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Automated Customer Invoice Generation

Overview

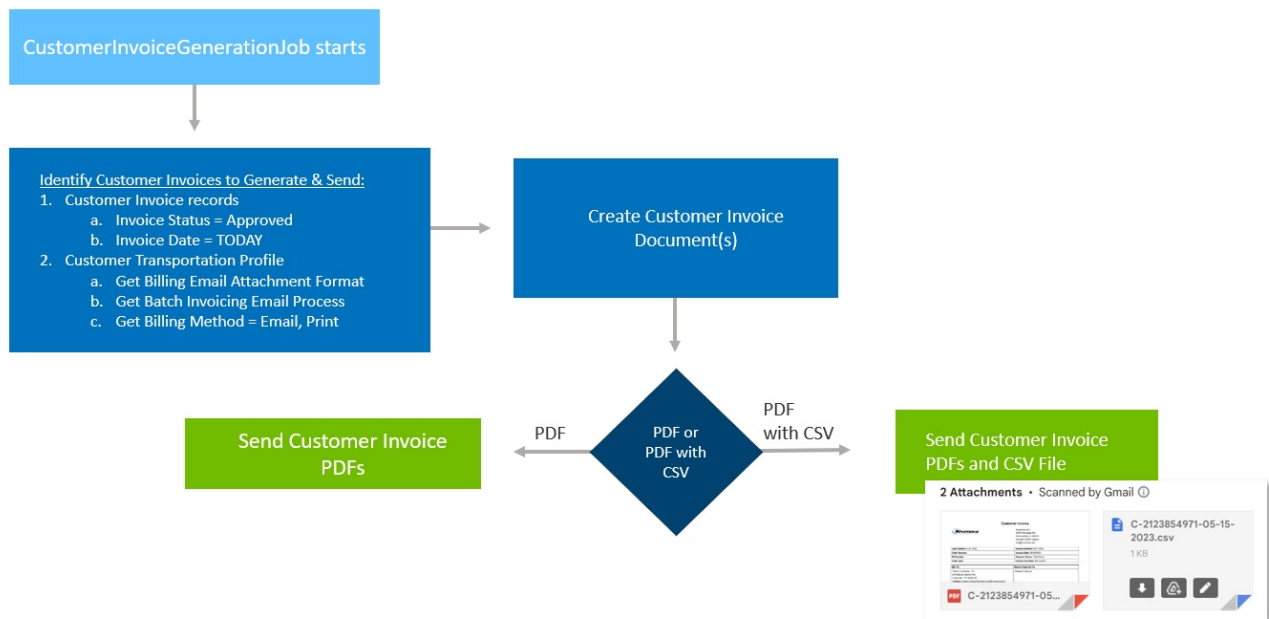
All invoices for a specific customer may be automatically consolidated and sent on a specified day of the week. A .CSV file may be created and included with the invoice email.

Automated Customer Invoice Generation

Automated customer invoicing is completed by running the CustomerInvoiceGenerationJob.

The CustomerInvoiceGenerationJob is available to run from the Job Monitor. The job processes invoices each time it runs based on the following criteria:

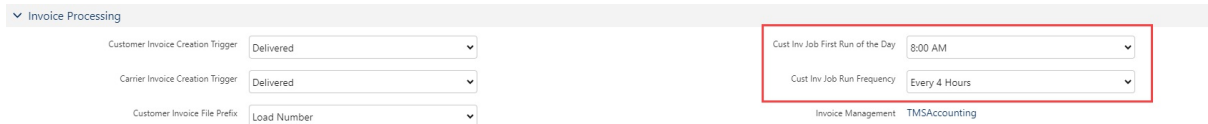
- The **Auto-Send Invoices** field in the Transportation Profile record of the customer is *Checked*.
- The **Invoice Date** is today.
- The **Invoice Status** is set to *Approved*.
- The **Billing Method** is *Email* or *EDI*.



