MidMonth Statement

Helpful Tips for issuing a Mid Month Statement:

Sometimes you need to issue a statement to a customer of what they owe at that moment, and so a Mid-Month Statement report is available in the AR Reports section of the View Reports form.

First, for both month-end and mid-month statement reports, the statement format for an account will be **Balance Forward format** or **Open Item format**, depending on the setting on that account in the **Doctor A/R Setup** form at the time the statement is generated. By default, accounts will be flagged for Balance Forward format statements.

A **Balance Forward format** statement will include the detail of all invoices created in the current month, regardless of if they are paid or not. Unpaid invoices are not listed, and their amounts are reported collectively in the Aged Balances section of the report.

An **Open Item format** statement will include the detail of all unpaid invoices, regardless of which period each was created in. Any partially paid invoices from prior periods will also print. These amounts are still reported collectively in the Aged Balances section of the report.

To issue a real-time statement to an account that owes invoices from prior periods, ABS recommends going to the **Doctor A/R Setup** form and setting the account to receive an Open Item statement. On the **General tab**, select the **Open Item** option in the **Statement Options section** and Save the change.

In **Reports**, **View Reports**, look under the **AR REPORTS** header and select the **Mid-Month Statement**. Specify the Account Number when prompted and click Ok. The report will preview, and you'll see that every unpaid invoice is listed.

Hint: If your account numbers are complex, it's easier to copy and paste to the report. When in the Doctor A/R Setup form, highlight the Account Number that shows at the top of the form, right click, and choose Copy. When you Run the report, click into the Account Number field and then press Ctrl-V on your keyboard.

The report is ready to print.

If you email from Evolution, you can email the report to the account instead.

Right click anywhere on the report preview and select "Send eMail with report (pdf)". You'll be prompted to name the report. ABS recommends short and simple, such as just the account name and date.

Select the account from the account list that pops up and click Select & Close.

Select an email template from the form that pops up.

The Send eMail form will display, with the report created as a .pdf and attached to the email.

> Note: when emailing reports to customers, make sure the report you're sending contains ONLY that account's data. This feature does not have the ability to create and attach a .pdf of only specific pages.

Contact ABS Support for more "tips and tricks" to get the most usage and efficiency from your Evolution system!