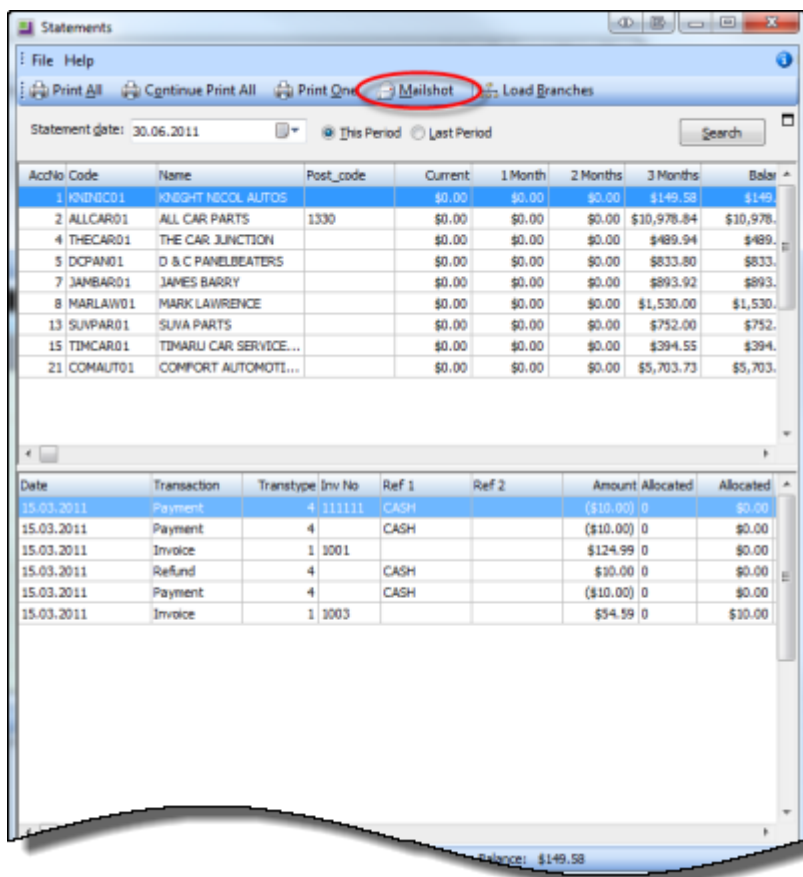
Please note that your menus may be set up differently from the DEMO used in this tip of the week. If the statement process is not available on the menu then please contact your system administrator.

To access the statements go to Reports -> Debtors Reports -> Debtor Statements.

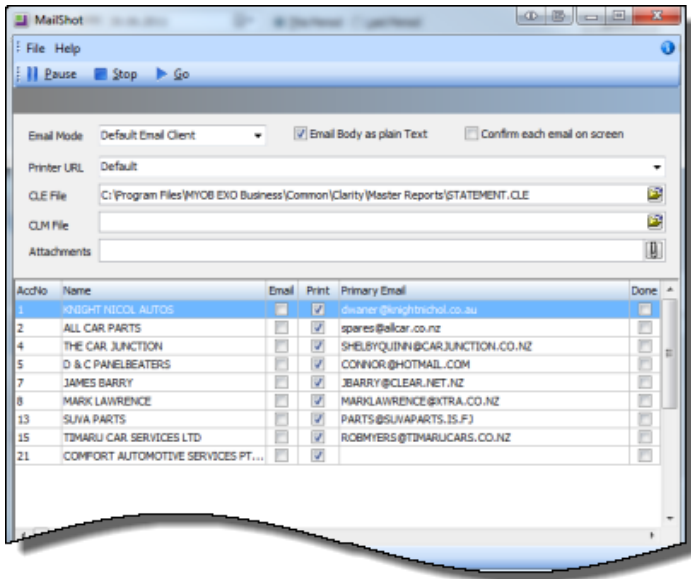


The Statements screen will display. This screen shows the awaiting statements and the appropriate transactions in the lower part of the screen. Double click on each account to display the associated transactions. The option to further drill down onto each transaction is available.

To email out the Statements, select the new **Mailshot** icon:

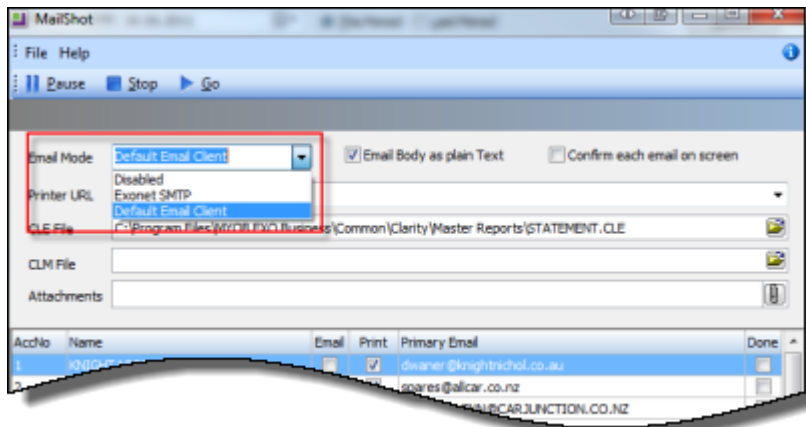


The Mailshot screen looks like this:



