How do I create and print a customer reminder statement?

A customer reminder statement summarizes a customer's account with your company by listing recent invoices, credit memos, and payments received. Use reminder statements when you bill through invoices but want to remind your customers about late payments.

Quicken already has all the information you need to create reminder statements; you don't have to fill them out. Instead, review the information that will appear on each statement, decide whether to add finance charges, and print.

1. Click the **Business** tab.
2. Click the **Business Actions** button and choose Invoices and **Estimates** > **Print Statements**.
3. In the **Customer Statements** dialog, select the statement layout you want to use from the **Layout** list.
4. Select the customers for whom you want to print statements.

   > ⓘ **Tell me more**
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   > - **All**: Prints statements for all your customers.
   > - **Selected**: Click **Choose**, and then select the names from the customer list.
   > - **One**: Select a name from the customer list.

5. In the **Date Range From** and **To** fields, enter the date range.
6. In the **Statement Date** field, enter the statement date. (Optional)
   Quicken puts today's date on the statement, but you can change it.
7. Select the **Don't print statements with a zero balance check box**. (Optional). Quicken creates a statement for each of the customers you selected.
   Make sure the check box has been cleared (the default) if you do want to print statements with a zero balance.
8. Click **Print**.
9. In the **Print Invoice** dialog, modify any available options. For example, you can select whether to print to paper or a PDF:
   - Select Quicken PDF Printer to print a PDF.
   - Select another printer to print to paper.
10. Click **OK** to print the statements.
11. If you're printing to a PDF, enter a name for the PDF when Quicken requests this information, navigate to where you want to save the PDF, and click **Save**.

This feature requires **Quicken Business & Personal**. Learn how you can upgrade Quicken in minutes.