

AUTOMATIC INVOICE EMAIL AND STATEMENT NOTIFICATION TO CLIENTS

March 21, 2026

The features to automatically bill are configured using a 4 special reports that have the “batch” name to them. We will discuss the steps to fully invoice automatically.

CUSTOMER INVOICES BY BATCH

- Program will place all invoices for the day or week into one email. So best used if you would like to send all invoices in one PDF for a customer into one email. 5 invoices created, one email will be sent
- Program will limit email to to 10MB per email.

CUSTOMER INVOICES BY BATCH 2

- Program will send ONE email per billed document. So if 5 invoices were created, 5 emails will be sent

CUSTOMER INVOICES BY BATCH 3

- Program will send ONE email with various PDFs, ONE PDF per invoice in order to reduce the amount of emails

CUSTOMER STATEMENT BY BATCH REPORT

- Primary use is to send Customer Statements only once a week or once a month as reminder to clients.
- Can be used to include statements and invoices again that are pending

▼ Module: AR
▼ Sub Module:
CUSTOMER INVOICES BY BATCH - One Email, One PDF containing all invoic...
CUSTOMER INVOICES BY BATCH 2 - One Email for each PDF Invoice
CUSTOMER INVOICES BY BATCH 3 - One Email, One PDF for each Invoice
CUSTOMER STATEMENT BY BATCH REPORT

Under Customer profile – Contacts

Each option has multiple possible selections

- Basic selection: will only send invoices and/or statement

Customer Invoices By Batch

Customer Invoices By Batch 2

Customer Invoices By Batch 3

Customer Statement By Batch

- DIS

This option will send the Invoice and/or Statement and include any DIS document in the INVOICE document. (DIS is specific to the Invoice DIS)

- Billed Docs

This option will include Invoice + the document forms being billed. Example the 7501 for entry or the 7512 form for Inbonds

- Billed Docs and DIS

This option will include Invoice + document forms + Invoice DIS documents

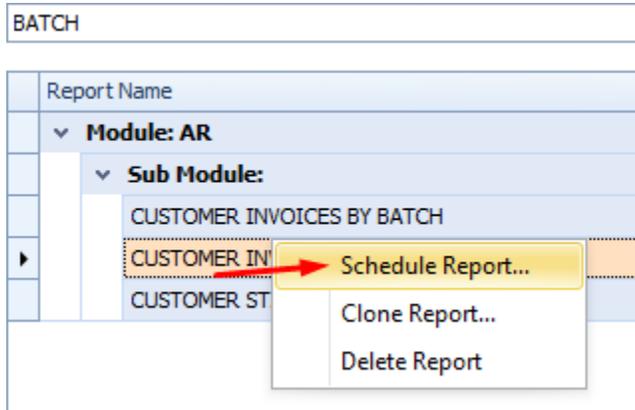
- Billed Docs and DIS Drilldown

This option will include Invoice + document forms + and all DIS documents in Invoice and the document DIS buckets. So if you are attaching your clients commercial invoice in the entries, use this option to include in the “invoice package”.

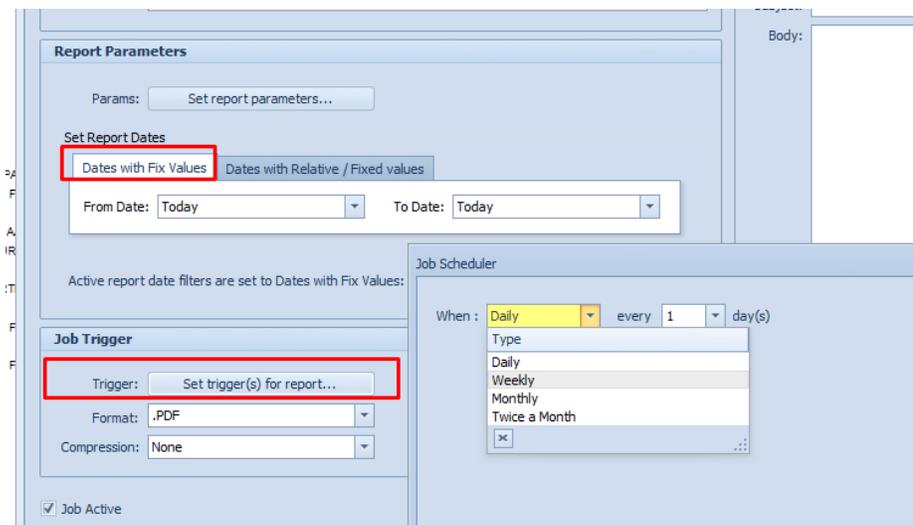
On SchedJob - Customer Invoices By Batch 2 - DIS
On SchedJob - Customer Invoices By Batch 2 - Billed Docs
On SchedJob - Customer Invoices By Batch 2 - Billed Docs and DIS
On SchedJob - Customer Invoices By Batch 2 - Billed Docs and DIS Drilldown
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On SchedJob - Customer Statement By Batch
On SchedJob - Customer Statement By Batch - Invoices
On SchedJob - Customer Statement By Batch - Invoices, Inv DIS
On SchedJob - Customer Statement By Batch - Invoices, Inv DIS, Billed Docs
On SchedJob - Customer Statement By Batch - Invoices, Inv DIS, Billed Docs, Docs DIS
On SchedJob - Customer Statement By Batch - Invoices, Billed Docs

Steps to Activate Automatic Sending of Invoice Packages

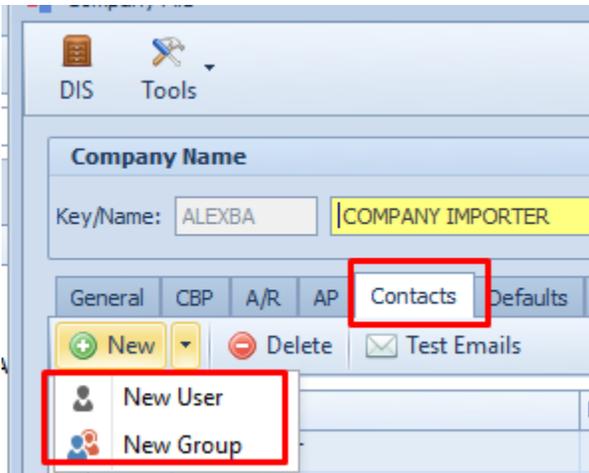
1. Select the "By Batch" document that fits best to your clients needs.
2. One Time activation of the Schedule Job
 - a. Right on the report and select Schedule Report



3. While you can select you own selection, for this example:
To send daily invoice packages
Use Dates with Fix Values for From Yesterday TO Yesterday
Trigger: Daily at 10pm
(But you can select your own choices depending on your customer scenario)



4. Go to the Customer Profile – CONTACTS
 - a. Either select Group for multiple email address or User for one specific email address. (These are the email address for your clients)
 - b. *Activate per Customer.*



5. Select Module: A/R and your selection based on your or your client needs.

