

Emailing Invoices in Bulk for UPS

Department	Version	Publish Date
Business Intelligence	1.1	6/20/2024

Purpose

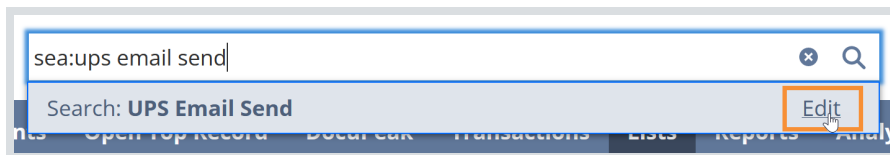
This document details the process of initiating a bulk send of invoice PDFs to UPS.

Access	Resources
✓ NetSuiteWaste Harmonics Administrator Jr role	N/A

Procedure

1. Update Saved Search

1. In the NetSuite **Global Search Bar**, enter "sea:ups email send" and select *Edit* on the suggestion.



2. Under **Criteria**, update the **Date** filter to the requested date range.

Criteria Results Highlighting Available Filters Audience Roles Email

Use this tab to specify criteria that narrow down your search.

☐ USE EXPRESSIONS

Standard • Summary

FILTER *

Type

Uploaded to 3rd Party Date (Custom Body)

Main Line

Date

OK Cancel + Insert Set Description pve

3. Update any other fields as needed.
4. Select **Save**.

2. Update the Workflow

1. In NetSuite, go to **Customization > Workflow > Workflows**.
2. Find the **UPS Invoice to Send** workflow and select **Edit**.
3. In the Workflow sidebar, select **Edit** (✎).

The Workflow window opens.

Workflow

Save Cancel Change ID Execute now Actions

Basic Information

NAME *
UPS Invoice to Send

ID
customworkflow188_2

RECORD TYPE
Transaction

SUB TYPES *
Advanced Intercompany Journal Entry
Cash Refund
Cash Sale
Check

DESCRIPTION

OWNER
EMPL0058 Murphy, Cooper

☐ EXECUTE AS ADMIN

RELEASE STATUS
Released

KEEP INSTANCE AND HISTORY
Always

☐ ENABLE LOGGING

☐ INACTIVE

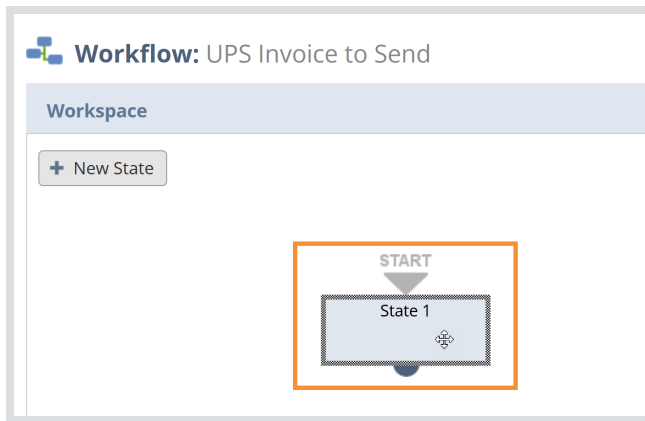
Initiation

4. Under Schedule:
 1. From **SAVED SEARCH FILTER**, choose *UPS Email Send*.
 2. For **EXECUTION DATE**, choose the current date.

3. From **EXECUTION TIME**, choose a time in the afternoon for best results.
5. If any other fields were requested, update those fields as needed.
6. Select **Save**.

