

## Prepare a Statement for Accounts Receivable

The Create Statements window is used to create customer monthly statements. No accounting entries occur. Note that there are several pages of *QBO* windows for this section, and the circled letters from the Quick Reference Table below are disbursed throughout those pages.

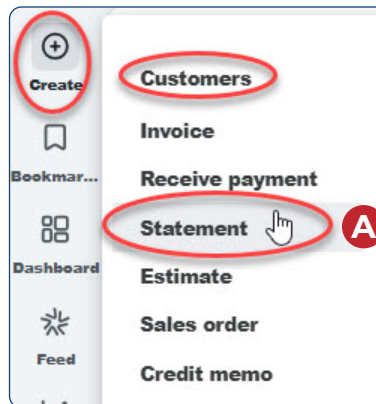
### Quick Reference Table

Step	Box or Other Location	Procedure
<b>A</b>	<b>QBO Navigation bar</b>	<b>+ Create</b> → <b>Statement</b> (in the <b>Other category</b> ) to open the <b>Create Statements window</b> .
<b>B</b>	<b>Statement Date</b>	Select the <b>Statement Date</b> , which is typically at the end of a month.
<b>C</b>	<b>Start Date</b>	Select the <b>Start Date</b> , which is typically at the beginning of a month.
<b>D</b>	<b>End Date</b>	Select the <b>End Date</b> , which should match the <b>Statement Date</b> .
<b>E</b>	<b>Recipients List section</b>	Notice that the default setting is to generate statements for all customers that fit the parameters you selected earlier. Use the check boxes to deselect any statements that you do not want to generate.
<b>F</b>	<b>Print or Preview button</b>	Click the <b>Print or Preview button</b> to view the customer statement, which opens the <b>Preview statements window</b> (see third <i>QBO</i> window illustration).
<b>G</b>	<b>Preview statements window</b>	Review the customer statement for accuracy.
<b>H</b>	<b>Print icon</b>	Click the <b>Print icon</b> and then save a PDF of the customer statement. See fourth <i>QBO</i> window for a sample customer statement. Close all windows to return to the main <i>QBO</i> window.



## Prepare a Statement for Accounts Receivable

QBO windows



**Create Statements**

Statement date: 01/31/2023 (B) | Statement type: Balance Forward | Total balance from 6 customers: **\$2,996.25**


Customer balance status: Open | Start date: 01/01/2023 (C) | End date: 01/31/2023 (D)

Recipients	Email Address	Balance
Airport Inn	Jlilley@AirportInn.com	\$0.00
Ameristay International	AllisonGreen@Ameristay.com	\$490.00
Bestway Motor Lodge	SmalleyM@BestwayMotorLodge.com	\$0.00
Bronson Hotel	BrownJulius@BronsonHotel.com	\$1,381.25
Greenleaf Suites	WhittierKyle@Greenleaf.com	\$0.00
Sunway Suites	MarthaE@Sunway.com	\$1,125.00


Buttons: Cancel | Print or Preview | Save | Save and send (F)

## Prepare a Statement for Accounts Receivable

QBO windows (continued)

 **Preview statements** Give feedback ? ×

To print, right-click the preview and select Print. Or, click the Print icon if you see one below. Clicking the print button will open the document in a new tab.

  
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**Jackson Supply Company**  
US  
+12696010419  
studentaug2025@gmail.com

**Statement**

**TO**  
Ameristay International  
5000 West Drive  
Columbus, OH 43215  
United States

**STATEMENT NO.** 1004  
**DATE** 01/31/2023  
**TOTAL DUE** \$490.00  
**ENCLOSED**

DATE	DESCRIPTION	AMOUNT	BALANCE
12/31/2022	Balance Forward		0.00
01/15/2023	Invoice #1005	490.00	490.00

Cancel Print and close ▼

Jackson Supply Company  
US  
+12696010419  
studentaug2025@gmail.com

## Statement

**TO**  
Ameristay International  
5000 West Drive  
Columbus, OH 43215  
United States

**STATEMENT NO.** 1003  
**DATE** 01/31/2023  
**TOTAL DUE** \$490.00  
**ENCLOSED**

DATE	DESCRIPTION	AMOUNT	BALANCE
12/31/2022	Balance Forward		0.00
01/15/2023	Invoice #1005	490.00	490.00

Current Due	1-30 Days Past Due	31-60 Days Past Due	61-90 Days Past Due	90+ Days Past Due	Amount Due
490.00	0.00	0.00	0.00	0.00	<b>\$490.00</b>

