

GETTING STARTED WITH RUND00 · SETUP

A Statement, On Demand

A regular calls needing their statement now. Generate it for that one customer and send it, without waiting for the monthly run.

DO IT IN 4 STEPS

1

Get there

POS side, the Statement runs list.

[Customers](#) → [Statement runs](#)

2

Generate

Set the date range, pick the one customer.

[+ Generate statements](#)

3

Send

Open the run, check the customer.

[Send selected statements](#)

The whole routine

- 1 Open [Customers](#) → [Statement runs](#) (or search "statement").
- 2 Click [+ Generate statements](#), set the **Date** range.
- 3 Search your customer, check their box, click [Generate statements](#).
- 4 Open the new run, check the customer, click [Send selected statements](#).
- 5 [Preview](#), then [Send statements](#) to email, or [Download](#) to print.

The catch to remember**Generate, then send**

Building the run does **not** deliver it. Sending is a separate step. And a manual run never adds [finance charges](#).

Email or paper: emailing needs at least one contact with an email on the customer's file. No email? Use [Download statements](#) to save a PDF you can print and mail.

New to statements? Only charge-account customers get them, and it's safe to rehearse this in your practice store. It won't touch your real books or reach a real customer.