

QUICK REFERENCE GUIDE

May 1, 2019

Create Customer Statement Notes

This guide covers creating Statement Notes that can be selected to display on customer statements. Agencies can create notes that will be printed on customer statements. This requires the AR Receivables Supervisor role. Staff that generates the customer statements will select which note that will appear on the statement, if any.

Steps to complete:

Step 1: Create a Customer Statement Note

1. Navigate to the *Statement Note Code* page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, left-menu, Statements, Statement Note Code.
WorkCenter	Accounting, Accounts Receivable, Receivables WorkCenter, left-menu, Reports/Processes section, Customer Interactions, Statement Note Code.

2. Click the **Add New Value** tab.
3. Enter your *SetID* (your *Business Unit*).
4. Enter a *Statement Note Code*. The *Statement Note Code* can be any 10-digit alphanumeric value you choose. The code(s) should be recognizable by staff who generate customer statements and who will need to select these code(s).

Statement Note Code

Find an Existing Value Add a New Value

SetID

Statement Note Code

5. Click the **Add** button. The *Statement Note* page displays.

Statement Note

SetID G1001 Statement Note Code G10TEST

Statement Note Description

*Description

*Text

This is the Statement Note Text. If you have question regarding this statement please email John Smith at john.smith@state.mn.us.

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display

6. Complete the *Statement Note* page as described below:

Field Name	Field Description
*Description	Enter a description for the note.
*Text	Enter the text that will appear on the statements when this code is selected.

7. Click on the **Save** button.

If you want to edit the Statement Note text, navigate back to the *Statement Code* page, use the **Find an Existing Value** tab to search for and select the existing code, and edit the fields as described above.