

12R8 Enterprise Invoice Emailing

Enterprise has integrated functionality that allows users to send mass *Emails* with PDF copies of the **Invoice** attached. These *Emails* can be sent to multiple recipients and **Customers** in one quick and easy process. On the **Customer Billing Setup** form select an *Invoice Method* of "Email" or "Print and Email". Then choose the *Email Template*, and the **Contacts** that should be recipients for the *Emailed Invoices*.

**Note - Invoice Emailing is only available to those clients that have purchased the Email Document Distribution System (EDDS) module.*

The screenshot shows the 'billing schedule' and 'invoicing' sections of the software. The 'Invoice Method' is set to 'Print and Email' and the 'Email Template' is 'Invoice to Contact'. Below this, there is a table of 'Invoice Recipients' with the following data:


| Name | Title | Contact Method | Details |
|---------------|---------------|----------------|------------------------------|
| Hampton, Irv | Supervisor | Email | emailtestrecipient@gmail.com |
| Irving, Talya | AP Specialist | Email | emailtestrecipient@gmail.com |

To add an *Email* recipient in the Invoice Recipients area click on the  button to open the form.

The 'add invoice recipient' dialog box shows the 'Recipient' field set to 'Irving, Talya' and the 'Contact method' set to 'emailtestrecipient@gmail.com'. A 'Save' button is visible at the bottom right.

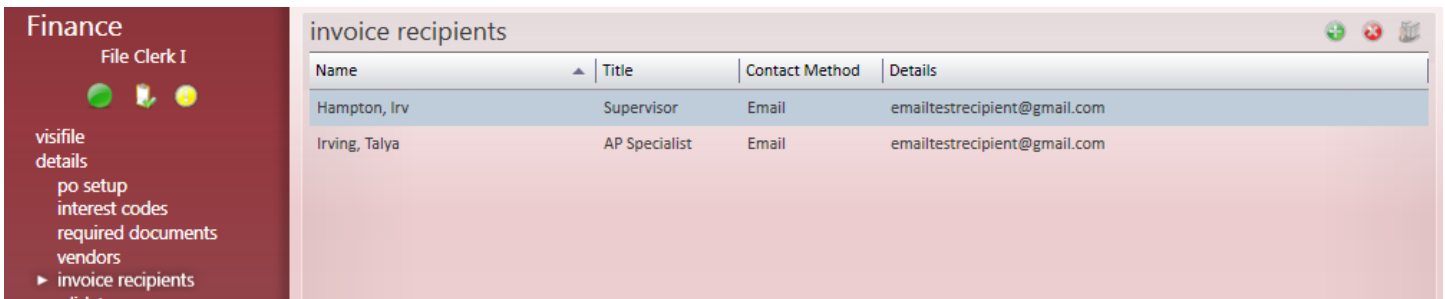
Select the **Contact** recipient from the drop down menu.

**Note – Only Contacts that are associated with this Customer will be listed in the drop down menu.*

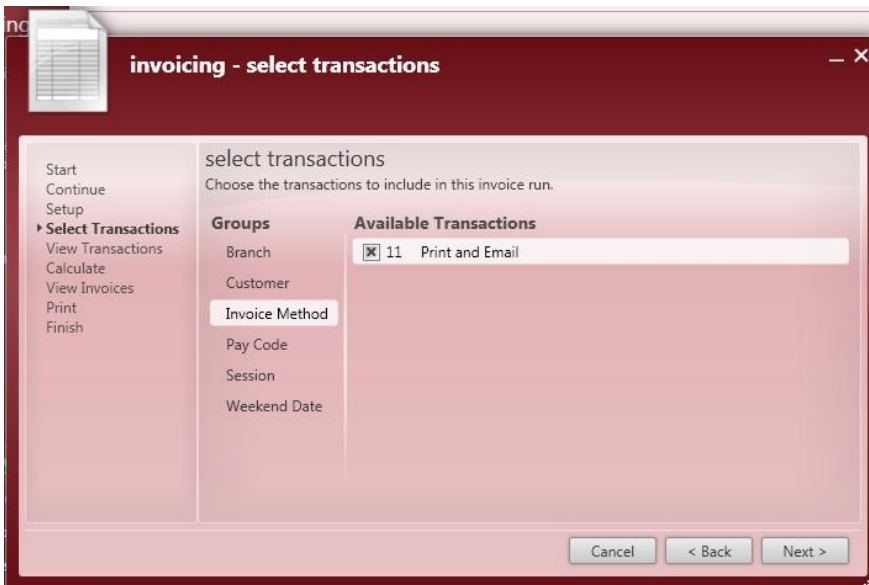
Select an *Email* address from the *Contact Method* drop down menu. If there isn't an *Email* address available click on the  button to add.

