Bulk Email Invoice

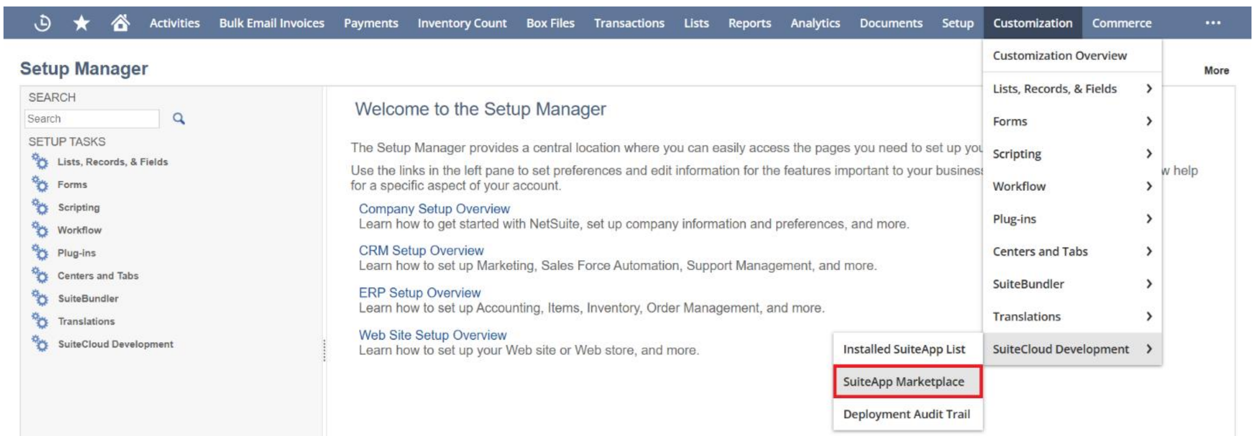
User Manual

Table Of Contents

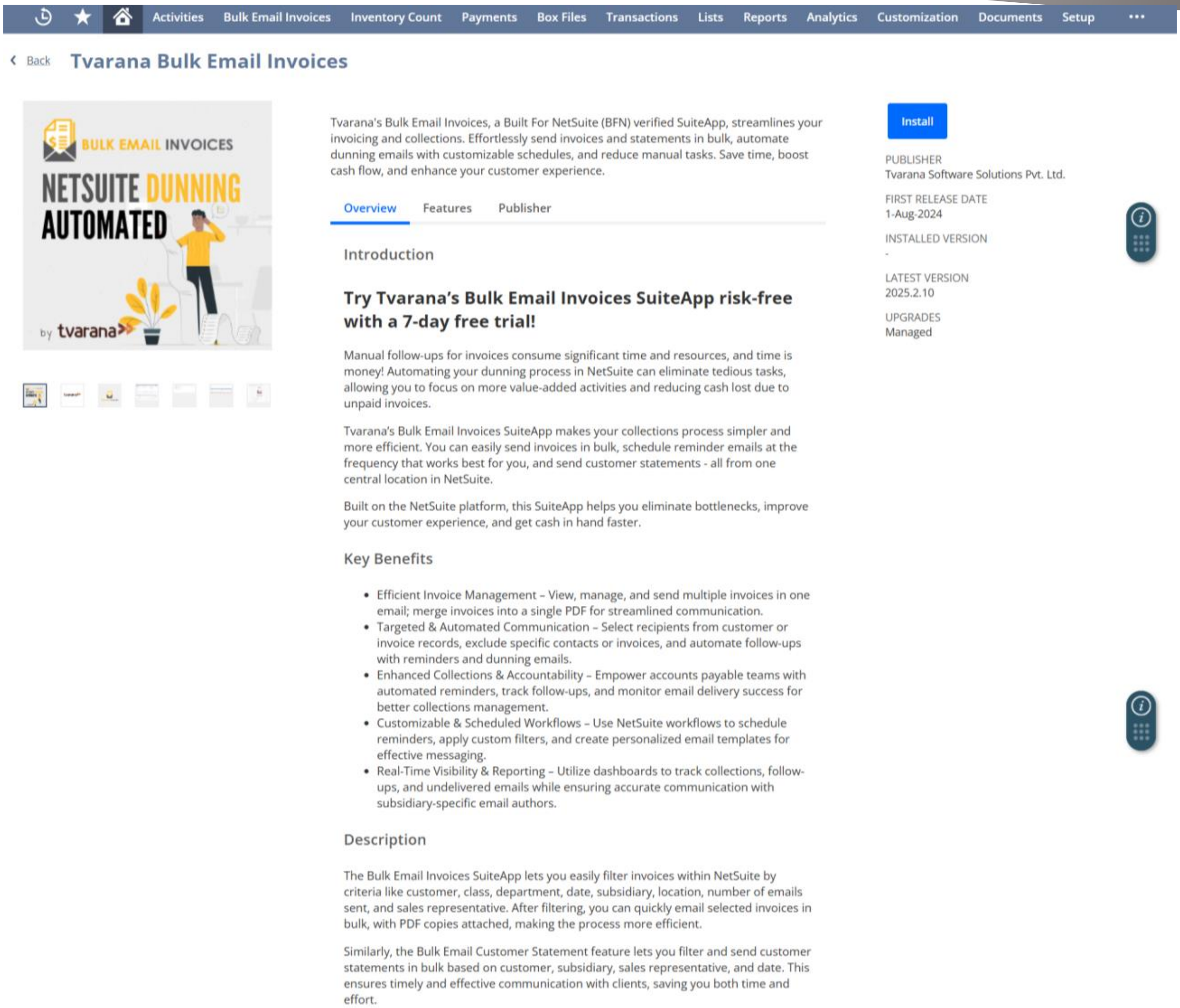
BULK EMAIL INVOICE

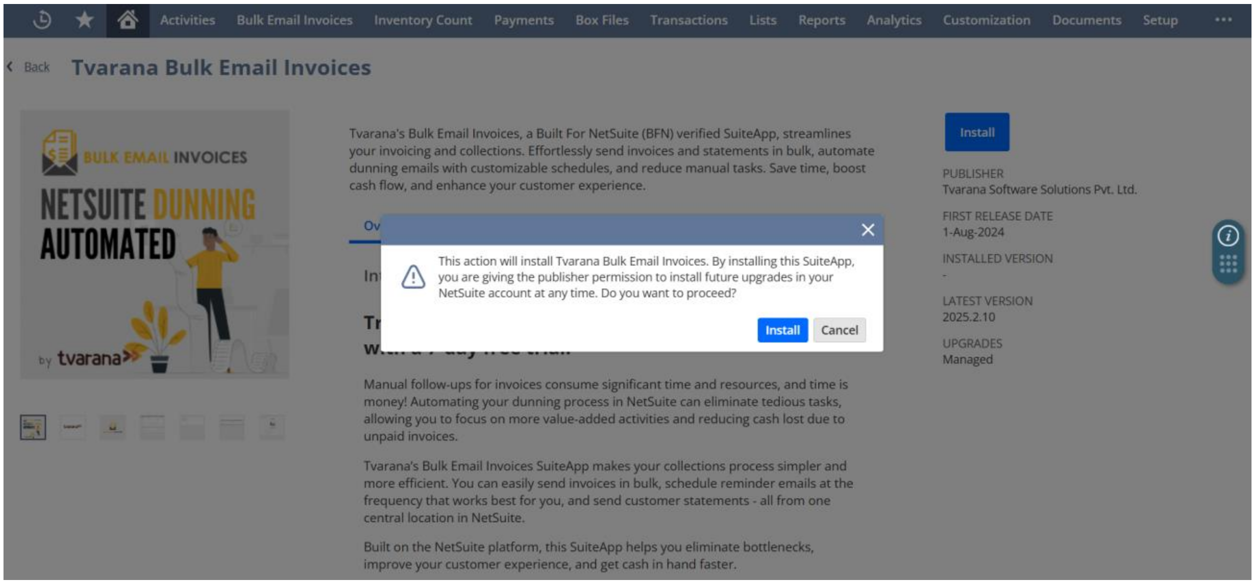
1. BEI AS SELF INSTALL SUITEAPP

- To self-install BEI. Visit the SuiteApp marketplace and search for Bulk Email Invoice SuiteApp.
- Navigation for SuiteApp Marketplace within NetSuite is Customization-> SuiteCloud Development-> SuiteApp Marketplace.

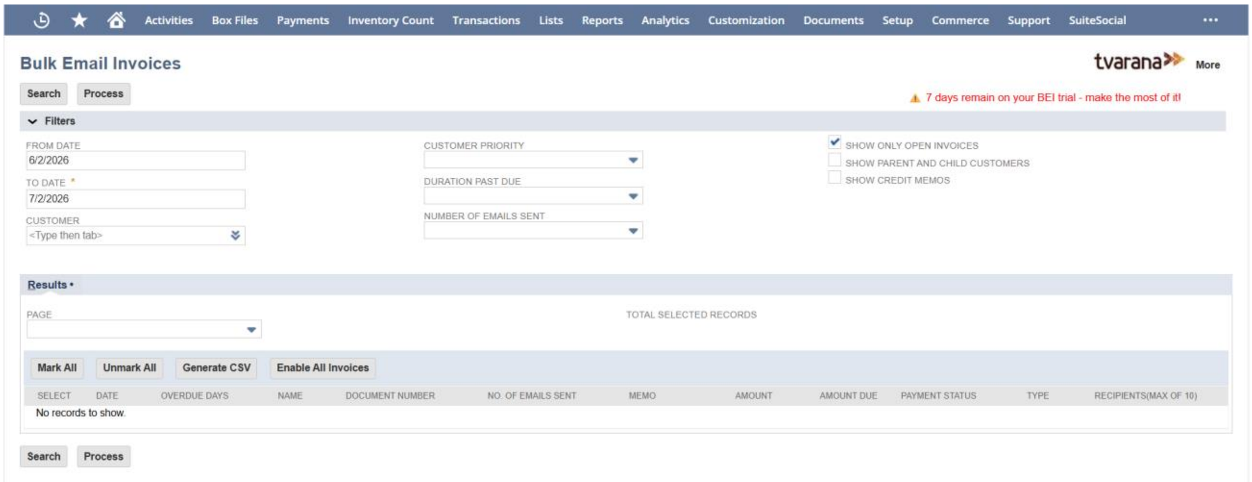


- Click on the Install button.

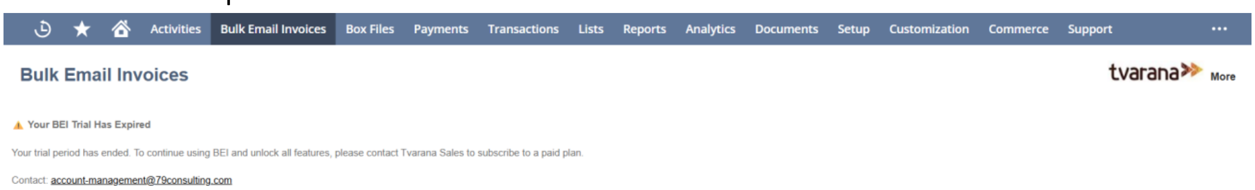

Activities
Bulk Email Invoices
Inventory Count
Payments
Box Files
Transactions
Lists
Reports
Analytics
Customization
Documents
Setup
Back
Tvarana Bulk Email Invoices
BULK EMAIL INVOICES
NETSUITE DUNNING AUTOMATED
by tvarana
Tvarana's Bulk Email Invoices, a Built For NetSuite (BFN) verified SuiteApp, streamlines your invoicing and collections. Effortlessly send invoices and statements in bulk, automate dunning emails with customizable schedules, and reduce manual tasks. Save time, boost cash flow, and enhance your customer experience.
Overview
Features
Publisher
Introduction
Try Tvarana's Bulk Email Invoices SuiteApp risk-free with a 7-day free trial!
Manual follow-ups for invoices consume significant time and resources, and time is money! Automating your dunning process in NetSuite can eliminate tedious tasks, allowing you to focus on more value-added activities and reducing cash lost due to unpaid invoices.
Tvarana's Bulk Email Invoices SuiteApp makes your collections process simpler and more efficient. You can easily send invoices in bulk, schedule reminder emails at the frequency that works best for you, and send customer statements - all from one central location in NetSuite.
Built on the NetSuite platform, this SuiteApp helps you eliminate bottlenecks, improve your customer experience, and get cash in hand faster.
Key Benefits
• Efficient Invoice Management – View, manage, and send multiple invoices in one email; merge invoices into a single PDF for streamlined communication.
• Targeted & Automated Communication – Select recipients from customer or invoice records, exclude specific contacts or invoices, and automate follow-ups with reminders and dunning emails.
• Enhanced Collections & Accountability – Empower accounts payable teams with automated reminders, track follow-ups, and monitor email delivery success for better collections management.
• Customizable & Scheduled Workflows – Use NetSuite workflows to schedule reminders, apply custom filters, and create personalized email templates for effective messaging.
• Real-Time Visibility & Reporting – Utilize dashboards to track collections, follow-ups, and undelivered emails while ensuring accurate communication with subsidiary-specific email authors.
Description
The Bulk Email Invoices SuiteApp lets you easily filter invoices within NetSuite by criteria like customer, class, department, date, subsidiary, location, number of emails sent, and sales representative. After filtering, you can quickly email selected invoices in bulk, with PDF copies attached, making the process more efficient.
Similarly, the Bulk Email Customer Statement feature lets you filter and send customer statements in bulk based on customer, subsidiary, sales representative, and date. This ensures timely and effective communication with clients, saving you both time and effort.
Install
PUBLISHER
Tvarana Software Solutions Pvt. Ltd.
FIRST RELEASE DATE
1-Aug-2024
INSTALLED VERSION
-
LATEST VERSION
2025.2.10
UPGRADES
Managed


Activities
Bulk Email Invoices
Inventory Count
Payments
Box Files
Transactions
Lists
Reports
Analytics
Customization
Documents
Setup
Back
Tvarana Bulk Email Invoices
Install
PUBLISHER
Tvarana Software Solutions Pvt. Ltd.
FIRST RELEASE DATE
1-Aug-2024
INSTALLED VERSION
-
LATEST VERSION
2025.2.10
UPGRADES
Managed
This action will install Tvarana Bulk Email Invoices. By installing this SuiteApp, you are giving the publisher permission to install future upgrades in your NetSuite account at any time. Do you want to proceed?
Install
Cancel

- BEI SuiteApp installation is now initiated. Wait till the SuiteApp installation is complete.
- After successful installation, the user will receive a confirmation message through email, and the account administrator will also receive an email containing information related to the installation.
- Now, you can use all the Bulk Email Invoices SuiteApp features.
- You will see a message at the top of the BEI screens with the number of days left.



- After the free trial period finishes, the BEI screens will display "Your BEI Trail Has Expired."

