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Changing a Customer to Receive Monthly Statements
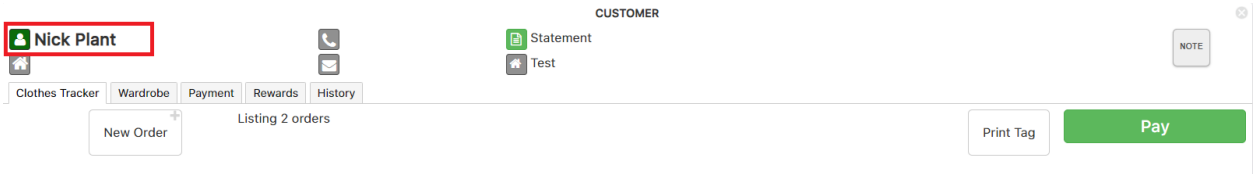
Josh Nye

2 years ago · Updated

Follow

Follow the steps below to set a customer to receive monthly statements automatically.

1. Open the customer's account and click on their name to open their account settings.

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2. In the first tab that appears, change the current pay setting to "Statement."

3. Then select any additional statement needed for the customer.

4. Below is an explanation of each statement setting.

- Email Automatically: If a customer has an email on file they will automatically be emailed their statement on first of the month. Otherwise

you will have to print their statement when you bulk print all your statements.

- Include order details on Invoices: This will include an additional section that lists each order for the statement period with the full detail for every order and a total for the period.
- Include item summary on Invoices: This will include an additional section that summarizes the counts of every item type the customer had cleaned during the period.
- Include Invoices on Statements: This setting is generally for corporate accounts. It affects the statement if you've created invoices during the period. It will not show any orders on an invoice created during the period and will include each invoice as an accompanying section.
- Include separate Invice for each order: This setting will create an additional page for every single order for the statement period. This setting is also generally only for certain corporate accounts.

5. Click Save and the customer will now have a statement create automatically on the first of the month.

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