Once the form is completed click the *Save* button to update the system and close the form.

The Invoice *Email* recipients can be viewed and/or changed at the **Order** level by expanding on **Details** and then selecting the *Invoice Recipients* form as shown below:

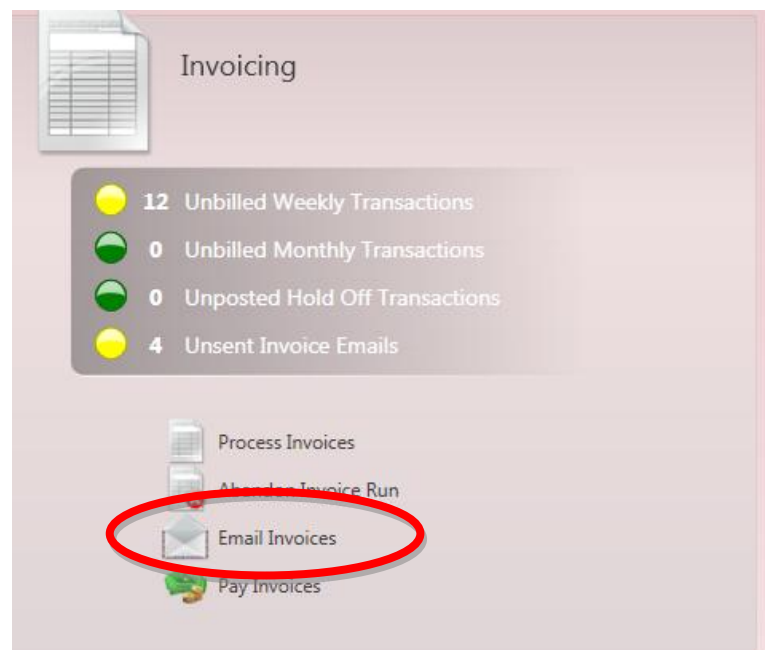


Once the **Customer** record is set up and the recipients are selected the **Invoice Emails** can be created.



Continue with the usual **Invoice** process. When selecting the *Transactions* to include in the run, viewing them by *Invoice Method* will allow the user to view and/or select *Transactions* that will be sent via *Email*.

Once the **Invoices** have been *Posted*, the *Invoice Run* wizard can be closed by clicking *Finish*. After the invoice run wizard is closed select the *Invoicing* box and choose *Email Invoices*.



invoicing - start

Start
Select Invoices
View Emails
Send Emails
Finish

sender email options
Select and email address to send from

Sender Email Address: imapdummyaccount@gmail.com

Cancel Next >

When *Email Invoices* is selected the invoice email wizard opens to the *Invoicing – Start* form. Select the *Sender Email Address* from the drop down menu and click *Next*.

Note – If the drop down menu is blank, the **Email address needs to be set up in the **E** menu *Options* form.*

In the *Invoicing – Select Invoices* form choose the **Invoices** that will be included in the **Invoice Email** run. Once the **Invoice(s)** have been selected, click *Next*.

invoicing - select invoices

Start
Select Invoices
View Emails
Send Emails
Finish

select invoices
Choose the invoices to include in this email run.

| Groups | Available Invoices |
|-------------|---|
| Branch | <input type="checkbox"/> 1 RunId: 1161; Created on: 8/26/2009 by chintz |
| Customer | <input type="checkbox"/> 2 RunId: 1177; Created on: 9/2/2009 by jaredg |
| Invoice | <input type="checkbox"/> 1 RunId: 1181; Created on: 9/2/2009 by erica |
| Invoice Run | <input type="checkbox"/> 1 RunId: 1184; Created on: 9/14/2009 by jason |
| | <input type="checkbox"/> 1 RunId: 1187; Created on: 9/16/2009 by alisha |
| | <input type="checkbox"/> 1 RunId: 1193; Created on: 9/23/2009 by mikeb |
| | <input type="checkbox"/> 16 RunId: 1207; Created on: 9/30/2009 by erica |
| | <input type="checkbox"/> 1 RunId: 1208; Created on: 9/30/2009 by erica |
| | <input checked="" type="checkbox"/> 11 RunId: 1212; Created on: 9/30/2009 by alisha |

