

Enterprise - How to Email Invoices

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Emailing Invoices

Customer records in Enterprise can be set up to receive printed invoices, emailed invoices, or both. This article reviews how to setup your system to email invoices and provides an overview on how the email invoice process works.

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Setting up your System

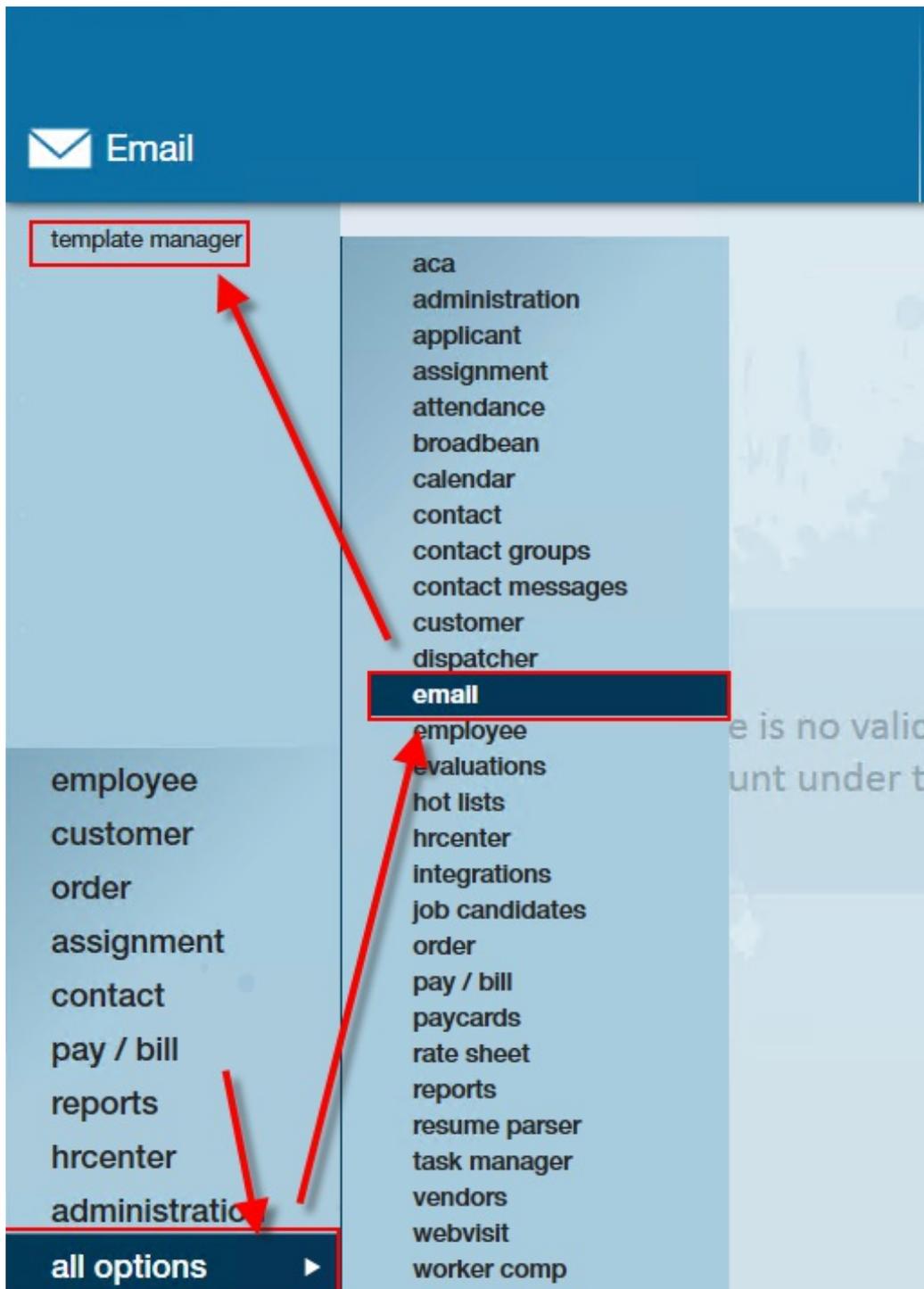
Before you can begin emailing invoices, the following items need to be setup first:

1. Ensure that a mass mailer is set up. This will allow invoices to be emailed out from your system en masse. For more information on setting up a mass mailer: [Mass Mailer SMTP Setup](#).
2. Set up an [email template](#) for invoices sent out via email.
3. Set up the [customer record](#) invoice preferences with email options
4. Select [Invoice Recipients](#)

Setting up an Email Template

Users can setup a myriad of invoice email templates by navigating to 'all options' in the

navigation tree. Then select 'email' and then 'template manager':



The template manager will display all of the templates that are available in your system. For more information about email templates: [How to Set up and Utilize Email Templates](#).

Consider why you are setting up your invoice template. Do you need more than one? For example, if one customer requests very specific information in their invoice email, a custom template could be designed for them. Perhaps you would like to use a different template per branch. The possibilities are endless!

Customer Record Setup

If you intend on emailing invoices to your customer on a regular basis, it is crucial that their customer record is setup accordingly.

To do this, navigate to 'invoice setup,' then 'billing setup':

The screenshot shows a software interface for customer record setup. The left sidebar contains a navigation menu with the following items: visifile, details, defaults, documents, integrations, invoice history, invoice setup, adjustments, billing setup (highlighted with a red box), credit and payroll, misc, peo setup, po setup, evaluations, messages, employee, customer (highlighted with a red box), order, assignment, contact, pay / bill, reports, hrcenter, administration, and all options. The main area displays the 'billing schedule' and 'invoicing' sections. The 'invoicing' section includes a dropdown for 'Invoice Method' set to 'Print and Email'. Below this is a table of 'Invoice Recipients' with the following data:

Name	Title	Contact Method	Details
Martins, Michelle	Owner	Email	M.Martins@xip.xom
Young, Bryan	Supervisor	Email	B.Young@xip.xom

From the section titled 'invoicing,' select an invoice method that includes "email." In the example below, the service rep has selected "Print and Email":

Martins Lumberyard (Primary)
 351 7TH ST W
 SAINT PAUL, MN 55102
 (651) 656-1555
 ID: 4295013472
 Branch: Memphis SW

! Printing Wastes Ink

tasks appointments soc

visifile
 ▶ details
 ▶ defaults
 documents
 ▶ integrations
 ▶ invoice history
 ▶ invoice setup
 adjustments
billing setup
 credit and payroll
 misc
 peo setup
 po setup
 ▶ evaluations
 messages

employee
customer

billing schedule
 Billing Frequency Weekly Bill On...

invoicing
 Style Invoice S Type
 Invoice Method **Print and Email**

Method	Description
Print Only	Print Invoices Only
Email Only	Email Invoices Only
Print and Email	Print and Email Invoices
Print With Timecard Image	Print Invoices with Timecard Images
Email With Timecard Image	Email Invoices with Timecard Images
Print and Email with Timecard Image	Print and Email Invoices with Timecard Images
Supress Billing	Do not print or email invoice

Name	Method	Description
Martins, Michelle	Owner	Email M.Martins@xip.com
Young, Bryan	Supervisor	Email B.Young@xip.com

Next, specify which email template you would like to send to the customer. Remember, all of the options listed in the drop-down correspond with the templates you designed in our first step outlined above:

Martins Lumberyard (Primary)
 351 7TH ST W
 SAINT PAUL, MN 55102
 (651) 656-1555
 ID: 4295013472
 Branch: Memphis SW

! Printing Wastes Ink

tasks appointments soc

visifile
 ▶ details
 ▶ defaults
 documents
 ▶ integrations
 ▶ invoice history
 ▶ invoice setup
 adjustments
billing setup
 credit and payroll
 misc
 peo setup
 po setup

