Sample Client Letter

This is a sample letter to send to vendors to begin using

a Cloud Document Program and Direct Deposit Systems

We are changing to a new document management system.

Good Day,

[Your Company Name} has starting using a cloud-based document management program. Effective today please send all invoices, statements & remittance forms to [**Custom Hubdoc Email**] @app.Hubdoc.com.

Each document (bill…) must be a single PDF and you can send a number of PDF’s in one email to Hubdoc. Multi page for a single document is fine, but the program does not currently split multiple bills saved as a single file.

We will also be migrating to an online payment program soon and would appreciate if you would send us a scan of a void cheque by reply emails or by post if you prefer. If you are uncomfortable giving us your bank info, we will also be using eTransfer; so if you let us know the email address to eTransfer to we would be happy to do that instead. Please fill out the information below and attach your void cheque.

Thank you;

[Name of your Company Authorizing Person]

[Your Telephone Number]

[Your Email]

**Payment System Information:**

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bank Code (3 Digit) : \_\_\_\_\_\_\_\_\_ Bank Transit# (5 digit): \_\_\_\_\_\_\_\_\_\_\_\_ Bank Account#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you prefer e-transfer please provide email to send transfers to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Answer to the e-transfer security question will be: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Copy/paste or retype into an email or a document.**

**Begin by emailing out to your suppliers or mailing it with cheques.**

**Input data into Plooto as the vendor banking information is sent back to you.**

  