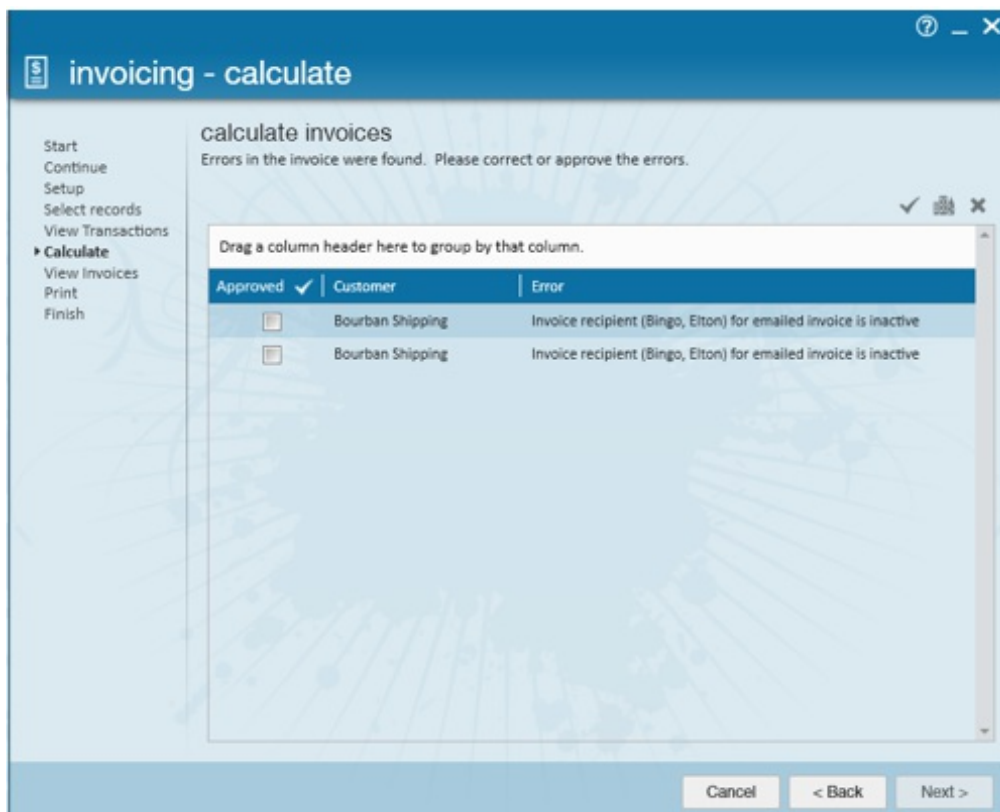


Enterprise - How to Fix the Invoice Recipient Error

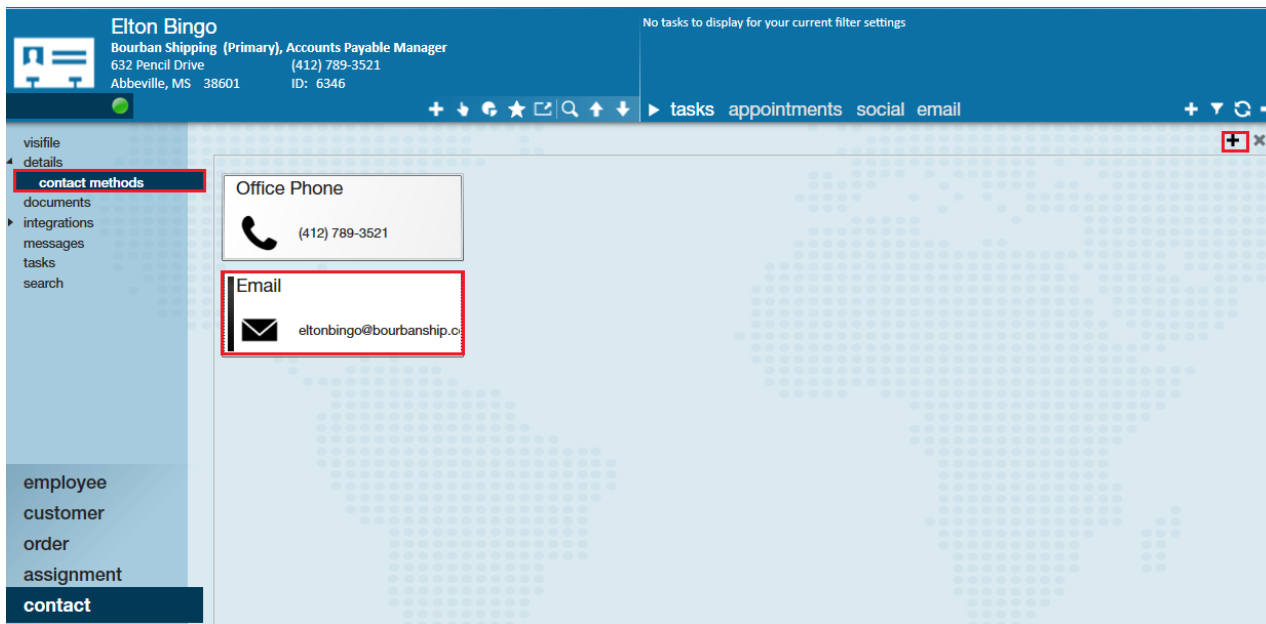
Last Modified on 01/06/2020 2:03 pm CST

Error messages will appear during an invoice run if a customer has chosen an invoice method which contains "email", but the contact, or recipient, is inactive, or does not have an email address associated with their record. The following article describes how to remedy both issues.