Firstly choose the **Email Mode**:

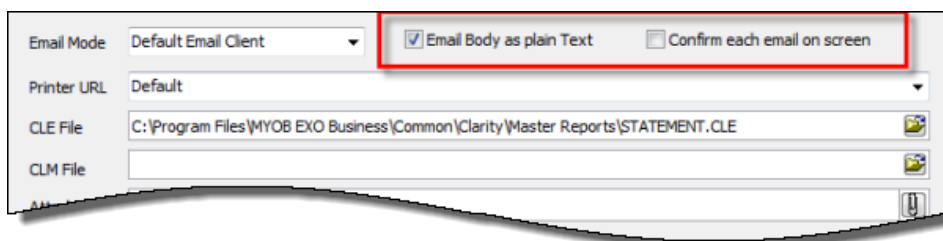
- **Disabled** - Emails will not be sent
- **Exo SMTP** - good for sending large batches of emails
- **Default Email Client** - will use the default emailing program, and is good for smaller batches of emails



The next two things to consider are whether to set the email body to be plain text or html, and if a confirmation screen should display for each email.

The benefits of sending as plain text is that a smaller file is used and most clients will accept the email with no issues. The drawbacks are that images and formatting will not be in the email.

If **Confirm each email on screen** is selected then every email that is being sent will come up on the screen to be checked. This is not an issue if only a few emails are being sent but could be time consuming if a large batch is being sent.



If a mail merge document is to be used then search the directory for the document. Mailshot also allows attachments to be added to emails.

AccNo	Name	Email	Print	Primary Email	Done
1	KNIGHT NICOL AUTOS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	dwaner@knightnichol.co.au	<input type="checkbox"/>
2	ALL CAR PARTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	spares@allcar.co.nz	<input type="checkbox"/>
4	THE CAR JUNCTION	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SHELBYQUINN@CARJUNCTION.CO.NZ	<input type="checkbox"/>
5	D & C PANELBEATERS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CONNOR@HOTMAIL.COM	<input type="checkbox"/>
8	MARK LAWRENCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARKLAWRENCE@XTRA.CO.NZ	<input type="checkbox"/>
6		<input type="checkbox"/>	<input checked="" type="checkbox"/>	PARTS@MARKETPARTS.CO.NZ	<input type="checkbox"/>

Next select which statements will be emailed or printed. Both of these options can be selected if the statement is to be printed and emailed. Leave the options un-ticked if neither option is applicable.

AccNo	Name	Email	Print	Primary Email	Done
1	KNIGHT NICOL AUTOS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	dwaner@knightnichol.co.au	<input type="checkbox"/>
2	ALL CAR PARTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	spares@allcar.co.nz	<input type="checkbox"/>
4	THE CAR JUNCTION	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SHELBYQUINN@CARJUNCTION.CO.NZ	<input type="checkbox"/>
5	D & C PANELBEATERS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CONNOR@HOTMAIL.COM	<input type="checkbox"/>
8	MARK LAWRENCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARKLAWRENCE@XTRA.CO.NZ	<input type="checkbox"/>
9	MARKET PARTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PARTS@MARKETPARTS.CO.NZ	<input type="checkbox"/>
10	NIGEL EMERSON	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NIGELEMERSON99@HOTMAIL.COM	<input type="checkbox"/>
13	SUVA PARTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PARTS@SUVA PARTS.IS.FJ	<input type="checkbox"/>
15	TIMARU CAR SERVICES LTD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ROBYMERS@TIMARUCARS.CO.NZ	<input type="checkbox"/>
21	COMFORT AUTOMOTIVE SERVICES PT...	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>

Once the list is correctly selected then click on **Go**. The option to **Pause** or **Stop** during the emailing process is available if required.



Once all emails are sent the **Done** checkboxes will be ticked.

AccNo	Name	Email	Print	Primary Email	Done
1	KNIGHT NICOL AUTOS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	dwaner@knightnicol.co.au	<input checked="" type="checkbox"/>
2	ALL CAR PARTS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	spares@allcar.co.nz	<input checked="" type="checkbox"/>
4	THE CAR JUNCTION	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SHELBYQUINN@CARJUNCTION.CO.NZ	<input checked="" type="checkbox"/>
5	D & C PANELBEATERS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CONNOR@HOTMAIL.COM	<input checked="" type="checkbox"/>
8	MARK LAWRENCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARKLAWRENCE@XTRA.CO.NZ	<input checked="" type="checkbox"/>
9	MARKET PARTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PARTS@MARKETPARTS.CO.NZ	<input type="checkbox"/>
10	NIGEL EMERSON	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NIGEMERSON99@HOTMAIL.COM	<input type="checkbox"/>
13	SUVA PARTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PARTS@SUVA PARTS.IS.FJ	<input type="checkbox"/>
15	TIMARU CAR SERVICES LTD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ROBMYERS@TIMARUCARS.CO.NZ	<input type="checkbox"/>
21	COMFORT AUTOMOTIVE SERVICES PT...	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>