Cancel < Back Next >


invoicing - view emails


Start
Select Invoices
View Emails
Send Emails
Finish

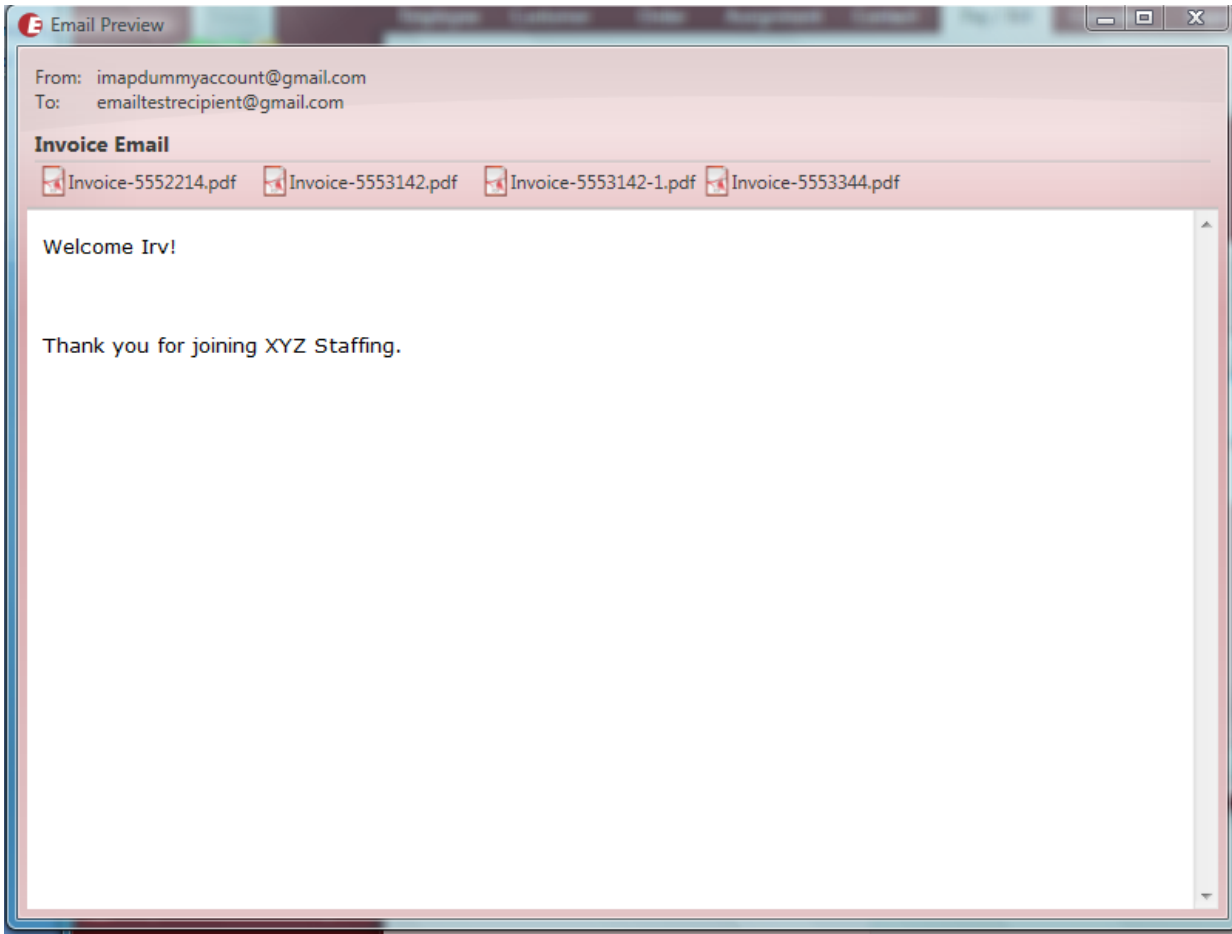
view emails

| Name | Email |
|----------------|------------------------------|
| ZZJuno, Lilith | emailtestrecipient@gmail.com |
| ZZJuno, Tori | emailtestrecipient@gmail.com |


Cancel < Back Next >

In the *Invoicing – View Emails* form the *Email* addresses of the **Invoice Email** recipients will be displayed. To remove a recipient, highlight the line and click on the  button. Once all of the recipient info looks correct, click *Next*.

