Emailing Invoices in Bulk for UPS

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

Purpose

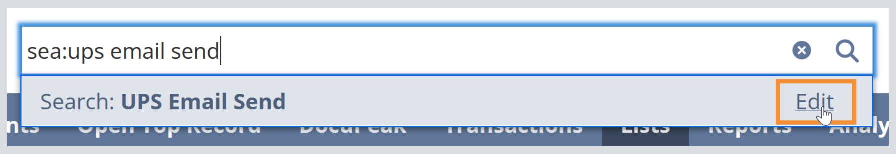
This document details the process of initiating a bulk send of invoice PDFs to UPS.

Access	Resources
NetSuite *Waste Harmonics Administrator Jr* role	*N/A*

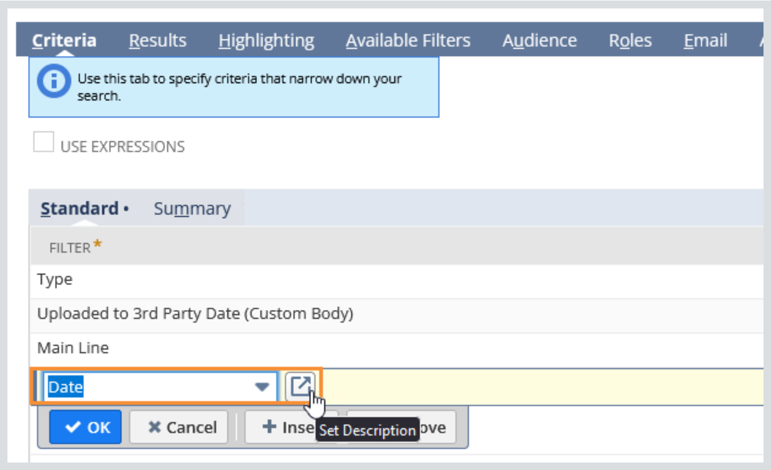
Procedure

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.

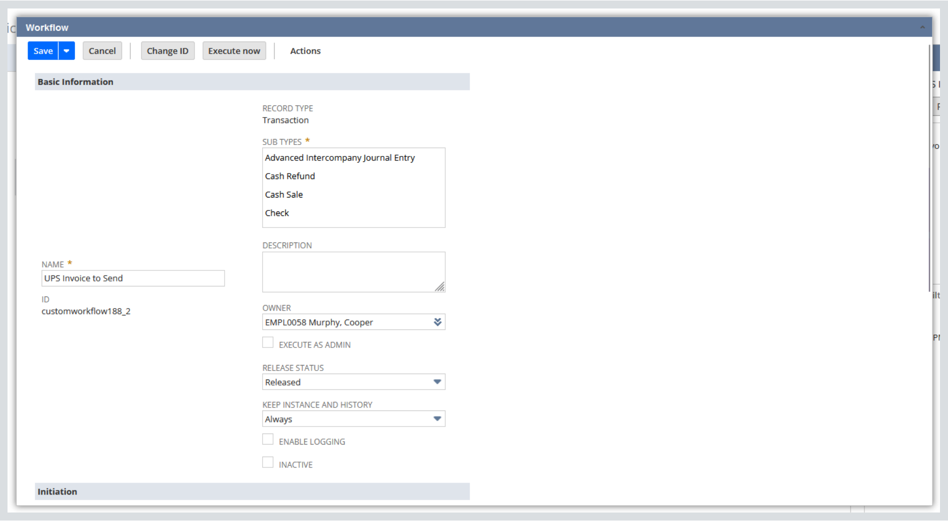


3. Update any other fields as needed.
4. Select **Save**.

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.

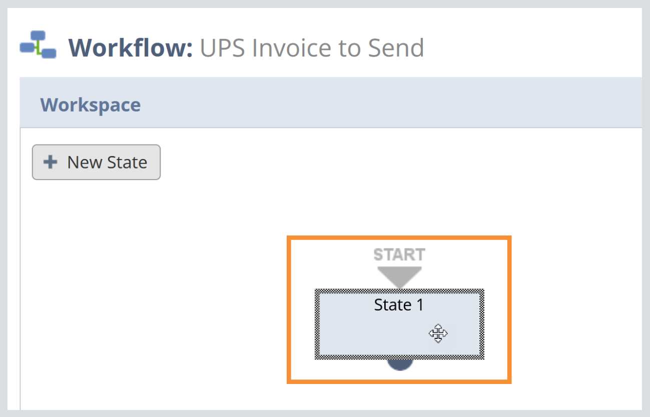


4. Under Schedule:
   1. From **SAVED SEARCH FILTER**, choose *UPS Email Send*.
   2. For **EXECUTION DATE**, choose the current date.

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**.

