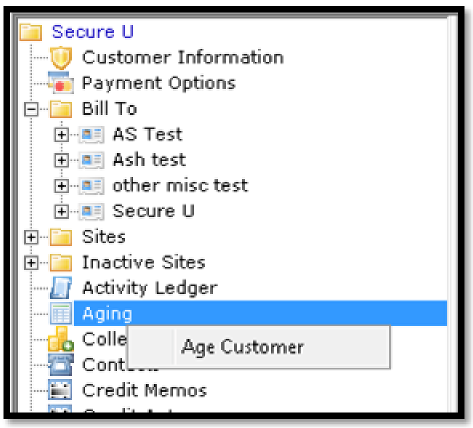
Printing Statements with History

02/08/2024 2:24 pm EST

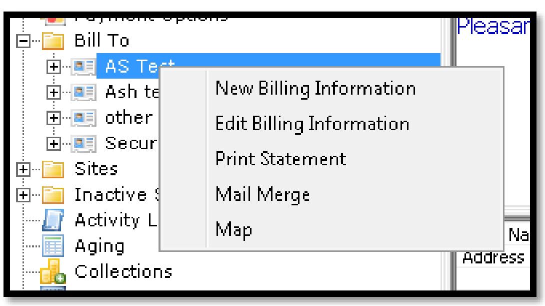
A company may wish to view statements for a single customer instead of running statements for multiple customers. You can run statements for an individual customer by creating one statement for the whole customer, or by creating a statement for each bill to address on the customer. Follow the steps below to run the statement for an individual bill to address.

1. Open Customer

2. Right-click Aging – Click on Age Customer



3. Go to Bill To > Highlight the Bill To and right-click on Print Statement

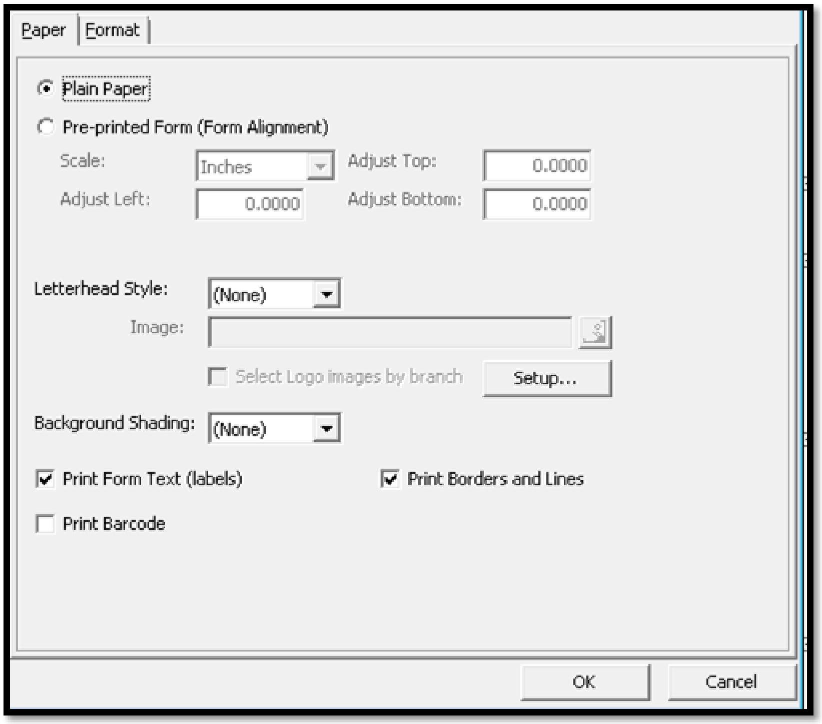


4. Next select:

   A. Paper Tab

      i. Print Form Text (labels)

      ii. Print Borders and Lines

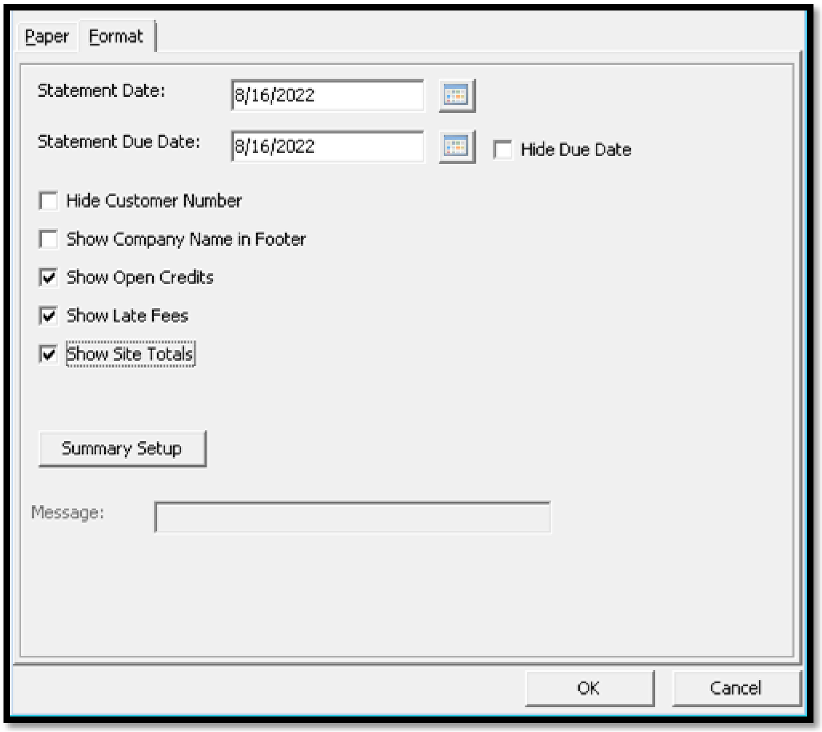


B. Format Tab

a. Click Show Open Credits

b. Click Show Late Fees

c. Click Show Site Totals



5. Click the OK Button – Make sure Printer is selected and Standard Form (S01) or the one the customer uses – the different forms will show the data differently so depending on how the customer wants to see the data will depend on which form is used.

6. The Statement shows the Net Due – All the invoices outstanding along with the date description, Amount, and Balance Due – Also shows the different past due balances and the amount of credits on the account as of that date.