

Bulk Email Invoice User Manual

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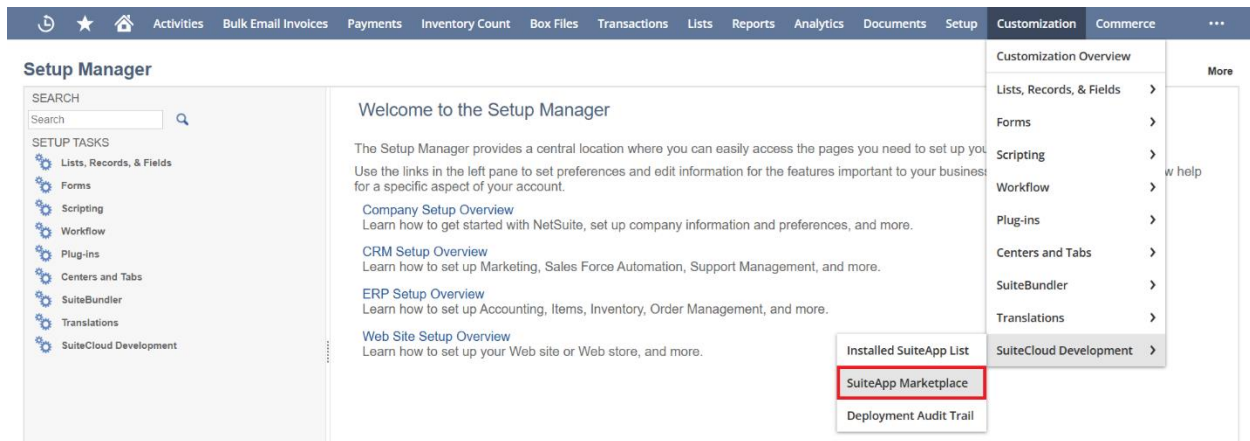
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BULK EMAIL INVOICE

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.

Back Tvarana Bulk Email Invoices



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



Back Tvarana Bulk Email Invoices



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Install

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-

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.

The screenshot shows the 'Bulk Email Invoices' SuiteApp interface. At the top, there's a navigation bar with various tabs like Activities, Box Files, Payments, etc. Below the navigation bar, the title 'Bulk Email Invoices' is displayed. A search bar and a 'Process' button are visible. A message at the top right states '7 days remain on your BEI trial - make the most of it!'. The interface includes a 'Filters' section with fields for 'FROM DATE' (6/2/2026), 'TO DATE' (7/2/2026), 'CUSTOMER' (a dropdown menu), 'CUSTOMER PRIORITY', 'DURATION PAST DUE', and 'NUMBER OF EMAILS SENT'. There are also checkboxes for 'SHOW ONLY OPEN INVOICES', 'SHOW PARENT AND CHILD CUSTOMERS', and 'SHOW CREDIT MEMOS'. Below the filters is a 'Results' section with a 'PAGE' dropdown and 'TOTAL SELECTED RECORDS'. A table with columns like SELECT, DATE, OVERDUE DAYS, NAME, DOCUMENT NUMBER, NO. OF EMAILS SENT, MEMO, AMOUNT, AMOUNT DUE, PAYMENT STATUS, TYPE, and RECIPIENTS(MAX OF 10) is shown, but it currently displays 'No records to show'. At the bottom, there are buttons for 'Mark All', 'Unmark All', 'Generate CSV', and 'Enable All Invoices'.

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

The screenshot shows the 'Bulk Email Invoices' SuiteApp interface after the trial period has expired. The top navigation bar is the same. Below the navigation bar, the title 'Bulk Email Invoices' is displayed. A message at the top left states 'Your BEI Trial Has Expired'. Below this message, a text block says 'Your trial period has ended. To continue using BEI and unlock all features, please contact Tvarana Sales to subscribe to a paid plan.' and 'Contact: account-management@79consulting.com'.

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.

The screenshot shows the 'Bulk Email Invoices' SuiteApp interface. The 'Bulk Email Invoices' tab is selected in the top navigation bar. A dropdown menu is open under the 'Bulk Email Invoices' tab, showing options: 'Bulk Email Invoices Overview', 'Actions', 'Reports', 'Automation Configuration', 'Invoices Screen Setup', and 'Quick Start Guide'. The 'Invoices' option under 'Actions' is highlighted with a red box. The bottom of the screen shows the footer: 'NetSuite (Edition: United States) Release 2025.2, Copyright © 1999, 2025, Oracle and/or its affiliates.'

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

Bulk Email Invoices tvarana 79 More

Search Process

Filters

FROM DATE
15.09.2025

TO DATE
15.10.2025

CUSTOMER
<Type then tab>

CUSTOMER PRIORITY

DURATION PAST DUE

NUMBER OF EMAILS SENT

TERMS

SHIPPING COST

DUE DATE

☒ SHOW ONLY OPEN INVOICES

☐ SHOW PARENT AND CHILD CUSTOMERS

☐ FINANCE APPROVED

Results

PAGE TOTAL SELECTED RECORDS

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)
No records to show													

Search Process

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

Activities Bulk Email Invoices Payments Inventory Count Admin Transactions Lists Reports Analytics Documents Setup Customization Commerce

Bulk Email Invoices

Search Process

Filters

Actions

EMAIL TEMPLATE *
Invoice 30 days overdue

☒ SEND MULTI-ATTACH EMAIL
☒ MERGE ATTACHMENTS

☐ INCLUDE CUSTOMER STATEMENT (OPEN TRANSACTIONS ONLY)
☐ INCLUDE CUSTOMER STATEMENT
☐ INCLUDE CHILD STATEMENTS

☐ SEND TO PARENT CUSTOMER
☐ EXCLUDE SELECTED INVOICES

- **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.

EMAIL TEMPLATE *

Invoice 30 days overdue

Invoice 30 days overdue

Invoice 60 days overdue

Invoice 90 days overdue

Invoice Before Due Date

Monthly Special

New Customer Discount

New Customer Promotion

Order Approved 10/16/18 12:13:39 AM

- **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.

