

Viewing or Printing Customer Statements or Summary Year End Statements

1. From the Home screen, click the **Statements** tile.



2. From the Statement Type drop-down, select **Customer Statement** or **Summary Year End**.
3. Enter the desired date range.
4. Click **OK**.

The screenshot shows the 'Customer Statement Criteria' dialog box. The 'Statement Type' is set to 'Customer Statement'. The 'Begin Date' and 'End Date' fields are empty. The 'Export To' dropdown is set to 'PDF'. Buttons for 'OK', 'Reset', and 'Cancel' are at the bottom.

5. The statement will be available to be viewed or printed.