Step by Step Guide to

Unpaid Billing Email Notification

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Purpose of this Guide

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Purpose of this Guide

- This guide helps Accounting Seed users **automatically** send an email to a customer who has an Unpaid Invoice
- We will look at how to create an **email template**
- Then we will create a Workflow Rule

Create a Workflow Rule

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Create a Workflow Rule

- We will use a Workflow Rule to automate the process of sending an email when a Billing is 30 days old
  - For more info on workflow rules you can read this Salesforce article: https://help.salesforce.com/articleView?id=customize_wf.htm&type=5
- Click on the **Gear** icon on upper right hand corner and choose **Setup**
- In **Quick Find** search for **Workflow Rules** and click on it
- On the Workflow Rules page click on **New Rule**
- On Step 1: choose the **Billing** object
- On Step 2:
  - Rule Name: Billing Due
  - Evaluation Criteria: created, and any time it's edited to subsequently meet criteria
  - Run this rule if the **formula evaluates to true**
  - In the formula box paste in the below & click **Save & Next**:

    AND(AcctSeed__Balance__c > 0, Text(AcctSeed__Status__c) = 'Posted', Today() >= AcctSeed__Date__c, Text(AcctSeed__PDF_Email_Status__c) = 'Sent')

- Step 3: Under **Time-Dependent Workflow Actions** click on **Add Time Trigger**
  - Under **Workflow Time Trigger Edit** enter 5 [you can enter any number that makes sense for your business] days after **Billing: Due Date**
  - Click **Save**
  - In the Add Workflow Action picklist choose **New Email Alert**

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Create Workflow Rule

We are on the **New Email Alert** page. Fill out the fields as follows:

- Description: Billing Due email
- Unique Name: auto populates
- Email Template: choose the Billing Due Date email template you wish to use
    - If you don't have a template, you can look at the next slide for directions for creating one
- Recipient Type (we are indicating who the email will be sent to):
    - Search: Related Contact
    - Available Recipients: Related Contact: Billing Contact
    - Additional Emails: You can enter additional recipients to be CCed into the email. Perhaps you want your accountant to be copied on all the Billing Due emails
    - From Email Address: this article will help you decide which option to pick.
        - https://help.salesforce.com/articleView?id=000171303&type=1
- Click **Save**
- On the Edit Rule Billing Due page click **Done**
- On Workflow Rule: Billing Due page click **Activate**

Create an Unpaid Billing Email Template

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Create an Unpaid Billing Email Template

1. In Setup's *Quick Find* search for and click on **Classic Email Templates**
2. Click on **New Template**
3. Choose **HTML** and click **Next**
4. Fill out the fields:
   - Available For Use: True
   - Email Template Name: Billing Due Email
   - Letterhead: You need to create a Letterhead if you don't already have one Here are directions to do so: https://tinyurl.com/y4gbjw8n
   - Description: This template is used to email a billing due
   - Subject: {!Organization.Name} - Overdue Invoice #{!AcctSeed__Billing__c.Name}

1. Click **Next**
2. HTML Email Content: Paste the below:

```
{!Contact.Name},<br/><br/>

Attached is your billing #{!AcctSeed__Billing__c.Name} dated {!AcctSeed__Billing__c.AcctSeed__Date__c}. The current balance on this billing is {!AcctSeed__Billing__c.AcctSeed__Balance__c}<br/><br/>

Please <a href="{!AcctSeed__Billing__c.AcctSeed__Payment_Link__c}">click here</a> to pay this billing.<br/><br/>

Thank you for your business,
 {!Organization.Name}
```

8. Click **Next**
9. Click **Copy Text from HTML version**
10. Click **Next**
11. Click **Save**