GETTING STARTED WITH RUNDOO · SETUP

Sending 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.