Bulk Email Invoices

Search Process

Filters

FROM DATE: 01.02.2025
TO DATE: 07.10.2025
CUSTOMER: <Type then tab>
SUBSIDIARY:
DEPARTMENT:
CLASS:

LOCATION:
CUSTOMER PRIORITY:
SALES REP:
DURATION PAST DUE:
NUMBER OF EMAILS SENT:
☒ SHOW ONLY OPEN INVOICES

☐ SHOW INVOICE GROUP INVOICES
☐ SHOW PARENT AND CHILD CUSTOMERS
☐ SHOW CREDIT MEMOS
☐ SHOW ONLY EXCLUDED INVOICES
☐ SHOW ONLY EMAILED INVOICES
☐ SHOW PARENT AND CHILD INVOICES

- 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.

Results

PAGE: 1 to 6 of 6 TOTAL SELECTED RECORDS: 1

Mark All Unmark All Generate CSV Enable All Invoices

SELECT	DATE	OVERDUE DAYS	NAME	DOCUMENT NUMBER	NO. OF EMAILS SENT	MEMO	AMOUNT	AMOUNT DUE	PAYMENT STATUS	TYPE	RECIPIENTS(MAX OF 10)
☒	25.08.2025	14	Alain Henderson	INV1001003696	74		30,000,001.00	29,941,201.00	Open	Invoice	alain@gmail.com
☐	01.09.2025	36	159 Flexible Solutions	INV1001003698	21		2,165.00	1,974.74	Open	Invoice	flexiblesolutions@gmail.com
☐	02.09.2025	1,015	3M - Continental	INV1001003701	61		1,082.50	1,082.50	Open	Invoice	Continental@3m.com
☐	23.09.2025	0	159 Flexible Solutions	INV1001003709	3		1,082.50	1,082.50	Open	Invoice	flexiblesolutions@gmail.com

Bulk Email Invoices

Search Process

Actions

EMAIL TEMPLATE: Invoice 30 days overdue
☐ SEND MULTI-ATTACH EMAIL

☐ INCLUDE CUSTOMER STATEMENT (OPEN TRANSACTIONS ONLY)
☐ INCLUDE CUSTOMER STATEMENT
☐ INCLUDE CHILD STATEMENTS

☐ SEND TO PARENT CUSTOMER
☐ EXCLUDE SELECTED INVOICES

Results

PAGE: 1 to 6 of 6 TOTAL SELECTED RECORDS: 1

Mark All Unmark All Generate CSV Enable All Invoices

SELECT	DATE	OVERDUE DAYS	NAME	DOCUMENT NUMBER	NO. OF EMAILS SENT	MEMO	AMOUNT	AMOUNT DUE	PAYMENT STATUS	TYPE	RECIPIENTS(MAX OF 10)
☒	25.08.2025	14	Alain Henderson	INV1001003696	74		30,000,001.00	29,941,201.00	Open	Invoice	alain@gmail.com
☐	01.09.2025	36	159 Flexible Solutions	INV1001003698	21		2,165.00	1,974.74	Open	Invoice	flexiblesolutions@gmail.com

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

Bulk Email Invoices

Search Process

Filters

Actions

EMAIL TEMPLATE *
Invoice 30 days overdue

SEND MULTI-ATTACH EMAIL

INCLUDE CUSTOMER STATEMENT (OPEN TRANSACTIONS ONLY)
INCLUDE CUSTOMER STATEMENT
INCLUDE CHILD STATEMENTS

SEND TO PARENT CUSTOMER
EXCLUDE SELECTED INVOICES

Results

PAGE 1 to 6 of 6

Reloading Page | Submitting your request...

Mark All	Unmark All	Generate CSV	Enable All Invoices									
SELECT	DATE	OVERDUE DAYS	NAME	DOCUMENT NUMBER	NO. OF EMAILS SENT	MEMO	AMOUNT	AMOUNT DUE	PAYMENT STATUS	TYPE	RECIPIENTS (MAX OF 10)	
☒	25.08.2025	14	Alan Henderson	INV1001003696	74		30,000,001.00	29,941,201.00	Open	Invoice	alan@gmail.com	
☐	01.09.2025	36	150 Flexible Solutions	INV1001003698	21		2,165.00	1,974.74	Open	Invoice	flexiblesolutions@gmail.com	
☐	02.09.2025	1,015	3M - Continental	INV1001003701	61		1,082.50	1,082.50	Open	Invoice	Continental@3m.com	

- 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](#).

Bulk Email Invoices

Search Process Refresh

Filters

Actions

EMAIL TEMPLATE *
Invoice 30 days overdue

SEND MULTI-ATTACH EMAIL
MERGE ATTACHMENTS

INCLUDE CUSTOMER STATEMENT (OPEN TRANSACTIONS ONLY)
INCLUDE CUSTOMER STATEMENT
INCLUDE CHILD STATEMENTS

SEND TO PARENT CUSTOMER
EXCLUDE SELECTED INVOICES

Information
Request Complete: Your request has been submitted successfully. Request ID : 18

- 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.

tvarana More

› Filters

▼

Actions

- ☐ INCLUDE CUSTOMER STATEMENT (OPEN TRANSACTIONS ONLY)
- ☐ INCLUDE CUSTOMER STATEMENT
- ☐ INCLUDE CHILD STATEMENTS
- ☐ SEND TO PARENT CUSTOMER
- ☐ EXCLUDE SELECTED INVOICES

Results •

TOTAL SELECTED RECORDS
2

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)
☐	23.09.2025	0	159 Flexible Solutions	INV1001003709	3	0	0		1,082.50	1,082.50	Open	Invoice	flexiblesolutions@gmail.com,
☒	23.09.2025	28	Better Buy	INV1001003711	7	0	0		1,322.50	1,322.50	Open	Invoice	purchase@betterbuy.com

