We are currently updating our site; thank you for your patience.

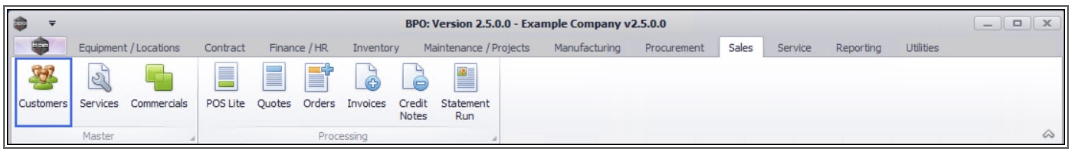
SALES

CUSTOMERS – STATEMENT RUN

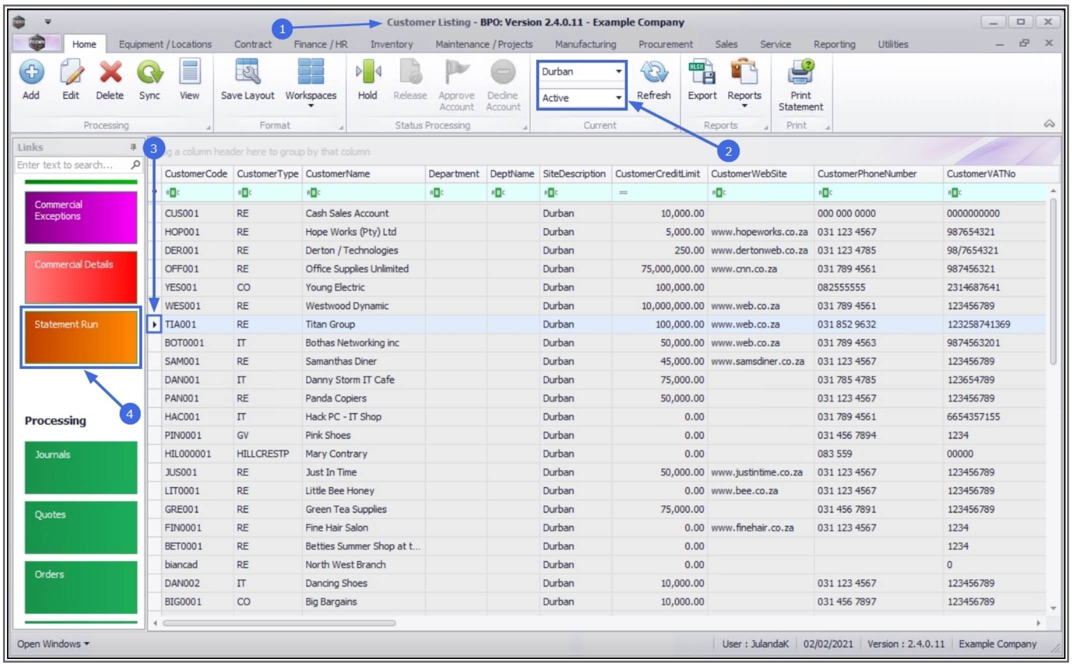
The **Statement Run** tile from the Customer Listing screen enables you to process the statement run for a selected customer. This works in conjunction with the BPO Open Items Manager application and provides the option to process Customer Statements and / or Invoices.

Click on the link to be redirected to Introduction to Statement Run if you require more details on this topic.

Ribbon Access: Sales > Customers



1. The **Customer Listing** screen will display.
2. Select the **Site** and **Status** where the customer can be located.
3. Select the **row** of the **customer** whose statement run you wish to process.
4. Click on the **Statement Run** tile.



5. The **Statement Run for Customer : [**customer code**]** screen will be displayed.

The **Save** button is currently greyed out, which means that the screen cannot be edited. As soon as a selection is made in the Statement Data Grid then you will be able to Save the screen.