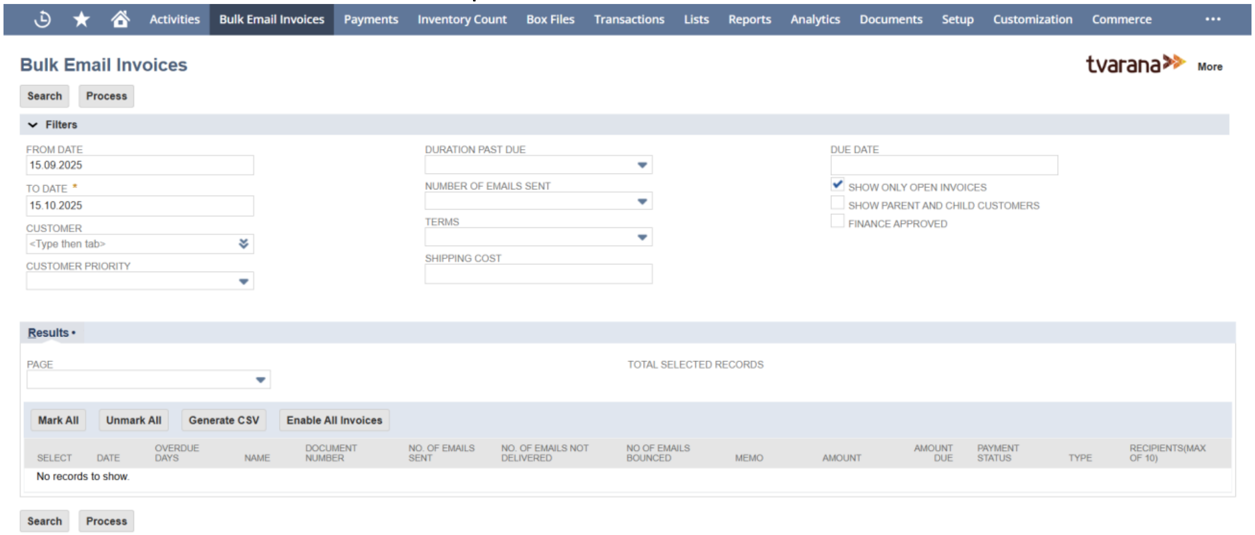


2. NAVIGATION FOR BEI

To send your invoices using BEI, navigate to the Bulk Email Invoices tab in the main menu. You can find this through a global search as well.

- You can navigate to Bulk Email Invoices > Actions > Invoices from the Administrator role.
- You can also Navigate to Bulk Email Invoices from the BEI-AR role.

- Click on the Invoices tab to open the BULK EMAIL INVOICES PAGE.



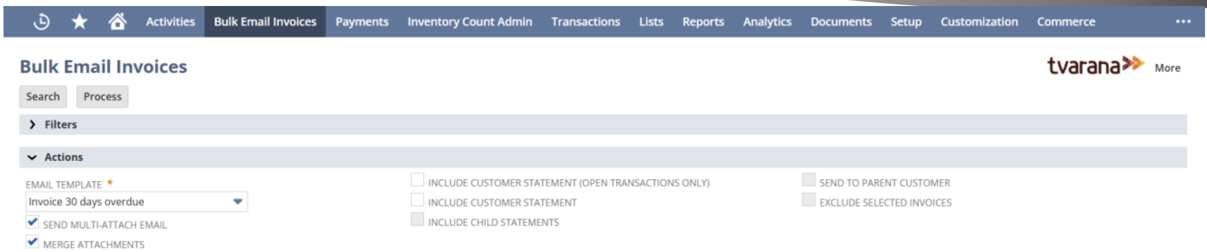
Find different fields like **Customer, From Date, To Date,** and **Email Template** in the drop-down list on this page. It also includes some mandatory fields to retrieve data between two specific dates. All fields are divided into filters and actions. Filters are used to filter data, while actions are used to send emails.

3. FIELD DESCRIPTION

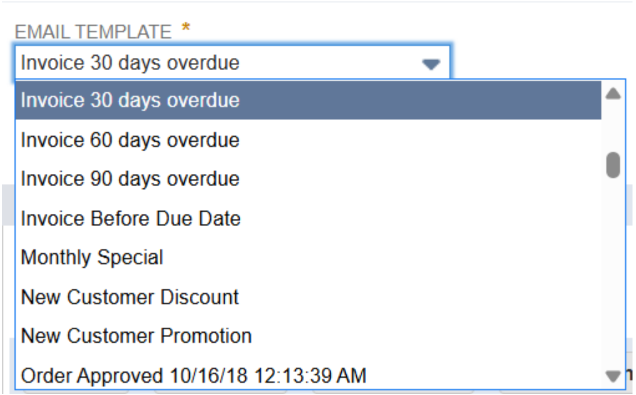
a. FILTERS

- **CUSTOMER:** Select the customer to filter and view all invoices associated with that particular customer.
- **CUSTOMER PRIORITY**: Filter the invoice results based on the priority level configured on the Customer record.
- **DURATION PAST DUE**: Filter the invoice results based on the selected value for “DURATION PAST DUE” which is overdue within the range selected. In the Invoices sublist, the user will be able to view the number of “OVERDUE DAYS” for the respective invoice.
- **SHOW ONLY OPEN INVOICES**: Check this checkbox to filter invoices that are open.
- **NUMBER OF EMAILS SENT**: Filter search results by Number Of emails sent.

b. ACTIONS



- **INCLUDE CUSTOMER STATEMENT (ONLY OPEN TRANSACTIONS)**: Check this box to include only open transactions on statements.
- **INCLUDE CUSTOMER STATEMENT**: Check this checkbox to include customer statements.
- **INCLUDE CHILD STATEMENTS**: Check this checkbox to include child invoices in the customer statement.
- **SEND TO PARENT CUSTOMER**: Check this checkbox to send out the emails to only the parent customers.
- **EXCLUDE SELECTED INVOICES**: Check this checkbox to exclude your invoices which are open/paid in full.
- **EMAIL TEMPLATE**: Allows you to build your email by choosing from preset templates.



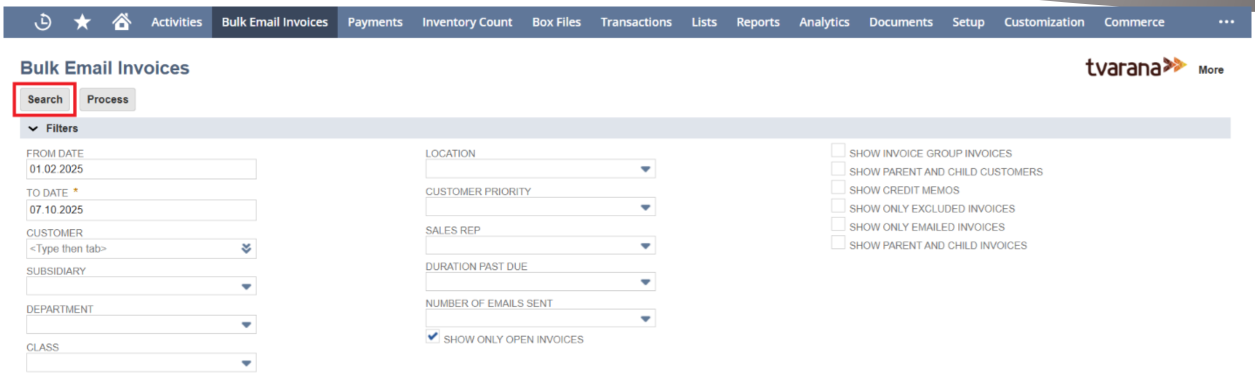
- **SEND MULTI-ATTACHMENT EMAIL**: Check this checkbox to send an email with multiple invoices as attachments.
- **MERGE ATTACHMENTS**: Check this checkbox to merge all invoices into a single PDF.

c. RESULTS

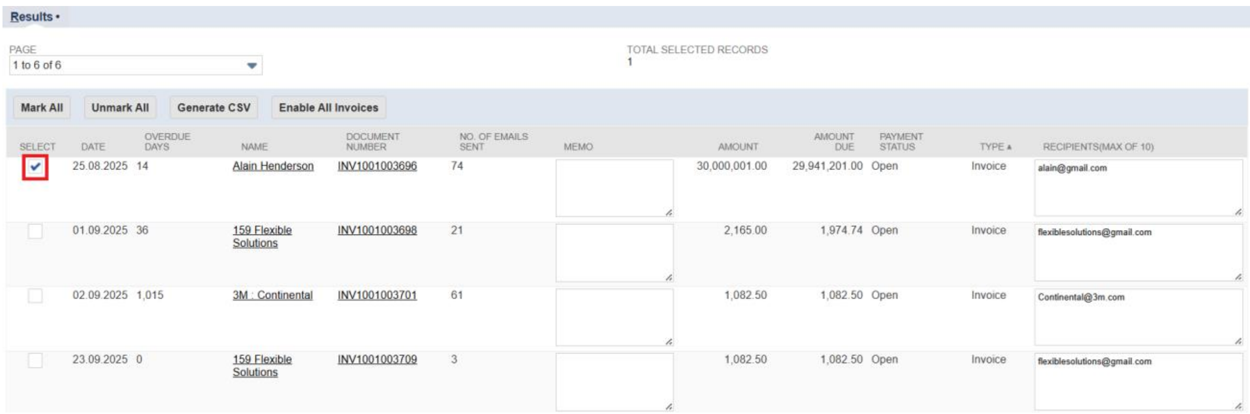
Find all invoices filtered out based on the filters above.

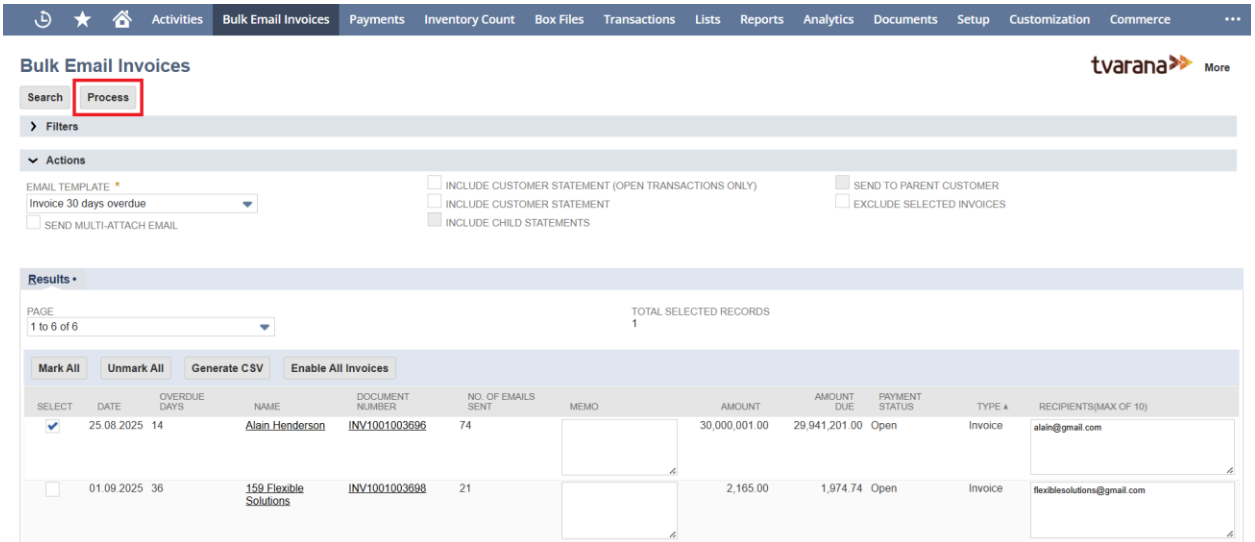
4. SENDING BULK EMAIL INVOICES:

- Fill out all the required fields on the Bulk Email Invoices page as shown in the screenshot below.

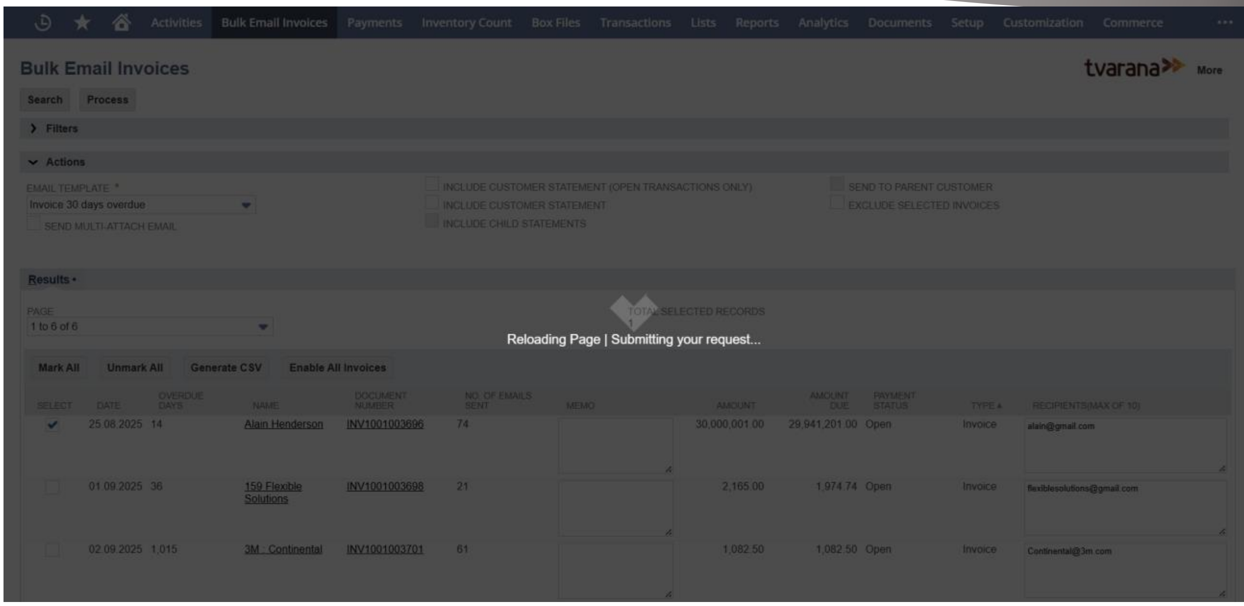


- Use the available filters to narrow down the list of invoices based on your criteria, then click Search to display the matching invoices.
- From the search results, mark the Select checkbox for each invoice you wish to include Email template and then click Process.