- 10



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

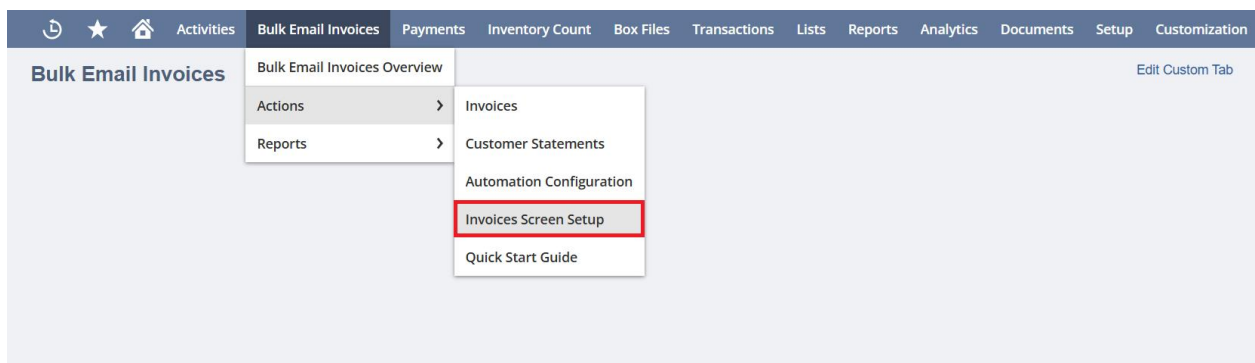
- Similarly, if you would like to view only the excluded invoices, select the Show Only Excluded checkbox on the page.

The screenshot shows the 'Bulk Email Invoices' screen. At the top, there is a navigation bar with icons for home, star, and activities, followed by a menu: Activities, Bulk Email Invoices, Payments, Inventory Count, Box Files, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, and Commerce. Below the navigation bar, the title 'Bulk Email Invoices' is displayed. Underneath the title are three buttons: Search, Process, and Refresh. A 'Filters' section is expanded, showing various filter options: FROM DATE (01.06.2025), TO DATE (07.10.2025), CUSTOMER (dropdown), SUBSIDIARY (dropdown), DEPARTMENT (dropdown), CLASS (dropdown), LOCATION (dropdown), CUSTOMER PRIORITY (dropdown), SALES REP (dropdown), DURATION PAST DUE (dropdown), NUMBER OF EMAILS SENT (dropdown), and a checkbox for 'SHOW ONLY OPEN INVOICES'. On the right side, there are several checkboxes: SHOW INVOICE GROUP INVOICES, SHOW PARENT AND CHILD CUSTOMERS, SHOW CREDIT MEMOS, SHOW ONLY EXCLUDED INVOICES (checked), SHOW ONLY EMAILED INVOICES, and SHOW PARENT AND CHILD INVOICES.

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**

Activities Bulk Email Invoices Payments Inventory Count Box Files Transactions Lists Reports Analytics Documents Setup Customization Commerce ...

Bulk Email Invoices Screen Setup

Save

Standard Filter Options

☒ SUBSIDIARY
☒ DEPARTMENT
☒ CLASS
☒ LOCATION

☒ SALES REP
☒ SHOW INVOICE GROUP INVOICES
☒ SHOW CREDIT MEMOS

☒ SHOW ONLY EXCLUDED INVOICES
☒ SHOW ONLY EMAILED INVOICES
☒ SHOW PARENT AND CHILD INVOICES

Custom Filters

FIELD TYPE	FIELD	SEARCH OPERATOR	SOURCE	FIELD HELP	
currency	Shipping Cost	greaterthan			Delete
select	Terms	anyof	term		Delete
date	Due Date	onorafter			Delete
checkbox	Finance Approved	is			Delete
multiselect	Copy Employees	anyof			Delete

Add Row

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.

BEI EMAILS FROM *
Customer

BEI EMAIL AUTHOR
Andy Andrews

INVOICE MERGE PDF TEMPLATE

CREDIT MEMO MERGE PDF TEMPLATE

BEI EMAILS TO CC
peter@tvarana.com

☒ SHOW UNDELIVERED AND BOUNCED EMAILS COUNT

INVOICE PDF TEMPLATE OVERRIDE

CREDIT MEMO PDF TEMPLATE OVERRIDE

☐ EXCLUDE CUSTOMER MAIN EMAIL

☐ EMAIL SALES REPRESENTATIVE

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

General

BEI EMAILS FROM *

Customer

Customer

Invoice

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.

BEI Automation Management					
Add Configuration					
Configured Subsidiaries					
SUBSIDIARY	DUNNING ENABLED	STATEMENT ENABLED	EMAIL REPORT ENABLED	LAST UPDATED	MANAGE
Gatwick Investment Ltd	Yes	No	Yes	03/26/2026 10:24 PM	Open
Gatwick Investment Ltd : United Kindom	No	Yes	No	03/26/2026 9:05 PM	Open
Add Configuration					

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.

BEI Automation Configuration

Submit

Automation

☐ ENABLE CUSTOMER STATEMENT

☒ ENABLE EMAIL REPORT

☒ ENABLE DUNNING

SUBSIDIARY

Gatwick Investment Ltd

Gatwick Investment Ltd : india subsidi

Gatwick Investment Ltd : india subsidi : child india subsidi

Gatwick Investment Ltd : india subsidi : child india subsidi : grand c

Customer Statement

STATEMENT EMAIL AUTHOR

79 Consulting

STATEMENT EMAIL TEMPLATE

Customer Statement

STATEMENT RANGE

Last Month

☐ INCLUDE CONSOLIDATED STATEMENTS

☐ INCLUDE OPEN TRANSACTIONS ONLY

STATEMENT FREQUENCY BASED ON

☐ DAY

☒ WEEK

DAY

of every month

WEEK

First

DAY OF THE WEEK

Monday

Email Report

BEI REPORT EMAIL AUTHOR

79 Consulting

BEI REPORT EMAIL TEMPLATES

Invoice 30 days overdue

BEI REPORT EMAIL RECIPIENTS

Accountant (DEMO ROLE)

