

Batch Email and Print Invoice Utility

The Batch Email and Print Utility allows the ability to batch email invoices at the same time as printing hard copies. It also allows batch emailing of copy invoices already printed.

Sales Modification

The standard Sales - Processing form will be modified with an additional email address field being added. This field will be captioned "Batch Invoice Email". Mandatory input will not be enforced. If this field is populated it is the customer responsibility to ensure a valid email address is entered.

SOP Modification

The SOP – Batch Processing form will be modified such that when any type of documents are being progressed to Invoice a seamless bespoke process will be invoked that emails a copy of the generated PDF to the customer.

The "To" field will be populated with the Email address of the "Invoice Email" which will be taken from the Account the Invoice is being raised against. Where Delivery (Branch) accounts are being processed the email will be sent to the email defined on the Delivery account only.

The PDF generated as part of the standard process will be added to the Email as an attachment.

SOP / Invoicing Modification

A new option captioned "Batch Email Posted Invoice" will be added to SOP / Invoicing – "Utilities" menu. The purpose of this option is to allow for Invoices that have been previously posted to be emailed to the relevant email address.

Upon selection of this option, the "Batch Email Posted Invoice" selection form would be loaded.

The user would be able to sequence the process by sales account number or invoice number by way of a "From" "To" range.

A "Date From" and "Date To". Range will also be available.

Once the selection criteria are defined, a new bespoke form "Email Invoices" will be displayed in grid format showing the list of invoices that are available for emailing.

The following information will be displayed on the list:

- Account
- Invoice Date
- Ref 1
- Ref 2
- Invoice Value
- Selected (Y/N) – This would be defaulted to "Y"

The user will be able to select one or more invoices for emailing from the list, by means of standard Select / (De) Select / Select All / (De)Select All options, provided on a standard Action Menu

On acceptance of the selection, all selected invoice will be emailed to the "Invoice Email" address specified against each relevant account using the same process as described above.

Notes:

This is only compatible with on-premise versions of Microsoft Outlook. This process will not be compatible with other email clients or Office 365 online.

The Click Once application may need to be installed on each machine that will be sending emails. This is to allow the bespoke process to seamlessly automate the email process.

Batch Email and Print Invoice Utility - £450.00

Annual Maintenance and Support - £95.00