AR Customer Statements - How to Print & Email

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About Customer Statements

The **Customer Statements** screen in 1place allows you to generate customer statements based on selected statement criteria, date ranges, payment terms, and customers. Statements can be **printed or emailed** to customers.

How to Access Customer Statements

1. Go to **AR**.

2. Select **Customer Statements**.

Configure the Statement

Before generating the statements, configure the options at the top of the screen.

Statement Type

Select the type of statement you want to generate.

Available statement types include:

- **Open Item**
- **Detailed - Payments Summarized**
- **Detailed - Payments Summarized (All Shipping Locations)**
- **Detailed - Payments Allocated**
- **Detailed - Payments Allocated (All Shipping Locations)**
- **Open Item (All Shipping Locations)**
- **Open Item (All Shipping Locations - Parent Company)**

Select the statement type that matches the level of AR detail you need to provide.

Display

Select how customers should be included based on their balance.

Available options include:

- **All - With Debit (+) or Credit (-) Balance**
- **All - With Debit (+) Balance**

Use the appropriate option depending on whether you want statements to include customers with credit balances.

Distribution Method

Select how the statements will be delivered.

- **Print** – Generate statements for printing.
- **Email** – Generate statements to be emailed to customers.

Payment Term

Select a payment term to limit the customers included in the statement list, or select **All** to include all payment terms.

Examples include:

- All
- 10th of month
- 2 months
- Net 30
- Net 15
- Net 10
- 2% 10 Net 30

Date Range

Enter the **From Date** and **To Date** for the statement period.

Select Customers

The customer list displays customers that match the selected criteria.

1. Review the customer list.

2. Use the checkboxes beside the customers you want to include.
3. Select the customers whose statements you want to generate.

You can use the **Search** field to locate a specific customer.

The list displays information such as:

- Customer #
- Customer Name
- Customer Email
- Customer Payment Terms
- Customer Balance

Preview the Statements

After configuring the statement criteria and selecting the customers:

1. Click **Preview**.
2. Review the generated statements.
3. Confirm that the statement information and customer selection are correct.

Print Customer Statements

To print the statements:

1. Set **Distribution Method** to **Print**.
2. Configure the statement type, display, payment term, and date range.
3. Select the customers.
4. Click **Preview**.
5. Review the statements.
6. Print the statements using the available print option.

Email Customer Statements

To email the statements:

1. Set **Distribution Method** to **Email**.

2. Configure the statement type, display, payment term, and date range.

3. Select the customers.

4. Click **Preview**.

5. Review the statements.

6. Proceed with the email option to send the statements to the customers' email addresses.

> **Note:** Make sure the customer's email address is correct under Customer Email column before emailing a statement.

Statements History

The **Statements History** tab can be used to review previously generated customer statements.