A/P Clerk

A/R Clerk

Accountant

Dunning Preferences

DUNNING EMAIL AUTHOR

Emma Desal

☐ EMAIL PARENT CUSTOMER

☐ EXCLUDE PARTIALLY PAID INVOICES

☒ SEND MULTI-ATTACH EMAIL

☒ MERGE ATTACHMENTS

☒ INCLUDE CUSTOMER STATEMENT (OPEN TRANSACTIONS ONLY)

☐ INCLUDE CUSTOMER STATEMENT

☐ INCLUDE CHILD STATEMENTS

STATEMENT RANGE

Last Quarter

Dunning Configuration

FOLLOW-UP FREQUENCY (IN DAYS)

5

THRESHOLD AMOUNT

500

DUNNING LEVELS	EMAIL TEMPLATE	NUMBER OF DAYS	BEFORE/AFTER DUE DATE
DL_1	Invoice 30 days overdue	30	After Due Date
DL_2	Invoice Before Due Date	3	Before Due Date

Add

Cancel

Insert

Remove

tvarana

More

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.

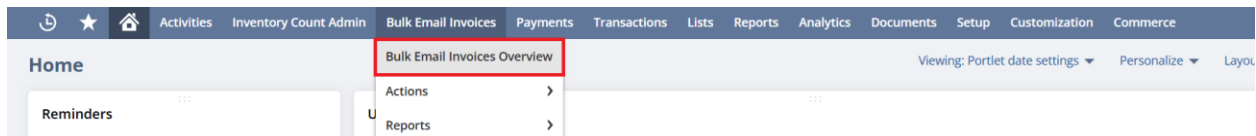
Once all configurations are completed, click Submit to save the settings. The automation will then be executed according to the defined schedule and criteria, ensuring efficient and consistent communication with customers regarding their financial transactions.

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:

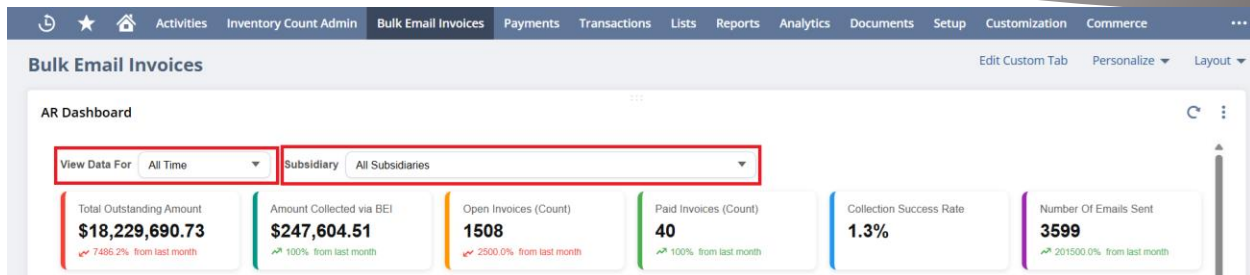
Navigate to: **Bulk Email Invoice → Bulk Email Invoice Overview**



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:

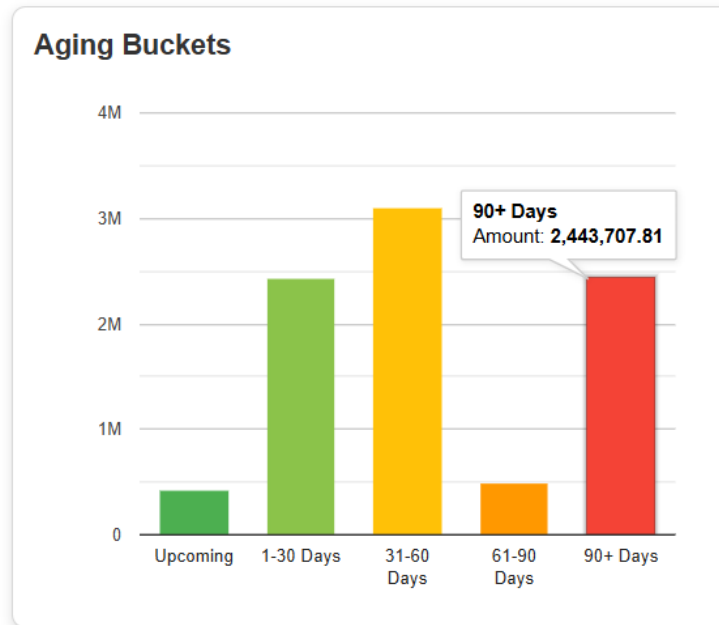
- **Total Outstanding Amount** – Total value of unpaid invoices
- **Amount Collected via BEI** – Payments collected through the BEI process
- **Open Invoices (Count)** – Number of invoices still pending
- **Paid Invoices (Count)** – Number of invoices fully paid
- **Collection Success Rate** – Percentage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



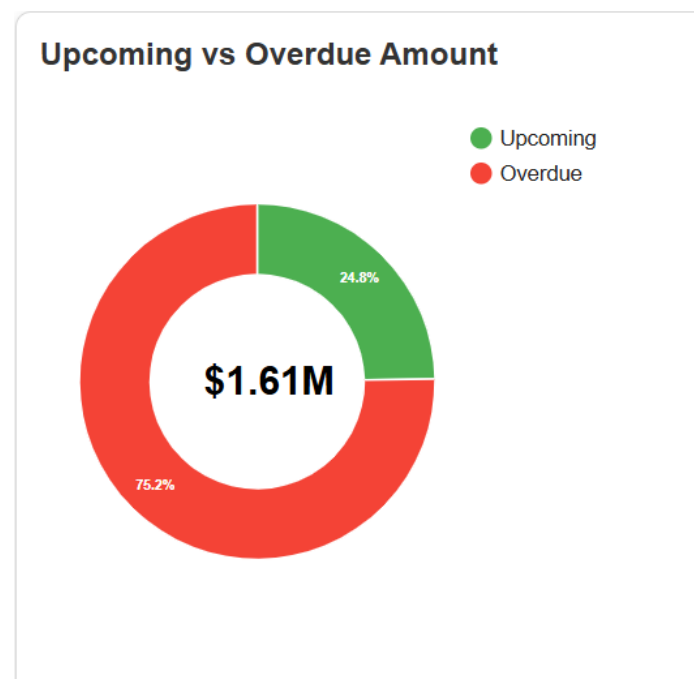
Each tile includes a trend indicator comparing the selected period with the previous one, helping users quickly evaluate performance and identify changes in collections and outstanding balances.

