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Charging Monthly CC Statement Customers

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2 years ago · Updated

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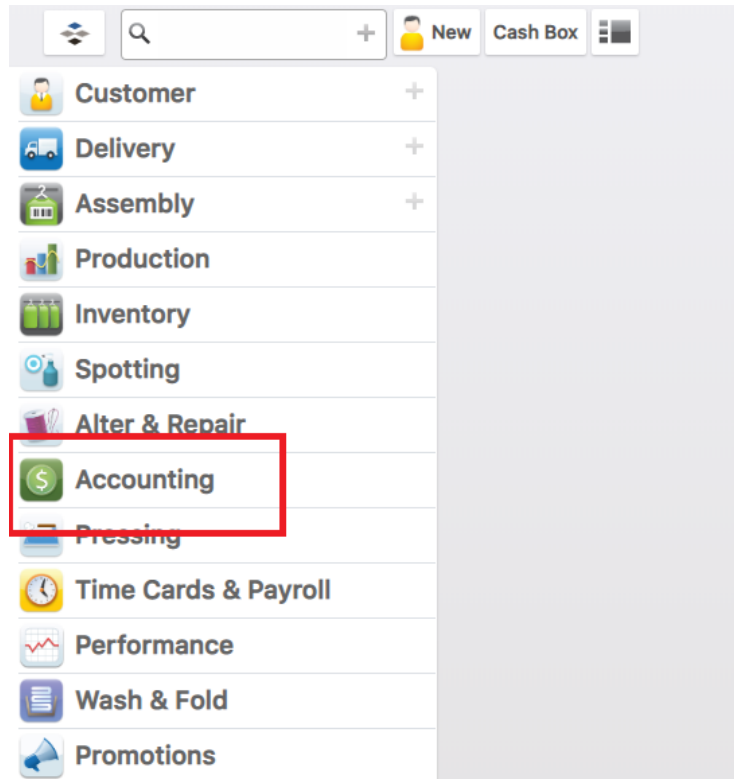
We have the option to charge all statement customers with a card on file at once, or charge each customer individually.

Charge cards in bulk:

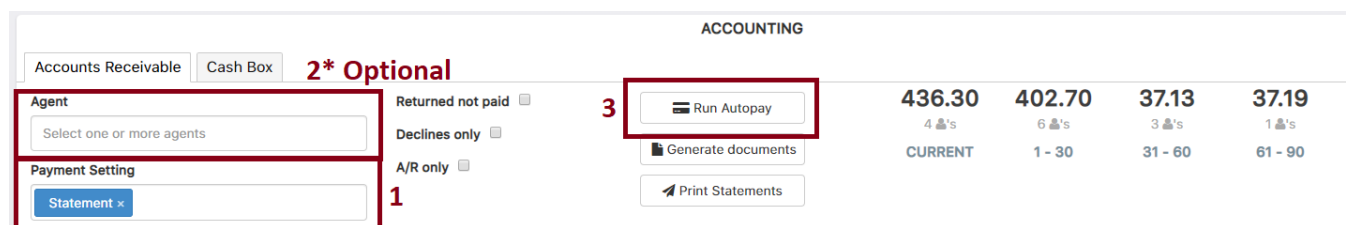
The "Run Autopay" option in Accounting will normally charge any unpaid autopay customer balances. However, if we apply filters to the Accounts Receivable tab in the Accounting module, we can target our statement customers with this to charge all statement customers with a card on file.

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1. Open the Accounting Module and wait for Accounts Receivable to load.



2. Set the "Payment Setting" filter to STATEMENT. *OPTIONAL* Set the "Agent" filter to the Agents whose statement customers you'd like to charge. If you'd like to charge ALL statement customers, leave this "Agent" filter blank.



Charging cards individually:

1. Open the Accounting Module and wait for Accounts Receivable to load.

2. Click on the Payment header to filter the report by the customers with cards on file.

3. Select Statement from the Payment setting filter to see only the statement customers that will be charged monthly.

The screenshot shows the ACCOUNTING interface with the following components:

- Top Bar:** Includes a search bar, a 'New' button, a 'Cash Box' button, and a 'Prices' button. The user is logged in as 'Store 1: Assembly | Josh'.
- ACCOUNTING Section:**
 - Accounts Receivable:** Shows a total of 125.00. Below this, there are filters for 'Agent' (a dropdown menu), 'Returned not paid' (a checkbox), 'Declines only' (a checkbox), and 'A/R only' (a checkbox). There are also buttons for 'Run Autopay', 'Generate documents', and 'Print Statements'.
 - Payment Setting:** A dropdown menu is set to 'Statement', with a red '3' next to it.
 - Summary:** Shows totals for 'CURRENT' (125.00), '1 - 30' (0.00), '31 - 60' (0.00), '61 - 90' (0.00), and '91+' (6,420.47).
- Table:** A table with columns: Customer, Agent, Payment Setting, Statement, Current, 1 - 30, 31 - 60, 61 - 90, 91+, Total A/R, Deposits, Credits, Balance, and Payment. A red box highlights the first three rows of the table. A red '2' highlights the 'Payment' column header.

Customer	Agent	Payment Setting	Statement	Current	1 - 30	31 - 60	61 - 90	91+	Total A/R	Deposits	Credits	Balance	Payment
Michelle Robinson	Store 1	Statement	✓ Emailed 04/01					43.30	43.30			43.30	VISA Pay
Jonah Cristo	Store 1	Statement	✓ Emailed 04/01					43.30	43.30			43.30	Pay
Mike UTC	Route 1	Statement	Send 03/31					80.05	80.05			80.05	Pay
Bill Wright	Route 1	Statement	Send 03/31					86.50	86.50			86.50	Pay
Colorado Statement Issue	Store 1	Statement	✓ Emailed 04/01					195.25	195.25	123.00		72.25	Pay
Master Hotel Quest Services	New York Store	Statement	Send 03/31					52.10	52.10			52.10	Pay
Room 300 Master Hotel	New York Store	Statement	Send 03/31					10.80	10.80			10.80	Pay
Split Test	Store 1	Statement	Send 03/31					38.10	38.10			38.10	Pay
Pentagon Police	Store 1	Statement	Send 03/31					4,690.57	4,690.57			4,690.57	Pay
Carlton Services	Jerome	Statement	Send 03/31					10.40	10.40			10.40	Pay
AR Too High	Radiant Leather	Statement								450.00		(450.00)	Pay

4. Click on each customer's name, then click Pay. The statement amount will already be selected in the payment box.

5. Simply click Pay to charge the amount due on the statement. Any orders for the current billing period that are not yet on a statement will not automatically be selected.



	ID	Date	Pieces	Amount
✓	6/01	Statement 14C38C		\$143.30
●	5092	5/08	5	\$43.30
●	5092	5/01	5	\$100.00

✓	19106-01100	6/05	1	\$7.00
Subtotal:				\$143.30
Amount Due:				\$143.30

Auto Select

4 Payment Amt / Deposit:

143.30 ✓

☒ VISA **** 1111 Expires: 12/2034

☐ Use a new card

VISA

MasterCard

AMERICAN EXPRESS

DISCOVER

Card Number

MM / YY

☐ Save as Card on File

☐ Cash

☐ Check

☒ Card

Claim Gift Card

5 Pay



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