SMRT Systems Help Center

Search

Articles in this section   ⌄

Manually Creating & Sending a Statement

Nick Platania

2 years ago · Updated
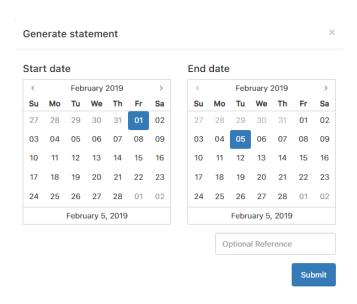
Follow

First, open the customer's account and go to the Payment tab and look for the Statement option near the top right once you're there.
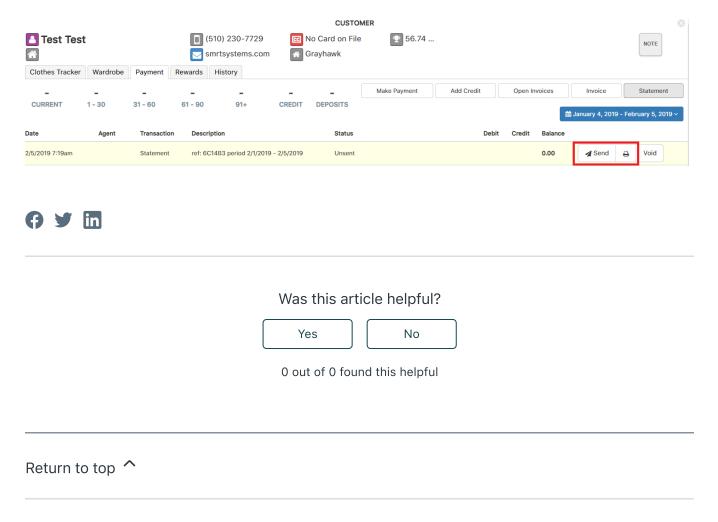

Here you'll just need to select the start and end dates for the time the statement needs to cover and select Submit.

Help

Generate statement   ✕

Start date   **End date**

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	**01**	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	01	02

‹ February 2019 ›

February 5, 2019

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	01	02
03	04	**05**	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	01	02

‹ February 2019 ›

February 5, 2019

Optional Reference

Submit

Once the statement is created, you'll see the option to Send (will have the option to email if available) or Print it within the customer's Payment tab.

Employee Levels

Group Billing Setup

Groups

Socket Keyboard Mode for Android 8.0 OS

Wireless Scanner and Printer Pairing to a New Device

Related articles

Tax Exempt Customer

Adding A Photo In The Mobile App

Paying With Credit Card

KPI Data Fields

Creating Special Care Folders

Comments

0 comments

Article is closed for comments.

SMRT Systems Help Center