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.

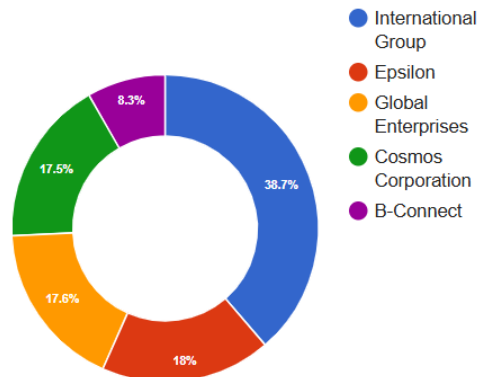


- The **Upcoming vs Overdue** chart shows the proportion of invoices that are not yet due versus those that are overdue.



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

Top 5 Overdue Customers



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.

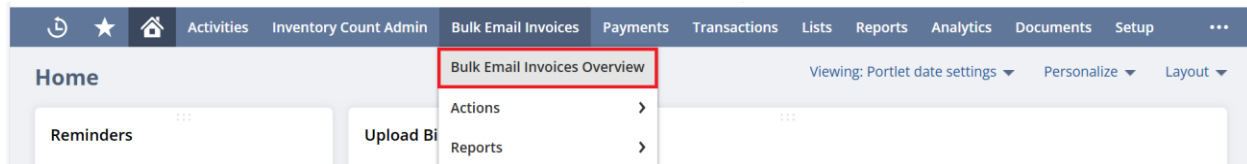
Invoices Requiring Your Attention						
Customer		Due Period		Min. Outstanding		Rows per page
All Customers		All Due Periods		Amount		25
Invoice #	Customer	Outstanding	Due Date	Last Emailed	Auto Processed	Follow-up Status
INV03091935	Smith Inc.	\$94.00	2/18/2024	3/18/2026	Yes	14 days ago
INV03091936	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.

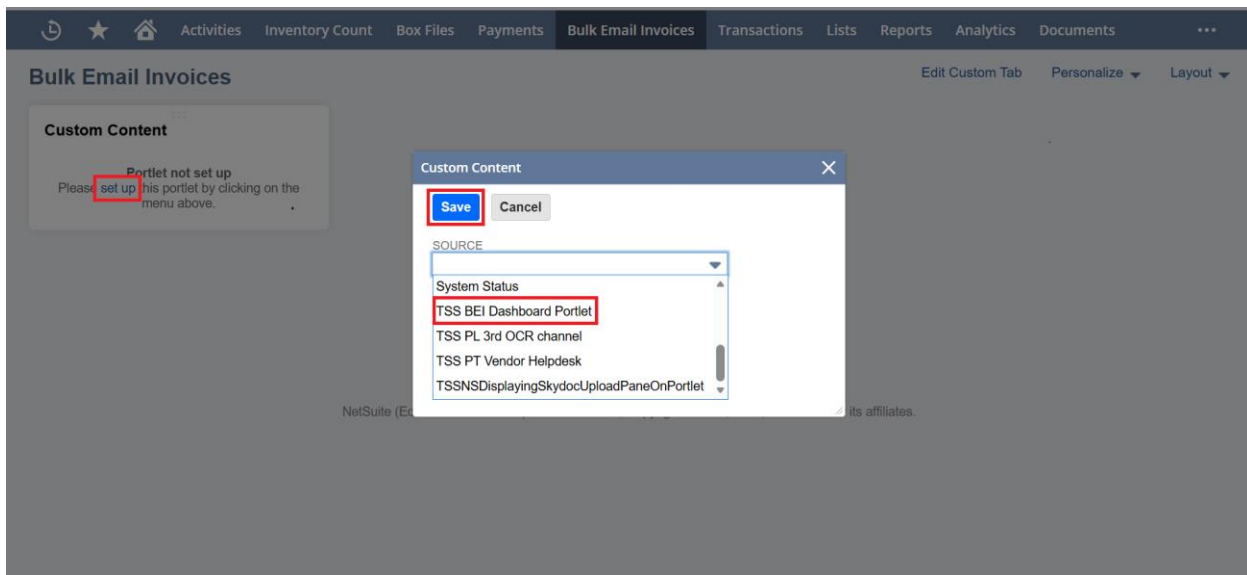
The Follow-up Status shows how recently an email was sent (e.g., “1 day ago”). Clicking this value opens the invoice in the Bulk Email screen, allowing users to quickly resend or follow up.

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.

Relationships Communication Address Financial System Information Access Subscription Details **Bulk Email Invoice Details** SkyDoc

☐ ALLOW BEI TO USE CONTACT EMAILS
☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION

BULK EMAIL ADDRESSES

FOLLOW-UP CALL - EMAIL LIMIT
3

REASON FOR EXCLUSION

☐ EXCLUDE FROM BULK EMAIL
 CUSTOMER PRIORITIZATION

PRIORITY LEVEL

STATEMENT SENT DATE

☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS
☐ EXCLUDE FROM BEI MANUAL PROCESSING
☐ EXCLUDE FROM BEI MANUAL STATEMENTS

Customer Dunning Configuration

Show Files from Selected Line Item

DUNNING LEVELS *	EMAIL TEMPLATE *	NUMBER OF DAYS *	BEFORE/AFTER DUE DATE *
DL 1	Invoice 30 days overdue	30	After Due Date

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.

