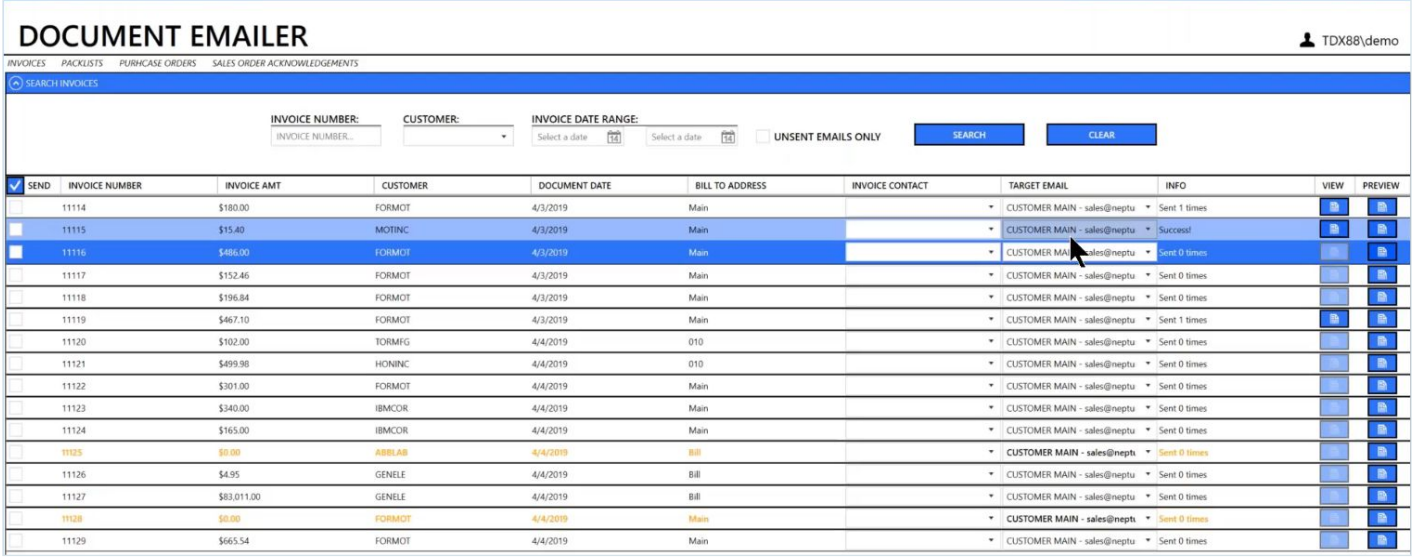
JOBBOSS SOLUTIONS

Batch Invoice Emailer

Bring invoice preparation and customer delivery into one workflow.

Neptune Batch Invoice Emailer brings JobBOSS invoice creation, PDF preparation and email delivery into a repeatable Accounts Receivable process. Work from existing invoices or selected packlists, review the intended recipients and process the actions your billing team needs.



Invoice selection and recipient review in the recorded Batch Document Emailer demonstration.

Make routine billing easier to manage

- **Prepare batches from JobBOSS records.** Find the relevant work without assembling each invoice email by hand.
- **Keep your existing billing process.** Create and review invoices in JobBOSS, then use the utility for customer delivery.
- **Group invoices by customer.** Send the selected invoices as separate PDF attachments in one message.
- **Reuse the setup.** Apply configured sender accounts, report layouts, email text and recipient defaults.

Designed for Accounts Receivable staff, billing administrators and office teams responsible for getting invoices to customers.

CAPABILITIES

From packlist to customer email

Choose the parts of the workflow that fit your billing process.

Capability	What your team can do
Batch invoice creation	Create one invoice per selected packlist, then review the generated invoices.
Posting and printing	Choose posting and printing as separate operations when required by your process.
PDF invoice delivery	Generate an invoice PDF for each selected invoice and group the attachments into one email per customer.
Reusable communications	Use configured sender accounts, invoice templates and recipient defaults. Review the selected target before sending.
Statements and past due	Send the configured customer statement or past-due report from the AR workspace.
Recent email history	Review recorded sender and recipient details, time and stored invoice PDFs.



Demonstration detail: the selected target address remains visible beside the invoice and document controls.

One AR workflow within Document Emailer

The application is also known as **Document Emailer**. Other document workflows, including sales-order acknowledgements, purchasing, quotes and customer/vendor communications, are available as optional modules. Neptune can confirm the modules appropriate for your installation.

WORKFLOW AND LEARNING

Equip the team to run the process

Keep the overview, operating guide and recording together.

1. **Find the intended work**
   Search the relevant customer and date scope, then review the invoices or packlists.

2. **Prepare and review**
   Create invoices when needed, inspect the PDF and confirm the target recipient and selected actions.

3. **Process the selected operations**
   Use the batch controls for the work you have reviewed. Invoice creation and customer email delivery can be separate stages.

4. **Confirm the result**
   Read the processing result, inspect recent history and resolve any reported issue before repeating affected work.

Training and reference resources

Companion Training Guide
Use Neptune-Batch-Invoice-Emailer-Training.pdf for daily sending, packlist-based creation, recipients, templates, statements, history and troubleshooting. Keep it with the supplied installation references for your team.

Watch the Batch Document Emailer demo

See the application and its invoice email workflow in the supplied recorded demonstration. The recording shows an earlier interface layout.

Talk with Neptune

Discuss your invoice process, confirm the appropriate modules and arrange training or configuration assistance.

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