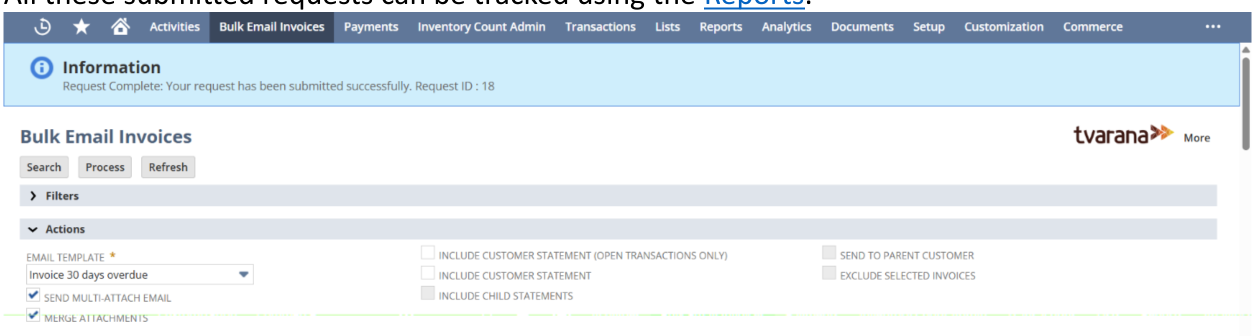




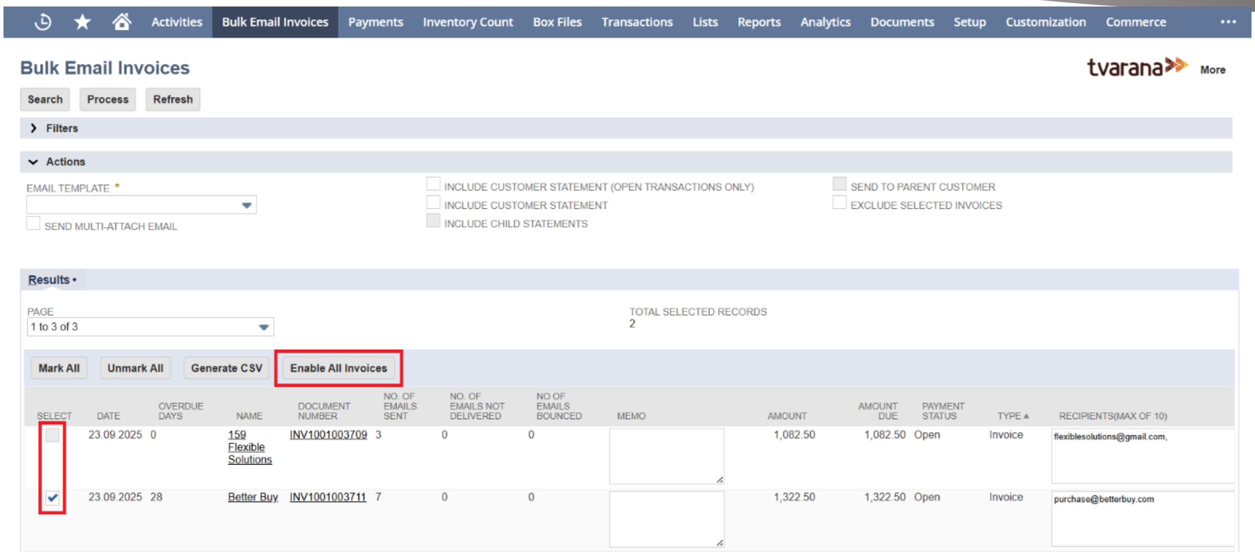
- After clicking the **Process** button, the following screen appears, showing that the selected invoices are being queued for processing.



- After the invoices are queued, a confirmation message is displayed, showing that the request has been successfully submitted along with the Request ID. All these submitted requests can be tracked using the Reports.



- Once invoices are queued for processing, all the invoices submitted on that day will be disabled to prevent further processing. If the user needs to process any of the previously submitted invoices again, the user can re-enable them by clicking the **“Enable All Invoices”** button.



- Instead of using the “Enable All Invoices” button, the user can also select specific disabled invoices directly at the line level. This allows the user to reprocess only selected invoices rather than all invoices.
- After processing, a backend job automatically triggers to send the emails to each customer. Each customer receives their respective invoice as an attachment.

DONT FORGET...

YOUR INVOICE

Dear Epsilon,

This mail is regarding your invoice #2066 dated 7/23/2025 with due date 7/23/2025.

Your payment is currently 30 days overdue.

Please fulfill the payment for your account. If you have any questions about these charges, do not hesitate to reach out to us.

We appreciate your business.

Thanks and regards,

If you would like to send multiple invoices related to a customer in a single email, click the Send Multi-Attach email checkbox and click on the Process button.

- In the BEI screen, you can view the "NO OF UNDELIVERED EMAILS" and "NO OF BOUNCED EMAILS" columns if you check the "SHOW UNDELIVERED AND BOUNCED EMAILS COUNT" checkbox under General Preferences.

Results •

PAGE
1 to 6 of 6

TOTAL SELECTED RECORDS
0

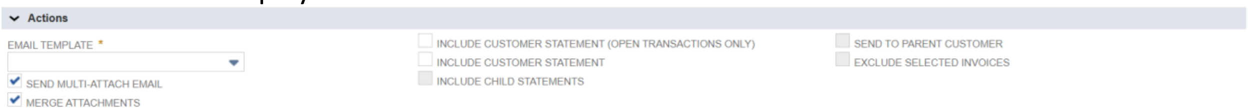
Mark All | Unmark All | Generate CSV | Enable All Invoices

SELECT	DATE	OVERDUE DAYS	NAME	DOCUMENT NUMBER	NO. OF EMAILS SENT	NO. OF EMAILS NOT DELIVERED	NO OF EMAILS BOUNCED	MEMO	AMOUNT	AMOUNT DUE	PAYMENT STATUS	TYPE ▲	RECIPIENTS(MAX OF 10)
	25.08.2025	14	Alain Henderson	INV1001003696	74	0	0		30,000,001.00	29,941,201.00	Open	Invoice	alain@gmail.com

- The “NO. OF EMAILS UNDELIVERED” column is to see the number of emails that are undelivered to the customer.
- The “NO. OF EMAILS BOUNCED” column is to see the number of emails that are bounced back.

4.1. MERGE ATTACHMENTS

Merge attachments functionality is used to merge multiple attachments into a single “PDF.” After enabling the “SEND MULTI-ATTACH EMAIL” checkbox, the “Merge Attachments” checkbox will be displayed.



- To send multiple bills on a single PDF to the customer, Enable the merge attachment checkbox to select the Email Template & click on the Process button.

SUBJECT
BEI Processing Summary – Process Confirmation

MESSAGE
Bulk Email Invoice Processing Summary

Total processed Transactions: 3
Multi Attachment: True
Total unprocessed Transactions due to missing email addresses: 0

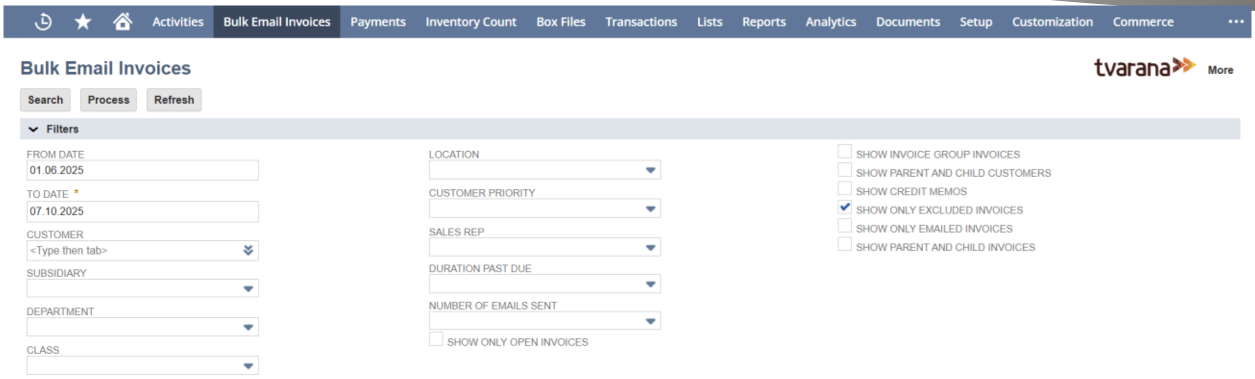
Regards,
Tvarana SuiteApp Team

4.2. EXCLUDE SELECTED INVOICES

- If you would like to exclude certain invoices from being sent to your customers, go into the invoice list on the BEI page, click the **Exclude Selected Invoices** checkbox, select the invoices, and click Process.

4.3. SHOW ONLY EXCLUDED INVOICES

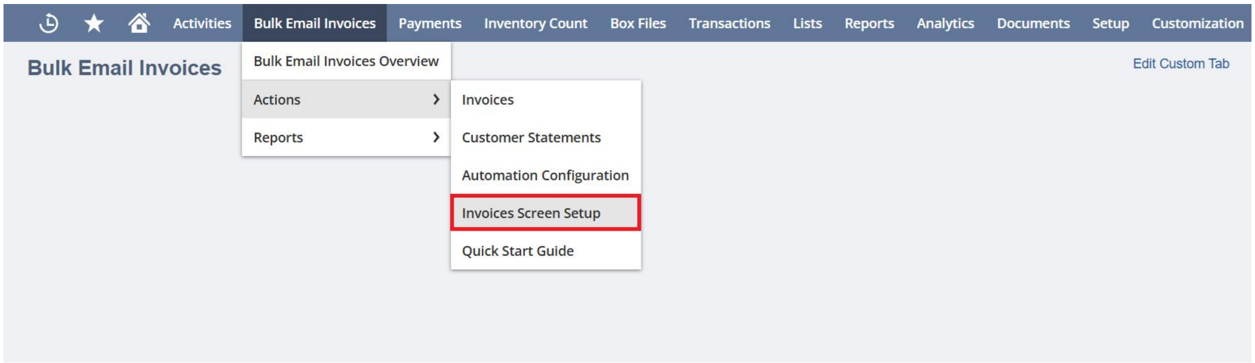
- Similarly, if you would like to view only the excluded invoices, select the Show Only Excluded checkbox on the page.



5. BULK EMAIL INVOICES SCREEN SETUP

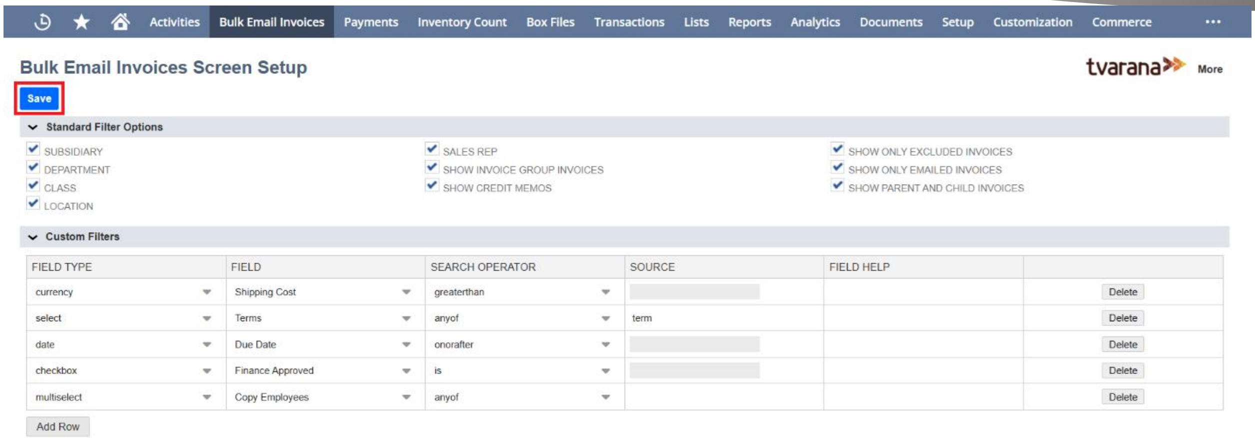
The Bulk Email Invoices Screen Setup allows users to define and manage both standard and custom filters that are displayed on the Bulk Email Invoices screen.

Navigation for this screen is –**Bulk Email Invoices ->Actions -> Invoices Screen Setup**



The Screen contains two sections:

- **Standard Filters Section**
- **Custom Filters Section**



5.1. STANDARD FILTERS SECTION

- Displays all predefined filter options available on the BEI screen, such as Subsidiary, Department, Class, and Location.
- Each filter includes a **Select** checkbox to control its visibility on the BEI screen.
  - **Checked:** The filter appears on the BEI screen.
  - **Unchecked:** The filter is hidden.

FIELD DESCRIPTION

a. MAIN FILTERS

- **SUBSIDIARY**: The drop-down list displays the list of available subsidiaries. Select the subsidiary to display the respective open invoices for that subsidiary. If a subsidiary is not selected, all the open invoices across all subsidiaries are displayed.
- **DEPARTMENT**: Filters search results by the department.
- **CLASS**: Filters search results by class.
- **LOCATION**: Filters search results by location.
- **SALES REP**: Filter search results for a Sales Rep.
- **SHOW INVOICE GROUP INVOICES**: Check this checkbox to filter invoices which are invoice grouped types.
- **SHOW CREDIT MEMOS**: Check this checkbox to display credit memos.
- **SHOW ONLY EXCLUDED INVOICES**: Check this checkbox to display only excluded Invoices.
- **SHOW ONLY EMAILED INVOICES**: Check this checkbox to display only emailed Invoices.
- **SHOW PARENT AND CHILD INVOICES**: Check this checkbox to display both child and parent customer invoices.

- **SHOW PARENT CUSTOMERS**: Check this checkbox to filter all transactions including the sub-customer.

5.2. CUSTOM FILTERS SECTION

Users can define multiple **custom filters** for more flexible data selection.

5.3. SUPPORTED FIELD TYPES

Custom filters can be created using the following field types:

- Checkbox
- Currency Field
- Date
- Multi Select
- Select

5.4. CONFIGURATION COLUMNS

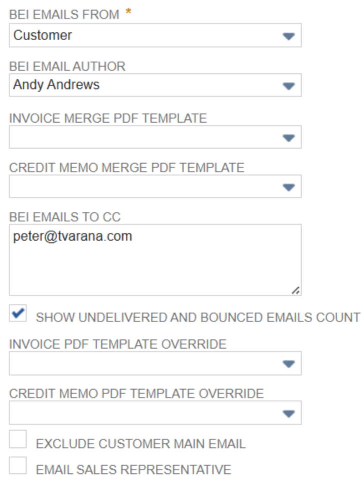
Each custom filter record includes the following configuration options:

1. **Field Type:** Defines the type of field to be used (e.g., Select, Date, etc.).
2. **Field Name:** Displays available fields from the Invoice record that can be used in search filters.
3. **Search Operator:** Displays the available operator types based on the selected field type.
4. **Source** –
    a. Automatically populated for standard fields.
    b. Manually defined for custom fields.

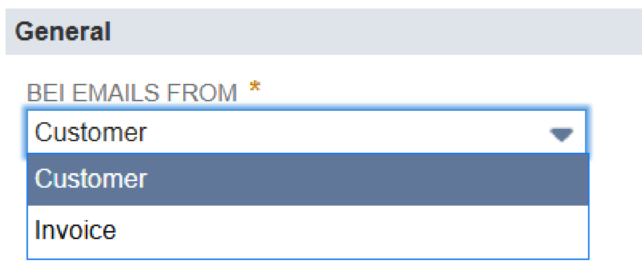
5. **Field Help:** Users can enter the field help for the custom field.

6. BEI PREFERENCES

Navigate to Custom preferences on the general preferences (Setup> company> preferences> General Preferences) to enable/disable these functionalities.



a. **BEI EMAILS FROM:** This field is used to select the source of email addresses used on the BEI screen and automation process.



We have two options in the “BEI Email From” dropdown field

- Customer: If you select the Customer in the “BEI email from” dropdown field, it will source the Email and the Bulk Email Addresses (under the Communication subtab) from the customer record and will be auto populated under the BEI page in the RECIPIENTS column and while sending automated emails.
- Invoice: If you select the Invoice in the “Bei email from” dropdown field it will source the Emails from the “To Be Email Field” (under the Communication subtab) from the invoice record and will auto-populate under the BEI page in the RECIPIENTS column and while sending automated emails.

b. **BULK EMAIL AUTHOR:**

Emails sent from the Bulk Email Invoices screen will use the name and email address specified in the "BEI Email Author" field as the sender. If no value is provided, the current user will be used as the author.

c. **INVOICE MERGE PDF TEMPLATE:**

The PDF template selected here will be used for the invoices while using the MERGE PDF functionality from the BEI screen.

d. **CREDIT MEMO MERGE PDF TEMPLATE:**

The PDF template selected here will be used for credit memos while using the MERGE PDF functionality from the BEI page.

e. **BEI EMAILS TO CC:**

The email(s) added here will be CC in all the emails sent using the BEI tool.

f. **SHOW UNDELIVERED AND BOUNCED EMAILS COUNT:**

Check the SHOW UNDELIVERED AND BOUNCED EMAILS COUNT to display undelivered and bounced emails count on BEI screen.

g. **INVOICE PDF TEMPLATE OVERRIDE:**

The PDF template selected here will be used for the INVOICE while sending the mail from the BEI page.
If no template is selected, then the default template which is selected on INVOICE will be used for sending the mail from the BEI page.

h. **CREDIT MEMO PDF TEMPLATE OVERRIDE:**

The pdf template selected here will be used for the CREDIT MEMO while sending the mail from the BEI page.
If no template is selected, then the default template which is selected on the CREDIT MEMO will be used for sending the mail from the BEI page.

i. **EXCLUDE CUSTOMER MAIN EMAIL:**

Check this checkbox to enable “EXCLUDE THE CUSTOMER'S MAIN EMAIL” from BEI.

