

Manage User Statements

Last Modified on 04/29/2022 12:55 pm EDT

Users are automatically emailed a statement to the email attached to the account once they have paid in full an outstanding balance, but can also be emailed or downloaded after payment as well.

Download statements

Individual user statements or a pdf collection of all statements for all users with activity can be downloaded after payment.

Individual user statements

1. From the **Admin Navigation**, select **Checkout & Payments > Checkout**.
2. Search and select the desired user.
3. From the user's detail select the 'Actions' dropdown.
4. Select 'Generate Statement'.
5. The statement automatically downloads.
6. Print statement.

PDF collection of all statements

1. From the **Admin Navigation**, select **Checkout & Payments > Statements & Receipts**.
2. Select Generate Statements.
3. When PDF file is complete, select the prompt to download.
4. The PDF will automatically download.

Tip: If the file is taking a significant amount of time to download, you will have the option to select if you would like the system to send the PDF file directly to your email. By selecting this option, once the file is done generating, the system will automatically send the file directly to the email address that you have on file.

Customize statements

Statements can be customized by adding a note or including your organization logo.

Add a statement note

Include a custom [statement note](#) on a user's statements which displays just below the details section. If no statement note is provided, the area remains blank. This note has a character limit of 4,000.

Need to include your organization's Tax ID?

Add it to the statement note field. Need to confirm or update the Tax ID used when establishing

the Merchant Account? Visit [Statement and Receipt FAQs](#) to find out how.

Note: Tax IDs are automatically included on campaign receipts.

Add your organization's logo

The organization's logo added in your [site settings](#) will appear on the statement.