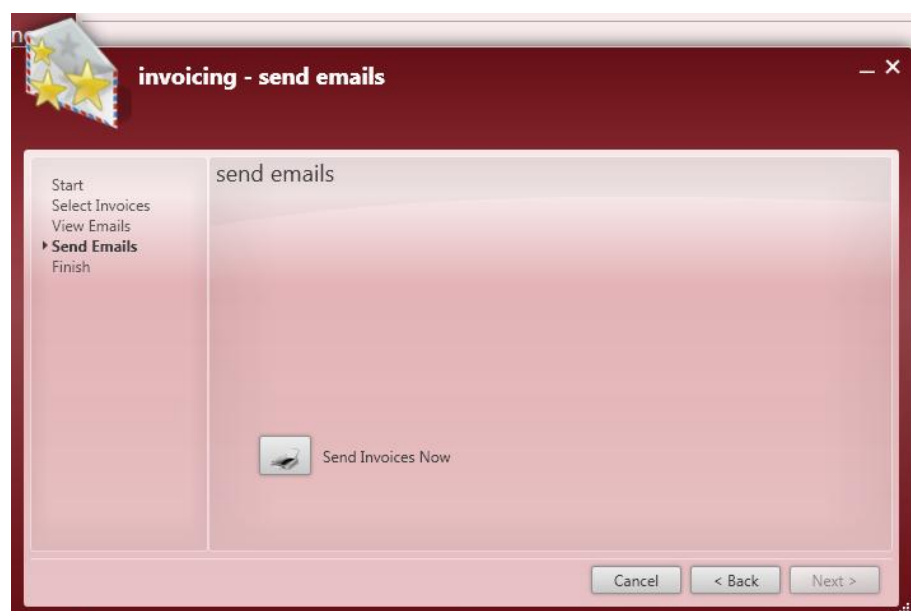
In the *Invoicing – View Emails* form the user can see a preview of the *Email* (as shown below) by selecting the line and clicking on the  button. To view the PDF Invoice attachments, double-click on the document file name.

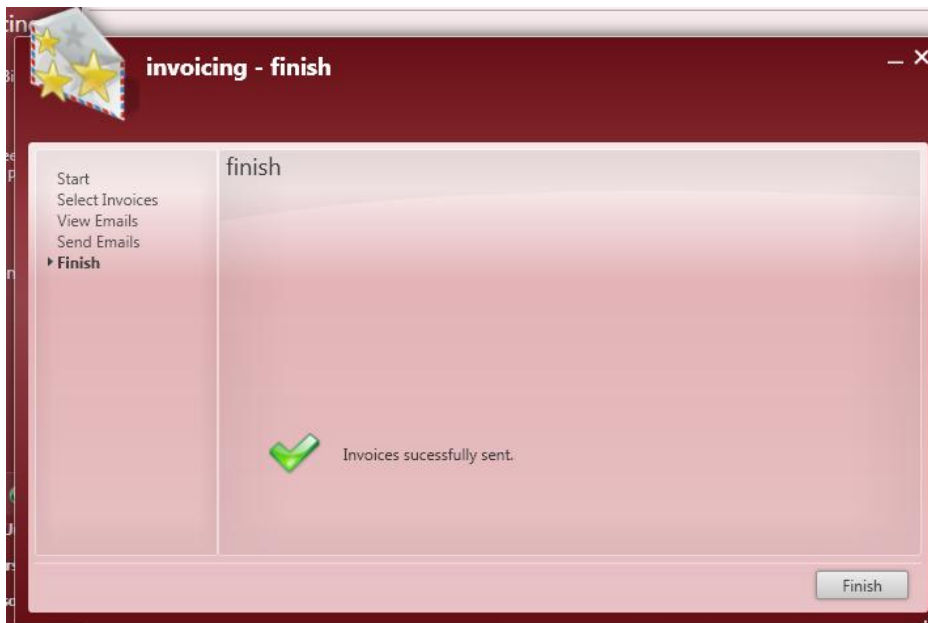


*Note – The text of the *Email* is determined by the **Invoice Email Template** selected on the **Customer Billing Setup** form.

In the *Invoicing – Send Emails* form click on the  button to send the **Invoice Emails** to the recipients.

The screen will then update to show the progress of sending the *Emails*.

