

User Manual for **INVOICE MERGE**

by GloboWeb

A Comprehensive Guide to the Invoice Merge and Email Features

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Overview

Invoice Merge is a CLI-based tool designed to merge PDF invoices from multiple systems into unified, account-specific documents. It uses Comet invoices as the source of truth and supports automated merging and optional email delivery.

When you launch the application, you will see this...

```
Command Prompt - InvoiceM  ×  +  ▼
INVOICE MERGE by GloboWeb
Main Menu

1. Email Invoices
2. Merge Invoices
3. Update Settings
4. Quit Application

Please enter a menu number: |
```

Quick Start: Invoice Merge

The Merge Invoices feature allows you to combine multiple invoice PDFs into a single file for each account — perfect for customers who receive multiple invoices in one billing cycle.

What You'll Need

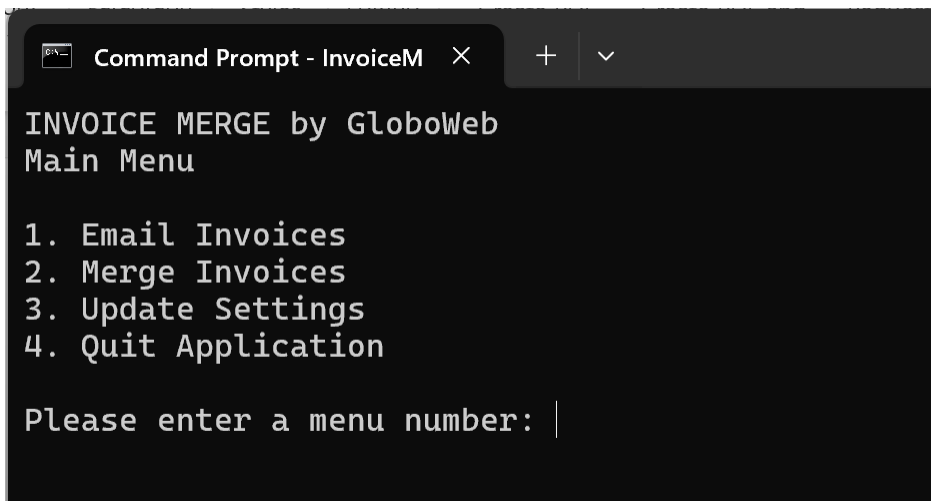
The following folders in the same directory as your InvoiceAndMerge.exe file

```
Detail/  
Invoice/  
Misc/  
Rapid/  
Unison/  
Waybill/  
Weights/
```

Each folder contains specific types of PDF invoices as described later in this manual

How to Use It

1. **Launch the program**
2. **Select Option 2: Merge Invoices**



```
Command Prompt - InvoiceM  X  +  v  
  
INVOICE MERGE by GloboWeb  
Main Menu  
  
1. Email Invoices  
2. Merge Invoices  
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4. Quit Application  
  
Please enter a menu number: |
```

3. **Let it Process**
 - The program will review all PDF files in all folders and extract them all into single files by account number
4. **Review Output** *** One PDF File Per Customer ***

- The program will then create a new folder named, **MMDD_Details** (where MMDD is the current date) and place the final “merged” invoice for each account.

Quick Start: Email Invoices

✓ Step-by-Step:

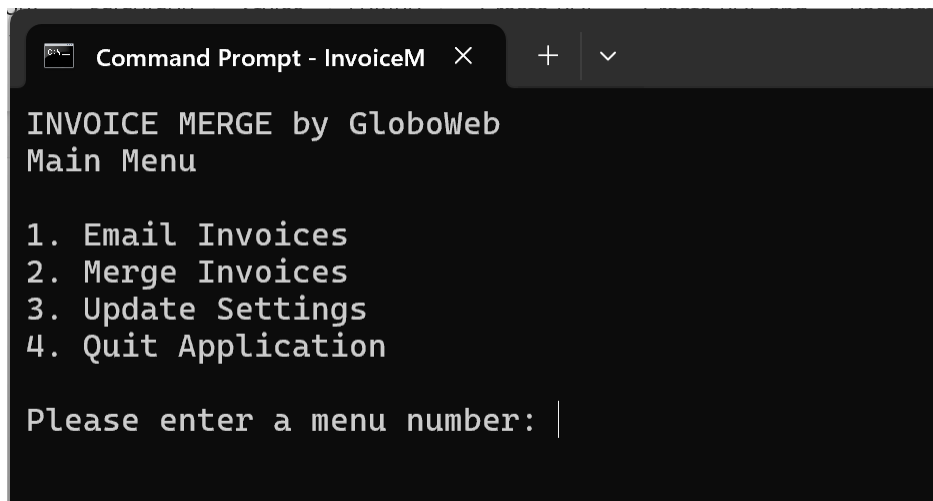
1. Prepare your files

- Ensure **email_map.xlsx** is in the same folder as the **.exe**
- Make sure there is a matching XML template for each Excel tab you intend to run

