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Customer-Specific Invoice Attachments

Overview

Customer-Specific Invoice Attachments

Specify, by customer, which POD and other customer-facing documents attached to a load are appended to customer invoices.

There are six inclusion actions:

- Never Include

- Always Include

- Always Include POD

- Include if Present

- Include if Accessorial Present

- Include if POD

There is a **global configuration** that determines which documents are included for customers that do not have specific requirements.

The **Carrier Quote** and **Customer Invoice** page layouts display the status of required and optional documents:

System Information

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Document Status

Document Type	Required	Present
Bill Of Lading	X	
Delivery Receipt	X	

Any attempt to email or print an invoice that does not have all the required documents results in a detailed warning message:

The **Document Type** list is based on the Document Type picklist field on the Customer Invoice Document object. Fields may be added to this picklist or entries can be disabled if they are not used.