# **Customer statements**

A statement is a summary of a customer's invoices and payments and is typically sent on a regular basis, such as monthly. Statements help your customers keep track of their account and how much they owe you.

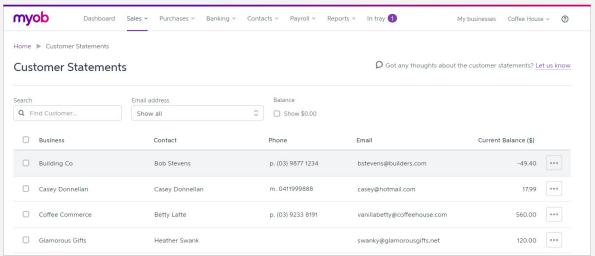
On the **Customer statements** page, you can review, print and email customer statements for individual customers, or for a range of customers. If you want to change the look of your statements, see the FAQs below for details.

Want to see the sales and payments for a customer over any period? You can get this on the S ales history page.

To review, print or email a customer statement

## To review, print or email a customer statement

1. In the Sales menu, click the Customer statements link. The Customer Statements page appears.



2. A full list of your customers is shown. You can individually select customers, or you can find a specific customer by typing their business or contact name in the search field.

You can also filter your customers by whether they have email addresses or not.

- 3. If you want to include customers with a zero balance, select the **Show \$0.00** option.
  - Note that both active and inactive customers will be shown.
- 4. If you want to edit customer details, such as an email or phone number, click the ellipses ( ) of the customer you want to edit, and click **View/Edit Contact**.
  - After editing the customer details, click **Save**. You'll be taken back to the **Customer statements** page and the customer details will be updated.
- 5. Select the customers you want to make statements for by clicking the box next to their name, or click the topmost box to select all

The **Print** and **Email** options only appear after selecting one or more customers.

- 6. If you want to review the statements, click Print. The statements appear as separate pages of a PDF, ready to review.
- 7. If you want to print the statements:
  - 1. Click **Print**. The statements appear as separate pages of a PDF, ready to review or print.
  - 2. Click the print icon ( ). The Adobe Reader **Print** window appears.
  - 3. Choose your print options and click **OK** to print the customer statements.
- 8. If you want to email the statements:
  - 1. Click Email. The Email window appears.
  - 2. If you want, edit the email Subject text or Message text.
  - 3. If you want to save this particular email **subject** and **message** as a default template to use in future statements, click **Save as template**.
  - 4. Click **Send** to email the customer statements.

# **FAQs**

Why can't I see the print or email options?

Can I edit the look or business details of my customer statements?

Can I select a statement date?

#### **Related topics**

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