Customer Statement Automation is a way to automatically create and send account statements to customers. It refers to the process of automatically generating and distributing account statements to customers. This typically involves using software to create personalized statements that reflect customer's account activity, such as transactions, balances, and any relevant fees.

Customer Statement Automation makes it easier and faster for companies to keep customers updated about their accounts. It sends statements to customers via email or online portal. Also it sends statements at scheduled times and updates customer information in real-time.

In this article,

Setup:

- Navigate to **Setup** > **Application Setup**.

- Select the **Customer Statements tab** to configure settings.

- Enable **Customer Statement** - Determines if the customer statements to be created automatically.
- Fill in all the given details:
- **Frequency** - Determines customer statement generation frequency. (e.g. - monthly, quarterly, yearly)
- **Statement Day** - Define day of the month the statement is scheduled to run.
- **Succeeding Date for Next Period** - Defines the commencement date for the subsequent customer statement cycle. This date determines the starting point for calculating statement data for the upcoming period.
- **Last Run Date** - Record the date of the most recent customer statement generation.

- **Next Statement Start Day** - Customer statement start date filter.
- **Next Statement End Date** - Customer statement end date filter.
- Navigate to **SMB Customer Statement.**
- The configuration interface will include the following required fields:
- **Print all with entries** - Specifies if an account statement is included for all customers with entries by the end of the statement period, as specified in the date filter.
- **Enable Print all with balance** - specifies if an account statement is included for all customers with a balance by the end of the statement period, as specified in the date filter.
- **Update Statement no.** - Specifies if you want to update the last statement No. field on each customer card after it prints the customer's statement.
- **Print Company Address** - Specifies if your company address is printed at the top of the sheet.
- **Statement Style** - Specifies how to print the statement.
- **Aged by** - Specifies how aging is calculated.
- **Length of Aging Periods** - specifies the length of each of the aging periods .
- **Log Interaction** - Specifies if you want to record the related interactions with the involved contact person in the Interaction Log Entry Table.
- Navigate to **Create Customer Statement Log Entry.**
- Select **Actions > Customer Statement Log.** For initial setup, verify the Customer Statement Log configuration.
- Navigate to Job Queue Entries.

Configuring Automated Customer Statement Generation via Job Queue

- We have to Configure a Job Queue which will generate a customer statement based on the setup we provided on the application setup.
- Set up a daily Job Queue to execute at [specific time], automatically generating customer statements and syncing with Accelera based on the next scheduled run date.
- To automate customer statement generation, configure a Job Queue as follows:
- Job Queue Configuration:

1. Object Type: Codeunit
2. Object ID: 14199818
3. Schedule: Recurring job, running daily at [specified start time]
4. Recurrence: All days of the month.

- Refer Use Job queue to schedule a task.
- The Job Queue will automatically execute on the next scheduled run date, generated by the Application Setup configuration, specifically on the succeeding date for the next period.

Data Synchronization Process

- The system will commence uploading data to Accelera Application for synchronization purposes.
- Note that Business Central will not transmit data; instead, it will receive synchronized information from Accelera.
- Customer statements generated in Accelera will be mirrored in Business Central's Customer Statement module.
- Corresponding logs will be synced, ensuring data consistency.
- Generated statements will be available for viewing in PDF format.
- Users can access detailed statement information, download, and upload statements as needed.
- This synchronization process ensures seamless data exchange and consistency between Accelera Application and Business Central.
- Navigate to **Customer Management.**
- Click on **view details.**