

# Customer Statements

Last Modified on 04/20/2022 4:49 pm EDT

The Customer Statements report option serves two purposes: generating customer statements and printing customer statements. On the customer record, if the delivery method is set to Print, users will print the statements that need to be mailed to the customer.

The statement generation process creates a .pdf file for customers that received printed statements. Users download the .pdf file and print the statements.

## Print Customer Statements

To print customer statements, navigate to Reports > Accounts Receivable > Customer Statements.

The Customer Statements page is displayed. In the lower panel of the page is the Statement Batch Runs listing. If there is a value greater than 0 in the Printed column, click the download button to the right. In a few seconds, the statement file appears on the task bar. Open the file to print or to save to the desired location for printing later.

A sample statement is shown below.

The screenshot shows the 'Customer Statements' configuration page. At the top right is a 'Generate Preview' button. The configuration is split into two columns. The left column includes: 'Charge Late Fee?' (checked), 'Annual Interest Rate' (18.00%), 'Statement Date' (3/28/2022), and 'Statement Message' (This is the Memo field from the Statement Rules setup). The right column includes: 'Incl Unapplied Cash?' (checked), 'Min Balance' (\$5.00), 'Min Days' (30.00), 'Min Late Days' (30.00), and 'Min Late Fee Amount' (\$3.99). Below the configuration is a 'Statement Batch Runs' table with columns: Created Date, Mailed, Emailed, Printed, Statement Date, and Created By. The 'Printed' column values are 2, 2, 2, 2, and 1. A green circle highlights the 'Printed' column. To the right of the table is a download icon (a square with a downward arrow) for each row, also highlighted with a green circle. At the bottom, there is a pagination bar showing '1 - 10 of 108 items' and a 'Refresh' button.

Created Date	Mailed	Emailed	Printed	Statement Date	Created By
Mar 28, 2022	10	19	2	Mar 28, 2022	bestsecurity
Mar 21, 2022	11	18	2	Mar 21, 2022	bestsecurity
Mar 2, 2022	11	11	2	Mar 2, 2022	bestsecurity
Feb 10, 2022	0	8	2	Feb 10, 2022	bestsecurity
Jan 14, 2022	0	8	1	Jan 14, 2022	bestsecurity

## Sample Customer Statement



**Best Security**  
 547 E Washington St.  
 Suite 2111  
 Chagrin Falls, OH 44023  
 800-867-5309  
 bestsecurity.com

# Statement

Customer # <b>1035</b>	Statement Date <b>04/01/2022</b>	Total Due <b>\$36,743.15</b>	Amount Paid <b>\$</b>
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To: Roger Waters  
 1000 Arnold Lane  
 Kent, OH 44240

Remit To: Best Security  
 547 E. Washington Street  
 Apt. 211  
 Chagrin Falls, OH 44023

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 Detach and return with your payment

Customer Name <b>Roger Waters</b>	Customer # <b>1035</b>	Statement Date <b>04/01/2022</b>	Amount Due <b>\$20,579.84</b>
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Invoice #	Invoice Date	Due Date	P.O. #	Invoice Amount	Amount Due
<i>Roger Waters, 1000 Arnold Lane Kent, OH</i>					
20571	10/01/2018	10/01/2018		\$105.49	\$105.49
20555	09/01/2018	09/01/2018		\$105.49	\$105.49
20526	06/01/2018	06/01/2018		\$210.98	\$210.98
20539	08/01/2018	08/01/2018		\$210.98	\$210.98
20512	04/01/2018	04/01/2018		\$105.49	\$105.49
20499	03/01/2018	03/01/2018		\$105.49	\$105.49
20487	02/01/2018	02/01/2018		\$105.49	\$105.49
20415	12/01/2017	12/01/2017		\$105.49	\$105.49
20440	01/01/2018	01/01/2018		\$105.49	\$105.49
10197	12/06/2016	12/06/2016		\$210.98	\$210.98
20260	10/01/2017	10/01/2017		\$316.47	\$316.47
20240	07/26/2017	07/26/2017		\$421.96	\$421.96
10189	10/23/2016	10/23/2016		\$843.92	\$843.92
20213	01/06/2017	01/06/2017		\$105.49	\$105.49
20224	03/02/2017	03/02/2017		\$105.49	\$105.49
20227	03/10/2017	03/10/2017		\$12,786.60	\$12,786.60
20229	04/05/2017	04/05/2017		\$13.48	\$13.48
10179	02/26/2016	02/26/2016		\$210.98	\$210.98
20281	11/02/2017	11/02/2017		\$105.49	\$105.49
20291	11/01/2017	11/01/2017		\$105.49	\$105.49
20300	11/01/2017	11/01/2017		\$105.49	\$105.49

0-30 Days <b>\$65.13</b>	31-60 Days <b>\$0.00</b>	Over 60 Days <b>\$20,514.71</b>	Late Fees <b>\$16,163.31</b>	Open Credits <b>\$0.00</b>	Total Due <b>\$36,743.15</b>
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### CONTACT US

Billing Questions <b>(440) 551-4464 x123</b>	Sales <b>(222) 222-2222</b>	Central Station <b>(333) 333-3333</b>	Service <b>(123) 221-2333</b>	Email <b>mary.smith@bestsecurity.com</b>
To pay online, please visit: <a href="http://bestsecurity.com">http://bestsecurity.com</a>				

Thank you for your business!