When enabled:

- The **primary email address** of the customer is excluded
- Applies consistently across:
  - Bulk Email Invoice
  - Manual Statements
  - Automated Statements

j. EMAIL SALES REPRESENTATIVE:

Check this checkbox to enable the “EMAIL SALES REPRESENTATIVE” feature that automatically adds the sales rep in CC for both manual and automated bulk email invoicing.

7. EMAIL AUTOMATION

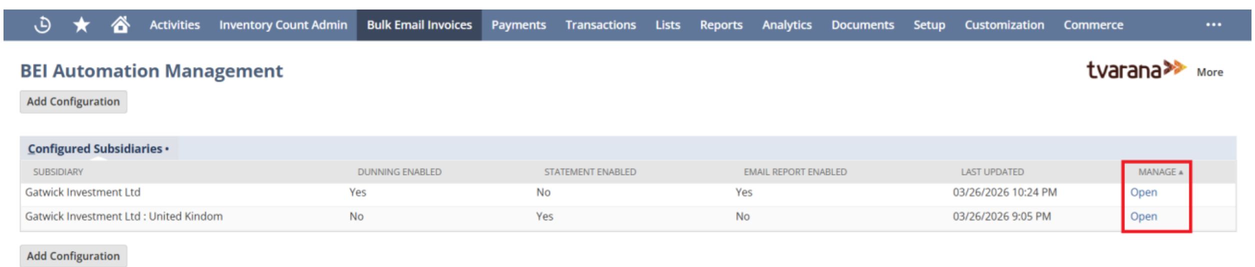
Automate emails sent to your customers and send periodic reminders. You can do this by specifying the number of days before or after the due date that emails need to be sent to your customers.

CONFIGURATION PAGE

Navigation: - Bulk Email Invoices> Action> Automation Configuration.

Configuration List View

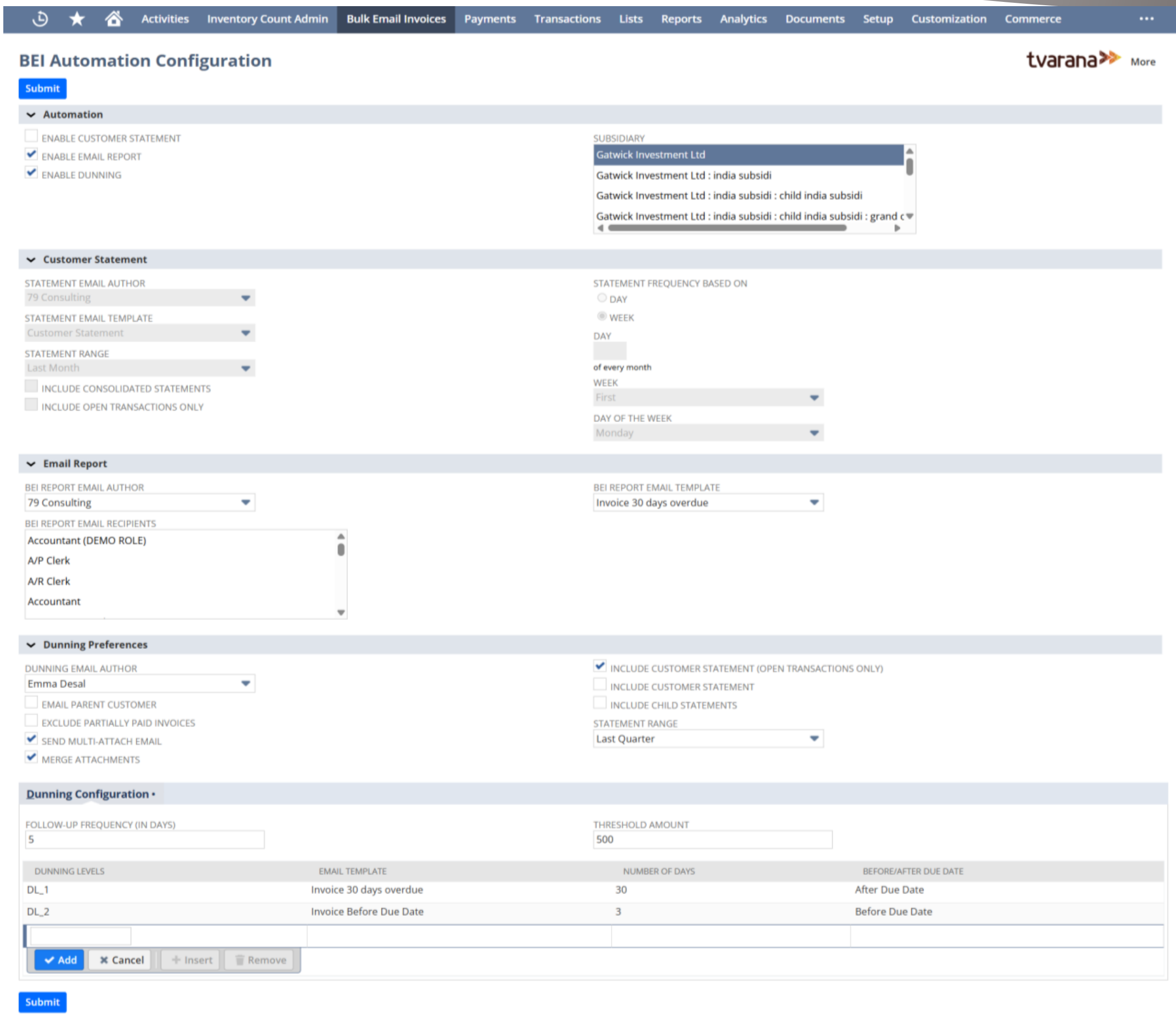
- Upon accessing the Automation Configuration screen, a **list view** is displayed.
- This list displays all existing automation configurations available in the system, organized by the subsidiary.



Managing Existing Configurations

- To modify an existing configuration:
  - Click on **Open** next to the required record
  - Update the configuration as needed

The BEI Automation Configuration page allows users to enable and customize automated processes for sending customer statements, transactional email reports, and invoice-related communications. This configuration ensures timely and consistent communication with customers, reducing manual effort for the Accounts Receivable team.



Automation

- **Enable Customer Statement**: Select this checkbox to enable and configure the fields under the Customer Statement Automation section. This enables automated generation and management of customer statements.
- **Enable Email Report**: Select this checkbox to enable and configure the fields under the Email Report section. This allows automated email distribution of reports to users with the BEI AR role.
- **Enable Automation**: Select this checkbox to activate and configure the fields under the Invoice Related Configuration section. This enables automation features related to invoice processing.
- **Subsidiary:** The Subsidiary field is used to define the subsidiaries for which the automation configuration is applicable.

Users can select one or multiple subsidiaries based on the requirements. The selected configuration will be applied to all chosen subsidiaries.

This allows users to:

- Apply the same configuration across multiple subsidiaries, or
- Create separate configurations for subsidiaries that require different automation settings

Proper selection of subsidiaries ensures that automation processes such as customer statements and dunning are applied only to the intended subsidiaries.

Customer Statement

- **Statement Email Author:** Select the NetSuite employee name that will appear as the sender of the automated emails.
- **Statement Email Template:** Choose the email template to be used for the customer statement email body. This template can include dynamic fields such as customer name, statement date, and totals.
- **Statement Range:** Choose the transaction period to be included in the statement.
- **Statement Frequency Based On**: Day – Sends the statement on a specific day of the month (e.g., 25th).
  Note: The maximum allowable date value is 28 to ensure compatibility across all months.
- Week – Sends the statement based on a selected week and day of the week (e.g., Fourth Wednesday of the month).
- **Include Consolidated Statements**: Check this option to send a single consolidated statement if the customer has multiple child records or subsidiaries.
- **Include Open Transactions Only**: If enabled, the statement will only include open (unpaid) transactions.

Email Report

- **BEI Report Email Author:** Select the employee whose name will appear as the sender of the email report.
- **BEI Report Email Template:** Choose the template used for the body of the transactional email report.
- **BEI Report Email Recipients:** Choose one or more recipients who should receive the report via email.
- Use Multi select to select the required roles such as:
    - A/R Clerk
    - Accountant (Reviewer)
    - Administrator

- You can select multiple recipients as needed.

Dunning Preferences

- **Dunning Email Author:** Select the employee whose name will appear as the sender of the Dunning emails.
- **Email Parent Customer:** When checked, it will allow the users to send the Invoices to parent customers.
- **Exclude Partially Paid Invoices:** When checked, partially paid invoices will be excluded from the follow-up emails.
- **Send Multi-Attach Email:** When selected, multiple invoices will be sent in a single email with separate attachments for each invoice.
- **Follow-up Frequency (In Days):** Enter the number of days between follow-up emails. Example: If set to "5," follow-up emails will be sent every 5 days.

- **Threshold Amount:** Specify the minimum total invoice amount required for follow-up emails to be triggered. If set to "0," all qualifying invoices are included regardless of the amount.

- **Include Customer Statement:** Check to include the customer statement with invoice emails.
- **Include Customer Statement (Open Transactions Only)**: Check this to include only open (unpaid) transactions in the customer statement when sent with invoices.
- **Include Child Statements:** When checked statements for child customers (linked to a parent customer) are also included.
- **Statement Range**: Define the date range for transactions included in the attached customer statement (e.g., Last 1 Month).

Dunning Configuration

The Dunning Configuration section allows the setup of automated reminder emails for overdue invoices.

- **Dunning Levels:** Define various levels of follow-up. Each level may have a different email template and timing.

- **Email Template:** Choose the email template used for this dunning level. Example: "Invoice 30 days overdue".
- **Number of Days:** Specify the number of days after which the dunning email should be sent. Example: "3" means the email will be sent 3 days after the invoice becomes overdue.
- **Before/After Due Date:** Choose whether the email should be sent **Before** or **After** the invoice due date.

To add a new dunning level, click **Add**, enter the required details, and save the configuration.

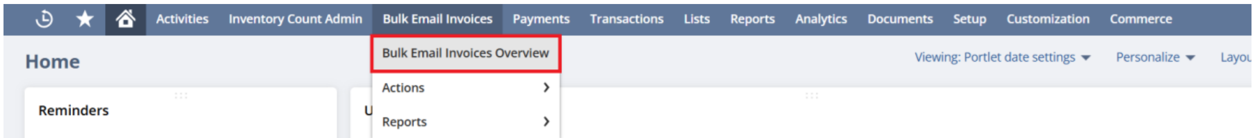
Once all configurations are completed, click Submit to save the settings. The automation will then be executed according to the defined schedule and criteria, ensuring efficient and consistent communication with customers regarding their financial transactions.

8. Bulk Email Invoice - Dashboard

The **Bulk Email Invoice Dashboard** provides a centralized view of invoice statuses, collections, and email activities. It helps users monitor outstanding balances, track communications, and take quick actions on invoices.

To access the dashboard:

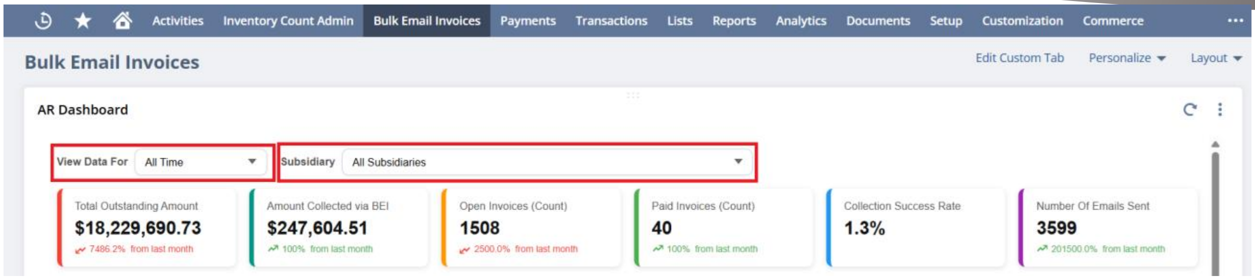
Navigate to: **Bulk Email Invoice → Bulk Email Invoice Overview**



8.1 Using Filters

The AR Dashboard includes two filters that control how the data is displayed:

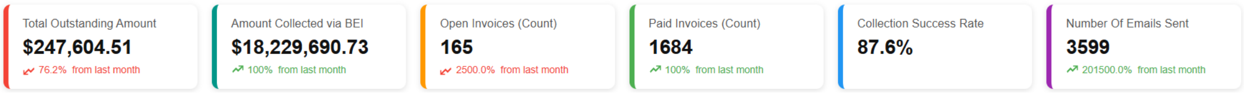
- **View Data For**: Defines the time period for the summary metrics (All Time, This Month, This Quarter, This Year). The values in the summary tiles are compared against the corresponding previous period (e.g., This Month vs. Last Month).
- **Subsidiary**: Filters the entire dashboard, including charts and invoice data, based on the selected subsidiary.



