2009-122 - Batch Email Invoicing

Option 1. – Will send them 1 by 1. Open the required Client record and then open the "Invoices" tab. Untick the invoices to be emailed and do a **right-mouse-click** and select 'Batch Email or Print unselected Invoices' from the options list.

| File | HOME | CONTACTS | RESOURCES | INVENTORY | QUOTES | PURCHASING | ORDERS | JOBS/SCHEDULING | INVOICING | QUALITY | MANA |
|---------|----------------|------------------------|---------------------|-----------------------|---------------|----------------------|-------------|-----------------|--------------------|-----------------|------|
| New | Save Clipboard | ≧Copy Cut SPaste | New/Edit Clients | New/Edit Suppliers | Show Notes | Tota Se Utilities | • | | | | |
| | | | | Clients | | | | - • • | | | |
| Client | Code: | C | ient Name: | 144 | | Part | Prefix: Tax | Code: | | | |
| Details | Delivery Inf | o Client Info | More Info Orc | iers Jobs Quotes | Parte Invoice | 5 Financial Hist | Notes QMS | | | | |
| Invoic | es: | | | | | | ۶Q | Search 🕝 🖶 | | | |
| | Inv No 🔻 | Date D | iv | Client Order No |) | Excl Amt | Tax Amt | Inc Amt Pr | | | |
| | 2030 0 | 11/02/16 | | | | \$150.00 | \$15.00 | View/ | Edit Invoice 2050 | | |
| | | | | | | | | Print | This List | | |
| | | | | | | | | Batch | Email or Print uns | elected Invoice | 5 |
| | | | | | | | | Edit T | ext T | | |
| | | | | | | | | Clear | Text | | |
| | | | | | | | | Insert | Row | | |
| | | | | | | | | Delete | Row | | |
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| | Cons | ignment Part/ | Mat Code | Qty | | | | | | | |
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| 3 4 | | | | | | | | | | | |
| 5 | | | | | | | | | | | |
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The Print Invoice window opens, open the "To Be Emailed" tab and **click** on the Email icon.

| | | | | | Print Invoi | ce | | | | × |
|--|--------------|------------|-----------|--|--|--------------|--------------|----------------------------|-------------|--------|
| l I | tem wit | h No Price | | Date To: | | Client Code: | <any></any> | | 👻 😁 Re | efresh |
| | | | | | | | | | Print | |
| | | | | | | | | | _ | |
| To B | e Printe | TO BE ER | nalled To | Be Faxed | | | | | | |
| | Tick | Inv No | Inv Date | Client Code 🔺 | 0 | lient Name | | Email Address | Amount | Sent |
| 1 | v | 2055 | 03/08/16 | A-Z | A-Z Stationery Su | upplies | | sheridan@itmsystems.com.au | \$.00 | |
| 2 | ~ | 2029 | 29/01/16 | AUST WIDE | Australia Wide Tr | ransport | | accounts@internet.com | \$803.00 | |
| 3 | V | 2054 | 04/12/15 | AUST WIDE | Australia Wide T | ransport | | accounts@internet.com | \$3.080.00 | |
| 4 | V | 2031 | 29/01/16 | BANDRILL | Bandicoot Drillin | a Pty Ltd | | accounts@bandrill.com.au | \$579.70 | |
| 5 | v | 2037 | 29/01/16 | BANDRILL | Bandicoot Drillin | ig Pty Ltd | | accounts@bandrill.com.au | \$148.50 | |
| 6 | V | 2041 | 09/06/16 | BANDRILL | Bandicoot Drillin | a Pty Ltd | | accounts@bandrill.com.au | \$20,223.50 | |
| 7 | v | 2044 | 05/10/17 | BANDRILL | Bandicoot Drillin | ig Pty Ltd | | accounts@bandrill.com.au | \$6,295.30 | |
| 8 | V | 2056 | 05/02/16 | BANDRILL | Bandicoot Drillin | a Pty Ltd | | accounts@bandrill.com.au | \$3.30 | |
| 9 | v | 2057 | 16/10/14 | BANDRILL | Bandicoot Drillin | ig Pty Ltd | | accounts@bandrill.com.au | \$4,966.50 | |
| 10 | V | 2058 | 13/06/14 | BANDRILL | Bandicoot Drillin | g Pty Ltd | | accounts@bandrill.com.au | \$.00 | |
| 11 | ~ | 2059 | 11/06/14 | BANDRILL | Bandicoot Drillin | g Pty Ltd | | accounts@bandrill.com.au | \$11.00 | |
| 12 | V | 2060 | 07/05/13 | BANDRILL Bandicoot Drilling Ptv Ltd accounts@bandrill.com.au | | | | accounts@bandrill.com.au | \$.00 | |
| 13 | v | 2032 | 29/01/16 | CAM METALS | AM METALS Camelot Sheetmetals Works sheridan@itmsystems.com.au | | | | \$.00 | |
| 14 | V | 2036 | 29/01/16 | CAM METALS | Camelot Sheetm | etals Works | | sheridan@itmsystems.com.au | \$19,554.09 | |
| 15 | V | 2043 | 09/06/16 | CAM METALS | Camelot Sheetm | etals Works | | sheridan@itmsystems.com.au | \$573.90 | |
| 16 | \checkmark | 2045 | 09/10/17 | CAM METALS | Camelot Sheetm | etals Works | | sheridan@itmsystems.com.au | \$3,049.20 | |
| 17 | ~ | 2015 | 05/06/14 | FERRET | Ferret Earthmovi | ing Pty Ltd | | sheridan@itmsystems.com | \$26,565.00 | |
| 18 | v | 2046 | 09/10/17 | FERRET | Ferret Earthmovi | ing Pty Ltd | | sheridan@itmsystems.com | \$35.20 | |
| 19 | V | 2053 | 29/09/17 | FERRET | Ferret Earthmovi | ing Pty Ltd | | sheridan@itmsystems.com | \$8,422.63 | |
| 20 | ~ | 2033 | 29/01/16 | LUSH LAND | Mower Land Pty | Ltd | | anton@itmsystems.com.au | \$2,407.58 | |
| 21 | V | 2034 | 29/01/16 | LUSH LAND | Mower Land Pty | Ltd | | anton@itmsystems.com.au | \$11.00 | |
| 22 | ~ | 2042 | 09/06/16 | LUSH_LAND | Mower Land Pty | Ltd | | anton@itmsystems.com.au | \$4,450.60 | |
| 23 | V | 2047 | 19/10/17 | PEL_MARINE | Pelican Marine S | ervices | | accounts@pelicanmarine.com | \$1,599.02 | |
| 24 | ~ | 2048 | 19/10/17 | PEL_MARINE | Pelican Marine S | ervices | | accounts@pelicanmarine.com | \$1,599.02 | |
| 25 | V | 2049 | 19/10/17 | PEL_MARINE | Pelican Marine S | ervices | | accounts@pelicanmarine.com | \$2,132.01 | |
| Selected Or Unselected Invo 🛛 BCC 🔧 🖂 Flag 🔹 Request a Read Receipt 🔅 Priority | | | | | | | | | | |
| | | | | Update | Complete : 41 Re | esults Du | ration: .313 | sec. | | |

