

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 [Sales history](#) page.


To review, print or email a customer statement

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

The screenshot shows the Myob Customer Statements page. At the top, there is a navigation bar with 'Sales' selected. Below the navigation bar, there is a search bar and a table of customer statements. The table has columns for Business, Contact, Phone, Email, and Current Balance (\$). The table contains five rows of customer data.

<input type="checkbox"/>	Business	Contact	Phone	Email	Current Balance (\$)	
<input type="checkbox"/>	Building Co	Bob Stevens	p. (03) 9877 1234	bstevens@builders.com	-49.40	...
<input type="checkbox"/>	Casey Donnellan	Casey Donnellan	m. 0411999888	casey@hotmail.com	17.99	...
<input type="checkbox"/>	Coffee Commerce	Betty Latte	p. (03) 9233 8191	vanillabetty@coffeehouse.com	560.00	...
<input type="checkbox"/>	Glamorous Gifts	Heather Swank		swanky@glamorousgifts.net	120.00	...

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?

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