

How to print Multiple Customer Statements

Printing up multiple customer statements is now quick and easy on SortMyBooks Online. With just 2 clicks of a mouse the system will display in PDF format all the statements for the customers that still have outstanding balances. Just follow the steps below:

1. Go to "Reports" - "Customer Reports" - "Customer Statements".
2. Select the Date Range that you wish to run the Statements for.
3. Tick the box that says "Multiple Statements".
4. Click "Apply".

Give the system a couple minutes to load the statements into PDF format, then a pop-up box should appear asking if you wish to "Open" or "Save" the Statements. Select which one you wish to do.

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Select range:
this act year

Job:

- Show notes

Customer:

Date:

- remittance
 - Outstanding Only
 - options

Account:
_____ ▾

- Multiple Statements

Apply Reset

Geraldine O'Connor

Period: from 01/01/2011 to 31/12/2011

Opening Balance (01/01/2011): 3,268.23

Date	Debtor	Due	Type	Status	Reference	Paidfor	Amount	Balance
04/01/2011	Paul Test	04/01/2011	invoice	unpaid, overdue	4451		0.00	3,268.23
19/01/2011	Paul Test	18/02/2011	invoice	unpaid, overdue	145		1,152.89	4,421.12
21/01/2011	Paul Test	20/02/2011	invoice	unpaid, overdue	146		1.50	4,422.62
21/01/2011	SortMyBooks	20/02/2011	invoice	unpaid, overdue	5/PO147		150.00	4,572.62
21/01/2011	Test 5	20/02/2011	invoice	unpaid, overdue	148		0.00	4,572.62
21/01/2011	Test 5	20/02/2011	invoice	unpaid, overdue	149		1.50	4,574.12
30/01/2011	SortMyBooks	30/01/2011	invoice	unpaid, overdue	4448		50.00	4,624.12
31/01/2011	SortMyBooks	31/01/2011	invoice	unpaid, overdue	R-4452		500.00	5,124.12
03/02/2011	Test 2	03/02/2011	invoice	unpaid, overdue	151		0.00	5,124.12
03/02/2011	SortMyBooks	05/03/2011	invoice	unpaid, overdue	Recurring-148		150.00	5,274.12
03/02/2011	Test 2	03/02/2011	invoice	unpaid, overdue	158		100.00	5,374.12