

## Billing and Accounting

### How to generate statements using the billing wizard

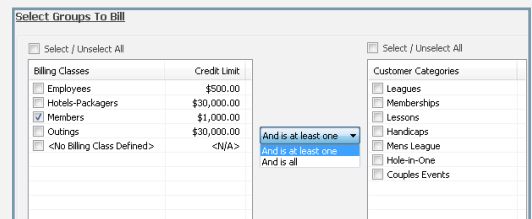
In this tutorial, you will learn how to generate statements using the billing wizard.

#### Customer statement setup

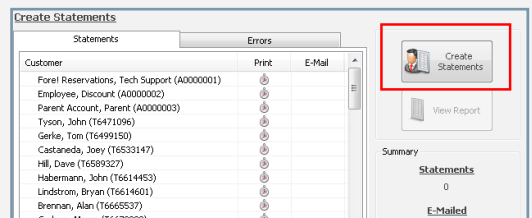
1. Navigate to Home | Customers.
2. Right-click on a customer.
3. Click Modify.
4. Click Sales | Setup.
5. Select Statements Options:
  - Print Only – Creates paper statement for customer
  - E-Mail Only – Paper-free option. Only sends statement to customer via email.
  - Print & E-Mail – Creates paper statement and emails statement
6. Click OK.

#### Generating statements

1. Navigate to Utilities | Billing Wizard.
2. Click the right arrow.
3. Choose customers by Billing Class and Customer Category.
4. Click the right arrow.
5. View the list of Customers that match the previous criteria.
6. Uncheck customers to NOT receive a statement.
7. Click the right arrow.
8. Select “Create Statements.”
9. Click the right arrow.
10. Select the Date Range to bill.
11. Enter the title and message.
12. Choose Detail Type and Options.
13. Click the right arrow.
14. Preview customers to generate statements.
15. Click “Create Statements.”
16. Print statements.



Select customers



Create statements