

Automated Statements

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If your company wants to generate statements in an automated fashion, navigate to setup with this path: Setup > Utilities > Automation.

At the bottom of the Automation page, click the Statement Generation toggle button to On. Lastly, select the day of the month statements will be generated. When finished click the Save button at the upper right of the page.

Once statements have been generated, if any customers have a delivery method of print, you will need to manually print these statements. Customers with a delivery method of email or mail, will automatically be delivered.

The screenshot shows the 'Automation' configuration page. At the top right is a green 'Save' button with a checkmark. The page is divided into several sections:

- Email Summary:** A toggle switch set to 'OFF' with a help icon.
- Forte Payment Submit:** A toggle switch set to 'OFF' with a help icon.
- Forte Funding:** A button with a lightning bolt icon and the text 'Run Now'.
- Expiring Credit Card Summary:** A toggle switch set to 'OFF' with a help icon.
- Invoice/Credit Delivery:** A toggle switch set to 'OFF' with a help icon.
- RMR Invoice Delivery:** A toggle switch set to 'OFF' with a help icon.
- RMR Generation:** A toggle switch set to 'ON' with a help icon. Below it are dropdown menus for 'Run on the 1st day of the month', 'RMR Next Invoice for Current Month', and 'Invoice Date is the 1st day of Current Month'. Below these are four lines of red text: 'Next RMR Run Date: 04/01/2022', 'RMR Next Invoice Date: 04/01/2022', 'Invoice Date: 04/01/2022', and 'Next CC/Check Funding Date: 04/xx/2022'.
- Master RMR Generation:** A toggle switch set to 'OFF' with a help icon.
- Statement Generation:** A toggle switch set to 'ON' with a help icon. Below it is a dropdown menu for 'Run on the 1st day of the month' and a line of red text: 'Next Statement Run Date: 04/01/2022'. Below that is a link: 'Statement processing will use statement defaults as specified in [Statement Rules](#)'.