# How to Print or Email Customer Statements

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## Overview

Use Customer Statements in 1place to provide customers with a summary of their account activity and balances. Accounting staff can send statements during regular billing cycles, follow up on outstanding balances, or respond to a customer's request for account information.

## Before You Begin

Review recent payments and credits so the customer receives an accurate statement. Confirm that payments have been recorded and applied appropriately.

For emailed statements, verify the recipient under **Customer Details > Communications > Default Email Communications**, using **Customer Statements** as the type. If no valid statement-specific address is available, 1place uses the customer's general email address.

### Steps

### 1. Open Customer Statements

Go to **AR > Customer Statements**.

### 2. Set the Statement Criteria

Configure:

- **Statement Type:** Choose the statement format.
- **Display:** Include customers with debit balances, or both debit and credit balances.
- **Payment Term:** Choose a term or **All**.
- **From Date / To Date:** Enter the statement period.

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)**

### 3. Choose the Distribution Method

Select **Print** or **Email**. When emailing, choose **PDF** or **Excel** as the file format.

## 4. Select Customers

Use **Search** to locate customers, then select their checkboxes. Review the customer names, balances, payment terms, and email addresses.

## 5. Preview and Review

Click **Preview**.

Check the customers, statement period, transactions, and balances before distribution. For example, if a customer recently paid an invoice that still appears outstanding, review the payment before sending the statement.

## 6. Print or Email

- **Print:** Use the available print option.
- **Email:** Use the email option to send the statements.

## 7. Review Statement History

Open **Statements History** to review previously generated statements.