Table of Contents

TMS Resources > TMS Features > Invoice & Payment Management > Customer Invoices > Customer Invoice Batch Generation

Customer Invoice Batch Email

Overview

Batch Invoicing by Email

Click the **Generate & Preview** button to view a set of invoices for one customer before sending them to the customer. A .CSV file is generated and attached to the email if the customer is configured with the "PDF with CSV" option.

To batch process a list of Customer Invoices, select the invoices and click the **Generate & Send** button. Note that you can select any invoices, crossing billing contact/customer boundaries.

> It is possible to select any invoices across billing contact and customer boundaries.

This button initiates a background process that generates and emails the invoices to the appropriate parties. Invoices that generate an error have the **Invoice Status** field set to "On Hold." The **Invoice Status Comments** field contains the detailed error message. The same list of errors are also emailed to the user.

For successful invoice sends, the following happens:

- The **Invoice Status** field that was **Pending** or **Approved** is set to ***Invoiced***.
- The **Date Sent** is set to "now."
- The **Invoice Status Comments** field is set to blank.

The **POD Required** field is populated automatically upon record creation from the Load's Bill To Transportation Profile.

Override the customer invoice batch .PDF cover page from **TMS Admin → Document Options**. Select the document type. Enter the name of the custom Visualforce page in the **Custom Header Page Name** field. The Visualforce page must be a .PDF-rendered page in order to render correctly.