

Standard Operating Procedure

Printing Statement – Sales Edition

Dole & Bailey, Inc.

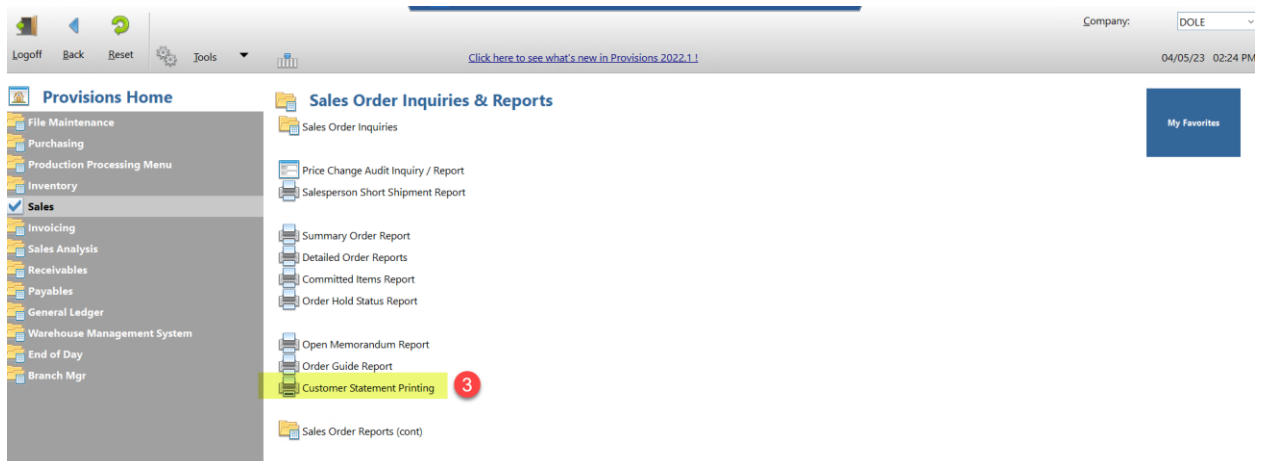
Implementation Date: 04/04/23

PURPOSE: Sprinting PDFs of Customer Statements for emailing in support of collections

1. Sales Menu
2. Click Sales Orders Inquires & Reports



3. Select Customer Statement Printing



4. Input Beginning Customer
5. Input Ending Customer
6. Change Output to PDF

The screenshot shows the 'Statement Print' window. At the top, the 'Send Output To:' dropdown is set to 'DF - PDF Output', with a red circle and the number 6 next to it. Below this, there are input fields for 'Beginning Customer:' and 'Ending Customer:', both containing the value '29475'. Red circles with the numbers 4 and 5 are placed over these input fields. There are also checkboxes for 'All Customers' and 'Break On Ship-To', and a text field for 'Statement Date:' with the value '04/05/23'. At the bottom right, there is a section titled 'Select Files to Use' with two radio buttons: 'Current Month Files' (selected) and 'Last Month Files'.

7. Go to you Email client and you will receive PDF in your email that can then be forwarded to Customer.

