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Monthly Billing / Sending Monthly Statements. >>OUTDATED<<🔒



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4 months ago · Updated

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On the first of every month, statements are automatically generated for every customer with the payment setting of "Statement". If the customer has an email on file and has the Email Automatically setting on, they will automatically be emailed their statement. Any customer without an email on file or without the email automatically setting on will need to have their statement printed and mailed.

Follow the steps below to print statements in bulk.

1. Log into the system.
2. From the Home Screen go to Reports then Receivables

3. Select Statement from the Payment Option list.

The screenshot shows the ACCOUNTING interface with the 'Payment option' dropdown menu open. The menu lists 'Statement' as the selected option. The interface also displays various financial metrics and a table of customer statements.

Customer	Agent	Payment Terms	Statement	Current	30	60	90	Payment
Noreen Syed	Restoration	Statement	Send 01/31	18,644...				Pay
Victoria Olin	Restoration	Statement	Send 01/31	13,144.97				Pay
Miriam Zahn	Restoration	Statement	Send 01/31	1,846.58				Pay
Mary Petix	Restoration	Statement	Send 01/31	5,119.70				Pay
Janine Sahagian	Restoration	Statement	Send 01/31	8,926.11				Pay
Lottie Lindsay	Restoration	Statement	Send 01/31	5,325.67				Pay
Joe Morelli	Restoration	Statement	Send 01/31	307.92				Pay
MR Lippencourt	Restoration	Statement	Send 01/31	2,055.32				Pay
Partho& Debolina Sanyal	Restoration	Statement	Send 01/31	4,630.88				Pay
Yvonne Kirks	Restoration	Statement	Send 01/31	2,054.73				Pay

4. If you want to restrict the statements that print to a specific route or store select them from the Agent list.

The screenshot shows the ACCOUNTING interface with the 'Agent' dropdown menu open. The menu lists various routes, including '86 - Route 10', '86 - Route 11', '86 - Route 12', '86 - Route 13', '86 - Route 14', '86 - Route 15', and '86 - Route 16'. The interface also displays various financial metrics and a table of customer statements.

Customer	Agent	Payment Terms	Statement	Current	30	60	90	Payment
Joel C Shapiro	86 - Route 13	Statement	Send 01/31	102.96				Pay
Anne Boenning	86 - Route 12	Statement	Send 01/31	169.23				Pay
Bernice & Morton Hunt	86 - Route 12	Statement	Send 01/31	77.13				Pay
William Bates	86 - Route 12	Statement	Send 01/31	222.30				Pay
Mary B. (Janie Smith)	86 - Route 12	Statement	Send 01/31	9.24				Pay
James Vander	86 - Route 13	Statement	Send 01/31	17.06				Pay
Sharon Mendelow	86 - Route 13	Statement	Send 01/31	203.21				Pay
Stephen Lande	86 - Route 13	Statement	Send 01/31	41.87				Pay

5. Click the Print Statements button and wait for the pop up to load.

6. Click Print All. If you are printing more than 100 statements you will be required to print the statements in groups of 100 or less.

Print & Mail all Statements and Invoices

Print all Statements and Invoices by clicking the button below.
Once printed, go back to this page mark them as sent.

There are more than 100 Statements and Invoices to print. After marking all statements sent, reopen this window to send the rest.

7. A new tab will open where we will print the statements from.

8. If you wish to save a record of the statements for easy access later, save the statements as a PDF instead of printing.

9. Print the statements.

10. Once the printer has finished go back to the SMRT tab and click the Confirm All button (you'll have to do this twice). This marks the statements as printed so you don't print duplicates.



Print & Mail all Statements and Invoices

Please  Confirm All or  Email All or confirm each document as sent:

11. Wait a few seconds and the Accounting module will reload.
12. Repeat the previous steps until there are no more statements to print.



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