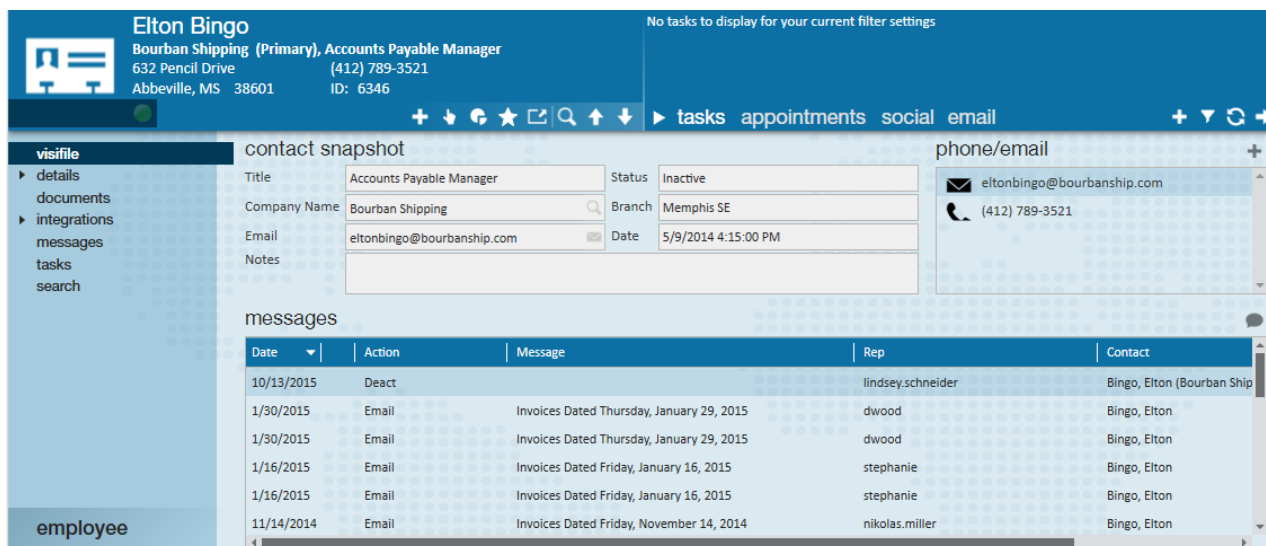
The following error will appear if there is currently no active contact to receive to receive an email, or no email address is tied to the contact record:




To fix the error, navigate to the recipient's contact methods, select the + icon, add email information.



If a contact record is inactive and they have been designated by the customer to receive invoices via email, their record must be reactivated.



Within the contact record, select the message icon  ; using an action code of reactivate, log a message in the body of the and select "Post".

message

Action React

Started working back at this company|


Details | Email | Attachments

Date/Time	10/13/2015 4:37:08 PM
Rep Name	lindsey.schneider
Link Employee	<input type="text"/>
Link Contact	Bingo, Elton
Customer	Bourban Shipping
Link Order	<input type="text"/>
Link Assignment	<input type="text"/>

follow-up
There are currently no follow-up items for this message.

- create a task
- schedule an appointment

Post

The contact is now active, indicated by the green icon  within the avatar area of their record.

Elton Bingo
 Bourban Shipping (Primary), Accounts Payable Manager
 632 Pencil Drive (412) 789-3521
 Abbeville, MS 38601 ID: 6346

No tasks to display for your current filter settings

tasks appointments social email

contact snapshot

Title: Accounts Payable Manager Status: Active
 Company Name: Bourban Shipping Branch: Memphis SE
 Email: eltonbingo@bourbanshipping.com Date: 5/9/2014 4:15:00 PM

phone/email

eltonbingo@bourbanshipping.com
 (412) 789-3521

messages

Date	Action	Message	Rep	Contact
10/13/2015	React	Started working back at this company.	lindsey.schneider	Bingo, Elton (Bourban Ship
10/13/2015	Deact		lindsey.schneider	Bingo, Elton (Bourban Ship
1/30/2015	Email	Invoices Dated Thursday, January 29, 2015	dwood	Bingo, Elton
1/30/2015	Email	Invoices Dated Thursday, January 29, 2015	dwood	Bingo, Elton
1/16/2015	Email	Invoices Dated Friday, January 16, 2015	stephanie	Bingo, Elton
1/16/2015	Email	Invoices Dated Friday, January 16, 2015	stephanie	Bingo, Elton

employee

To ensure the proper recipient has been selected, navigate to the customer record, expand the invoice setup section and select billing setup. Verify an email invoice method is chosen and confirm the correct invoice recipient has been added for the customer/department.

To delete an invoice recipient, click the contact you wish to remove and select the x (1) icon.

If you would like to add an invoice recipient, press + (2.) and enter the contact in the "Recipient" field and which email the invoice should be sent in the "Contact method" field; click Save to finish.

Bourban Shipping (Primary)
 632 Pencil Drive ID: 4294999728
 Abbeville, MS 38601 (987) 363-9523

No tasks to display for your current filter settings

tasks appointments social email

billing schedule

Billing Frequency: Weekly Bill On...

invoicing

Style: Invoice S Type
 Count: 1
 Invoice Method: Email Only
 Email Template: Invoice to Contact
 Currency: USD
 Invoice Handling: SEND INVOICE TO BRANCH
 Max Invoice:

Create Separate Invoices For Each

Order Branch
 Assignment Supervisor
 Employee Id Job Title
 Week End Sub-entity
 Cost Center Division
 PO Department Address

Invoice Recipients

Name	Title	Contact Method	Details
Bingo, Elton	Accounts Payab...	Email	eltonbingo@bourbanshipping.com

2. 1.

Invoice Line Items

Field Type: departmentname

customer

Once both areas are updated, the invoice run can be completed without issue.

Related Articles

