GETTING STARTED WITH RUNDOO · STATEMENTS

Statement Format & Delivery

Per customer, on their Settings tab, set how each bill is delivered and how it's formatted. Set it once and every run follows it.

THREE WAYS A BILL LANDS

1

Autopay

Charges a saved card or bank when statements run.

Settings → Autopay statement balances

2

Mail

Prints a paper copy in your statement run.

Settings → Mail statements

3

Email

Goes to the contacts you pick, set per contact.

Contacts → contact → Email statements

Set it up in 4 steps

1. Open the customer, click **Settings**, scroll to **Statements**.
2. Pick delivery: **Autopay**, **Mail**, or **Email** per contact.
3. Set **Statement type**: Open item or Balance forward.
4. Set **Statement invoices format**, then you're done.

Invoice detail

None · Condensed · Full page

Condensed fits several invoices per page. **Restrict to statement period** is Open item only.

Two format choices: Open item lists just what's still owed (the default most stores use). Balance forward is the full running ledger. Start new customers on Open item and switch only if they ask for the history.

Before it can land: Autopay needs a saved card or bank on file, and Mail needs a mailing address in the General section. No email on any contact means that customer gets skipped from the email run.