Configuration

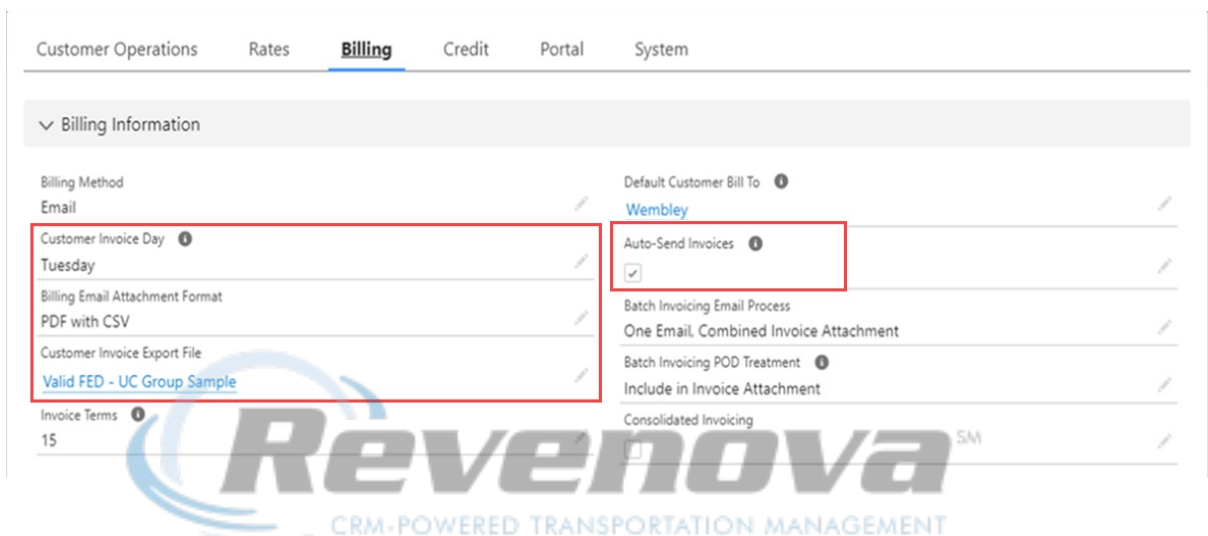
Configure the following settings.

1. Navigate to **TMS Admin** → **Configuration** and find the *Invoice Processing* section.



The *Cust Inv Job First Run of the Day* field is the time the job runs for the first time each day. Set the *Cust Inv Job Run Frequency* field to how often the job runs.

2. Navigate to the Customer Transportation Profile record. Select the *Billing* tab and configure the billing settings as necessary.



3. Set the **Customer Invoice Day**. Values are blank, and Monday through Sunday. This setting defines how the **Invoice Date** is calculated. When the value is blank, the Invoice Date is set to the current date. When there is a value, the date is set to the date based on the current day of the week. For example, if the **Customer Invoice Day** is set to Thursday, the Invoice Date is calculated as follows.

- If today is Monday, the Invoice Date is set to the date of Wednesday (3 days from Monday).
- If today is Thursday, the Invoice Date is set to today's date.
- If today is Friday, the Invoice Date is set to Thursday of next week (6 days from Friday).

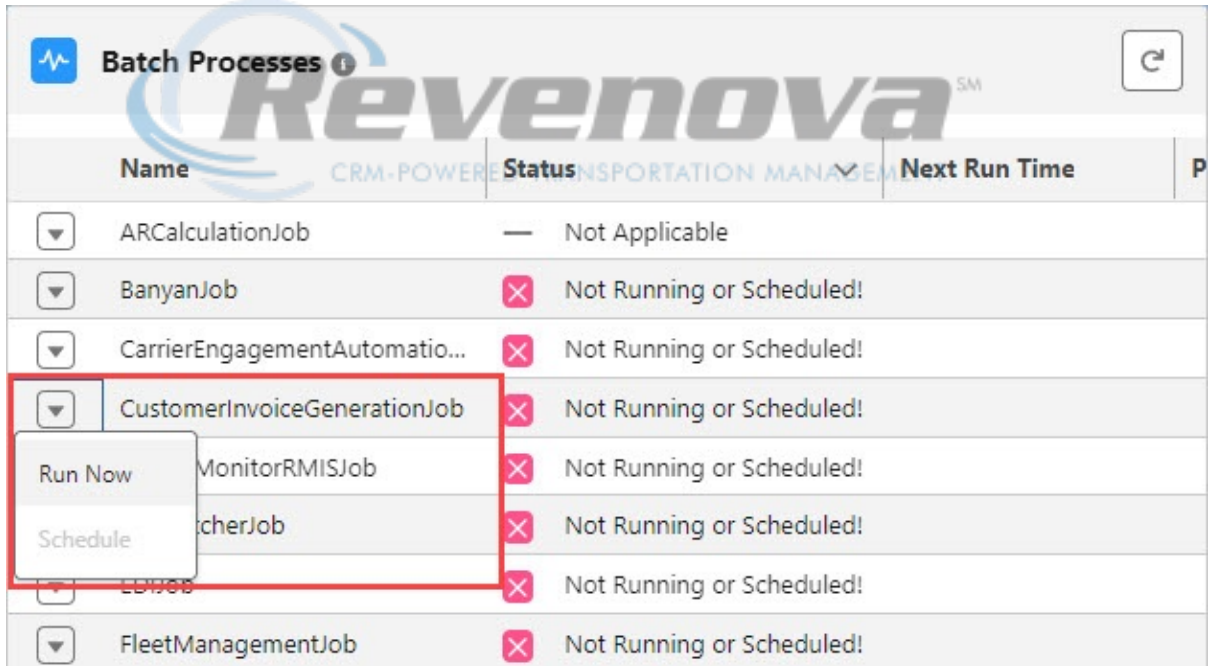
4. The **Billing Email Attachment Format** field value is .PDF by default. To send a .CSV attachment with the .PDF, change this field to *PDF with CSV*.
5. The **Customer Invoice Export File** is determined by the **Billing Email Attachment Format** field. When *PDF with CSV* is selected, an export file definition is required. Each customer has one file export definition. See File Export Definitions for more information.
 - a. When *PDF with CSV* is selected, a single .CSV file is generated. It includes all invoices selected for the Billing contact regardless of the Batch Invoicing Email Process setting.
 - b. The .CSV file is attached to the same email that includes the .PDF.
 - c. A .CSV file is NOT generated when clicking the **Generate & Print** button.
 - d. There is no default file export definition.