Option 2 - Create a pdf file of multiple invoices and attach the file to an email.

Please note: This feature doesn't automatically work on all systems, please contact the Opto Support Team for required set up.

Open the '*Edit Invoice*' module. For this example we will run the query by a date greater than 30/04/2012. **Press** <F11> to initiate the query , **click** in the "Client Code" field and type in the client code, then **click** in the date field and enter >30/4/12.

| | Invoice | |
|--|--|-------------------------|
| Invoice No: Client Code: 2050 BADGER Details More Info | ₽ ⊻ | Invoice Printed/Emailed |
| Invoice Date: Client Order No: > 30/04/2012 | Shipping Address: Badger Mining Pty Ltd | |
| Dete Greated: ADM: Int No. 07/02/2018 99 229 339 944 | Division: 12 Old Quarry Road | |
| Claim Notes Size Cost | Acc Rev CLONCURRY | QLD 4824 |

Press <F12> to run the query. Click on the Print icon (circled)

| | | Invoice | |
|---|------------------------|-------------------|-------------------------|
| Invoice No: C 2050 - Details More Info | Client Code: BADGER | ₽ 🖂 | Invoice Printed/Emailed |
| Invoice Date: Clier | nt Order No: | Shipping Address: | |

In the 'Print Preview' window, **1**. Click on the *Export* icon. **2**. Click on the *PDF* radio button. **3**. Click in the **Email** box to tick. **4**. Click on the *Browse* icon and find where you want to save it. **5**. Type in a name for the file and add the file extension .pdf on the end. **6**. Click on the *Save* button.

| Billing Address | × | | | TAX Shipping | |
|--|---|---|----------------|---|--|
| Export Reports | | -8 | Save | As | × |
| n PDF, RTF, CSV or HTML format. These reports may also be | | 🔄 🏵 🔻 🕈 🚺 « Loca | al ▶ Temp ▶ | ✓ 🖒 Search Temp | Ą |
| nort in the Archive or as a file readable only through this tool | luse | Organize 🔻 New folder | | | • 🔞 |
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| | | ConeDrive for Bus | BTN%Copy%1 | 15/09/2017 10:36 | File fol |
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Click on the **OK** button in the Export Reports window

| 8 | | E | xport Re | ports | | | | x | | |
|---------------------------------------|---|------------|----------|-------|-----------|------|-------|---|--|--|
| Export Reports | | | | | | | | | | |
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An email opens with the pdf file attached, enter email recipient and any text then send as normal.