

Manual Statements

Last Modified on 04/29/2022 10:40 am EDT

To manually generate statements, navigate to Accounts Receivable > Reports > Customer Statements.

The Customer Statements page will be displayed. The upper two panels will auto-fill with the options saved in Statement Rules. You may change any of these settings. The Statement Date will default to today's date, however you may change this if necessary.

After completing the statements rules, click on the Generate Preview button at the upper right of the page.

Created Date	Mailed	Emailed	Printed	Statement Date	Created By
Mar 21, 2022	0	0	0	Mar 21, 2022	bestsecurity
Mar 21, 2022	0	0	0	Mar 21, 2022	bestsecurity
Mar 21, 2022	0	0	0	Mar 21, 2022	bestsecurity
Mar 12, 2022	0	0	0	Mar 12, 2022	bestsecurity
Mar 11, 2022	0	0	0	Mar 11, 2022	bestsecurity
Mar 11, 2022	0	0	0	Mar 11, 2022	bestsecurity
Mar 10, 2022	0	0	0	Mar 10, 2022	bestsecurity
Mar 10, 2022	0	0	0	Mar 10, 2022	bestsecurity
Mar 4, 2022	0	0	0	Mar 4, 2022	bestsecurity
Mar 2, 2022	0	0	0	Mar 2, 2022	user004sf

In a few seconds, the Deliver Customer Statements page will be displayed. The grid contains all customers eligible for a statement according to the statement rules. If you want to create and deliver the statements for all customers in the grid, check the box to the left of the Customer # column header. If you want to select certain customers from the list, check the box to the left of each customer that will receive a statement.

When finished, click the Deliver Customer Statements button at the bottom 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.

Deliver Customer Statements



<input checked="" type="checkbox"/>	Customer #	Customer Name	Last Statement Date	Deliv. ↓	Open Balance	Late Fee To Apply
<input checked="" type="checkbox"/>	1035	Waters, Roger	Nov 12, 2021	Print	\$20,514.71	\$16,122.09
<input checked="" type="checkbox"/>	1038	All Electronics	Nov 12, 2021	Print	\$6,546.90	\$1,520.69
<input checked="" type="checkbox"/>	1039	Grossman, Matt	Nov 12, 2021	Print	\$7,126.60	\$5,723.60
<input checked="" type="checkbox"/>	1030	Jones, Drew	Dec 20, 2021	Mail	\$7,449.10	\$5,939.87
<input checked="" type="checkbox"/>	1033	Parsons, Alan	Nov 12, 2021	Mail	\$18,006.35	\$8,473.35
<input checked="" type="checkbox"/>	1052	Patterson, Josh	Nov 12, 2021	Mail	\$17,138.23	\$8,291.93
<input checked="" type="checkbox"/>	1028	Papay, Travis	Dec 21, 2021	Email	\$17,859.42	\$1,146.87
<input checked="" type="checkbox"/>	1034	Cocker, Alta	Nov 12, 2021	Email	\$5,282.02	\$3,141.71
<input checked="" type="checkbox"/>	1064	Gaetjens, Jeff	Nov 12, 2021	Email	\$5,494.86	\$0.00
<input checked="" type="checkbox"/>	1066	mctester, testv	Nov 12, 2021	Email	\$18,070.63	\$6,347.24

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✕ Cancel

+ Deliver Customer Statements