Activities Bulk Email Invoices Payments Inventory Count Box Files Transactions Lists Reports Analytics Documents Setup Customization Commerce

Bulk Email Invoices

Search Process

Filters

FROM DATE
09.09.2025
 TO DATE *
09.10.2025
 CUSTOMER
<Type then tab>
 SUBSIDIARY
 DEPARTMENT
 CLASS
 LOCATION
 CUSTOMER PRIORITY

SALES REP
 DURATION PAST DUE
 NUMBER OF EMAILS SENT
 TERMS
 SHIPPING COST
 DUE DATE
☒ SHOW ONLY OPEN INVOICES

☐ SHOW INVOICE GROUP INVOICES
☐ SHOW PARENT AND CHILD CUSTOMERS
☐ SHOW CREDIT MEMOS
☐ SHOW ONLY EXCLUDED INVOICES
☐ SHOW ONLY EMAILED INVOICES
☐ SHOW PARENT AND CHILD INVOICES
☒ FINANCE APPROVED

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.

Bulk Email Customer Statements

Search Process

Filters

CUSTOMER: <Type then tab> [dropdown]
 FROM DATE: 09.09.2025 [date picker]
 TO DATE: 09.10.2025 [date picker]
 SUBSIDIARY: [dropdown]
 SALES REP: [dropdown]

☐ SHOW SUB CUSTOMERS
☐ SHOW NO DUE CUSTOMERS

Results

PAGE: [dropdown] TOTAL SELECTED RECORDS

Mark All Unmark All Generate CSV

SELECT	NAME	CURRENCY	AMOUNT DUE	RECIPIENTS
No records to show				

Search Process

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.

Activities Bulk Email Invoices Payments Inventory Count Box Files Transactions Lists Reports Analytics Documents Setup Customization Commerce

Bulk Email Customer Statements

Search Process

Filters

Actions

EMAIL TEMPLATE * ☐ ONLY OPEN TRANSACTIONS ☐ SEND TO PARENT CUSTOMER

Results •

PAGE 1 to 129 of 129 TOTAL SELECTED RECORDS 121

Mark All Unmark All Generate CSV

SELECT	NAME	CURRENCY	A. AMOUNT DUE	RECIPIENTS
☒	13 Narrow Tech LTD	USD	6,539.84	info@ntf.com
☒	155 SpaceY Tech	USD	39,332.84	spaceytech@gmail.com
☒	159 Flexible Solutions	USD	3,057.24	flexiblesolutions@gmail.com

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.

Bulk Email Customer Statements

Search Process

Filters

CUSTOMER: <Type then tab>
 SUBSIDIARY:
 SALES REP:

FROM DATE: 21.09.2025
 TO DATE: 21.10.2025

☐ SHOW SUB CUSTOMERS
☐ SHOW NO DUE CUSTOMERS

Actions

Results

PAGE: 1 to 4 of 4
 TOTAL SELECTED RECORDS: 1

Mark All Unmark All Generate CSV

SELECT	NAME	CURRENCY	AMOUNT DUE	RECIPIENTS
☒	159 Flexible Solutions	USD	1,082.50	flexiblesolutions@gmail.com

- 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.

Bulk Email Customer Statements

Search Process

Filters

CUSTOMER: <Type then tab>
 SUBSIDIARY:
 SALES REP:

FROM DATE: 21.09.2025
 TO DATE: 21.10.2025

☐ SHOW SUB CUSTOMERS
☐ SHOW NO DUE CUSTOMERS

Actions

EMAIL TEMPLATE: *
☐ ONLY OPEN TRANSACTIONS
☐ SEND TO PARENT CUSTOMER

Results

PAGE: 1 to 4 of 4
 TOTAL SELECTED RECORDS: 1

Mark All Unmark All Generate CSV

SELECT	NAME	CURRENCY	AMOUNT DUE	RECIPIENTS
☒	159 Flexible Solutions	USD	1,082.50	flexiblesolutions@gmail.com

- 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.

Bulk Email Customer Statements

Search **Process**

Filters

CUSTOMER: <Type then tab> FROM DATE: 21.09.2025 TO DATE: 21.10.2025

SUBSIDIARY: SALES REP:

☐ SHOW SUB CUSTOMERS ☐ SHOW NO DUE CUSTOMERS

Actions

EMAIL TEMPLATE: * Invoice Before Due Date ☐ ONLY OPEN TRANSACTIONS ☐ SEND TO PARENT CUSTOMER

Results

PAGE: 1 to 4 of 4 TOTAL SELECTED RECORDS: 1

Mark All Unmark All Generate CSV

SELECT	NAME	CURRENCY	AMOUNT DUE	RECIPIENTS
☒	159 Flexible Solutions	USD	1,082.50	flexiblesolutions@gmail.com

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

Bulk Email Customer Statements

Search **Process**

Filters

CUSTOMER: <Type then tab> FROM DATE: 21.09.2025 TO DATE: 21.10.2025

SUBSIDIARY: SALES REP:

☐ SHOW SUB CUSTOMERS ☐ SHOW NO DUE CUSTOMERS

Actions

EMAIL TEMPLATE: * Invoice Before Due Date ☐ ONLY OPEN TRANSACTIONS ☐ SEND TO PARENT CUSTOMER

Reloading Page | Please wait until the process completes...

Results

PAGE: 1 to 4 of 4 TOTAL SELECTED RECORDS: 1

Mark All Unmark All Generate CSV

SELECT	NAME	CURRENCY	AMOUNT DUE	RECIPIENTS
☒	159 Flexible Solutions	USD	1,082.50	flexiblesolutions@gmail.com

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

The screenshot shows the 'Bulk Email Customer Statements' page. At the top, there is a navigation bar with various tabs. Below it, an 'Information' banner states 'Request Processing: Refresh the page to see the updated status'. The main section has three buttons: 'Search', 'Process', and 'Refresh', with 'Refresh' highlighted by a red box. Below these are 'Filters' and 'Actions' sections. The 'Filters' section includes dropdowns for 'CUSTOMER', 'SUBSIDIARY', and 'SALES REP', as well as date pickers for 'FROM DATE' and 'TO DATE'. There are also checkboxes for 'SHOW SUB CUSTOMERS' and 'SHOW NO DUE CUSTOMERS'. The 'Actions' section includes an 'EMAIL TEMPLATE' dropdown and checkboxes for 'ONLY OPEN TRANSACTIONS' and 'SEND TO PARENT CUSTOMER'.