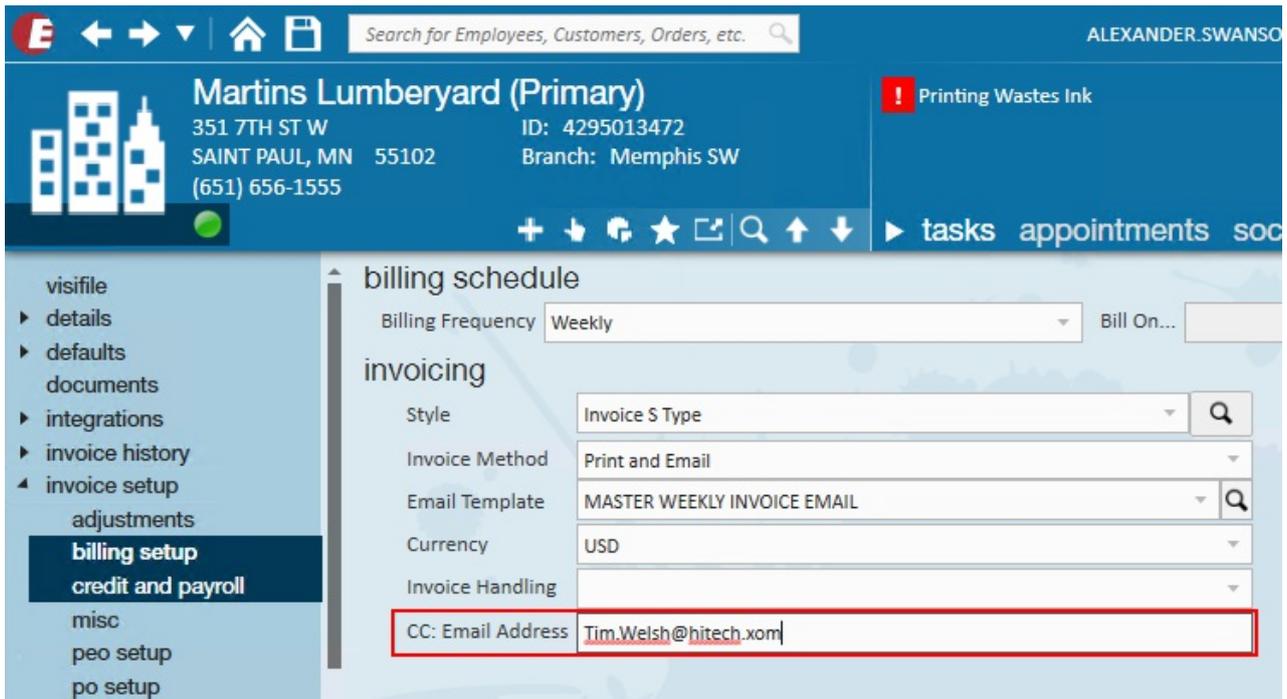
billing schedule
 Billing Frequency Weekly Bill On...

invoicing
 Style Invoice S Type
 Invoice Method Print and Email
 Email Template **MASTER WEEKLY INVOICE EMAIL**

Currency USD
 Invoice Handling
 CC: Email Address

If you would like a specific email to be CC'd on all invoices for a customer, the 'CC: Email Address' field may be used. For example, perhaps you want all of the new customer's emails

to also be sent directly to a branch manager for the first several weeks:



Invoice Recipients

In order for emails to be sent out, at least one invoice recipient must be set on the customer's record. Multiple recipients can be set to receive the same invoices for a customer record. In order to add an invoice recipient, **a contact record for that recipient must exist.**

To add a recipient, select the '+' icon:

invoicing

Style: Invoice S Type

Invoice Method: Print and Email

Email Template: MASTER WEEKLY INVOICE EMAIL

Currency: USD

Invoice Handling:

CC: Email Address: Tim.Welsh@hitech.xom

Add Recipient

Invoice Recipients

+ ×

No Records Found

This will open the 'add invoice recipient' window. Select a contact from the recipient drop-down window:

+ add invoice recipient

Recipient: [Redacted]

Contact method: [Redacted]

Name	Department
Caricotto, Mike	Primary
Freeman, Doug	Primary
Martins, Michelle	Primary
Murphy, Monica	Primary
Young, Bryan	Primary

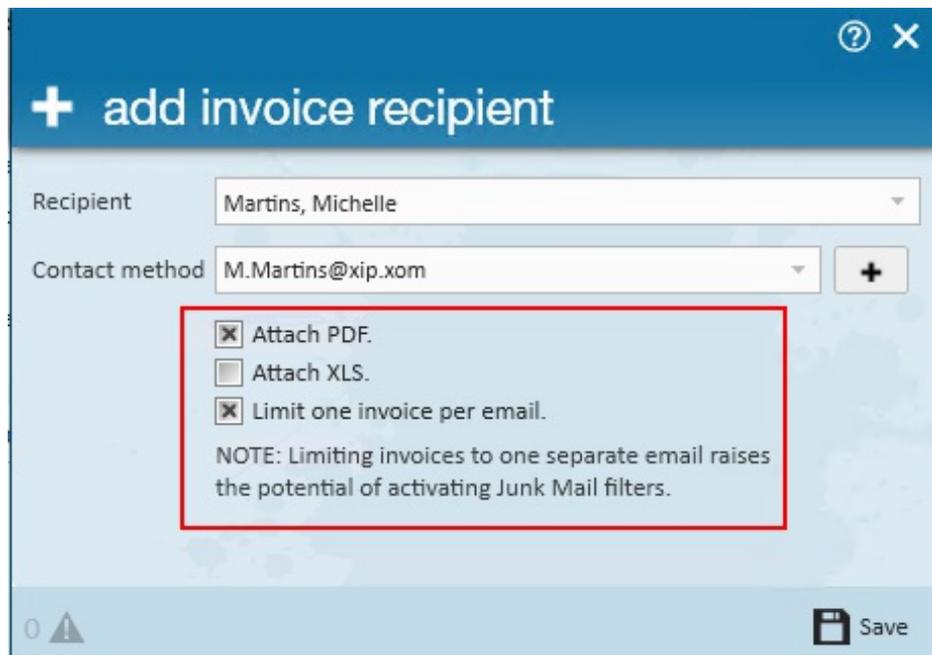
the potential of activating Junk Mail filters.

4 [Warning Icon]

Save

If the contact has multiple email addresses, select the email address you wish to send invoices to under the contact method drop-down. Additionally, new contact methods can be added with the '+' icon.

After selecting the appropriate email, you must then select the format the invoice will be in when it is sent to the contact:



The screenshot shows a dialog box titled '+ add invoice recipient'. It contains the following elements:

- Recipient: Martins, Michelle
- Contact method: M.Martins@xip.xom
- Attach PDF:
- Attach XLS:
- Limit one invoice per email:
- NOTE: Limiting invoices to one separate email raises the potential of activating Junk Mail filters.
- Save button

Contacts can be individually setup to receive PDF, XLS, or both formats. It is most common for a recipient to receive invoices as a PDF.

Note TimeCard images cannot be attached to the XLS invoices but will still be attached to the PDF format if both formats are selected on the invoice recipient.