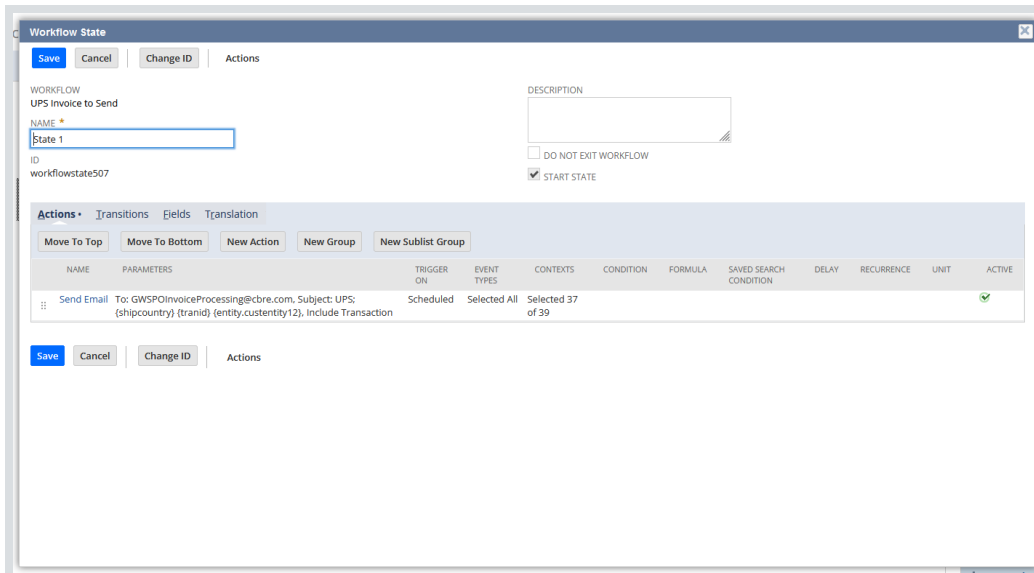
3. Update the Workflow State

1. Under Workspace, select the **State 1** box.



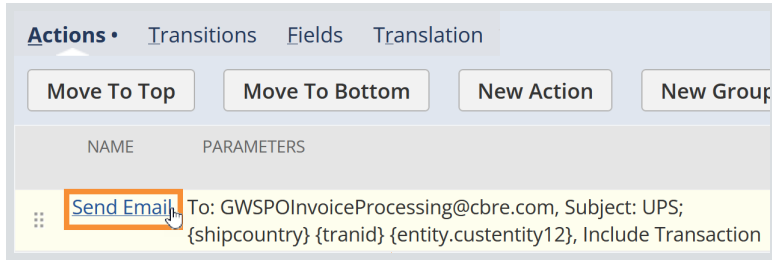
2. In the State sidebar, select **Edit** (✎).

The Workflow State window opens.



