

## User Guide: Statements

Explanation: Statements summarize a customer's account activities within a selected time frame, including payments, outstanding balances, and credits.

## How to Generate a Statement:

Statements

Get Statements from customer

Select Customers **All Customer** Choose Date 2024-09-01 - 2024-09-30 **See Summary**

1 Select Customer

Statement from 01/

Date	Customer
	All Customers
	MACHINE WRITE LTD
	CLIVE WILSON LTD
01/09/2024	MARSHALL EXCAVATING LTD
02/09/2024	FALLOW BUILDING LTD
02/09/2024	CAMPUS AND CO
02/09/2024	AMTINK LTD
02/09/2024	DEAN HOWDEN PANEL REPAIRS
02/09/2024	DERRICK BURGESS
02/09/2024	FORTROSE CAFE

3

4 **Export**

	Reference	Due Date	Invoice Amount	Payment	Balance NZD
					\$112,513.31
				\$ 250.00	\$112,263.31
				\$ 370.00	\$111,893.31
				\$ 250.00	\$111,643.31
				\$ 370.00	\$111,273.31

1. Select the customer from the "All Customers" dropdown menu.
2. Choose the start and end date for the statement period.
3. Click "See Summary" to generate the statement.
4. To export the statement as a file, click the "Export" button.