Emailing Invoice Process

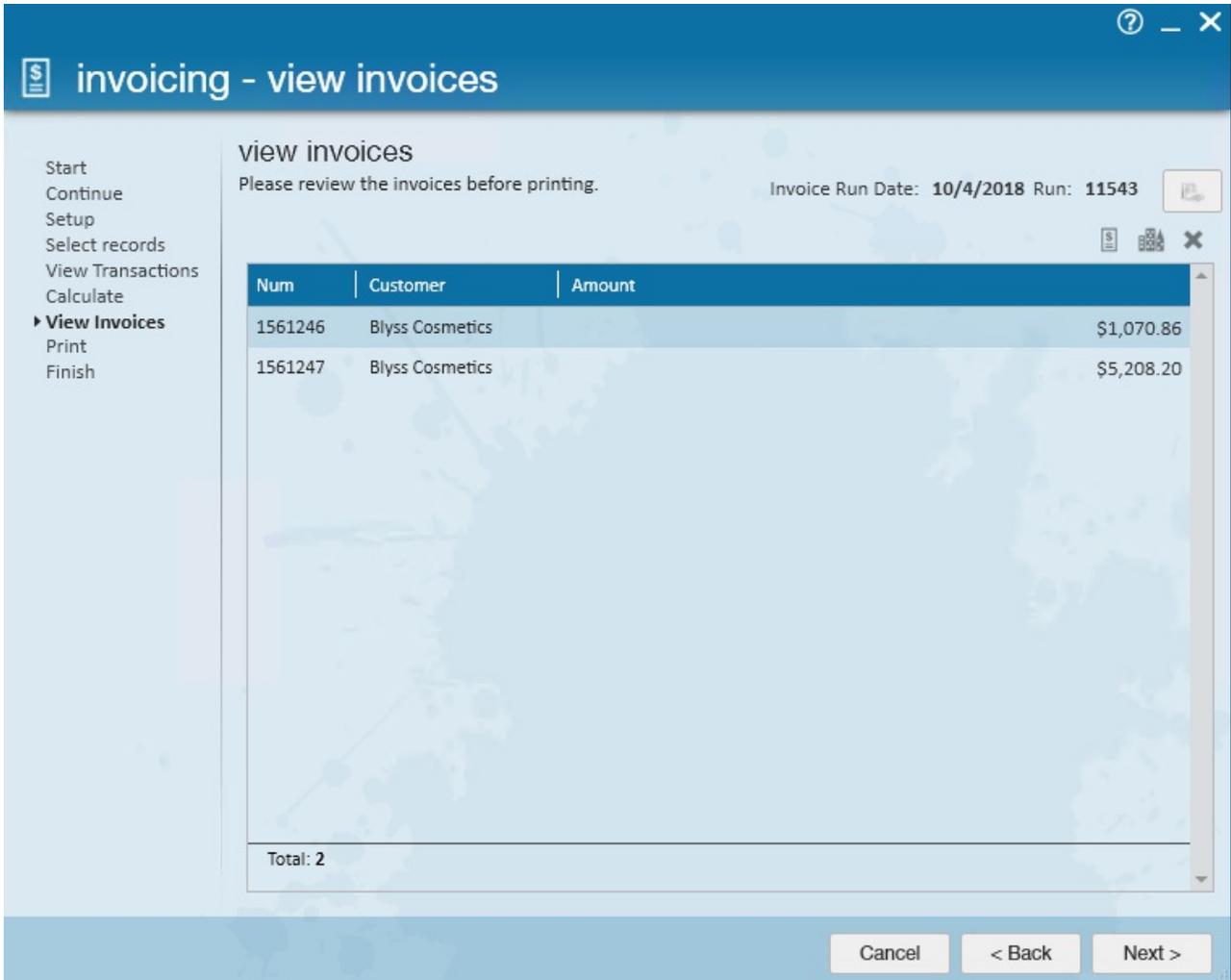
Customer records with an email option selected as their invoice method will have all emails pulled into an email invoice run. This is a separate step after the invoice run and must be done manually.

This can be illustrated in two simple steps:

1. Invoice all customers
2. Email Invoices

The Invoice Run

After completing an invoice run within pay/bill, invoices will be displayed in the 'view invoices' step. From here, continue on to the 'Print' step by selecting 'Next>':

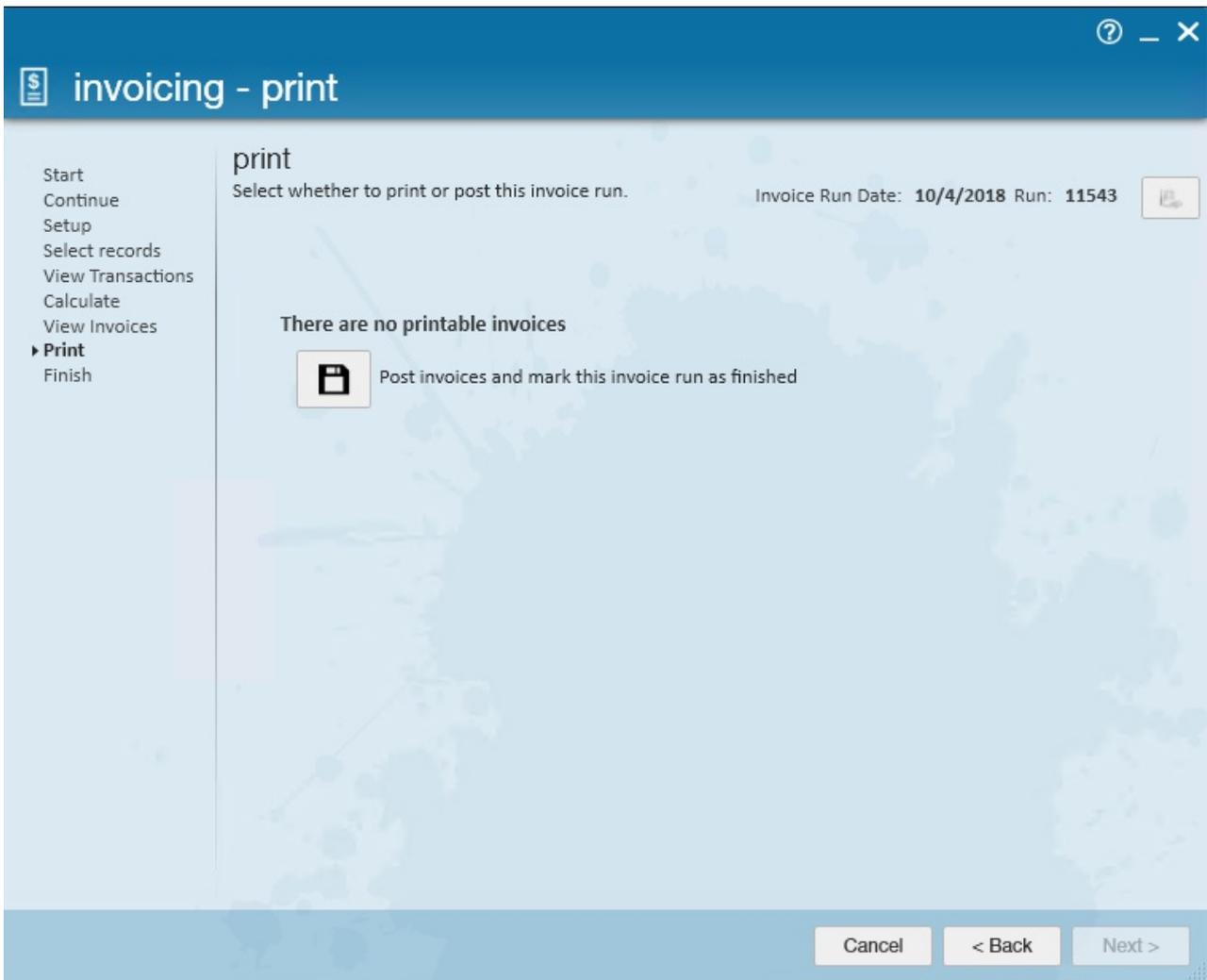


The screenshot shows a software window titled "invoicing - view invoices". On the left is a navigation menu with options: Start, Continue, Setup, Select records, View Transactions, Calculate, View Invoices (selected), Print, and Finish. The main area is titled "view invoices" and contains the instruction "Please review the invoices before printing." and "Invoice Run Date: 10/4/2018 Run: 11543". A table displays the following data:

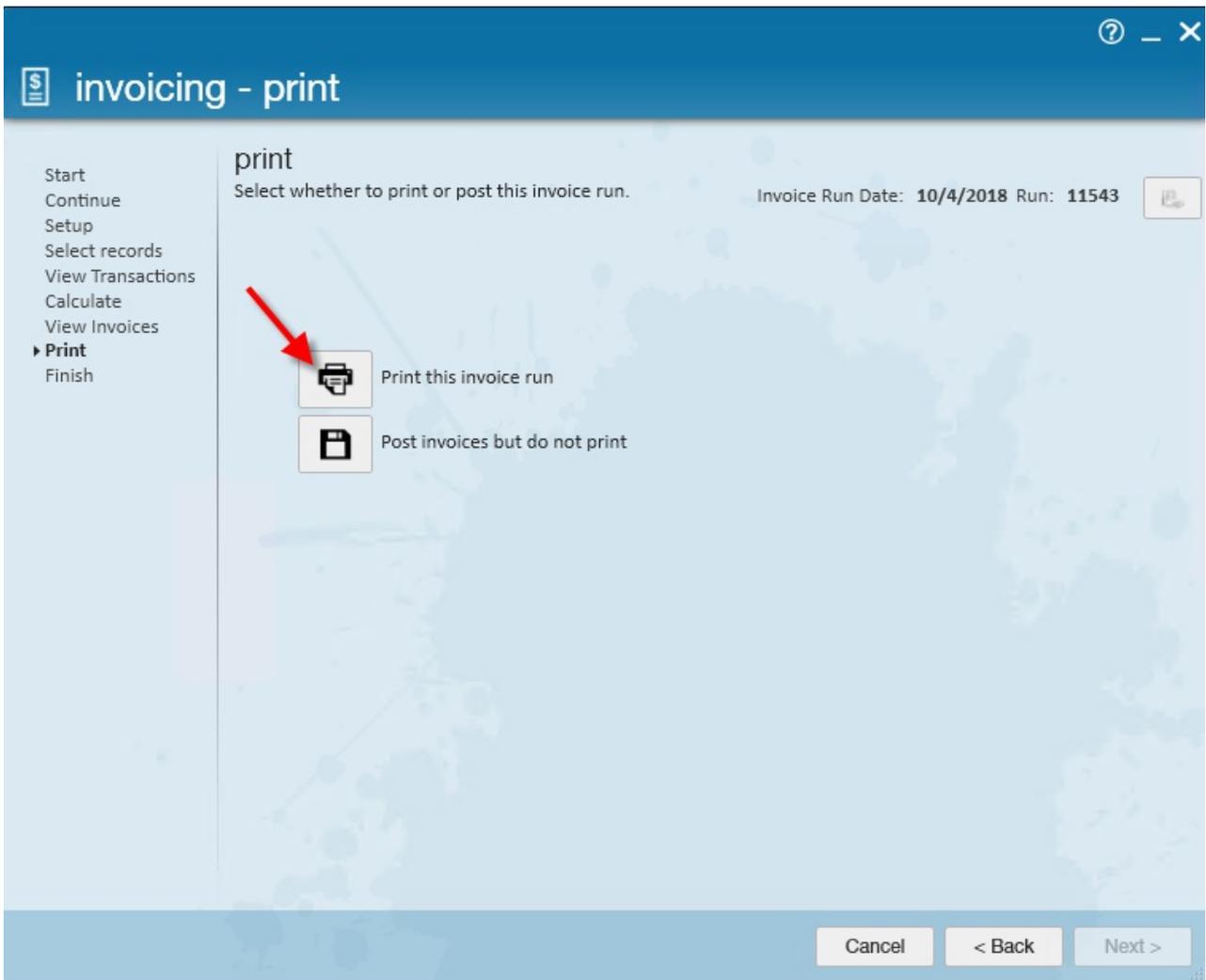
Num	Customer	Amount
1561246	Blyss Cosmetics	\$1,070.86
1561247	Blyss Cosmetics	\$5,208.20

At the bottom of the table area, it says "Total: 2". At the bottom of the window are three buttons: "Cancel", "< Back", and "Next >".

If there are no printable invoices in the run, such as customers which are set up to receive their invoices as 'Email Only,' you will be able to post the invoices and mark the run as completed.



If there are printable invoices in the run, such as customers which are set up to receive emailed invoices or the run has a mix of invoices from customers set up in differing ways, the run should be printed. This will print invoices that need to be printed but not print those that don't need printing (email only).



Note Invoices that have been posted and did not print where the customers are marked as 'print and email' still need to be or printed or they will be considered pending invoices:

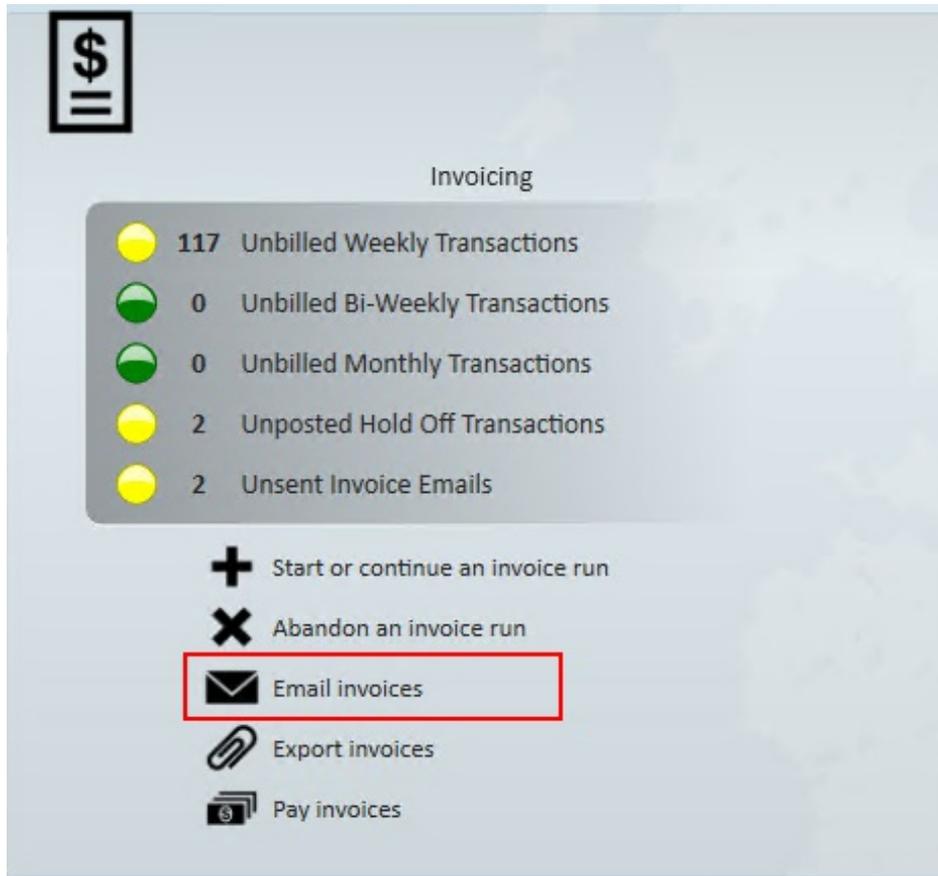
Pending	Blyss Cosmetics,				
1561247	Cost Center	Invoice Date	10/4/2018	Amount	
Inv ID: 17341		Last Paid		Paid	
OVERDUE		Invoice Due	10/4/2018	Balance	
Pending	Blyss Cosmetics,				
1561246	Cost Center	Invoice Date	10/4/2018	Amount	
Inv ID: 17340		Last Paid		Paid	
OVERDUE		Invoice Due	10/4/2018	Balance	

Email Invoices

Once invoices have been created, users are able to create an invoice email run. This will send predetermined email templates with the invoices attached to customers who have

elected for this.

To do this, start by expanding the invoicing box in pay/bill and select 'Email Invoices':