8.2 AR Dashboard Components

The top section presents key financial and activity indicators that provide a quick snapshot of receivables and collection performance:

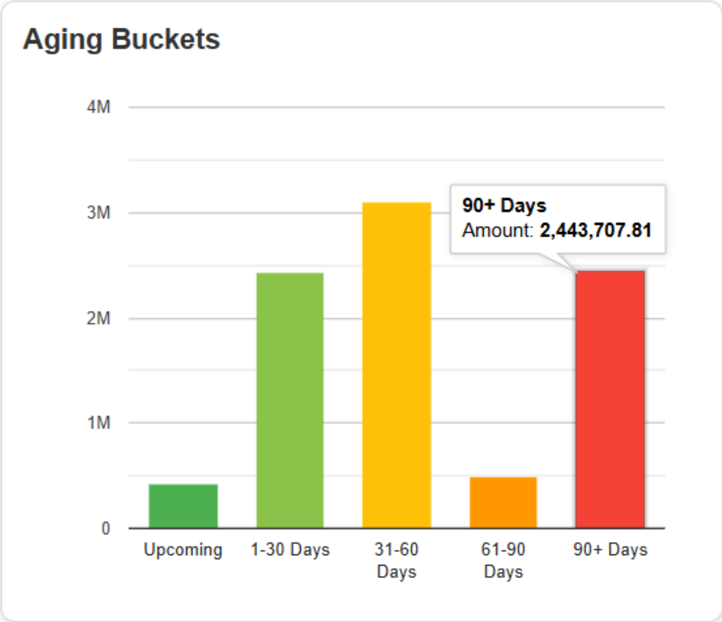
- **Total Outstanding Amount** – Total value of unpaid invoices
- **Amount Collected via BEI** – Payments collected through the BEI process
- **Open Invoices (Count)** – Number of invoices still pending
- **Paid Invoices (Count)** – Number of invoices fully paid
- **Collection Success Rate** – Percentage of successful collections
- **Number of Emails Sent** – Total emails sent to customers



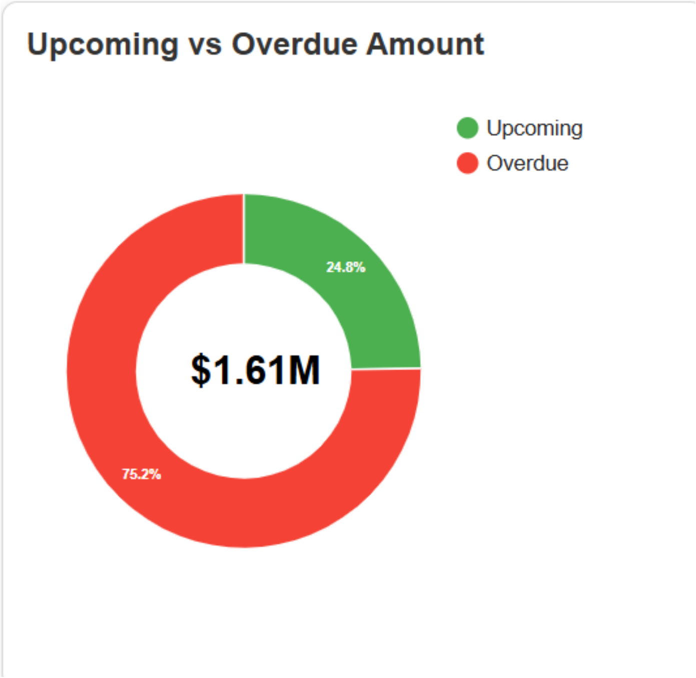
Each tile includes a trend indicator comparing the selected period with the previous one, helping users quickly evaluate performance and identify changes in collections and outstanding balances.

The dashboard includes visual charts that help identify where attention is required:

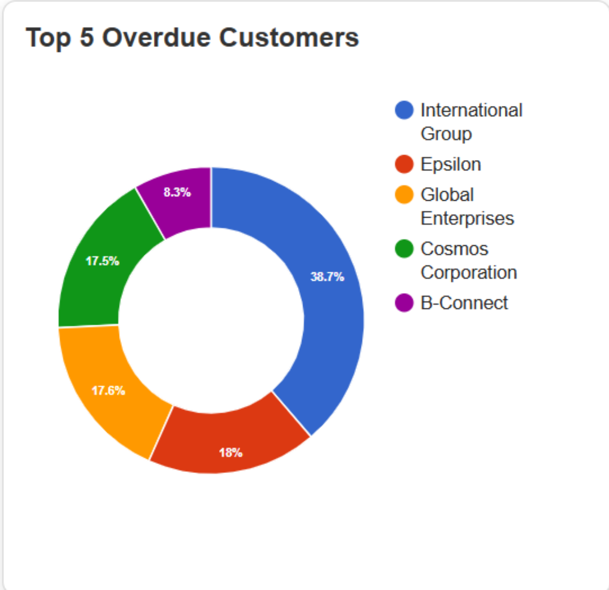
- The **Aging Buckets** chart shows invoices based on how long they have been outstanding (upcoming, 1–30 days, 31–60 days, etc.).
- When you hover over the chart, it displays the total amount of open invoices that are yet to be received.



- The **Upcoming vs Overdue** chart shows the proportion of invoices that are not yet due versus those that are overdue.



- The **Top Overdue Customers** chart highlights customers contributing the most to overdue balances.



All charts are interactive. Clicking on any segment (for example, a specific aging bucket or a customer) opens a filtered list of invoices in the Bulk Email screen. From there, users can review records and send emails directly.

Invoices categorized as **"Upcoming"** are those with a due date in the future, while all other categories represent overdue invoices based on the number of days past the due date.

8.3 Managing Invoices Requiring Attention

It allows filtering invoices by customer, due period, and minimum outstanding amount, making it easier to focus on specific records. The table displays key details such as invoice number, customer, outstanding amount, due date, last email date, and processing type.

Invoices Requiring Your Attention

Customer: All Customers | Due Period: All Due Periods | Min. Outstanding: Amount | Rows per page: 25

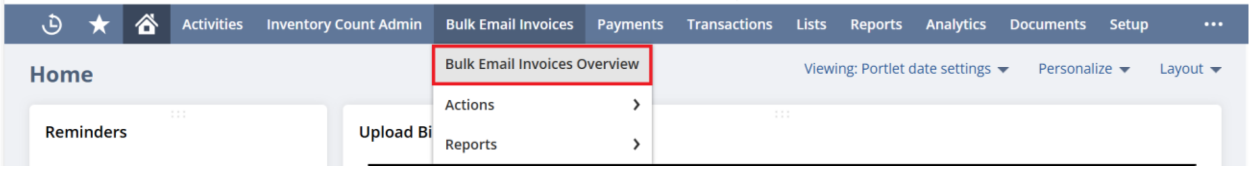
Invoice #	Customer	Outstanding	Due Date	Last Emailed	Auto Processed	Follow-up Status
INV03091935	Smith Inc.	$94.00	2/18/2024	3/18/2026	Yes	14 days ago
INV03091936	Hanninen Painting Distributors	$101.95	2/22/2024	Never	No	Never Sent
INV03091937	Caquias and Jank Catering Distributors	$49.98	2/22/2024	3/30/2026	Yes	2 days ago
INV03091938	Interior Solutions	$106.03	2/22/2024	Never	No	Never Sent
INV03091939	Gacad Publishing Co.	$6,795.55	2/22/2024	1/12/2026	Yes	79 days ago

The Last Emailed field helps track when a communication was last sent, while the Auto Processed field indicates whether the email was triggered by an automation screen or from a manual screen.

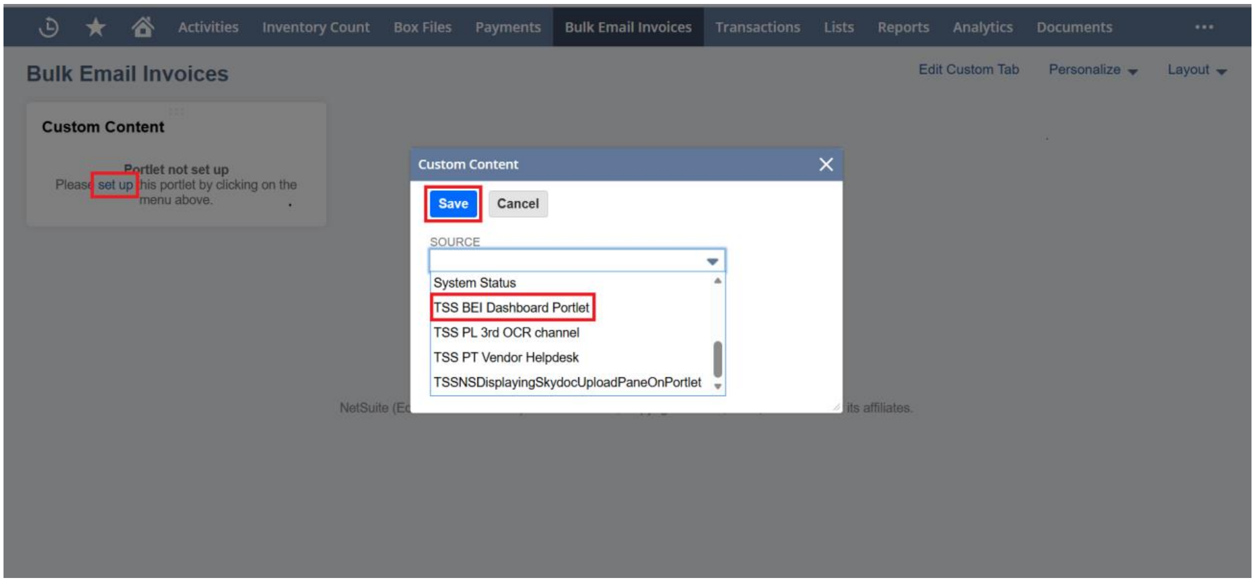
The Follow-up Status shows how recently an email was sent (e.g., “1 day ago”). Clicking this value opens the invoice in the Bulk Email screen, allowing users to quickly resend or follow up.

Invoices processed through automation may not always appear for manual follow-up actions.

Note: If the dashboard is not displayed after installation, navigate to Bulk Email Invoices (Center Tab) and click Bulk Email Invoice Overview.



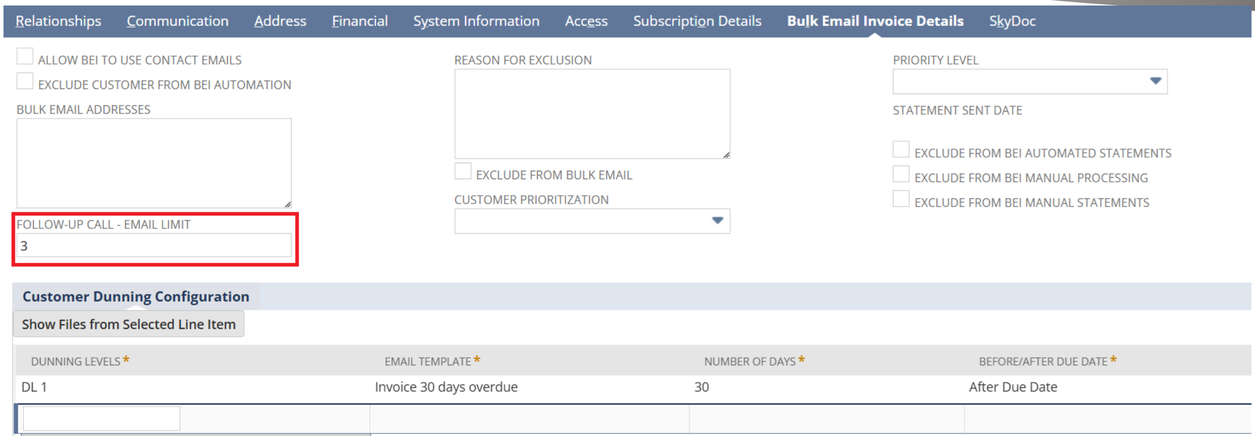
After that, click on Setup, select “TSS BEI Dashboard Portlet” from the dropdown, and click Save to enable the dashboard.



9. PHONE CALL TASK TO SALES REPRESENTATIVE

The phone call task is a feature that allows the user to automatically create a phone call to the sales representative to their respective customer invoice.

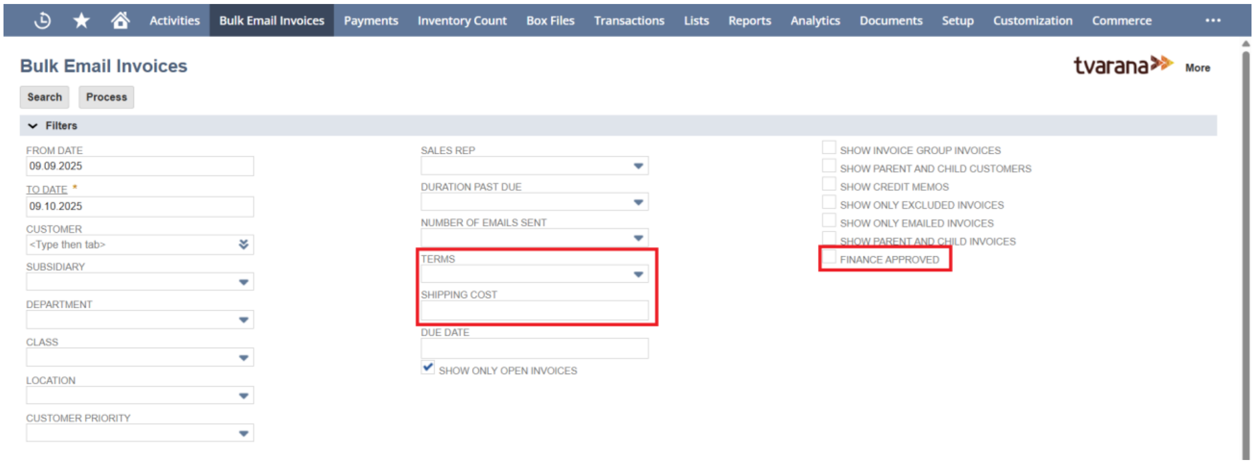
- Initially, Navigate to the customer record in NetSuite.
- Under the Bulk Email Invoice Details subtab, enter the value for “FOLLOW-UP CALL - EMAIL LIMIT” field.



FOLLOW-UP CALL - EMAIL LIMIT: The number of follow-up emails to be sent through BEI before a phone call task is created for the sales representative.

- The value entered in the “FOLLOW-UP CALL - EMAIL LIMIT” will work as a limit to create a phone call task.
- If the number of emails sent through BEI is greater than or equal to the “FOLLOW-UP CALL - EMAIL LIMIT” value for the customer of the invoice, then a backend process will run automatically to create a phone call task to the sales representative of the customer invoice.

Once the configuration is complete, click the Save button. All the selected custom filters will then be displayed on the Bulk Email Invoices screen as shown below.

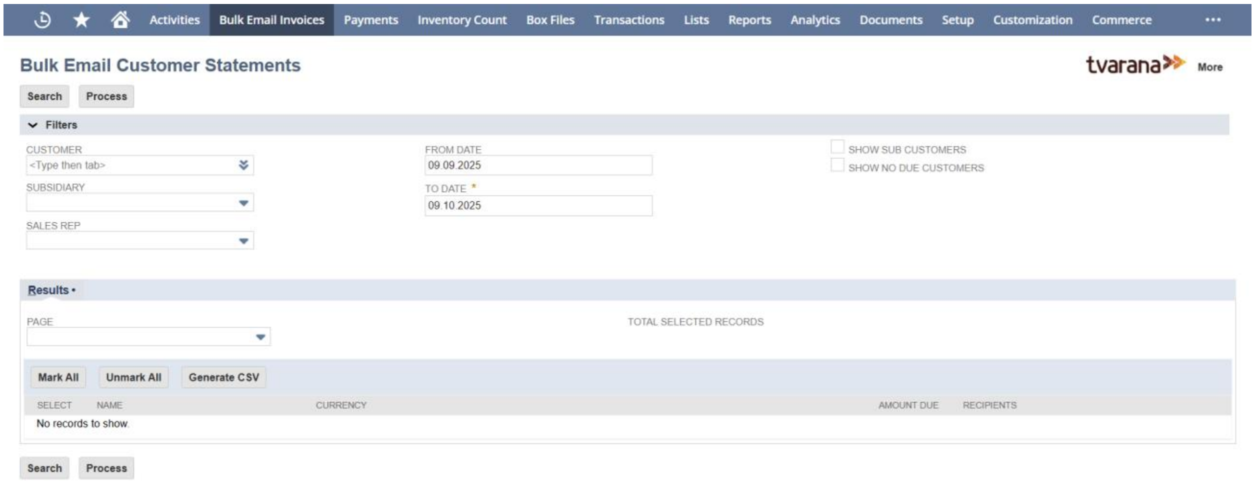


10. BULK EMAIL CUSTOMER STATEMENT

Using the Bulk Email Customer Statement, users will be able to send the customer statement to the customer.

