Customer Statement

To Create a Customer Statement:

1) From the HOME page choose 'Statements'
2) Modify the Statement Date
3) To include all the customer activity for a specific date rage, select Statement Period and define the date range

   -or-

   Choose All open transactions as of Statement Date; the option exists to Include only transaction over a specified number of days past due date
4) Select All Customers, Multiple Customers, One Customer or Customers of Type
5) Select the statement template
6) Statements can be generated per customer or per job, specify which is desired
7) Indicate whether to include invoice details and/or due dates on the statement
8) Indicate whether to generate statements with a balance under a defined amount and/or no activity for the indicated period
9) If you wish to include finance charges, click Assess Finance Charges
   a. A pop up window Assess Finance Charges will appear
   b. Make sure the appropriate customers are check (to uncheck – click on the customer line)
   c. Click Assess Charges
   d. If there are unapplied payments for the customers selected a pop up window Customer Has Unapplied Payments will appear, click OK
10) Preview the statements by clicking Preview
11) If the statements will be mailed click Print, after the statement is sent to the printer a pop up box Did Statement(s) print OK? will appear, click Yes
12) If the statements will be e-mailed, click E-mail, a pop up box Edit E-mail Information will appear, update the information and click Send Now