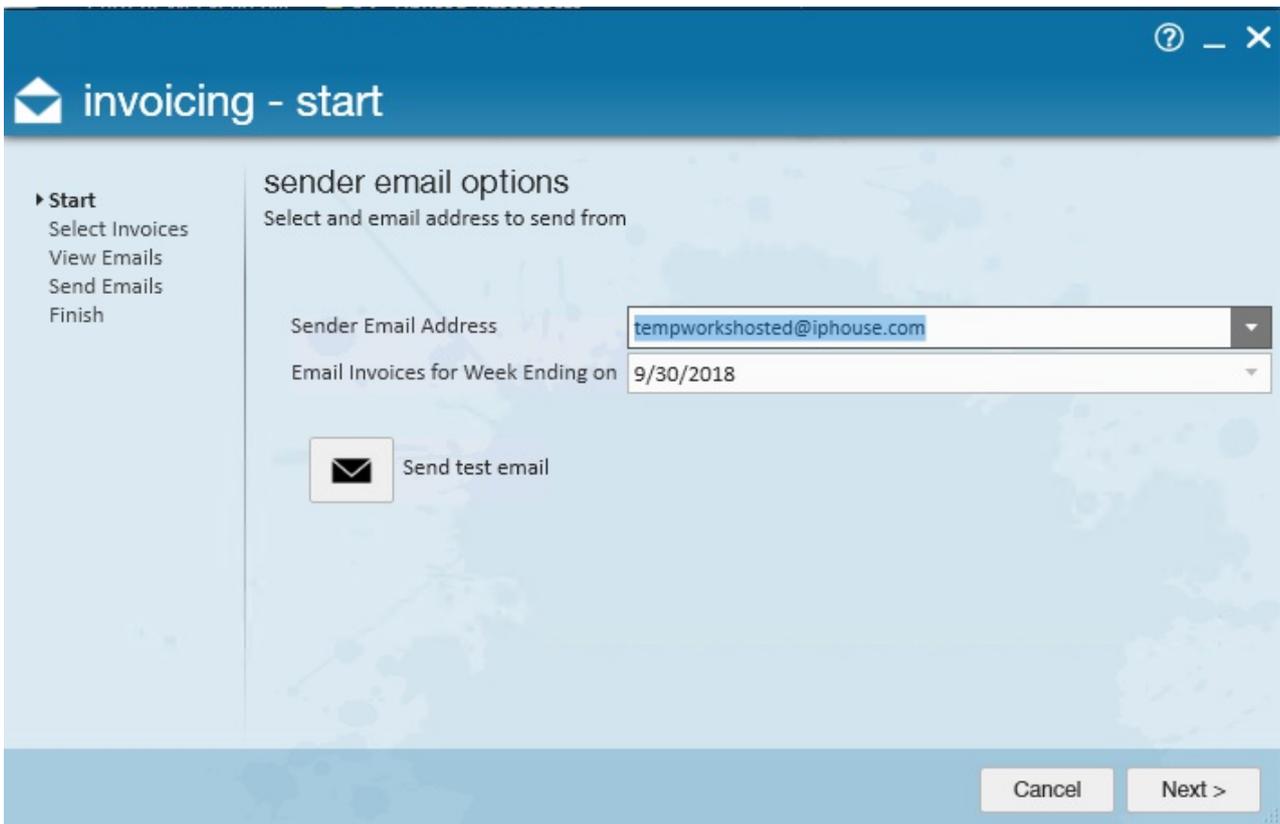


This will open the 'invoicing' wizard. The steps below highlight the process.

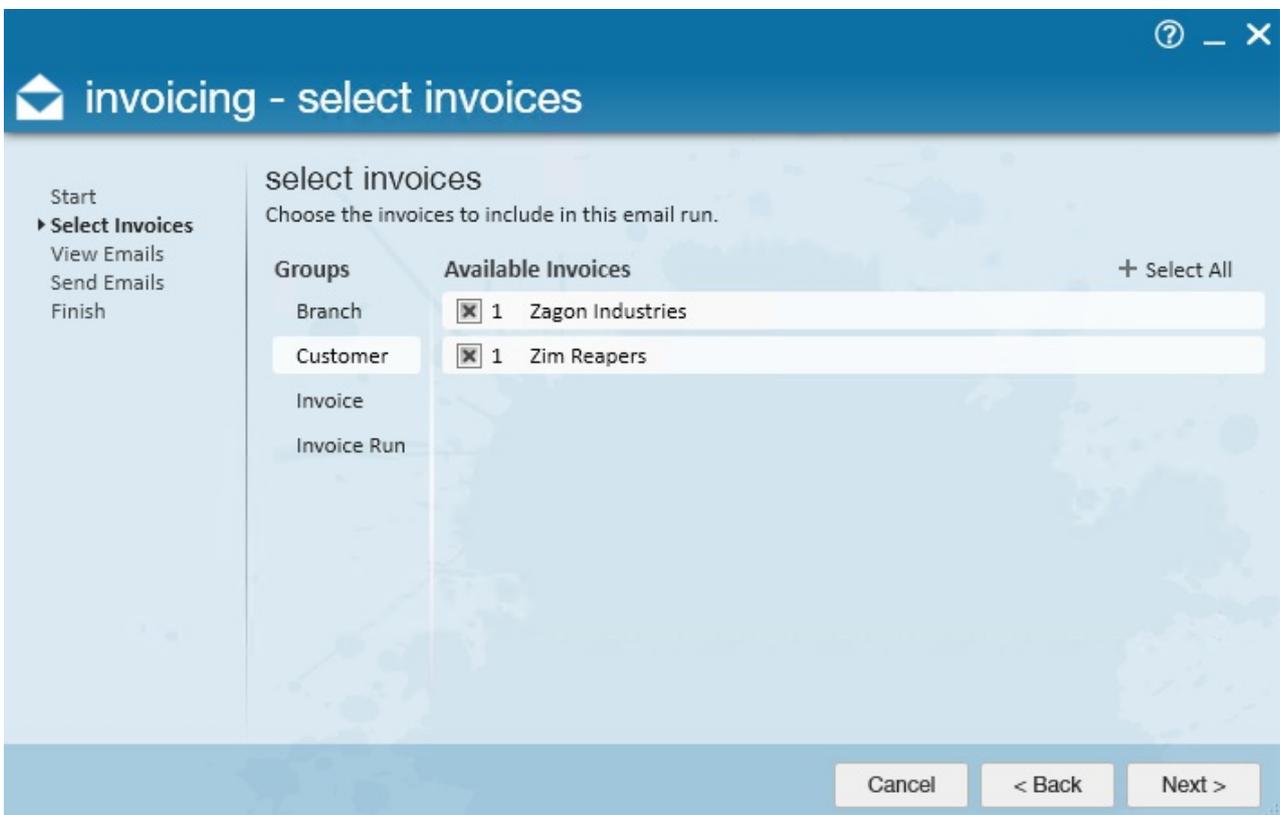
Step 1: Fill out the sender email options

- Choose your sender address.
 - This drop-down will be populated by your mass mailing options set up in your system.
- Select the weekend bill date you would like to pull invoices from.

Note Invoices that are to be emailed are not required to be sent before closing your pay/bill week.



Step 2: Select the invoices you would like to send. This can be filtered by a variety of groups so users can choose to email invoices by Branch, Customer, etc.

