

Sending Statements

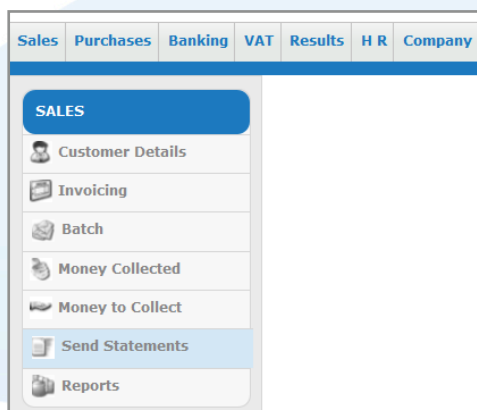
How to send statements to your customers

You can send statements to your customers showing their outstanding invoices. Most people do a statement run once a month. You can send statements to all your customers, to a batch of customers, or to a single customer.

Note that only unallocated items (which have not been allocated a payment yet) will appear on a statement. This includes payments in and payments out (e.g. credit notes).

To send a statement to just one customer

Press the **Sales** tab and then the **Send statements** button.



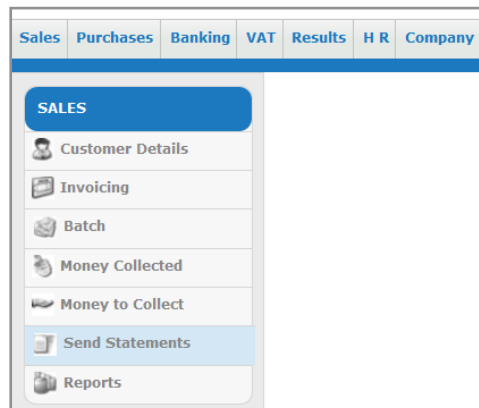
To print a statement for just one customer, the customer code in the **Account from** and **Account to** fields should be the same. Select the **Template** you wish to use and the **Invoice outstanding prior to date**. It will default to today's date.

Account from	<input type="text" value="EX1"/>
Account to	<input type="text" value="EX1"/>
Template	<input type="text" value="PLUS:ONE"/> ▼
Lines per page	<input type="text" value="10"/>
Invoice outstanding prior to (date)	<input type="text" value="28/02/2011"/> <input type="button" value="Apply"/>

Press **Apply**. The statement will then be brought up, ready to print.

To send statements to all your customers

Press the **Sales** menu tab and then the **Send statements** button.



Accept the defaults in the **Account from** and **Account to** fields as shown below. Amend the **Template** and **Invoice outstanding prior to date** if required.

Account from	0
Account to	zzzzzzzz
Template	PLUS:ONE
Lines per page	10
Invoice outstanding prior to (date)	28/02/2011
	<input type="button" value="Apply"/>

Press the **Apply** button. The statements are all produced together as one document, ready for printing.