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

This screenshot shows the same 'Bulk Email Customer Statements' page after the refresh action. A green banner at the top displays a checkmark icon and the text 'Confirmation Request Complete: Bulk Email Processing Complete'. The rest of the page, including the 'Search', 'Process', and 'Refresh' buttons, and the 'Filters' and 'Actions' sections, remains the same as in the previous screenshot.

- 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.

Relationships Communication Address Financial System Information Access Subscription Details **Bulk Email Invoice Details** SkyDoc

☐ ALLOW BEI TO USE CONTACT EMAILS
☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION

BULK EMAIL ADDRESSES

FOLLOW-UP CALL - EMAIL LIMIT
3

REASON FOR EXCLUSION

☐ EXCLUDE FROM BULK EMAIL
CUSTOMER PRIORITIZATION

PRIORITY LEVEL

STATEMENT SENT DATE

☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS
☐ EXCLUDE FROM BEI MANUAL PROCESSING
☐ EXCLUDE FROM BEI MANUAL STATEMENTS

Customer Dunning Configuration

Show Files from Selected Line Item

DUNNING LEVELS *	EMAIL TEMPLATE *	NUMBER OF DAYS *	BEFORE/AFTER DUE DATE *
DL 1	Invoice 30 days overdue	30	After Due Date

✓ Add ✕ Cancel ➕ Insert 🗑 Remove

- 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.

Relationships Communication Address Financial System Information Access Subscription Details **Bulk Email Invoice Details** SkyDoc

☒ ALLOW BEI TO USE CONTACT EMAILS

☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION

BULK EMAIL ADDRESSES

FOLLOW-UP CALL - EMAIL LIMIT

3

REASON FOR EXCLUSION

☐ EXCLUDE FROM BULK EMAIL

CUSTOMER PRIORITIZATION

PRIORITY LEVEL

STATEMENT SENT DATE

☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS

☐ EXCLUDE FROM BEI MANUAL PROCESSING

☐ EXCLUDE FROM BEI MANUAL STATEMENTS

Customer Dunning Configuration

Show Files from Selected Line Item

DUNNING LEVELS *	EMAIL TEMPLATE *	NUMBER OF DAYS *	BEFORE/AFTER DUE DATE *
DL 1	Invoice 30 days overdue	30	After Due Date

- 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.

Relationships **Communication** Address Marketing Support System Information Custom Vendor Management Box Files SkyDoc

☒ EXCLUDE CONTACT FROM BEI

Messages Activities Files User Notes

VIEW

Default

Email Attach Letter PDF Fax Refresh View History Customize View

- 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)

Relationships	Communication	Address	Financial	System Information	Access	Subscription Details	Bulk Email Invoice Details	SkyDoc
☐ ALLOW BEI TO USE CONTACT EMAILS ☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION		BULK EMAIL ADDRESSES 		FOLLOW-UP CALL - EMAIL LIMIT 3		REASON FOR EXCLUSION ☒ EXCLUDE FROM BULK EMAIL CUSTOMER PRIORITIZATION 		PRIORITY LEVEL STATEMENT SENT DATE ☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS ☐ EXCLUDE FROM BEI MANUAL PROCESSING ☐ EXCLUDE FROM BEI MANUAL STATEMENTS

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.

Relationships	Address	Sales	Financial	System Information	Bank Payment Details (Credit)	Bank Payment Details (Debit)	Bulk Email Invoice Details	SkyDoc
☐ ALLOW BEI TO USE CONTACT EMAILS ☒ EXCLUDE CUSTOMER FROM BEI AUTOMATION		BULK EMAIL ADDRESSES 		FOLLOW-UP CALL - EMAIL LIMIT 0		REASON FOR EXCLUSION ☐ EXCLUDE FROM BULK EMAIL CUSTOMER PRIORITIZATION Low PRIORITY LEVEL 		STATEMENT SENT DATE ☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS ☐ EXCLUDE FROM BEI MANUAL PROCESSING ☐ EXCLUDE FROM BEI MANUAL STATEMENTS

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.

Subsidiaries	Relationships	Communication	Address	Sales	Marketing	Support	Financial	Bulk Email Invoice Details	Portals Pro	Billing Accounts	Subscription Details	Org Cjart	SuiteSocial
☒ ALLOW BEI TO USE CONTACT EMAILS BULK EMAIL ADDRESSES ☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION		FOLLOW-UP CALL - EMAIL LIMIT 1		REASON FOR EXCLUSION ☐ EXCLUDE FROM BULK EMAIL PRIORITY LEVEL High		STATEMENT SENT DATE 4/3/2026 ☒ EXCLUDE FROM BEI AUTOMATED STATEMENTS ☐ EXCLUDE FROM BEI MANUAL PROCESSING ☐ EXCLUDE FROM BEI MANUAL STATEMENTS							

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.

Relationships	Communication	Address	Financial	System Information	Access	Subscription Details	Bulk Email Invoice Details	SkyDoc
☐ ALLOW BEI TO USE CONTACT EMAILS ☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION		BULK EMAIL ADDRESSES 		REASON FOR EXCLUSION 		CUSTOMER PRIORITIZATION 		FOLLOW-UP CALL - EMAIL LIMIT 3
						PRIORITY LEVEL 		STATEMENT SENT DATE
						☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS ☒ EXCLUDE FROM BEI MANUAL PROCESSING ☐ EXCLUDE FROM BEI MANUAL STATEMENTS		

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.

