

# Generating Customer Statements

For customers with house accounts, statements provide a detailed list of charges and payments made during the billing cycle. They also display the total amount due (including previously billed invoices that have not been paid).

## To generate customer statements:

1. On the **FTD Mercury Main Menu** menu, click the **Statements** button. The **Generate Statements** window opens.
2. Select the statement and sorting information. You must select the store, billing cycles, statement date, and whether you want to generate finance charges. Click **OK**.
3. When the **Finance Charge** window opens, select any customers you do not want to apply finance charges to and click **Remove**. Click **OK** to accept the finance charges for the remaining customers in the list.
4. In the **Output Statements** window, specify your print, fax, and email options.
5. Select other options as necessary, including the number of statements on the page (one for letter-sized paper, two for legal-sized paper), whether you want to print accounts with credit balances, and whether you want to print statements only if there has been activity since the last statement. You can also define the minimum amount owed on a customer account that will result in a generated statement (allowing you to exclude customers with small balances from receiving statements).
6. Click **Execute**.
7. You will be reminded to load statement forms into the printer. Click **OK**.
8. FTD Mercury will display the number of statements being printed, and the combined number of statements being faxed or emailed, along with the total dollar amount billed. Click **OK**. Statements will begin to print, and faxes and email messages will be sent according to settings for that house account.



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**Generate Statements**

Store Name: All Stores

Billing Cycle: Biweekly  
Daily  
Monthly  
Semi-Monthly  
Weekly

Statement Date: 10/ 5 /2005

Primary Sort: Name

Secondary Sort: Not Sorted

Generate Finance Charges

Promotional Message  
Stop by to see our new Fall product line!

OK Cancel

Use the Generate Statements window to select the billing cycles for the statements you are about to generate, the statement date, how you want to sort the statements, and whether you want to include finance charges.

The Output Statements window allows you to select how many statements per page, additional criteria for generating statements, and when to fax or email the statement to the customer (if configured for the customer).

**Output Statements**

Statements Per Page  
 One  Two

Criteria  
 Include Credit Balances  
 Only if Activity Since Last Statement  
 Minimum Balance to Output  
\$0.00

Fax  
 Now  
 Later  
4 /14/07 10:00 PM

Email  
 Now  
 Later  
4 /14/07 10:00 PM

Execute View Escape