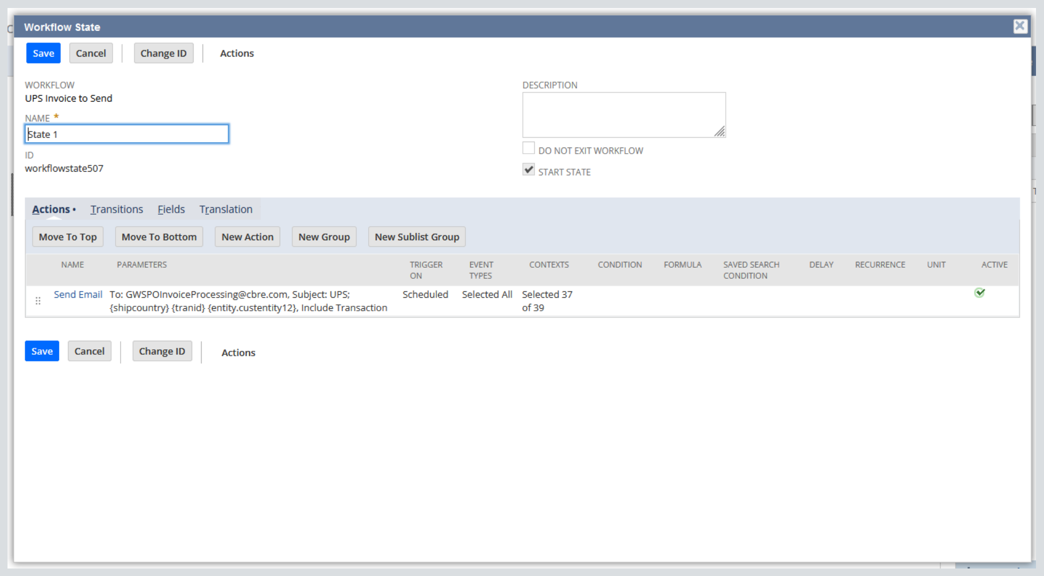
3. Update the Workflow State

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

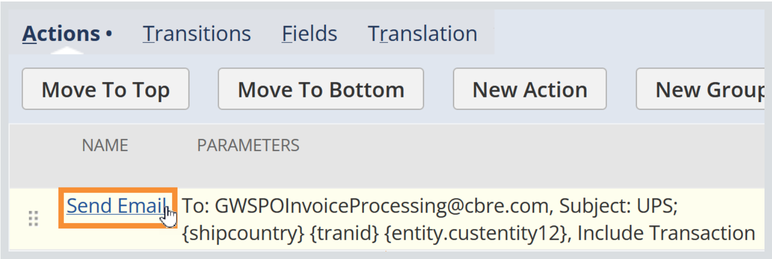


2. In the State sidebar, select **Edit** (✎).

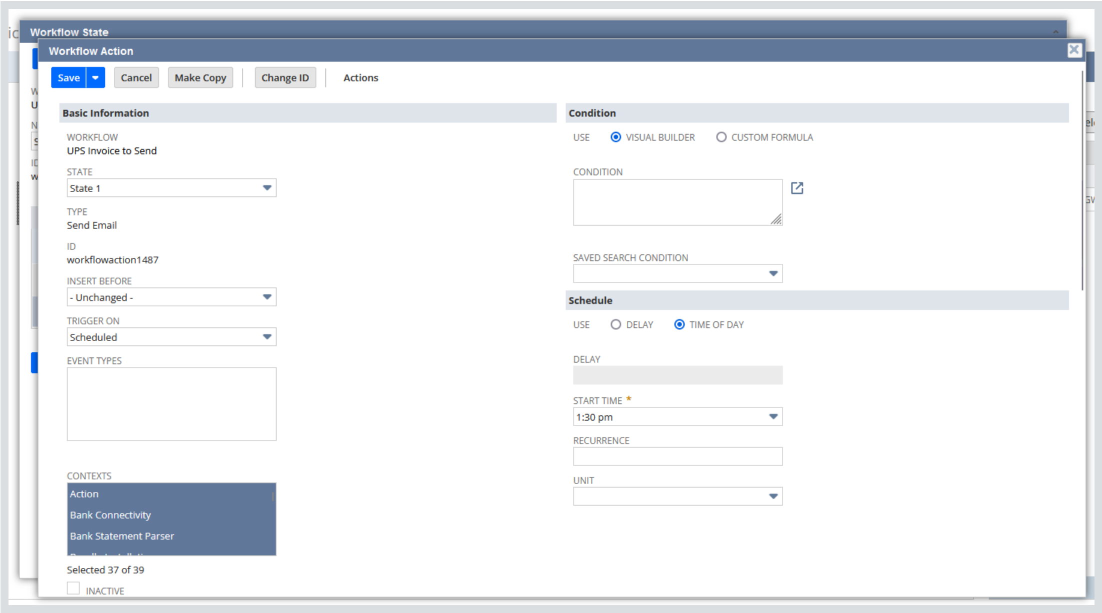
   The Workflow State window opens.



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



The Workflow Action window opens.



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