2. Launch the program

- If not already started, launch the program

3. Select Option 1: Email Invoices

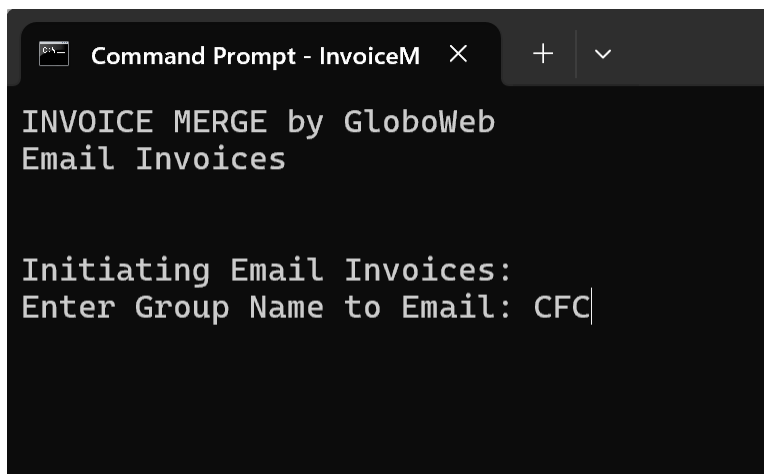


```
Command Prompt - InvoiceM
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```

4. Specify the name of the Tab you want to use



```
Command Prompt - InvoiceM
INVOICE MERGE by GloboWeb
Email Invoices

Initiating Email Invoices:
Enter Group Name to Email: CFC|
```

5. Let it run
6. Review the results

Reviewing Result of an Emal Invoices run

[illegible]

Note: If you can correct the errors, do so, and then clear the cell for the error(s) ONLY before re-running the action for the tab. Only rows with blank Status fields will be sent.

Deep Dive: Invoice Merge

Overview

InvoiceMergeAndMail is a CLI-based tool designed to merge PDF invoices from multiple systems into unified, account-specific documents. It uses Comet invoices as the source of truth and supports automated merging and optional email delivery.

Required Folder Structure

Before running the application, ensure the following folders exist **in the same directory as the .exe file**

```
Detail/  
Invoice/  
Misc/  
Rapid/  
Unison/  
Waybill/  
Weights/
```

Folder Purpose

Each folder contains PDF invoices from a specific system

Folder	Source System
Detail	Comet – Detailed Listing Reports
Invoice	Comet Invoices (source of truth)
Misc	Miscellaneous sources
Rapid	Rapid Invoices
Unison	Unison Invoices
Waybill	Waybill Digital Invoices

Comet Invoice Requirements

Comet invoices (in the Invoice/ folder) must follow this naming convention:

X1234567.pdf

- X = Single-letter company code (e.g. T, C)
- 1234567 = Numeric Comet invoice number

These invoices are treated as the authoritative source for merging.

Merge Order

Invoices from other folders are merged with the Comet invoice in the following order:

1. Detail
2. Weights
3. Rapid
4. Unison
5. Misc
6. Waybill

Running the Merge

To initiate the merge process:

1. Launch the application from the command prompt.
2. Select the **Invoice Merge** option from the CLI main menu.

Output Folder

After merging, a new folder will be created in the same directory:

MMDD_Details/ where **MM** = two-digit month, **DD** = two-digit day

Contents

Each merged invoice will follow this naming convention:

AAAAAA INV 123456 mmddyy.pdf

- **AAAAAA** = Alphanumeric account number
- **INV** = Literal string
- **123456** = Comet invoice number
- **mmddyy** = Invoice date

Notes

- Only invoices with matching account numbers across folders will be merged.
- If an invoice exists in a folder but has no corresponding Comet invoice, it will be ignored.

Email Invoice Feature: Deep Dive

Overview

The **Email Invoices** feature allows users to automatically send merged invoices to customers using a structured Excel file and XML-based email templates

Required File: ***email_map.xlsx***

This file must be located in the same directory as the .exe. It can contain multiple tabs, each representing a different mailing group (e.g. TPC, WEEKLY, etc.).

Tab Format

Each tab must follow this structure:

Cell	Content
A1	Single email address uses as the From address
Row 1	Header row with the following columns: ACCOUNT , TO , CC , BCC , STATUS

Column Details

- **ACCOUNT**: Alphanumeric account number
- **TO**: One or more email addresses separated by semicolons
- **CC**: Optional email(s) to copy
- **BCC**: Optional email(s) to blind copy
- **STATUS**:
 - **Blank** → ready to send (Only rows with a blank STATUS will be processed)
 - **"Sent on mm/dd/yyyy"** → already sent
 - **Error message (in red)** → failed to send



Required Template: XML Email Format

Each tab must have a matching **.xml** file in the same directory as the **.exe**. For example, if the tab is named TPC, the program expects:

TPC.xml



Example Template

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<EmailTemplate>
```

```
<Subject>
```

```
    Invoice for Account #[ACCOUNT]
```

```
</Subject>
```

```
<Body>
```

```
    Dear Customer,
```

```
    Please find attached your invoice for account #[ACCOUNT]. If you have any  
    questions or concerns, feel free to reply to this message.
```

```
    Thank you for your continued partnership.
```

```
</Body>
```

```
<Signature>
```

```
    Best regards,
```

```
    TPC Billing Department
```

```
    Phone: (951) 781-1000
```

```
    Email: ar@topprioritycouriers.com
```

```
</Signature>
```