Navigation:

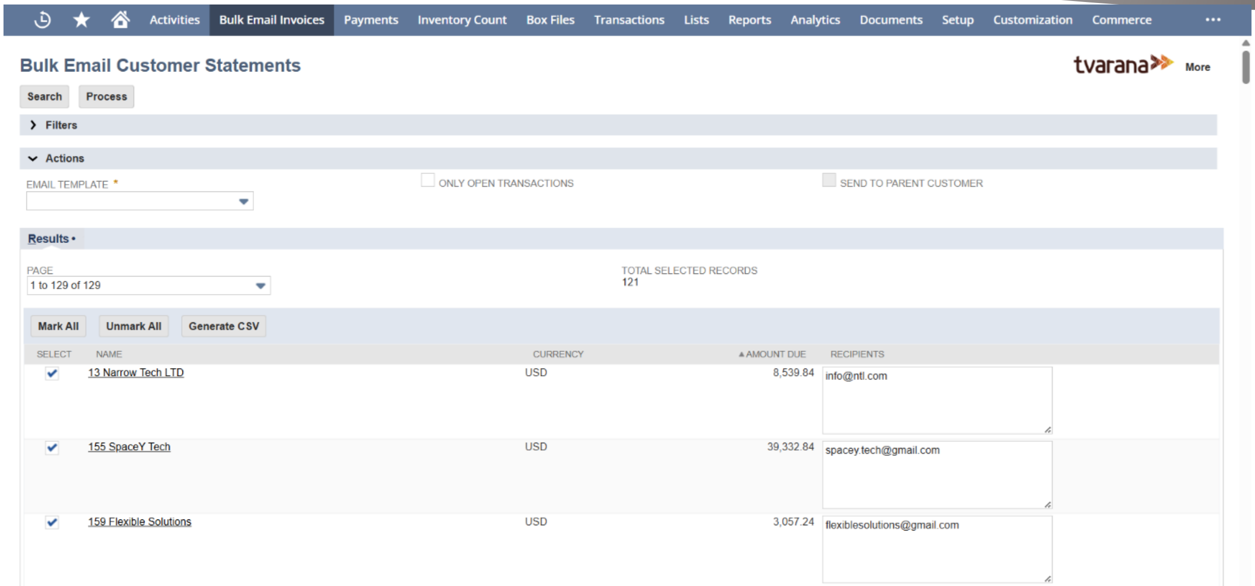
Bulk Email Invoices> Actions> Customer Statements.



The **Filters** section allows the user to filter results,

> **CUSTOMER:** Choose a customer for the customer statement.
>
> **SALES REP:** Choose a sales rep for the customer statement.
>
> **FROM DATE:** From date for the customer statement search.
>
> **TO DATE:** To date for the customer statement search.
>
> **SHOW SUB CUSTOMERS:** Check this checkbox to show only the sub-customer.
>
> **SHOW NO DUE CUSTOMERS:** Check this checkbox to filter all the customers who have no due for the selected date range.

After selecting the desired filters, click the Search button. If any records match the selected criteria, the Actions field group will be displayed.



The **Actions** section allows the user to perform actions-

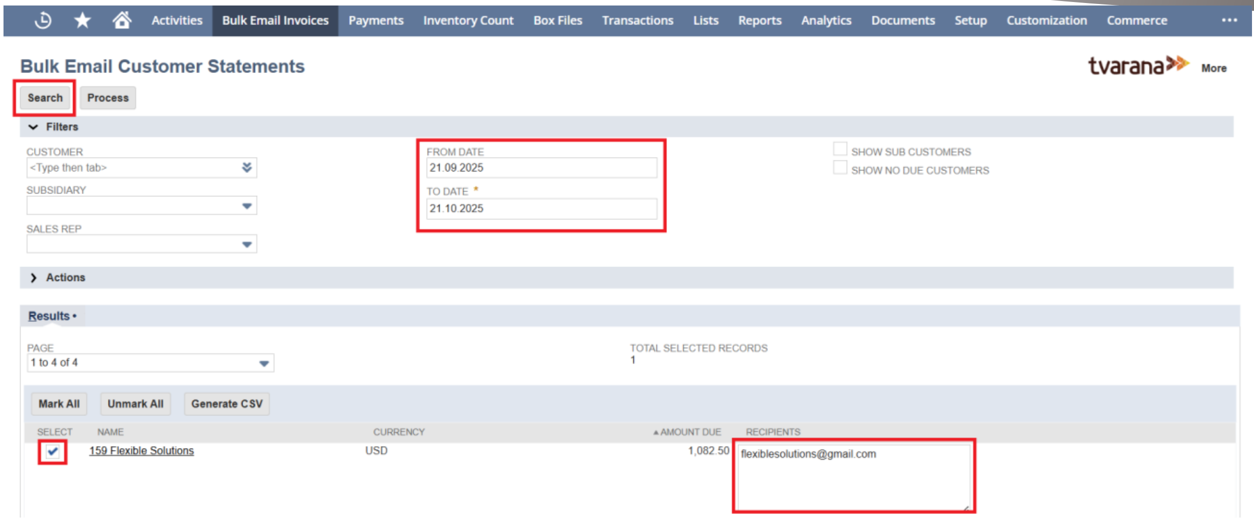
EMAIL TEMPLATE: Select an email template to send emails.

ONLY OPEN TRANSACTIONS: Check this box to send only open transactions on statements.

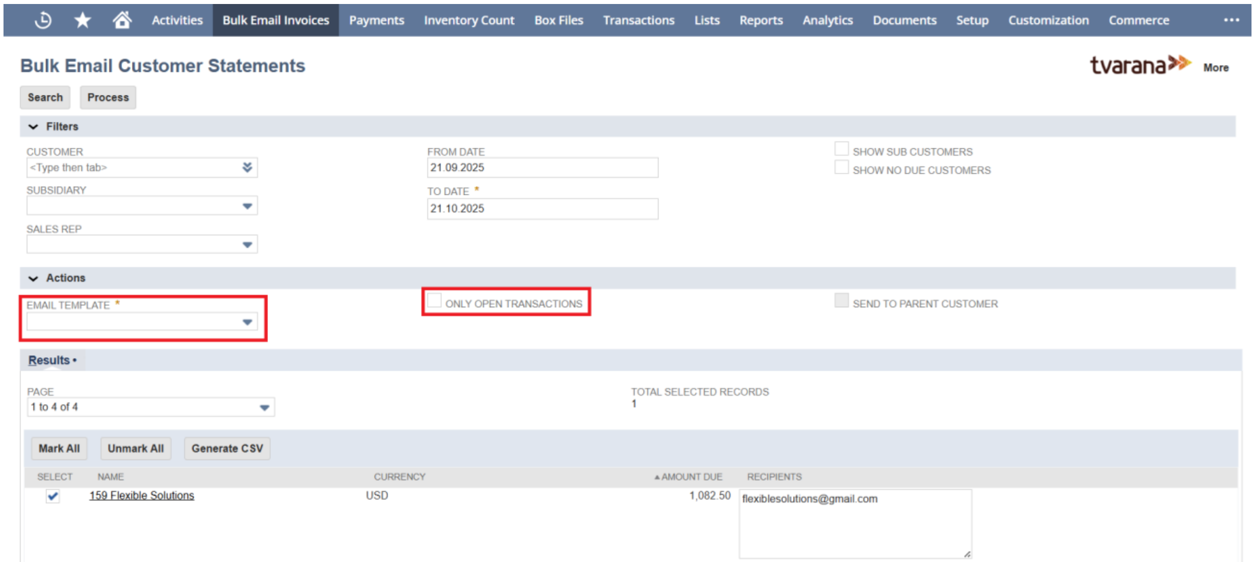
SEND TO PARENT CUSTOMER: This checkbox is used to send out emails to only the parent customers with sub-customer transactions data. (This checkbox will be checked by default if the SHOW SUB CUSTOMERS checkbox is checked.)

Procedure:

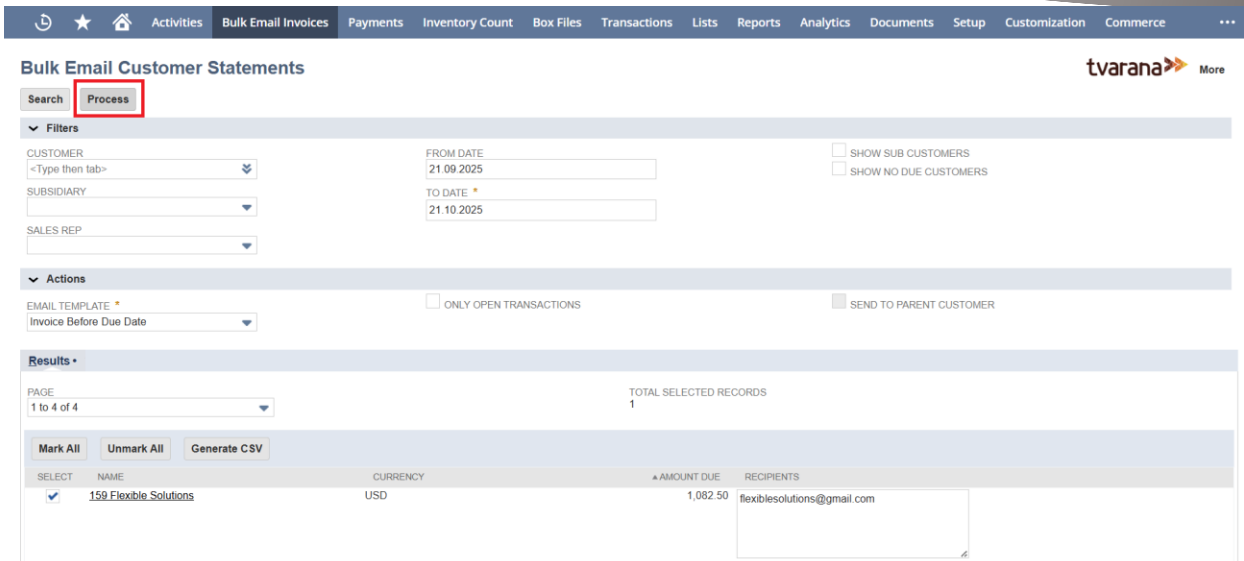
- Users can filter results based on their requirements by using fields in the Main Filters section.
  For Example: Enter values for “FROM DATE” and “TO DATE” and click on the Search button the user will be able to view all the customers having transactions in the given date range.



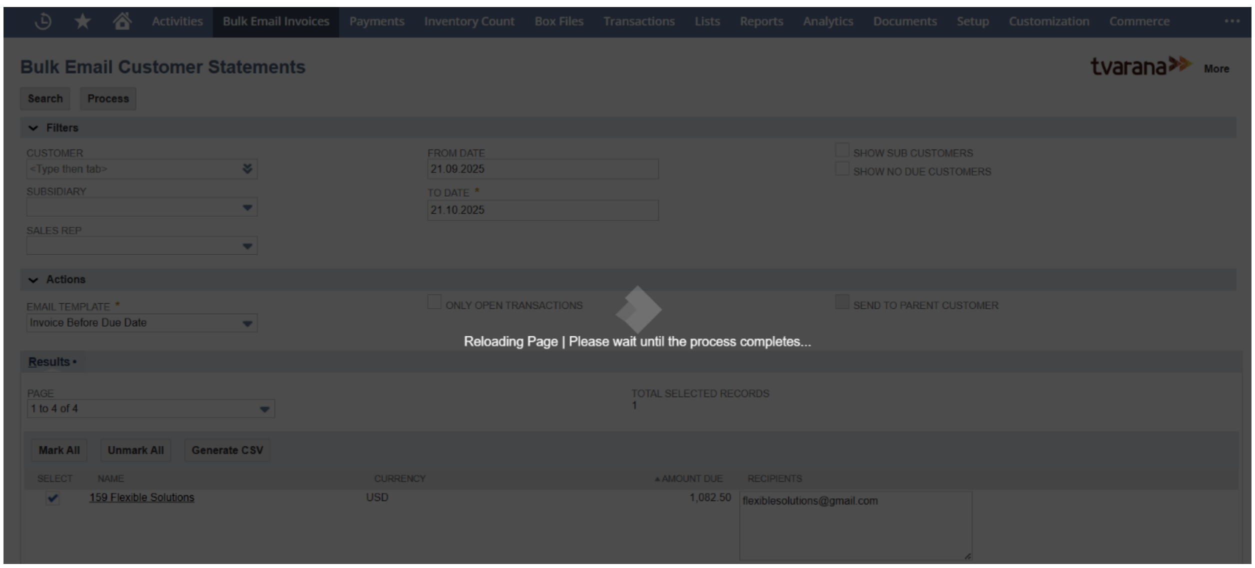
- Now users can select the required customers from the results sublist.
- If the customer is allowed to use contact emails in BEI, then customer contact emails will also be auto populated in the recipient field.
- Users can also add the recipients in the RECIPIENTS column to send the customer statement.



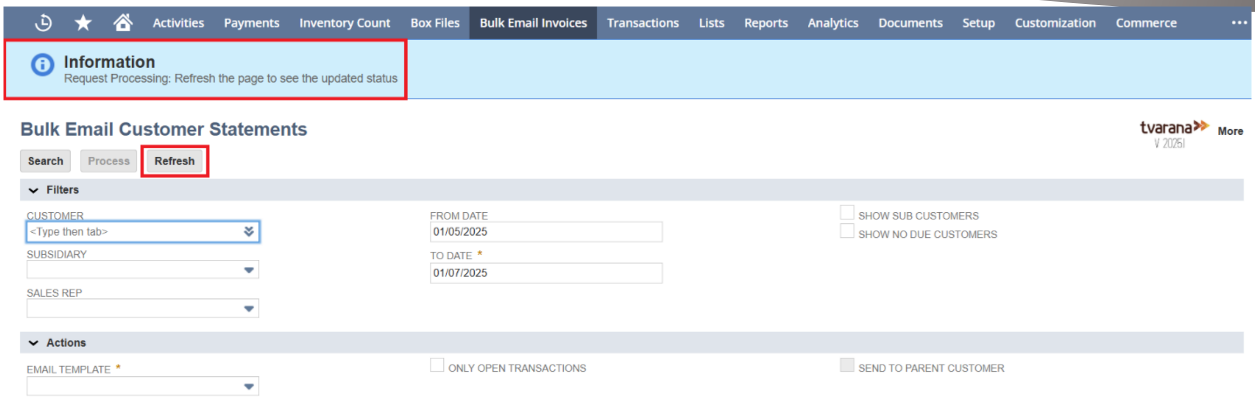
- Now in the Actions section, the user needs to select the **Email template** to send the customer statements to their respective recipients.
- If required, check the **ONLY OPEN TRANSACTIONS** checkbox.



