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Customer Invoice Batch Generation

Overview

Users can select any list of invoices to generate the invoice .PDF or .PDF with .CSV files and mail or print invoices in batches. The TMS generates and sends Customer Invoice emails based on the **Batch Invoicing Email Process** field. This field is located on the Billing Contact Account's Transportation Profile.

Customer Invoice Batch Generation

Users can select <u>any list of invoices</u> to generate the invoice .PDF or .PDF with .CSV files and mail these invoices to customers or print them <u>in batches</u>. The invoice Billing Contact Account's Transportation Profile defines the batch processing mode to use when batch invoicing a Contact.

- *One Email, Combined Invoice Attachment:* <u>One attachment containing all invoices</u> and one email is sent to each billing contact.
- *One Email, Individual Invoice Attachments:* <u>One attachment per invoice</u> and one email is sent to each billing contact.
- *Multiple Emails, Individual Invoice Attachments:* <u>One attachment and email is sent for each invoice</u>. Any files attached to a load that contain the phrase "Proof of Delivery" can also be included (see below).
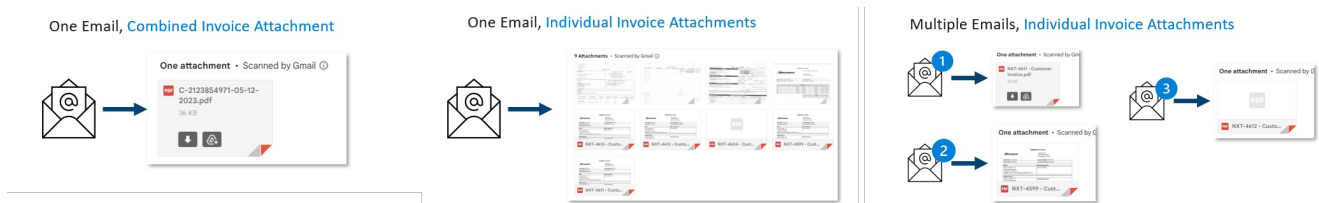
If no selection is made, the default setting is *One Email, Combined Invoice Attachment*.

- When the "PDF with CSV" option is selected in the **Billing Email Attachment Format** field of a customer, a single CSV file is generated that includes all the invoices selected for the Billing Contact regardless of the **Batch Invoicing Email Process** setting.
- The .CSV file is attached to the same email that includes the .PDF.
- A .CSV file is <u>not</u> generated when the user clicks on the **Generate & Print** button.

To include PODs in your invoice communications, set the following field:

Batch Invoicing POD Treatment ⓘ
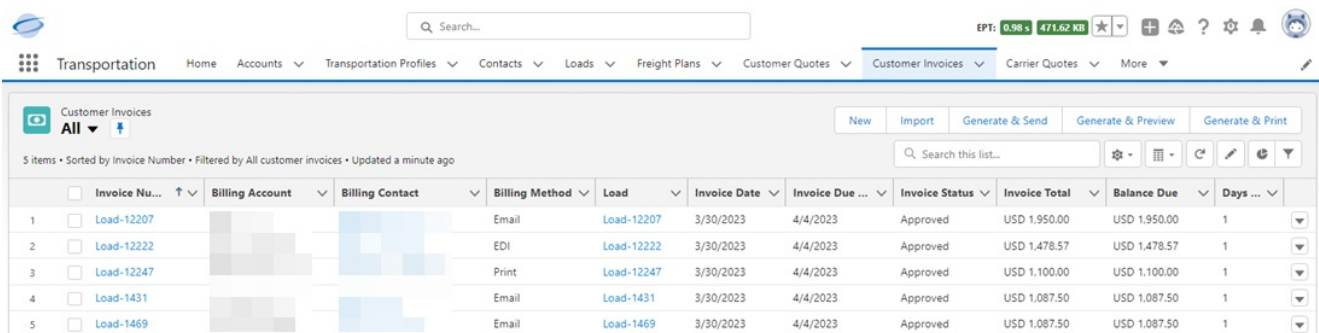
Include in Invoice Attachment ▼

--None--

Include as Attachment

✓ Include in Invoice Attachment

- *Include as Attachment*: Include each load attachment that contains the term "Proof of Delivery" as a separate attachment.
- *Include in Invoice Attachment*: Include each load IMAGE attachment that contains the term "Proof of Delivery" within the invoice DF document.

> Customer invoice documents generated from the Customer Invoice list view with the **Generate & Send**, **Generate & Preview**, or **Generate & Print** functions do <u>not</u> automatically share to Customer Portal users. Share customer invoice documents to Customer Portal users by doing the following.
>
> - Generate customer invoice documents from the record page.
> - Manually share each file.

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