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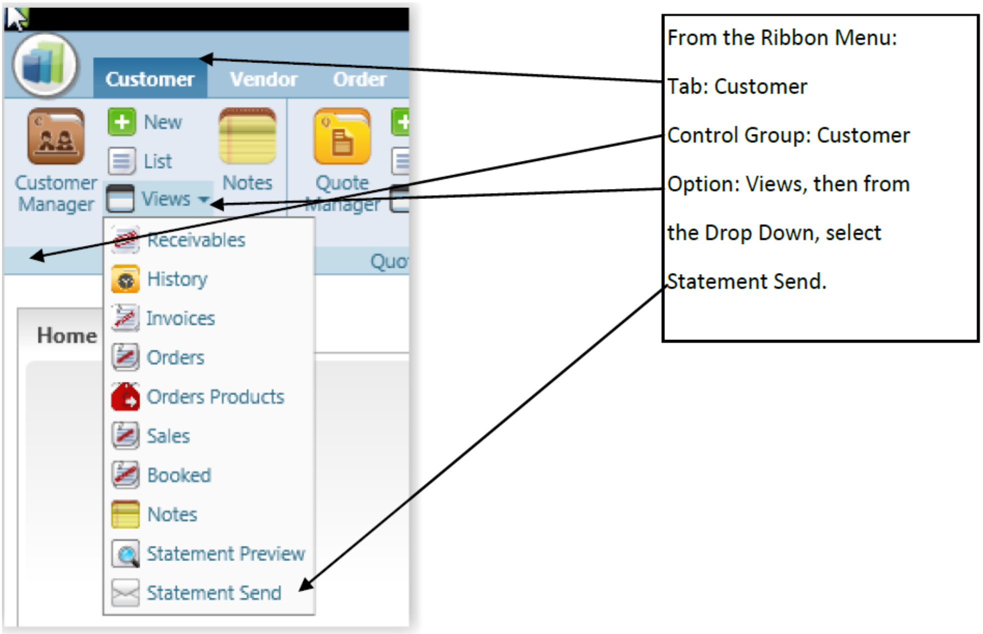
How Do You Create a Statement for a Customer?

Tammy Mason - 2022-07-18 - in Customers

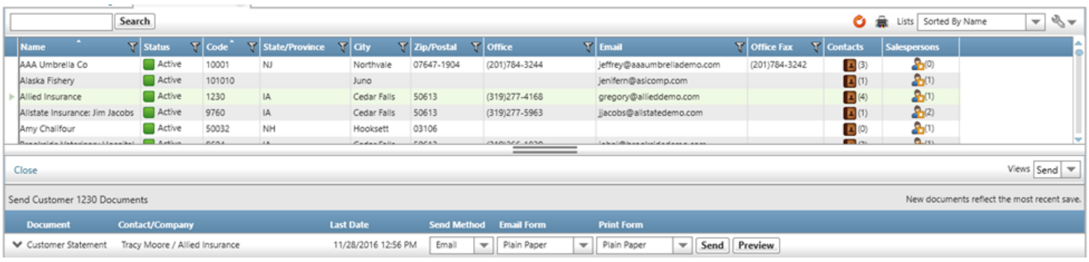
How Do You Create a Statement for a Customer?

Short Answer: View option for a customer.

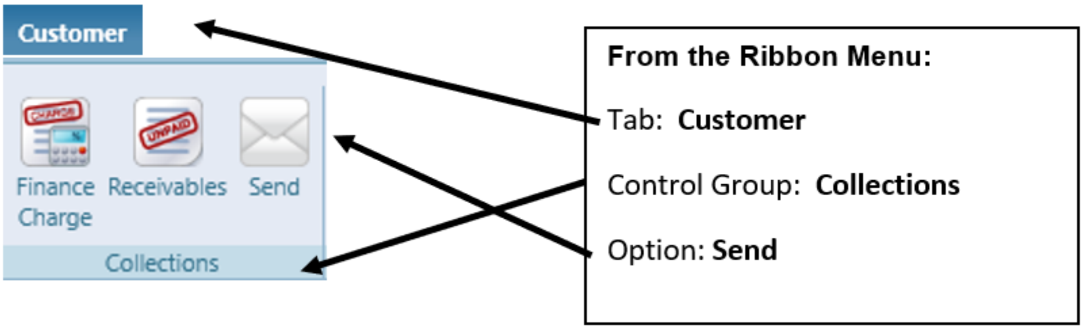


Explanation: Customer statements are unique to each customer. Statements can be sent via email or print.

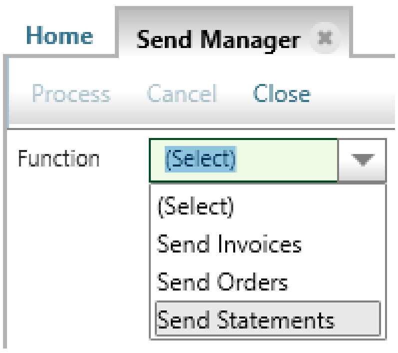
The Customer Manager window will load. Select the appropriate customer from the list. Once that customer loads in the edit window on the bottom, you can "Preview" the statement or select which option to "SEND" the statement. The available options are to print or email a customer statement.

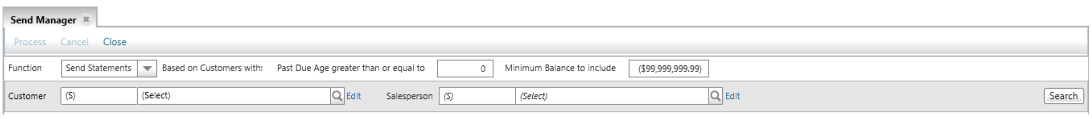


Batch Send Customer Statements?



The Send Manager will open.





Customers to receive statements can be selected based on certain criteria:

- Past Due Age
  - Used to select customers with invoices greater than a certain age.
  - Example: I only want to send statements to

customers that have at least one invoice that is more than 60 days past due.

- Minimum Balance
    - Used to select customers with a balance greater than a certain amount.
    - Example: I only want to send a statement to customers if the customer’s balance is greater than $5.00.

- Customer
    - Used to select a specific customer.

- Salesperson
    - Used to select customers with a specific “Primary” salesperson.

If multiple options are used, the customer must meet all criteria.

Multiple customers can be selected (one record at a time) or using the check box on the blue column header to “check all” records that met the search criteria.

Statement Send Method

The send method can be set up for each customer resource under the “Other” expander, using the Statement Via option.

If the customer option is left as (Select), the system will refer to the Send Method for Statements in Company Setup.

A default email template for customer statements has been added to the Email document defaults in Company Setup. This email statement template can be edited and updated similar to the other email document templates.