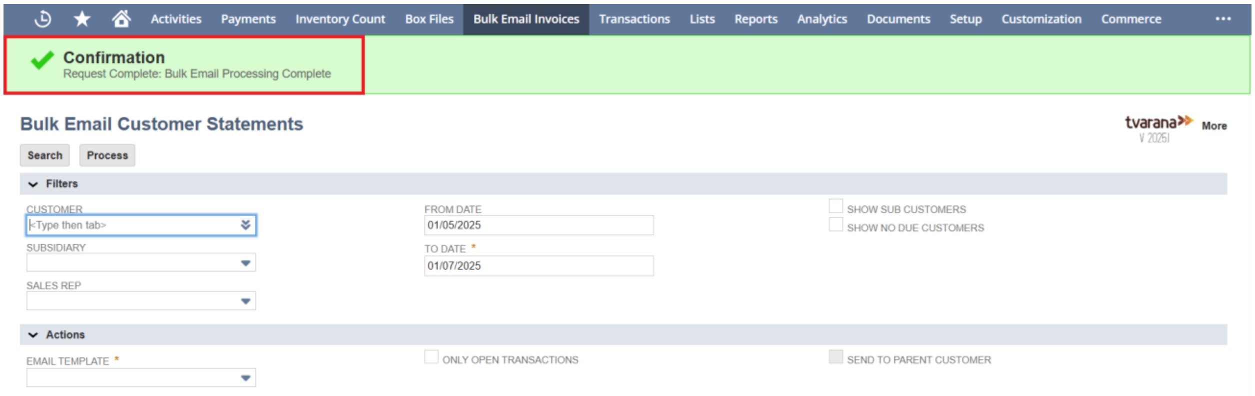
- Now click on the “process” button. The page gets reloaded with a message” Please wait until the process completes.” as shown below.



- A message will appear on the top of the page stating, “Request Processing: Refresh the page to see the updated status.”



- Click on the “Refresh” button until a confirmation message appears at the top of the page “Request Complete: Bulk Email Processing Complete.”



- The customers (recipients) will receive emails with “Customer Statement” as an attachment.

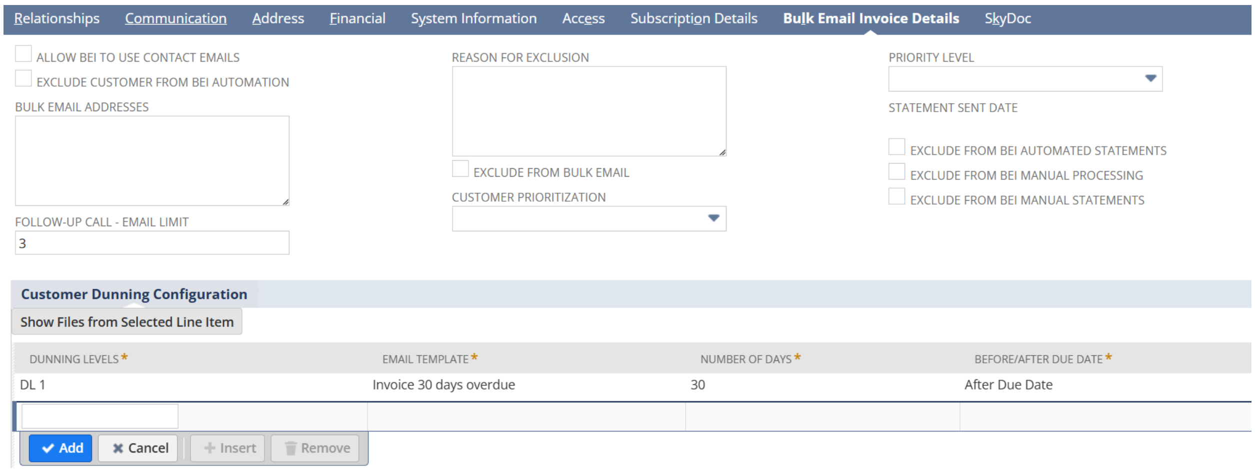
11. CUSTOMER LEVEL DUNNING TEMPLATES

On the customer record under Bulk Email Invoices subtab user can define the customer specific dunning levels.

∉ This section allows you to define customized dunning levels for individual customers as part of the BEI automation process.

- **Dunning Levels**:
  Select the dunning level you wish to configure. Each level corresponds to a specific reminder or escalation stage in the dunning process.
- **Email Template**:
  Choose the email template to be sent to the selected dunning level. This template defines the content and tone of the reminder sent to the customer.

- **Number of Days**:
  Enter the number of days to trigger the reminder. This value works in conjunction with the "Before/After Due Date" field to define when the reminder should be sent.
- **Before/After Due Date**:
  Specify whether the reminder should be sent **before** or **after** the invoice due date. Choose the appropriate option from the drop-down.
- **Add**: Saves the current line and allows you to enter another.
- **Cancel**: Discards the current entry.

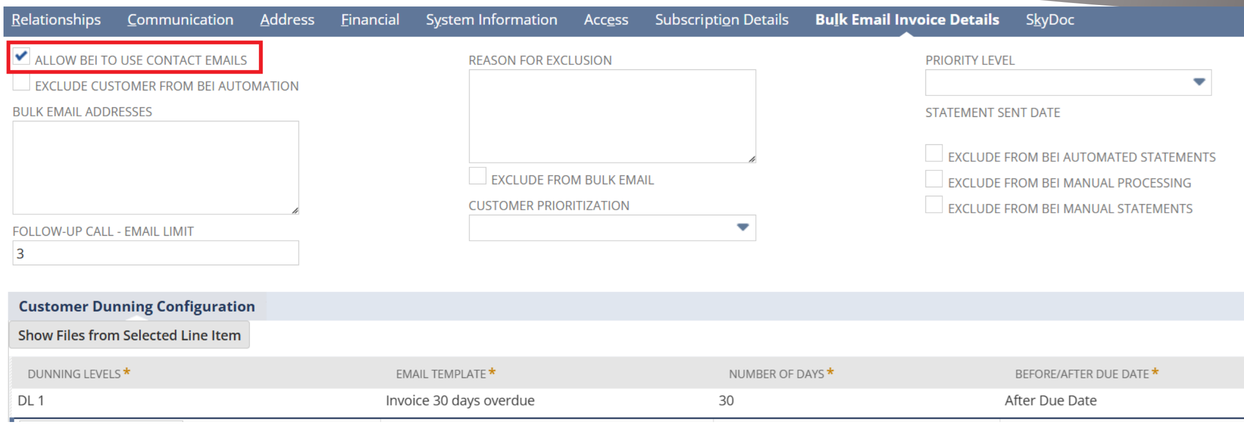


- Once the record is saved, all the dunning templates specified on the BEI Automation screen will be overwritten with the dunning templates selected on the customer's record for this customer.
- All the dunning mails sent to this customer will use the templates specified on the customer's record only.

12. ALLOW BEI TO USE CONTACT EMAILS

This feature allows users to send emails to customers and their associated contacts.

- Open the customer record that has contact records associated with it.
- Check the ALLOW **BEI TO USE CONTACT EMAILS** checkbox in the customer record under the communication subtab.
- Check the “Allow BEI To Use Contact Emails” checkbox under the Bulk Email Invoices subtab and click the Save button.

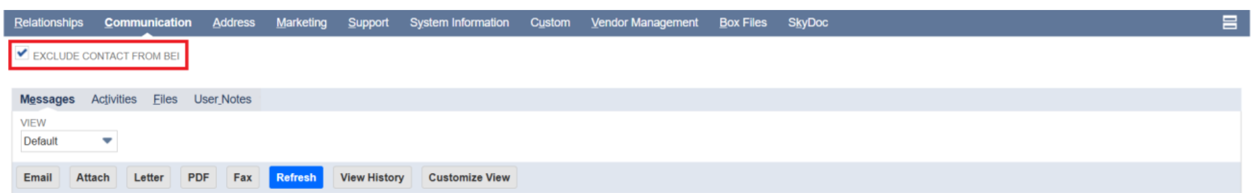


- Now the emails will be sent to customers and their associated contacts.

13. EXCLUDE CONTACT FROM BEI

This feature allows users to exclude contacts that are linked to customer records from the BEI screen.

- Select the contact record to exclude from the BEI and open it in the edit mode.
- Check the **EXCLUDE CONTACT FROM BEI** checkbox and click on the **Save** button.



- Now the respective contact will be excluded from the BEI screen.

14. SALES REPRESENTATIVE EMAIL IN CC

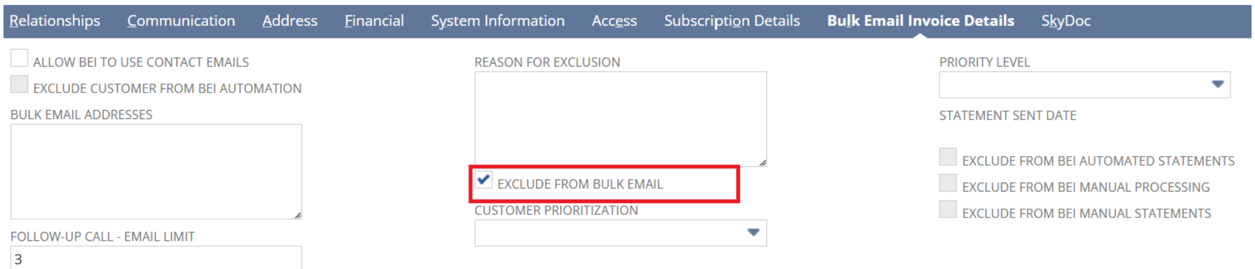
The email address of the customer's sales representative will automatically CC'd in both **automatic and manual bulk email invoicing.** Users can obtain this feature by enabling it from BEI Preferences.

15. EXCLUDING CUSTOMER FROM BEI AUTOMATION

15.1 Exclude from Entire Manual and Automation Processes (Global Behavior)

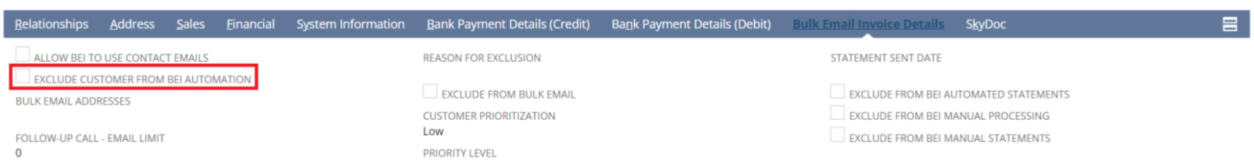
- When the **"Exclude from BEI (Bulk Email Invoices)"** checkbox is enabled:
- The customer is excluded from **all BEI processes**.
- All related checkboxes:

- Are automatically unchecked
- Become disabled (non-editable)



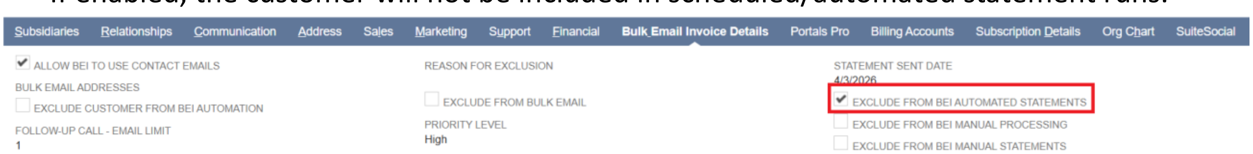
15.2 Exclude Customer From BEI Automation

A checkbox, **"Exclude Customer From BEI Automation,"** is available on the **customer record** under the **Bulk Email Invoices details** subtab. Checking this checkbox will exclude the customer from the automation screen.



15.3 Exclude from BEI Automated Statements

- Excludes the customer from **automated customer statement emails**.
- If enabled, the customer will not be included in scheduled/automated statement runs.

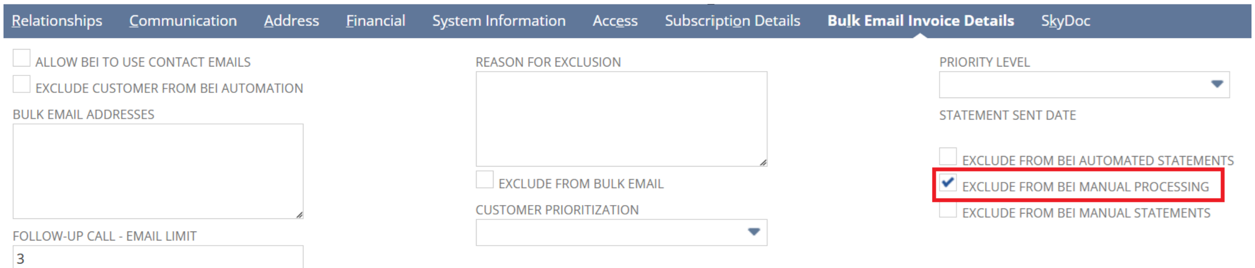


15.4 Exclude from BEI Manual Processing

- Excludes the customer from **manual BEI processing screens**.
- Applicable to:

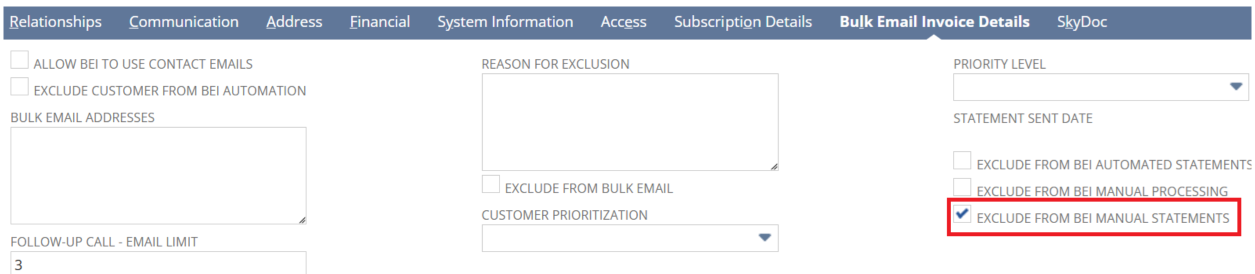
- Manual invoice sending
- Any manual bulk email processing

- Customer transactions will **not appear** in manual processing screens.



15.5 Exclude from BEI Manual Statements

- Excludes the customer from **manual customer statement screen**.
- The customer will not be available when sending statements manually.



15.6 Parent – Child Customer Behaviour from BEI

When a parent customer is excluded, all associated child customers are also excluded from the BEI. As a result, neither the parent customer nor its related child customers will be displayed in the BEI for either manual or automated processes.

Send to Parent Functionality

- When using the "Send to Parent" option to send invoices:
  - Statements are sent to the parent customer only.

Exclusion Logic

Case 1: Parent is Excluded

- If the parent customer is excluded:
  - All child customer statements are also excluded
  - No emails will be sent for those child customers

Case 2: Child is Excluded

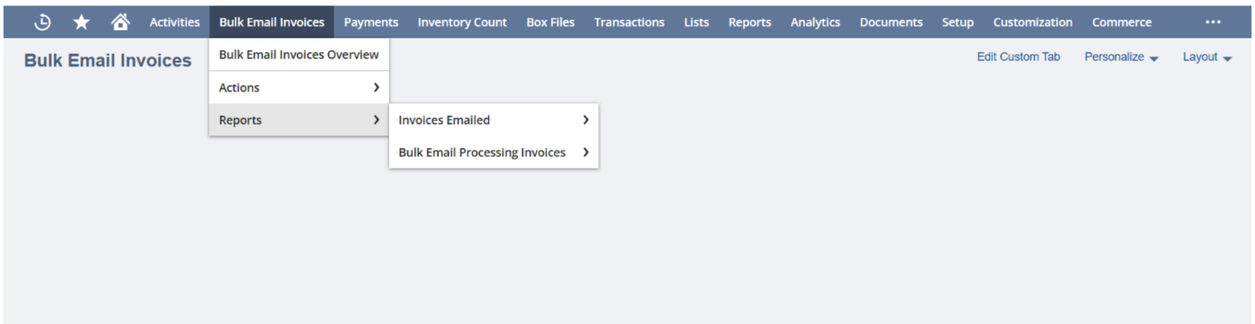
- If a child customer is excluded:
  - Only that specific child is excluded

- Other customers are processed normally

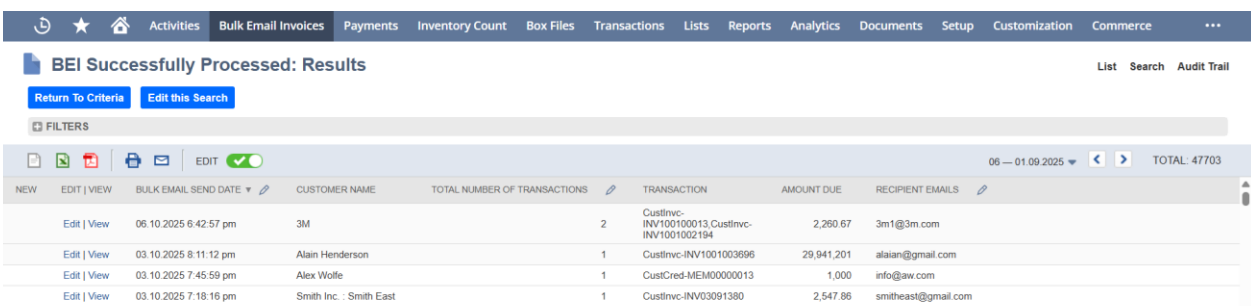
16. REPORTS

The Reports section under the Bulk Email Invoices provides detailed insights into the status and progress of invoice email activities. It allows users to monitor which invoices have been successfully sent and which are still in process. These reports help track the overall performance of bulk email operations and ensure accuracy in customer communications.