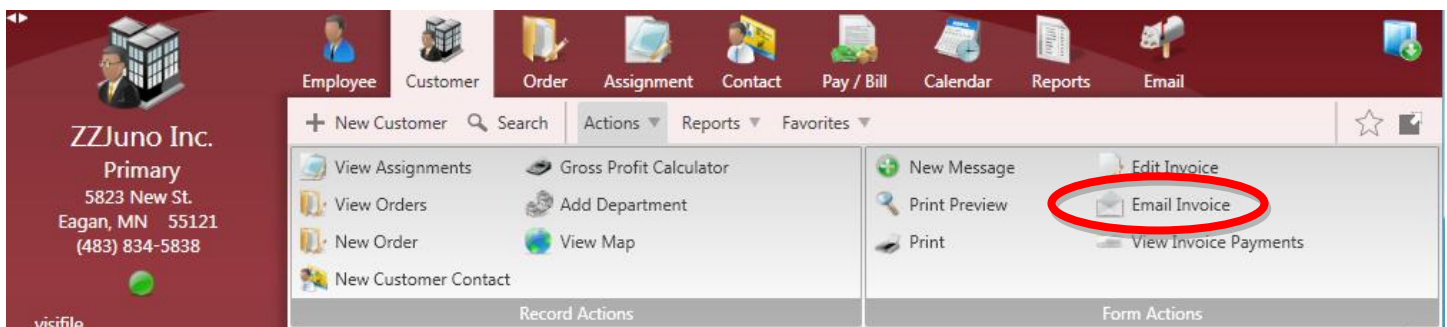
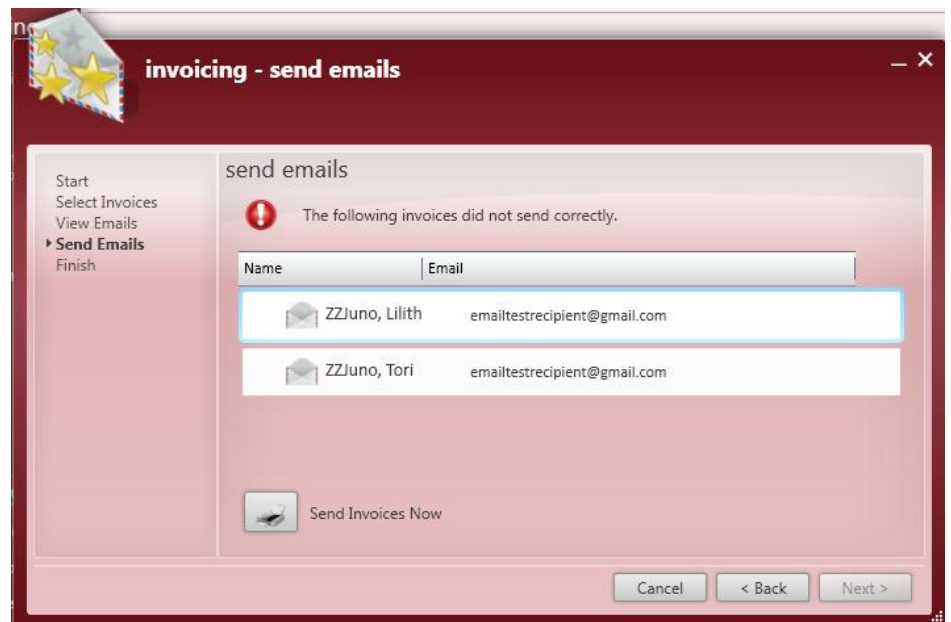




The *Invoicing – Finish* form will appear once the *Emails* have been sent successfully. Click on the *Finish* button to close out of the invoice email wizard.

If there are issues with sending the *Emails* the *Invoicing – Send Emails* form will come back up with an error notification on it. Address any issues (improperly formatted addresses, sender accounts not set up correctly, etc.)

Then click the  button to send.



To resend an *Email Invoice* or to send an *INVOICE* via *Email* that was originally printed, open the **Customer Invoicing** form and double-click on the **INVOICE** to view the *Invoice Details*. Or from the **Pay/Bill** area select the **INVOICE Register** and open the *Invoice Details* from there. Then click on the *Actions* drop down and select *Email Invoice*. This will open an outgoing *Email* with a PDF copy of the **INVOICE** attached. Choose the recipients and click *Send*.

Still Have Questions?

For more information about invoice emailing contact our customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

To submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact Alisha Arnold (Corporate Trainer) at 651-287-8370 or by sending an email to Alisha@tempworks.com.