

How to Print a Single Customer Statement

02/09/2024 11:55 am EST

Issue:

A customer is looking to create a single Customer Statement without having to go through the process of creating an entire statement batch and finding the one they'd like to send.

Resolution:

Open the customer account you wish to print the statement for.

A statement can be printed from the Bill To section or from Collections.

To print the statement from Bill To, select the Bill To you wish to print for.

Right Click.

A window with options will appear. Click on Print Statement.

When you open Print Statement, a Printing Preferences window will appear and you can go to the Format tab to choose to include items on the statement, such as Open Credits, Late Fees, or Site Totals.

Make any necessary changes to the statement and click Ok.

To print the statement from Collections, go to the Collections option on the customer account.

Right click. A window with options will appear. Click on Print Statement.

When you open Print Statement, a Printing Preferences window will appear and you can go to the Format tab to choose to include items on the statement, such as Open Credits, Late Fees, or Site Totals.

Make any necessary changes to the statement and click Ok.