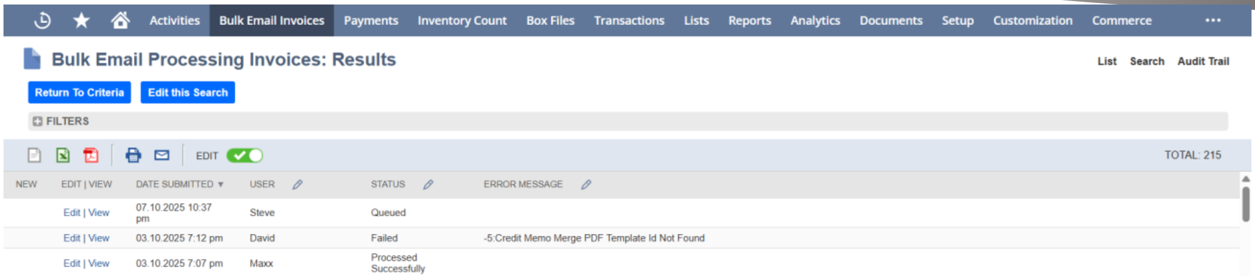
Navigation



- This section includes two key reports:
  - **Invoices Emailed:** Displays a summary of all invoices that have been successfully emailed to customers.



  - **Bulk Email Processing Invoices:** Shows details of invoices that are currently being processed or queued for email delivery.

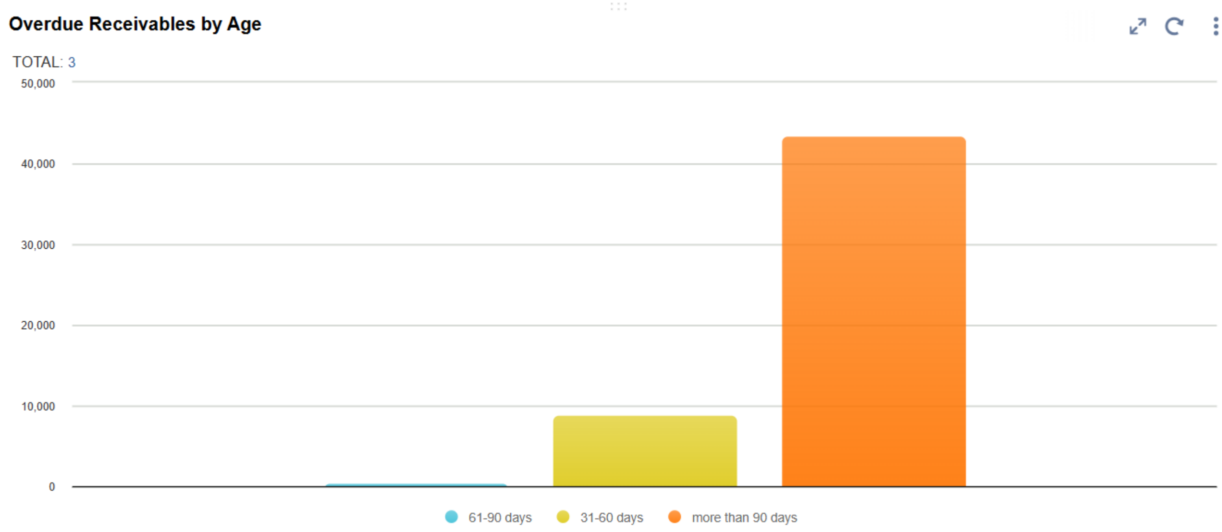


17. DASHBOARD

Users will be able to see the following on the BEI dashboard.

17.1. OVERDUE RECEIVABLES BY AGE

Overdue Receivables by age is a graphical representation of the total overdue receivables for different ranges of 1-30 days, 31-60 days, 61-90 days, and more than 90 days.



17.2. OVERDUE RECEIVABLES BY CUSTOMER

Overdue Receivables by customer represents the list of all the customers with overdue receivables with their respective Overdue Balance.

Overdue Receivables by Customer

TOTAL: 9

Edit | View	ID ▲	Overdue Balance
	3M	35,756.73
	New Gen Networks	108.25
	WCD Group	379.96
	Cyient	402.70
	Terra Group	8,539.84
	Neon Nine LTD	39,332.84
	GenWave	1,974.74
	ABC Audio	2,684.06
	Alain Henderson	30,682,431.12

17.3. INVOICES WITH PAUSED BEI

Invoices with Paused BEI show the list of the invoices that are excluded from the Bulk Email Invoices functionality.

Invoices with Paused BEI

TOTAL: 5

New	Edit | View	Invoice Number	Name	Invoice Excluded By	Reason for Exclusion	Exclusion Start Date	Amount
		Invoice #INV1001002959	ABC Audio	Tracy Miller	excluding invoice from bei	13.08.2025	117.99
		Invoice #INV1001003040	155 SpaceY Tech	Steve R		06.05.2025	2,165.00
		Invoice #INV1001003055	155 SpaceY Tech	Nicolas C		22.05.2025	2,165.00
		Invoice #INV1001003076	8 Sentini	Alex	excluding invoice from bei	21.08.2025	117.99
		Invoice #INV1001003085	C Clean LTD	Alex	excluding invoice from bei	01.09.2025	8,539.84

17.4. CUSTOMER WITH PAUSED BEI

Customer With Paused BEI shows the list of the customers that are excluded from the Bulk Email Invoice functionality.

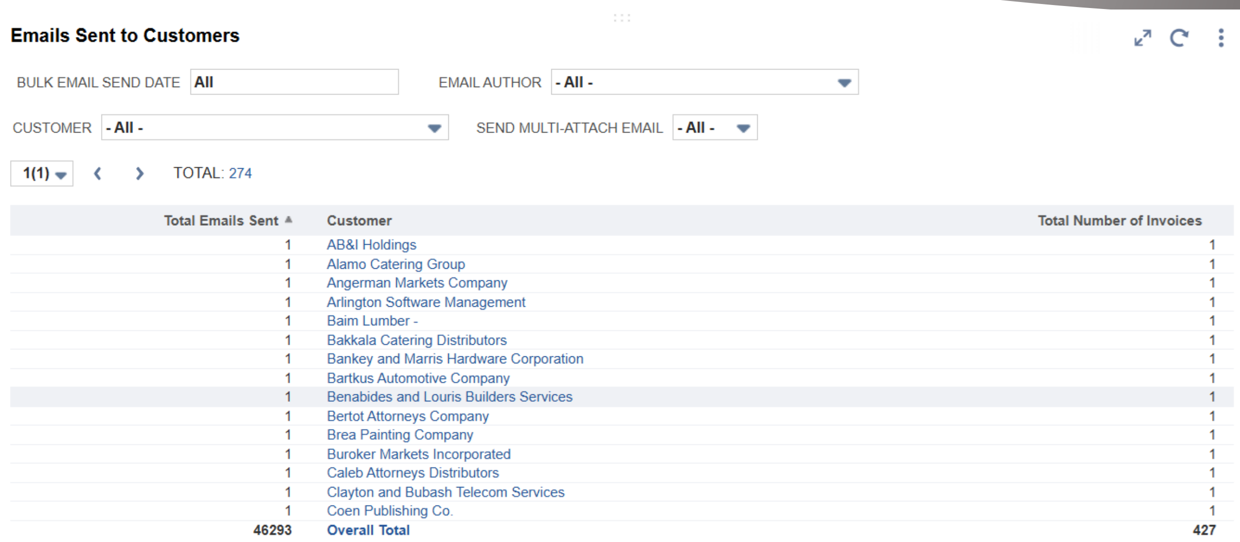
Customers with Paused BEI

TOTAL: 1

ID ▲	Customer Excluded By	Exclusion Start Date	Reason for Exclusion	Sum of Overdue Balance
10	Deep Tech LTD	29.08.2025	Excluded	402.70
Total				**402.70**

17.5. EMAILS SENT TO CUSTOMERS

This report provides a summary of email communications sent to customers as part of the BEI automation process. It enables users to monitor outbound invoice-related emails and track their delivery to customers.



Emails Sent to Customers

BULK EMAIL SEND DATE: All — EMAIL AUTHOR: - All -

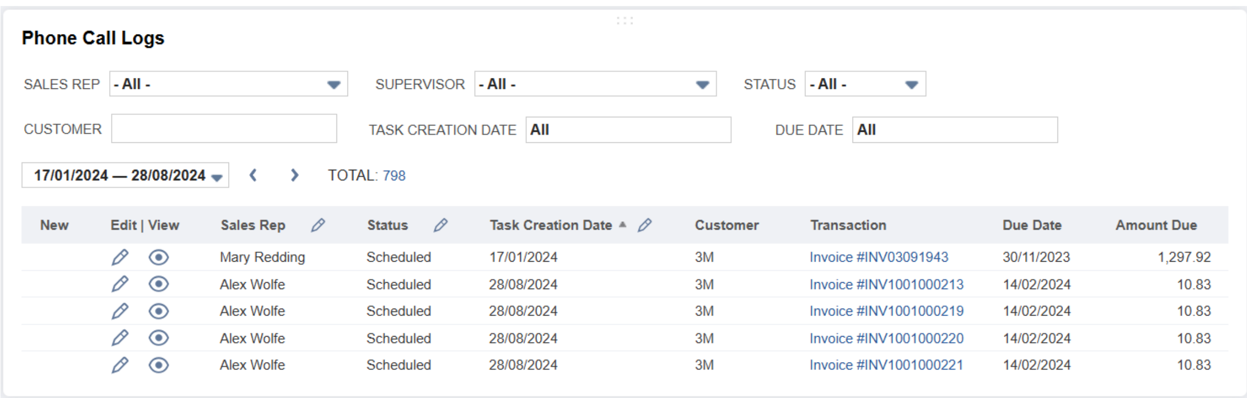
CUSTOMER: - All - — SEND MULTI-ATTACH EMAIL: - All -

1(1) TOTAL: 274

Total Emails Sent	Customer	Total Number of Invoices
1	AB&I Holdings	1
1	Alamo Catering Group	1
1	Angerman Markets Company	1
1	Arlington Software Management	1
1	Baim Lumber -	1
1	Bakkala Catering Distributors	1
1	Bankey and Marris Hardware Corporation	1
1	Bartkus Automotive Company	1
1	Benabides and Louris Builders Services	1
1	Bertot Attorneys Company	1
1	Brea Painting Company	1
1	Buroker Markets Incorporated	1
1	Caleb Attorneys Distributors	1
1	Clayton and Bubash Telecom Services	1
1	Coen Publishing Co.	1
46293	Overall Total	427

17.6. PHONE CALL LOGS

All the phone calls created using BEI will be shown in the phone call logs dashboard.



Phone Call Logs

SALES REP: - All - — SUPERVISOR: - All - — STATUS: - All -

CUSTOMER: — TASK CREATION DATE: All — DUE DATE: All

17/01/2024 — 28/08/2024 TOTAL: 798

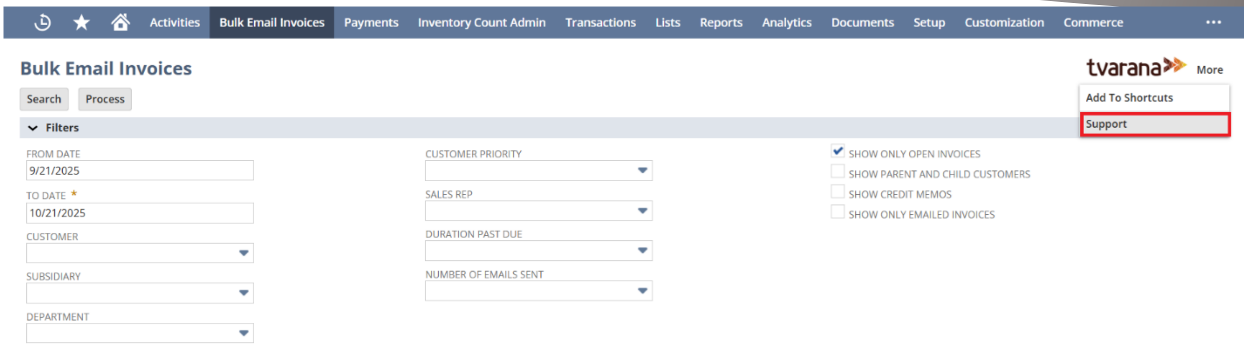
New	Edit | View	Sales Rep	Status	Task Creation Date	Customer	Transaction	Due Date	Amount Due
		Mary Redding	Scheduled	17/01/2024	3M	Invoice #INV03091943	30/11/2023	1,297.92
		Alex Wolfe	Scheduled	28/08/2024	3M	Invoice #INV1001000213	14/02/2024	10.83
		Alex Wolfe	Scheduled	28/08/2024	3M	Invoice #INV1001000219	14/02/2024	10.83
		Alex Wolfe	Scheduled	28/08/2024	3M	Invoice #INV1001000220	14/02/2024	10.83
		Alex Wolfe	Scheduled	28/08/2024	3M	Invoice #INV1001000221	14/02/2024	10.83

18. BEI LIMITATIONS

- Bulk Email Invoices can be sent up to a maximum of 500 entries at a time.

19.SUPPORT CASE

- All BEI screens now include a “Support” option under the More menu at the top-right corner, allowing users to reach the support team directly.


Activities
Bulk Email Invoices
Payments
Inventory Count Admin
Transactions
Lists
Reports
Analytics
Documents
Setup
Customization
Commerce
Bulk Email Invoices
tvarana
More
Add To Shortcuts
Support
Search
Process
Filters
FROM DATE
9/21/2025
TO DATE *
10/21/2025
CUSTOMER
SUBSIDIARY
DEPARTMENT
CUSTOMER PRIORITY
SALES REP
DURATION PAST DUE
NUMBER OF EMAILS SENT
SHOW ONLY OPEN INVOICES
SHOW PARENT AND CHILD CUSTOMERS
SHOW CREDIT MEMOS
SHOW ONLY EMAILED INVOICES