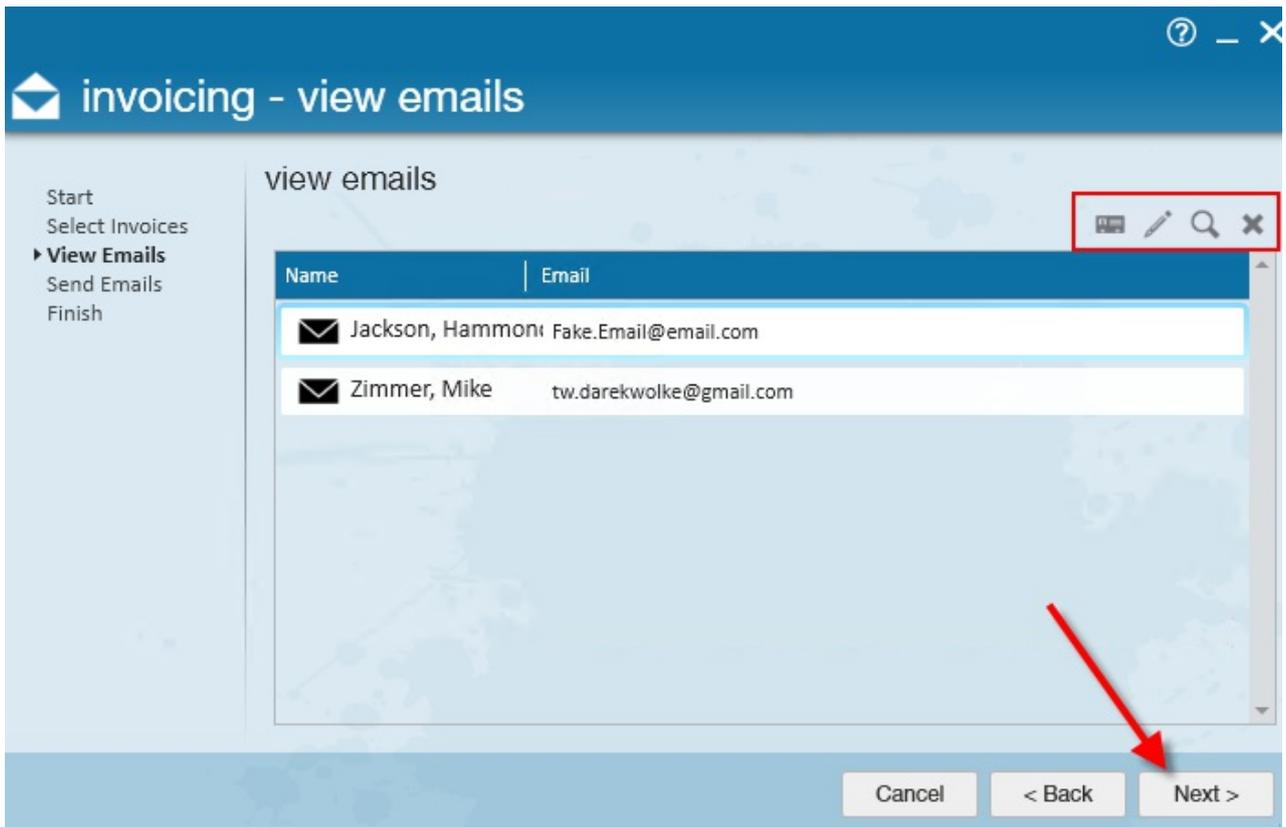


Step 3: Review emails to be sent

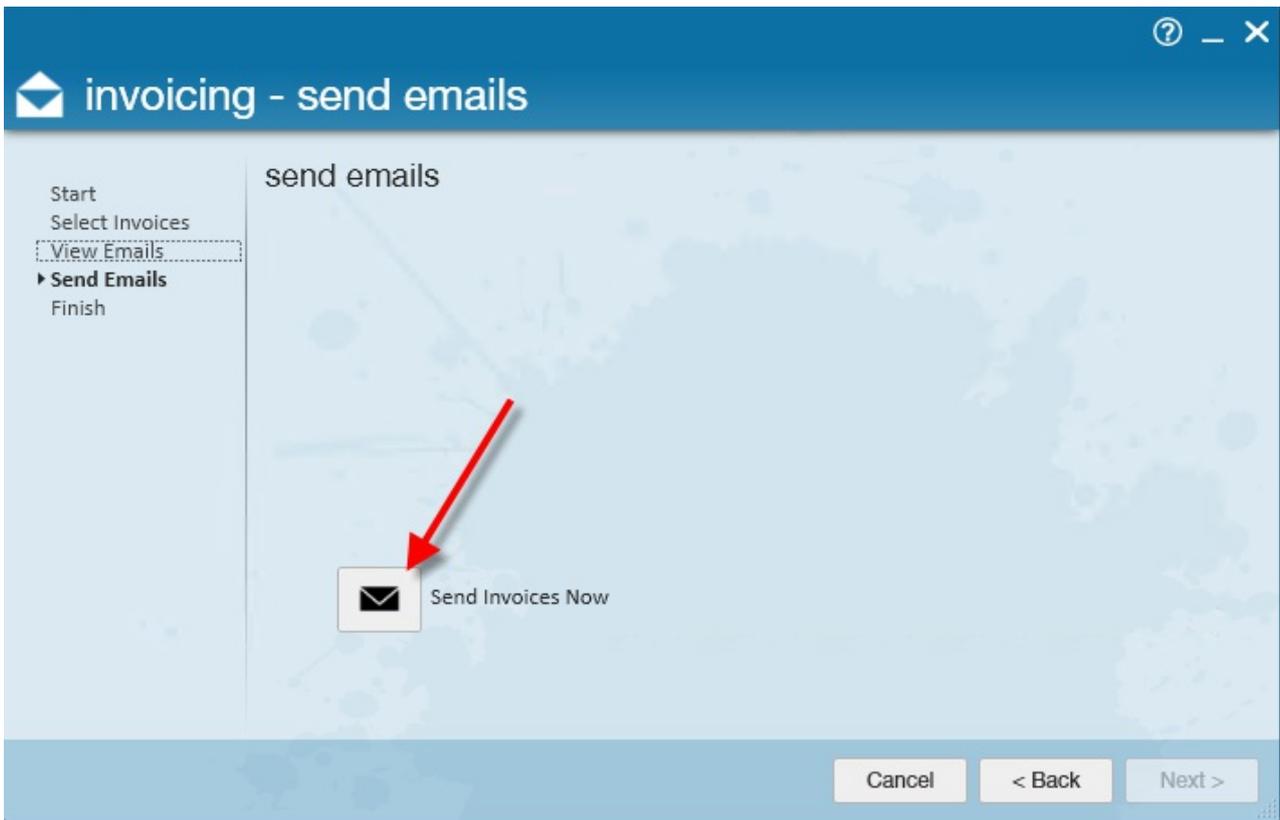
The 'view emails' step allows users to review the recipient's name and email address. From here, you can utilize the icons in the upper portion of the wizard to view a contact, edit contact details, preview the email, or remove the email.

Please note that you cannot edit the email body or template from here.

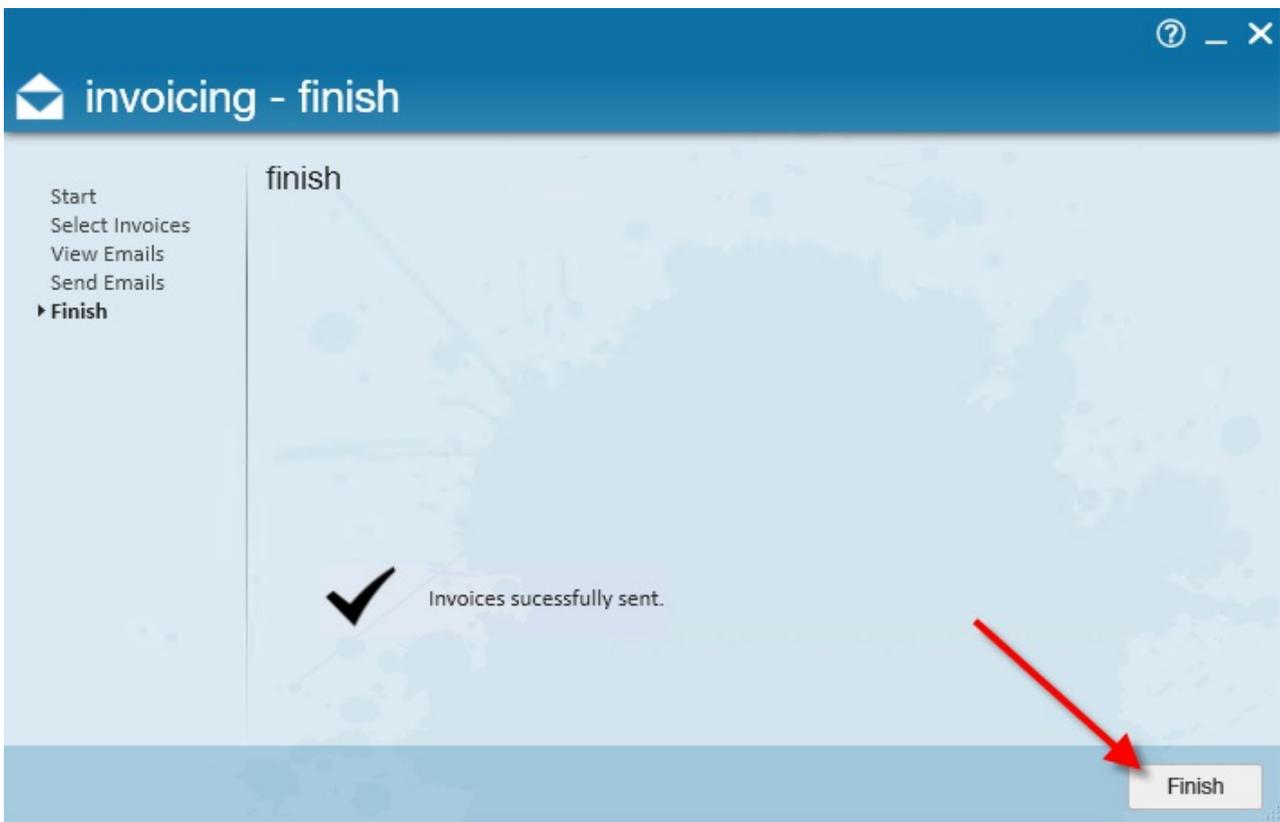
Each contact listed will receive the emails they are set to receive, thus you may see more than one contact from a customer represented:



Step 4: Send the invoice emails with the click of a button:



Step 5: Click 'Finish' to close the wizard:



Removing Invoices from an Email Run

If desired an individual invoice can be removed from an email run by marking it as do not email.

To accomplish this, locate the invoice in the 'invoice register'. Select the invoice to bring up the invoice detail page:

The screenshot shows the 'Payroll / Invoicing' interface. The left sidebar has 'invoice register' highlighted. The main area shows a table of invoices. The selected invoice is for 'Floyd's Farming' with invoice number 1561375. The table below shows the invoice details.

Item	id	quantity	rate	weekend date
Reg Hours	72121	26.00	\$25.00	10/20/2018
Reg Hours	72128	24.00	\$35.00	10/20/2018
Reg Hours	72092	25.00	\$25.00	10/20/2018
Reg Hours	72127	23.00	\$30.00	10/20/2018
Reg Hours	72107	21.00	\$40.60	10/20/2018
Reg Hours	72106	12.00	\$40.60	10/20/2018
Reg Hours		32.00	\$26.50	10/20/2018

From here open the actions menu, then locate the action 'Mark as Do Not Email':

The screenshot shows the 'Payroll / Invoicing' interface with the actions menu open. The 'Mark as Do Not Email' option is highlighted. The right side of the screen shows the invoice details and a table of items.

