

Table of Contents

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

Customer-Specific Invoice Attachments	2
Overview	2
Customer-Specific Invoice Attachments	2




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.


Home
 Customer Invoice Documents

Save
 Reset
 Reset to Global
 Cancel
 Done
 Customer

DOCUMENT TYPE	INVOICE ACTION	ACCESSORIALS	CARRIER UPLOAD
ACH Setup Form	Include if Accessorial Present	Customs Add Clear	<input type="checkbox"/>
Advance Request	Never Include	Add Clear	<input type="checkbox"/>
Authority	Always Include	Add Clear	<input type="checkbox"/>
Balance Due	Include if Present	Add Clear	<input type="checkbox"/>
Bill Of Lading	Include if Accessorial Present	Add Clear	<input type="checkbox"/>
Carrier Invoice	Never Include	Add Clear	<input checked="" type="checkbox"/>

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

Created By Dave TMS 2019, 3/7/2019 12:11 PM

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 screenshot shows the Revenova system interface. A red banner with a warning icon and a close button is displayed, stating: "Error - Customer Invoice Banner. The following required documents are missing: Load-505871: Delivery Receipt." Below the banner, the "Customer Invoice Load-505871" details are visible, including the load number, invoice date (10/5/2022), invoice due date (10/20/2022), invoice total (USD 1,986.20), and balance due (USD 1,986.20). At the bottom, there are buttons for "Apply Terms", "Generate", "Generate and Send", "Send via EDI", and "Create Credit Memo".

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.