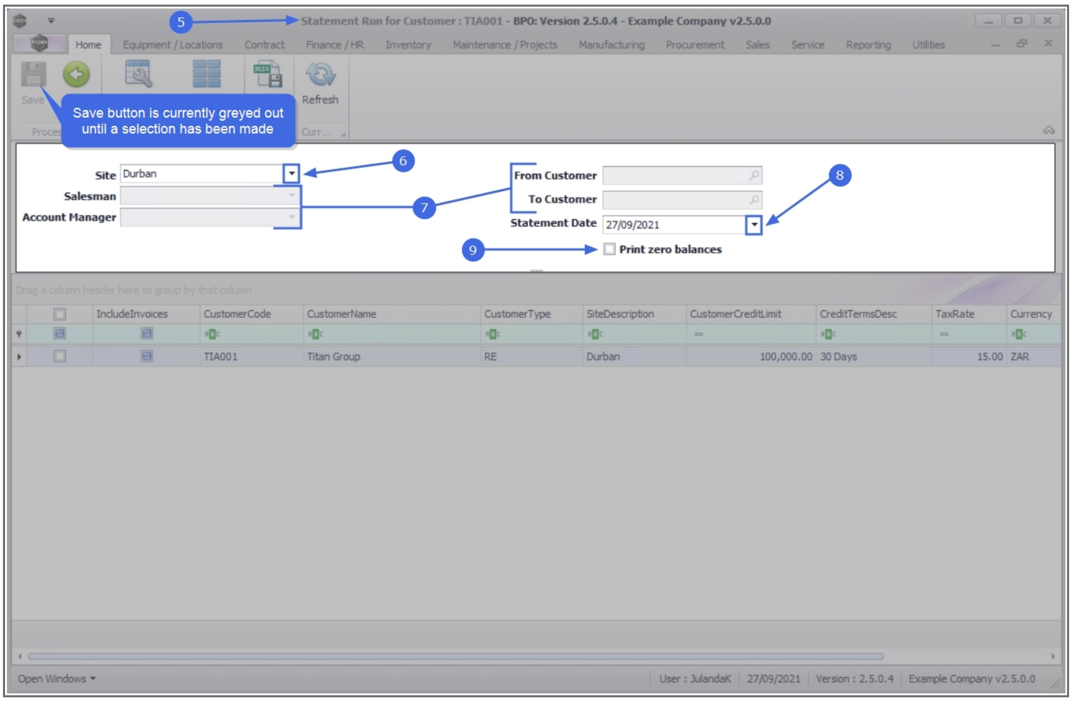
HEADER PANEL

6. Ensure that the correct **Site** has been selected, by clicking on the down **arrow** to display the site menu options.

The Site does not automatically update from the Customer Listing screen.

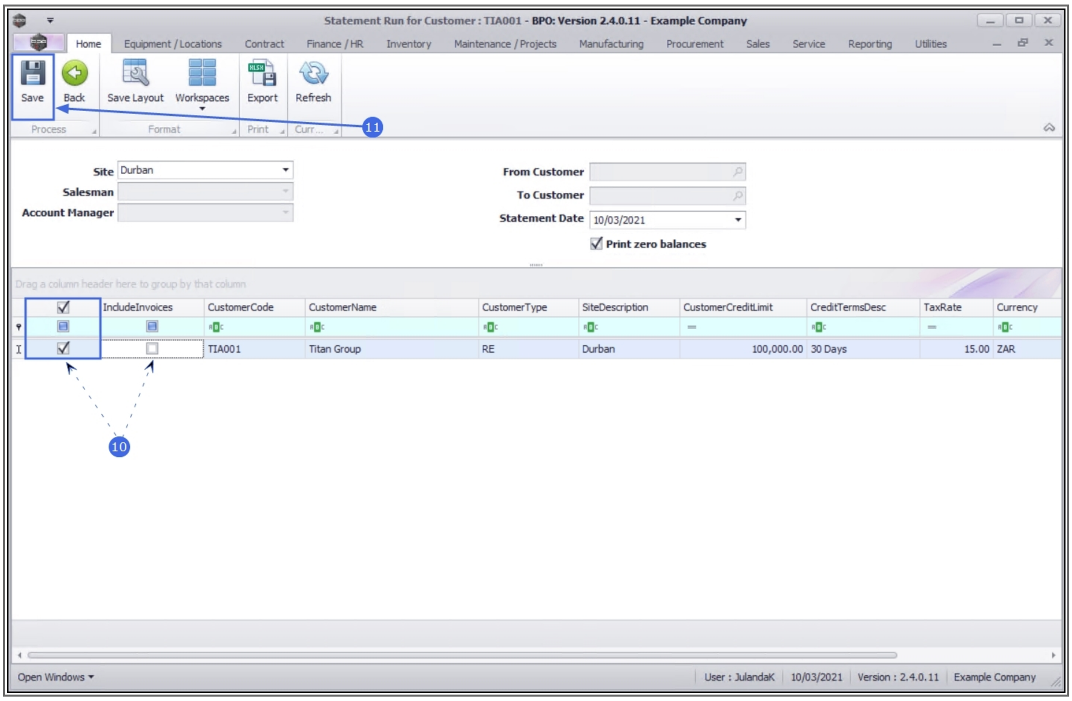
- The example has **Durban** selected.

7. The **Salesman**, **Account Manager**, **From Customer** and **To Customer** fields will be inactive (greyed out) when you access the Statement Run from the Customer Listing screen.
8. The **Statement Date** will auto populate with the current date.
   - Click on the **arrow** to use the calendar function to select an alternative date, if required.
9. Click on the **Print zero balances** check box if you wish to include statement items with a zero balance to print on Statements or Invoices.