Item	id	quantity	rate	weekend date
Reg Hours	72121	26.00	\$25.00	10/20/2018
Reg Hours	72128	24.00	\$35.00	10/20/2018
Reg Hours	72092	25.00	\$25.00	10/20/2018
Reg Hours	72127	23.00	\$30.00	10/20/2018
Reg Hours	72107	21.00	\$40.60	10/20/2018
Reg Hours	72106	12.00	\$40.60	10/20/2018
Reg Hours		32.00	\$26.50	10/20/2018

Once this has been done a warning will appear informing you of your action, invoices marked as such will now need to be manually printed or emailed to be given to your customers:



Mark this invoice as Do Not Print and Do Not Email

This will prevent the invoice from being printed or emailed again.

→ Yes

→ Cancel

Emailing Invoices Individually

If you would like to send another copy of an invoice or email an invoice individually you can do so from the invoice details screen.

1. Navigate to the invoice details
 1. Either navigate to pay/bill > invoice register and double click the invoice you want to send
 2. OR navigate to customer record > invoice history and double click the invoice you want to send
2. Select the envelope icon on the right
3. Select sending details:
 1. CC/BCC additional invoice recipients
 2. Select email template
4. Choose send

Sagebrush Inc 234 Sagebrush Lane Carroll, OH, 43112		Invoice Number 45774 Weekend Bill 6/7/2015 Invoice Date 6/12/2015 Pay Date			
		Owed Balance	Amount Paid		
		\$525.00	\$0.00		
Invoice Items	item	quantity	rate	weekend date	total
<input type="checkbox"/>	Bailey, Bob Admin. Assist.	Reg Hours	35.00	\$15.00	6/7/2015 \$525.00

Once Emails Have Been Sent

Example of the email template versus the actual email received:

Template

Hello ##Recipient.contact.FirstName##,

Your weekly invoices are attached to this email. Please contact High Tech Staffing if you have any questions. They are dated for ##Master.invoice.InvoiceDate## with a weekend bill of ##Master.invoice.WeekendBill##.

Thank you for your business!

Actual Email

Message Invoice-45798.pdf (3 KB)

Hello Elliot,

Your weekly invoices are attached to this email. Please contact High Tech Staffing if you have any questions. They are dated for Thursday, June 18, 2015 with a weekend bill of Sunday, June 14, 2015.

Thank you for your business!

Every time an invoice is emailed out of Enterprise, a message is automatically logged on the recipient's record displaying the text of the email:

The screenshot shows a software interface with an 'Action' dropdown menu set to 'Email'. Below it, a preview of an email is displayed with the following text:

Invoices Dated Thursday, June 18, 2015

Hello Elliot,

Your weekly invoices are attached to this email. Please contact High Tech Staffing if you have any questions. They are dated for Thursday, June 18, 2015 with a weekend bill of Sunday, June 14, 2015.

Thank you for your business!
Grey Matter Technologies

Below the email preview is a 'Details' panel with the following information:

Details	Attachments
Date/Time	6/18/2015 2:32:00 PM
Rep Name	dwood
Link Employee	[Dropdown menu]
Link Contact	Schwartz, Elliot
Customer	Grey Matter Technologies

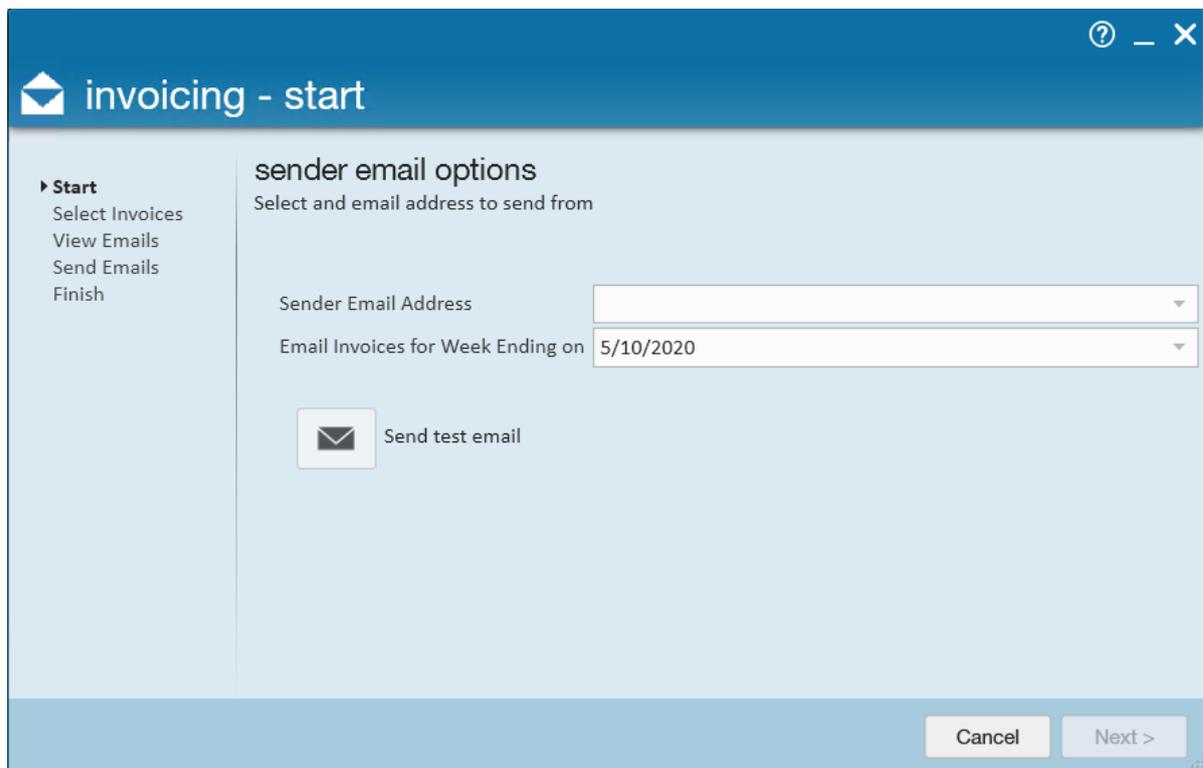
Reemail Invoices

If you want to reemail invoices in mass, you can do so from the Pay/Bill action menu.

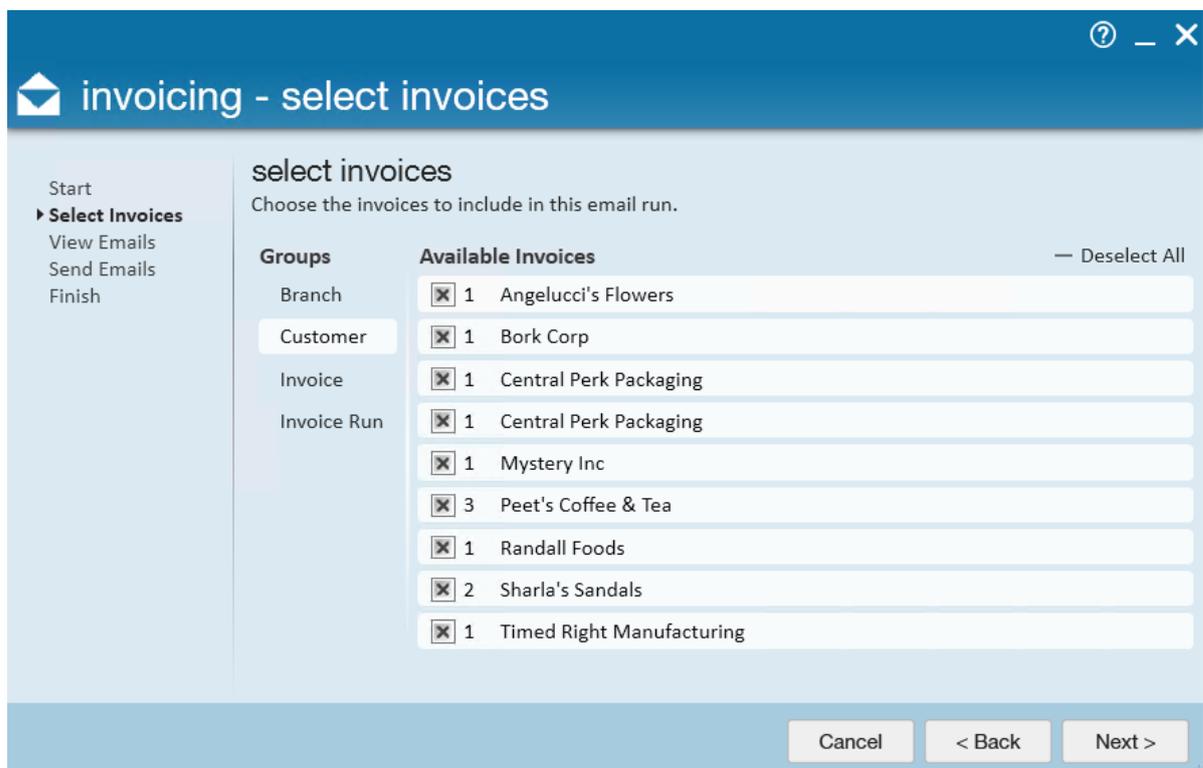
1. Navigate to the pay/bill section
2. Select the actions menu > Reemail Invoices