6. The **Auto-Send Invoices** field must be checked for the CustomerInvoiceGenerationJob to automatically generate and send customer invoices.

The Billing Method field on the customer Transportation Profile must be set to either Email or EDI to auto-send invoices.

The status of each successfully processed invoice is set to *Invoiced*. The **Date Sent** field is set to *Now*. The **Invoice Status Comments** is set to blank.

7. The **Batch Invoicing Email Process** field determines the batch processing mode used when batch invoicing a Contact. See more information here.
8. Set the **Batch Invoicing POD Treatment** field to include PODs with invoice communications. This field applies to both batch and individual invoicing. See more information here.
9. The **Invoice Terms** field is the number of days between the customer **Invoice Date** and the customer **Invoice Due Date**. This field is populated based on the customer Transportation Profile. If blank, the value in Document Options **Customer Invoice Default Terms** field is used.
10. The **Invoice Status** field is set to *On Hold* when invoice generation encounters an error. The **Invoice Status Comments** field contains the detailed error message. The list of errors are also emailed to the user.
11. When configured, run the CustomerInvoiceGenerationJob from the Batch Processes LWC.



Name	Status	Next Run Time
ARCalculationJob	— Not Applicable	
BanyanJob	✗ Not Running or Scheduled!	
CarrierEngagementAutomatio...	✗ Not Running or Scheduled!	
CustomerInvoiceGenerationJob	✗ Not Running or Scheduled!	
MonitorRMISJob	✗ Not Running or Scheduled!	
SchedulerJob	✗ Not Running or Scheduled!	
EDISB	✗ Not Running or Scheduled!	
FleetManagementJob	✗ Not Running or Scheduled!	

When customer invoices are automatically sent via email, the .PDF and any .CSV attachments are saved for reference. They are found on the recipient Contact record in the Notes & Attachments section.

Contact

Joe Revenova HQ

Title

Account Name

Phone (2)

Email

Contact Owner

Revenova HQ

312-999-7777

User User

Related

Details

We found no potential duplicates of this Contact.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Inspection Reports (0)

New

Customer Quotes (6+)

New

Customer Quote	Load	Quote Date	Status
Customer Quote 1	L-18	4/11/2024	Pending
Customer Quote 2	L-19	4/12/2024	Accepted
Customer Quote 3	L-20	4/12/2024	Accepted
Customer Quote 8	L-25	4/12/2024	Accepted
Customer Quote 4	L-21	4/12/2024	Accepted
Customer Quote 5	L-22	4/12/2024	Accepted

View All

Customer Invoices (6+)

New

Invoice Number	Billing Account	Billing Method	Load
L-18	Revenova HQ	EDI	L-18
L-20	Revenova HQ	Email	L-20
L-26	Revenova HQ	Email	L-26
L-21	Revenova HQ	Email	L-21
L-22	Revenova HQ	Email	L-22
L-23	Revenova HQ	Email	L-23

View All

Notes & Attachments (3)

Upload Files

C-1821109436-04-17-2024.pdf

Apr 12, 2024 • 39KB • pdf

C-1821109436-04-17-2024.csv

Apr 12, 2024 • 503B • csv

C-1821109436-04-17-2024.csv

Apr 12, 2024 • 503B • csv

View All

Files (3)

Add Files

C-1821109436-04-17-2024.pdf

Apr 12, 2024 • 39KB • pdf

C-1821109436-04-17-2024.csv

Apr 12, 2024 • 503B • csv

C-1821109436-04-17-2024.csv

Apr 12, 2024 • 503B • csv

View All

Billing .PDF Creation

When creating a Billing .PDF file in a list view the following error is possible.

'Attempting to de-reference null object.'

Possible solutions:

- Navigate to **TMS Admin, Customer Invoice Documents**. If the Invoice Action is set to **Include if Accessorial Present**, an accessorial must be linked. Click the **Add** button in the list. The TMS looks for the linked accessorial(s) before creating and sending the Billing/Invoice.
- Is there a **Billing Contact** associated?
 - Billing contact(s) may have been added to the Account after the Billings were generated. The Billing contact can be manually populated on the Billing record.
- If the **Billing Method** on the Customer Bill To Transportation Profile is set to Email, make sure the Billing Contact has an email address entered.

