Automated Statements

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.