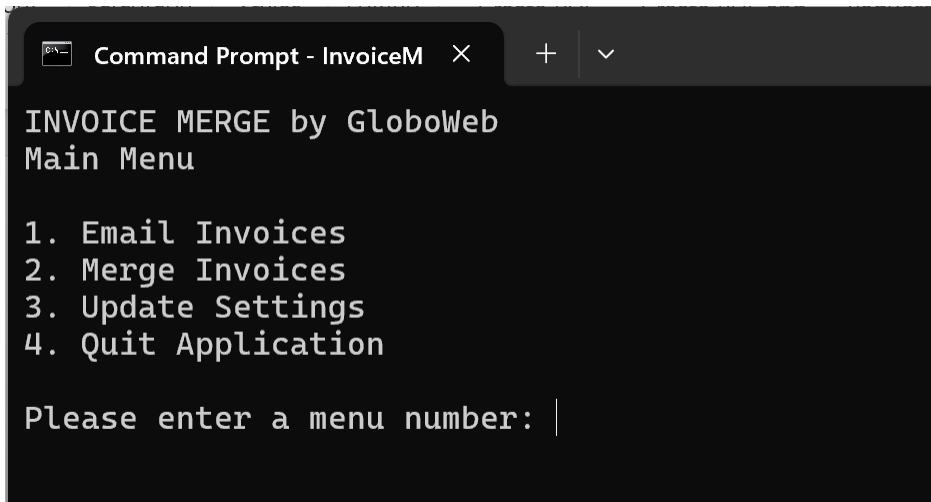
```
</EmailTemplate>
```

- Currently supported dynamic variable: [ACCOUNT]
- Future support may include [CONTACT], [DATE], etc.

Running the Email Action

To send invoices:

1. Launch the application if it is not already started
2. Select **Email Invoices** from the CLI main menu.



```
Command Prompt - InvoiceM  X  +  v

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```

3. If a folder named MMDD_Details (matching today's date) exists, it will be used automatically.
4. If no folder matches today's date, you'll be prompted to specify the folder manually.

Reviewing Results

After the action completes:

- Open email_map.xlsx
- Review the STATUS column in each tab:
- ☒ "Sent on mm/dd/yyyy" → success
-  Error message → failure (correct and retry)

Only rows with a blank STATUS will be sent on subsequent runs.



Setting Up the Email Environment

Before you can send emails using the Invoice Merge application, you need to configure a few SMTP settings on your machine. This setup ensures your email credentials and server details are available to the program securely and consistently.



Step-by-Step Setup Instructions

1. Run the Setup Script

Locate and double-click the file named...

`setup_smtp_env.bat`

This script will:

- Create the necessary environment variables for email functionality.
- Pre-fill values like SMTP server, port, username, and sender address.
- Leave the password field blank for security.

You'll see a message like:

```
IMPORTANT: You must manually set SMTP_PASSWORD when ready.  
You can do this by running:  
    setx SMTP_PASSWORD your_password_here
```

2. Set Your SMTP Password

For security reasons, the password is not stored by default. To set it:

1. Open **Command Prompt**.
2. Type the following command, replacing **your_password_here** with your actual SMTP password:

```
setx SMTP_PASSWORD your_password_here
```

3. Press **ENTER**



You only need to do this once. The password will be saved as a user-level environment variable.



Verifying Your Email Environment

To confirm everything is configured correctly, run the companion script:

`verify_smtp_env.bat`.

This script will:

- Display the current values of your SMTP environment variables.
- Warn you if any are missing or if the password is still blank.

Example output:

```
SMTP_SERVER = smtp.example.com
SMTP_PORT = 587
SMTP_USERNAME = user@example.com
SMTP_PASSWORD is set.
SMTP_FROM = user@example.com
```

After setting the variables, close and reopen your Command Prompt to ensure the changes take effect.



You're Ready!

Once all variables are set, you can run the Invoice Merge application and start sending emails.

If you ever need to update your SMTP settings, simply re-run `setup_smtp_env.bat` and update the password again if needed.