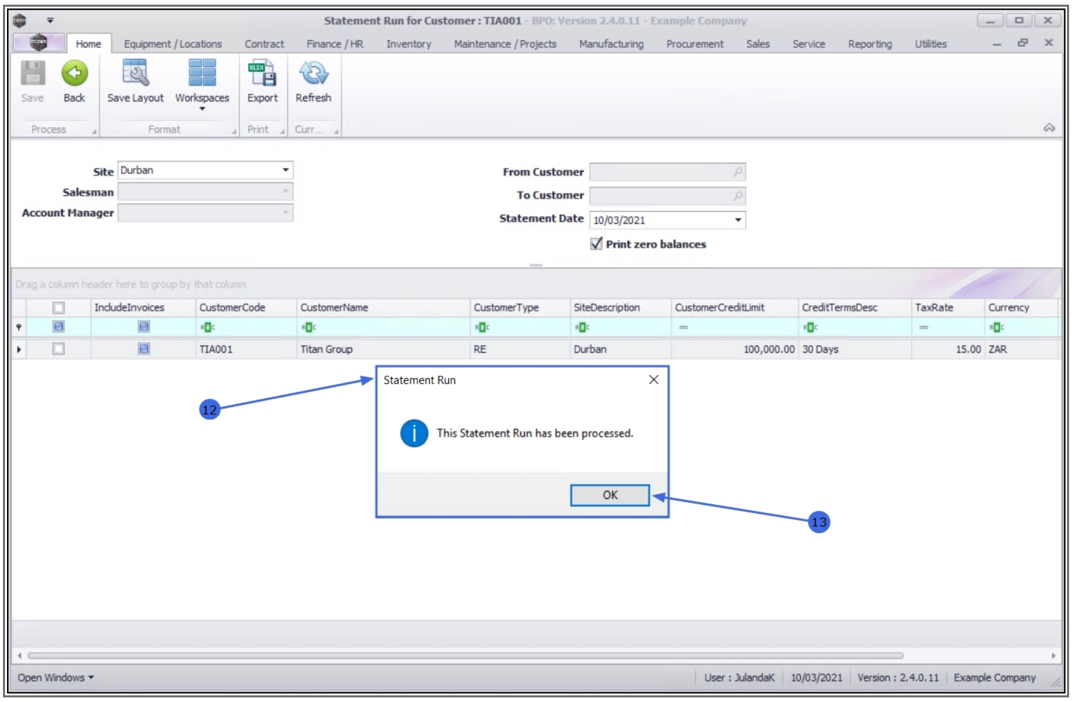


STATEMENT DATA GRID

10. On the Statement Item line;
    - Click on the check box to print **Statements** only.
    - Click on the check box, to **Include Invoices**.
11. When you have made your selections, click on **Save**.

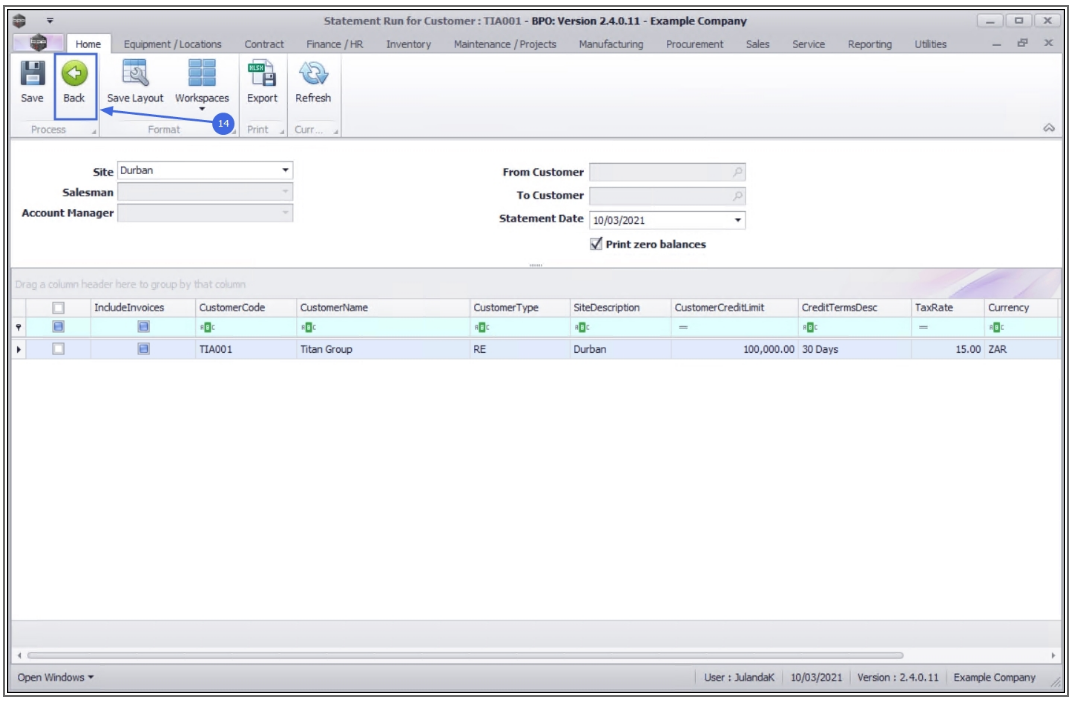


12. When you receive the **Statement Run** message notifying you that;
    - **This Statement Run has been processed.**
13. Click on **OK**.



The statements will be sent to the **Statement Queue** in **BPO Open Items Manager**.

14. Click on **Back** to return to the **Customer Listing** screen.



Related Topics

- Open Items Manager

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