The screenshot displays the 'Payroll / Invoicing' section of a software interface. The header is blue and contains a stack of coins icon, the title 'Payroll / Invoicing', and status information: 'Current Weekend Bill 5/10/2020', '1374 Unused Timesheets', and '1 Timesheets Not Paid'. Below the header, there are two main panels. The left panel, labeled 'Record Actions', contains a 'Close week' button. The right panel, labeled 'Form Actions', contains a list of actions: 'Export', 'Import', 'Upload Documents', 'Reprint Payroll Run', 'Reemail Check Stubs', 'Reemail Invoices' (highlighted with a mouse cursor), 'Available Paycards', 'Assign Paycard Numbers', 'Modify Worker Comp', 'Export Assignment info to PeopleNet', 'Import PeopleNet Time File', and 'Open Gross Up Calculator'. There are also navigation icons in the top right corner of the header.

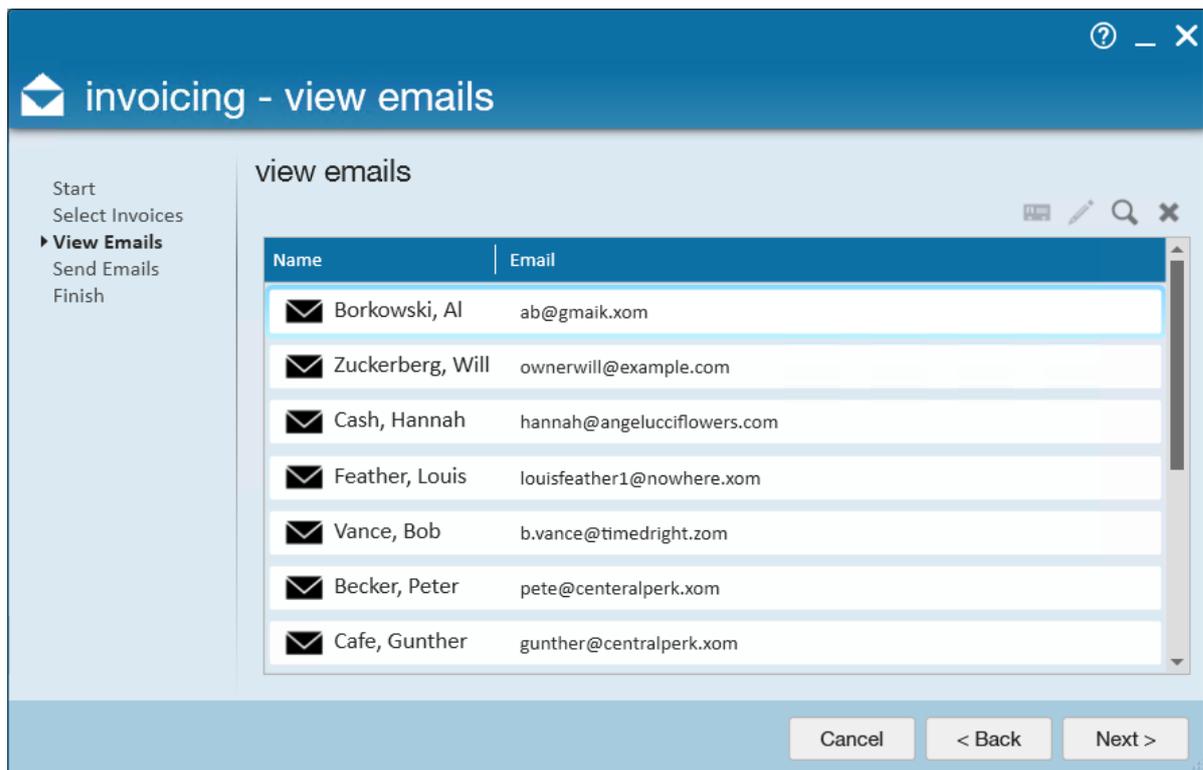
3. Select the mass mailer you want to send the emails from
4. Select the weekend date for the invoices



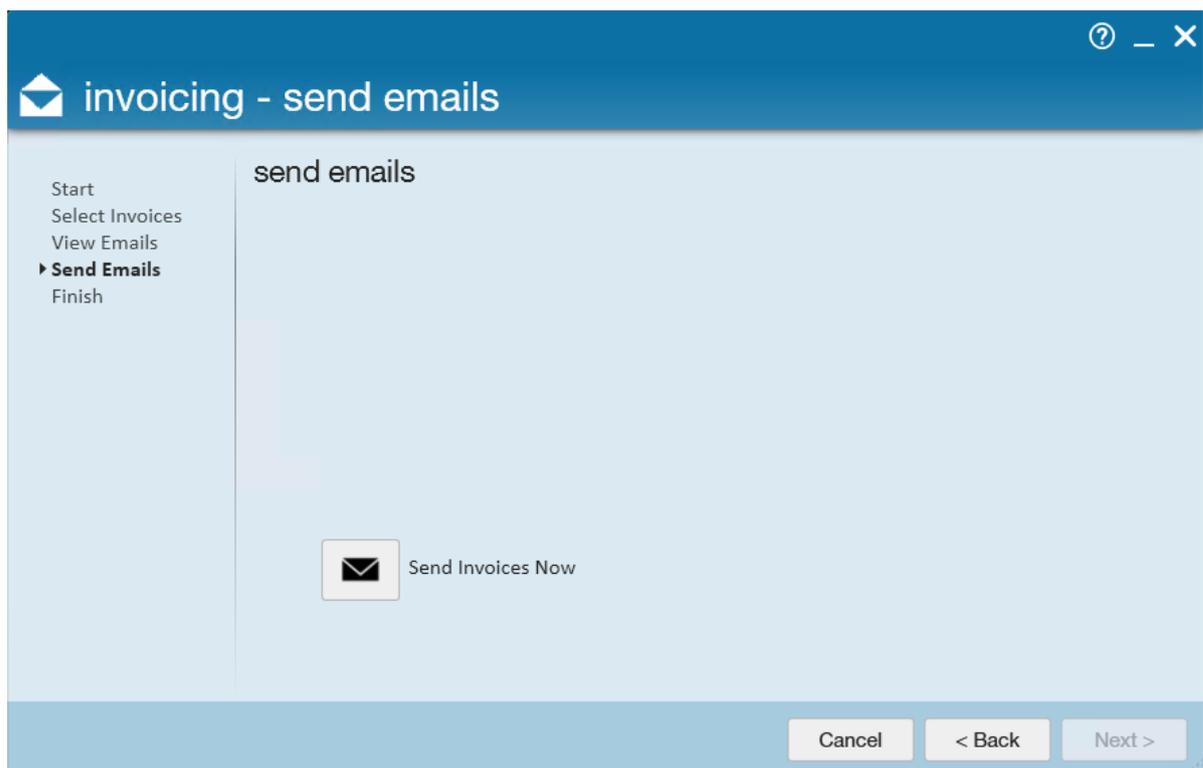
5. Select Next
6. Select invoices by customer, branch, invoice run, etc.



7. Select Next
8. Review the email addresses before selecting Next



9. Click Send Invoices Now



10. When the emails have been sent you will be able to close the window.

Related Articles