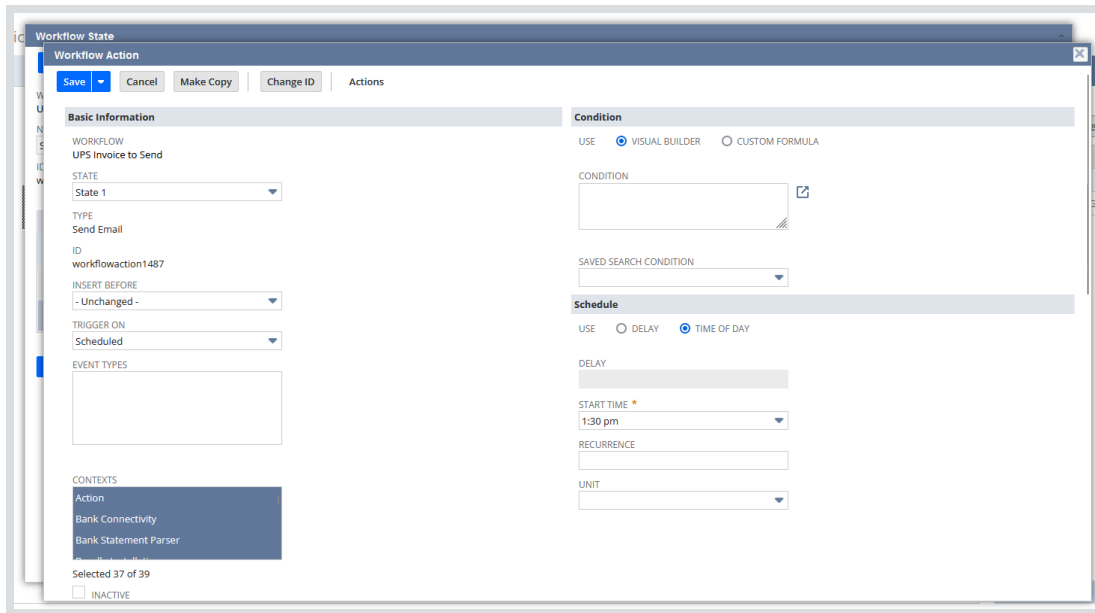
The screenshot shows the 'Workflow State' window. It has a 'Save' button, a 'Cancel' button, and a 'Change ID' button. The 'NAME' field is 'State 1' and the 'ID' is 'workflowstate507'. The 'DESCRIPTION' field is empty. Below these are tabs for 'Actions', 'Transitions', 'Fields', and 'Translation'. The 'Actions' tab is active, showing a table with columns: NAME, PARAMETERS, TRIGGER ON, EVENT TYPES, CONTEXTS, CONDITION, FORMULA, SAVED SEARCH CONDITION, DELAY, RECURRENCE, UNIT, and ACTIVE. The first row is 'Send Email' with parameters 'To: GWSPInvoiceProcessing@cbre.com; Subject: UPS; (shipcountry) (trandid) (entity.custentity12); Include Transaction', trigger 'Scheduled', event types 'Selected All', and contexts 'Selected 37 of 39'.

3. Under **Actions**, select **Send Email**.



Actions • Transitions Fields Translation
 Move To Top Move To Bottom New Action New Group
 NAME PARAMETERS
 Send Email To: GWSPInvoiceProcessing@cbre.com, Subject: UPS; {shipcountry} {trandid} {entity.custentity12}, Include Transaction

The Workflow Action window opens.



Workflow State
 Workflow Action
 Save Cancel Make Copy Change ID Actions
Basic Information
 WORKFLOW UPS Invoice to Send
 STATE State 1
 TYPE Send Email
 ID workflowaction1487
 INSERT BEFORE - Unchanged -
 TRIGGER ON Scheduled
 EVENT TYPES
 CONTEXTS
 Action
 Bank Connectivity
 Bank Statement Parser
 Selected 37 of 39
 INACTIVE
Condition
 USE ☒ VISUAL BUILDER ☐ CUSTOM FORMULA
 CONDITION
 SAVED SEARCH CONDITION
Schedule
 USE ☐ DELAY ☒ TIME OF DAY
 DELAY
 START TIME * 1:30 pm
 RECURRENCE
 UNIT

4. Under **Schedule**, from **START TIME**, choose the same time as the **EXECUTION TIME** on the workflow.
5. Under **Sender**:
 1. Select **SPECIFIC SENDER**.
 2. From **SENDER**, choose the Employee Record to send from.
6. Under **Recipient**, in **EMAIL**, enter the receiving customer's email address.
7. Under **Content**:
 1. Select **CUSTOM**.
 2. In **SUBJECT**, enter the subject template.

NOTE

Some customer's have specific formats that the SUBJECT must adhere to.

3. In **BODY**, enter any applicable information.
8. Under **Attachment**:
 1. Select **INCLUDE TRANSACTION**.
 2. From **TYPE**, choose *PDF*.
9. Select **Save** on the workflow action.
10. Select **Save** on the workflow state
11. Wait for the workflow to run.

4. Verify Run

1. Go to the Customer Record.
2. Under **Sales > Transactions**, open an invoice.
3. On the invoice, go to **Communication > Messages**. If successful, you'll see the generated email.

Revisions

Date	Summary of Changes	Author
3/29/2024	Initial document.	Jared Peeler
4/19/2024	Updated style.	Jared Peeler

Reviews

Date	Reviewer
4/4/2024	Cooper Murphy