



Including Copies of Invoices with Customer Statements

WinNetStar allows the user the option of including a copy of the invoices when printing customer statements. The following screen shots show how to select this option. You can set a preference in the Customer Master for each customer you wish to receive copies of invoices, or you can select this option at the time you print your statements. The option can be turned on or off at any time on a customer by customer basis. If you are using electronic signature capture, the customer's signature will also appear on the invoice if captured at the time of settlement.

Please keep in mind that if you select this option, the system processing time will take longer. The more customers that are selected for this option, and the more invoices there are on the statements, the longer the processing will take. The process of producing a print preview for a large number of customers with invoices will also require a large amount of RAM. **We suggest that you perform a test run prior to the time you will actually need to produce next month's statements in case you have any problems. If you do experience any issues, please call customer support at 800-766-4642.**

Easy Navigator

RIMSS WinNetStar Customer Statements

Print Selected Statements

Create Statements

Statement Period

Period: Last Month

From Date: 4/1/2011

To Date: 4/30/2011

Do Not Create Statements:

With a Zero Balance

With No Account Activity

Select All

To include invoices with the statements, click in the box for the respective customers. You can check or uncheck these boxes as you wish prior to printing statements. Please remember, the process of producing the customer statements with invoices will take a longer processing time than producing the statements without the invoices. The more customers that have this option selected, the longer it will take the system to generate the print preview.

Print	Customer Name	Customer Ref ID	Inactive	Bill To Address	Activity	Balance	Include Invoices
<input checked="" type="checkbox"/>	A NEW CUSTOMER		False		True	\$12,000.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	A Special 1 Customer	561	False		False	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	A Special 2 Customer	562	False		False	\$0.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	A Trade Customer	560	False		True	\$8.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	A Warranty Customer	564	False		True	\$358.89	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	ABC Enterprises	175	False	12345 South Main, Suite 125, San Marcos, TN, 85...	True	\$15,284.51	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ABC, Inc	729	False		True	\$28.75	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AGCO Finance	540	False		False	\$0.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AGCO WARRANTY	94	False	1400 AGCO Boulevard, Suite 1400, Tampa, FL, 34...	True	\$5,945.72	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Albor Industries, Inc.	36	False	1234 South Main, San Antonio, TX, 78258	True	\$78.02	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Bill Jones	344				\$1,500.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Billy Joe Thomas	300				\$0.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Blue Bird Finance	419				\$0.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Blue Bird Warranty	728				\$57.08	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CARGIL & COMPANY	70				\$0.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Cash Customer	34	False		True	\$0.00	<input type="checkbox"/>

The default value for this box is unchecked. If you would like to set the default value to checked you may do this on a customer by customer basis in the Customer Master. See screen shot for this setting later in this document.



After clicking on the "Print Selected Statements" menu option from the previous page, you will see this print preview. You must have Adobe Reader loaded on your workstation for this preview to display. Each customer's invoices should print immediately after the respective statement. Click on the printer icon to print your statements.

Albor Industries, Inc. (36)
 1234 South Main
 San Antonio TX 78258

CUSTOMER STATEMENT
 as of 4/30/2011

Date	Transaction Type	Doc. #	Due Date	Days Past Due	Amount	Balance
8/16/2010	Invoice	20170	9/30/2010		33,675.94	33,675.94
8/16/2010	Customer Receipt	140			-33,415.77	260.17
8/16/2010	Credit	140			-5.00	255.17
4/14/2011	Customer Receipt	157			-255.17	0.00
9/30/2010	Wholesale Invoice	30074	10/30/2010		48,500.00	48,500.00
4/14/2011	Customer Receipt	157			-48,500.00	0.00
4/1/2011	Finance Charge	144			3,344.82	3,344.82
4/14/2011	Customer Receipt	157			-3,344.82	0.00
4/14/2011	Invoice	20453	5/30/2011		100.00	100.00
4/14/2011	Customer Receipt	157			-71.83	28.17
4/14/2011	Credit	157			-28.17	0.00

Sales

Salesperson:

Terms

Payment Terms: 30th of Next Month

Purchase Order Required on Purchases

Financial Details

Credit Limit: \$0.00

Price Level: Trade

Credit Rating:

Finance Charge Override: 0.00 % Exclude from Finance Charges

Grouping and Tax

Customer Type: CONTRACT TRAINER

Tax Status: Non-Taxable

Reseller Number:

Tax Group Override: 0100 Adams Unicorp

Discounts

Parts Counter: 0.00 %

Parts on Repair Order: 0.00 %

Labor on Repair Order: 0.00 %

Print Options

Include Invoices on Customer Statements

The details tab of the customer master has an option to check that will pre-set the Include Invoices check box to checked each time you open the Customer Statements form.

Notebook

Add Note

User	Date Entered	Note	AutoDisplay
> jerry	3/12/2009	This is a note that needs to display in the Customer Notebook. The display should autosize the grid so that the user can see the entire contents. Hovering over the field shows the contents but then disappears. Additionally, the user.....	<input checked="" type="checkbox"/>