Relationships	Communication	Address	Financial	System Information	Access	Subscription Details	Bulk Email Invoice Details	SkyDoc
☐ ALLOW BEI TO USE CONTACT EMAILS ☐ EXCLUDE CUSTOMER FROM BEI AUTOMATION		BULK EMAIL ADDRESSES 		REASON FOR EXCLUSION 		CUSTOMER PRIORITIZATION 		FOLLOW-UP CALL - EMAIL LIMIT 3
						PRIORITY LEVEL 		STATEMENT SENT DATE
						☐ EXCLUDE FROM BEI AUTOMATED STATEMENTS ☒ EXCLUDE FROM BEI MANUAL PROCESSING ☐ EXCLUDE FROM BEI MANUAL STATEMENTS		

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

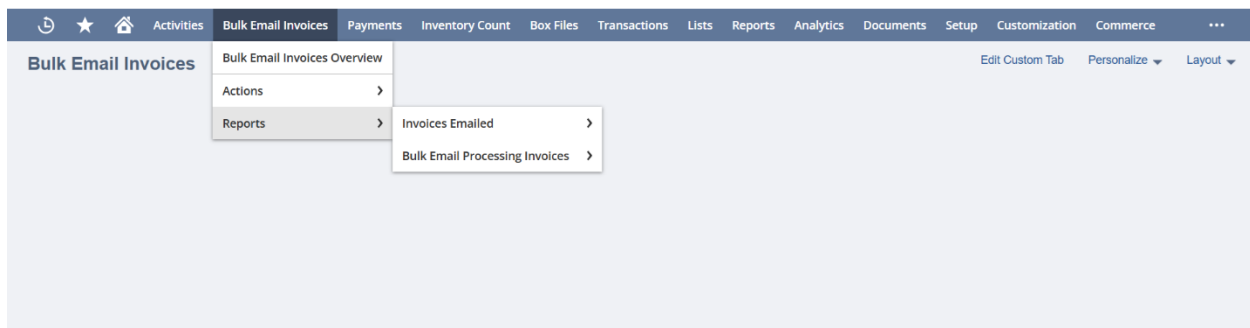
- If a child customer is excluded:
 - Only that specific child is excluded

- 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.

BEI Successfully Processed: Results

Return To Criteria Edit this Search

FILTERS

NEW	EDIT VIEW	BULK EMAIL SEND DATE	CUSTOMER NAME	TOTAL NUMBER OF TRANSACTIONS	TRANSACTION	AMOUNT DUE	RECIPIENT EMAILS
	Edit View	06.10.2025 6:42:57 pm	3M	2	CustInvc-INV100100013, CustInvc-INV1001002194	2,260.67	3m1@3m.com
	Edit View	03.10.2025 8:11:12 pm	Alain Henderson	1	CustInvc-INV1001003696	29,941,201	alain@gmail.com
	Edit View	03.10.2025 7:45:59 pm	Alex Wolfe	1	CustCred-MEM00000013	1,000	info@aw.com
	Edit View	03.10.2025 7:18:16 pm	Smith Inc. : Smith East	1	CustInvc-INV03091380	2,547.86	smitheast@gmail.com

06 — 01.09.2025 TOTAL: 47703

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

Activities	Bulk Email Invoices	Payments	Inventory Count	Box Files	Transactions	Lists	Reports	Analytics	Documents	Setup	Customization	Commerce	...
------------	---------------------	----------	-----------------	-----------	--------------	-------	---------	-----------	-----------	-------	---------------	----------	-----

Bulk Email Processing Invoices: Results List Search Audit Trail

[Return To Criteria](#) [Edit this Search](#)

FILTERS

NEW	EDIT VIEW	DATE SUBMITTED	USER	STATUS	ERROR MESSAGE
	Edit View	07.10.2025 10:37 pm	Steve	Queued	
	Edit View	03.10.2025 7:12 pm	David	Failed	-5 Credit Memo Merge PDF Template Id Not Found
	Edit View	03.10.2025 7:07 pm	Maxx	Processed Successfully	

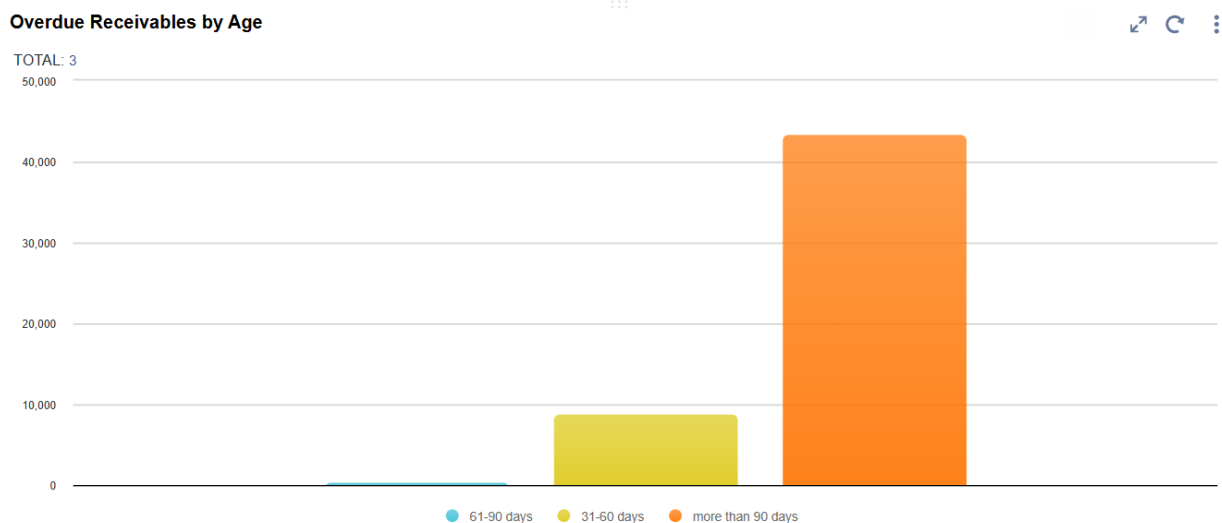
TOTAL: 215

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 EMAIL AUTHOR

CUSTOMER SEND MULTI-ATTACH EMAIL

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 SUPERVISOR STATUS

CUSTOMER TASK CREATION DATE DUE DATE

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.

Bulk Email Invoices

[Search](#)
[Process](#)

tvarana  More

[Add To Shortcuts](#)

[Support](#)

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