OPERATOR TRAINING

Batch Invoice Emailer

Prepare, review and send JobBOSS invoice batches.

Use this guide to email invoices already prepared in JobBOSS, create invoices from selected packlists, and handle customer statements and past-due notices. It covers the **Accounts Receivable** workflow in Neptune Document Emailer.

Choose your starting task

Task	Page
Recognize the application and controls	2
Confirm sender, reports and a controlled test	3
Email invoices already in JobBOSS	4
Create invoices from packlists	5
Choose actions and review the batch	6
Select recipients and prepare email text	7 / 8
Send statements and past-due notices	9
Review history and retry affected invoices	10
Troubleshoot, practice and find resources	11 / 12 / 13

Before the first customer batch

Confirm the intended JobBOSS database, working invoice reports and an approved sending account. Your setup contact should complete the controlled email test and report review before routine use.

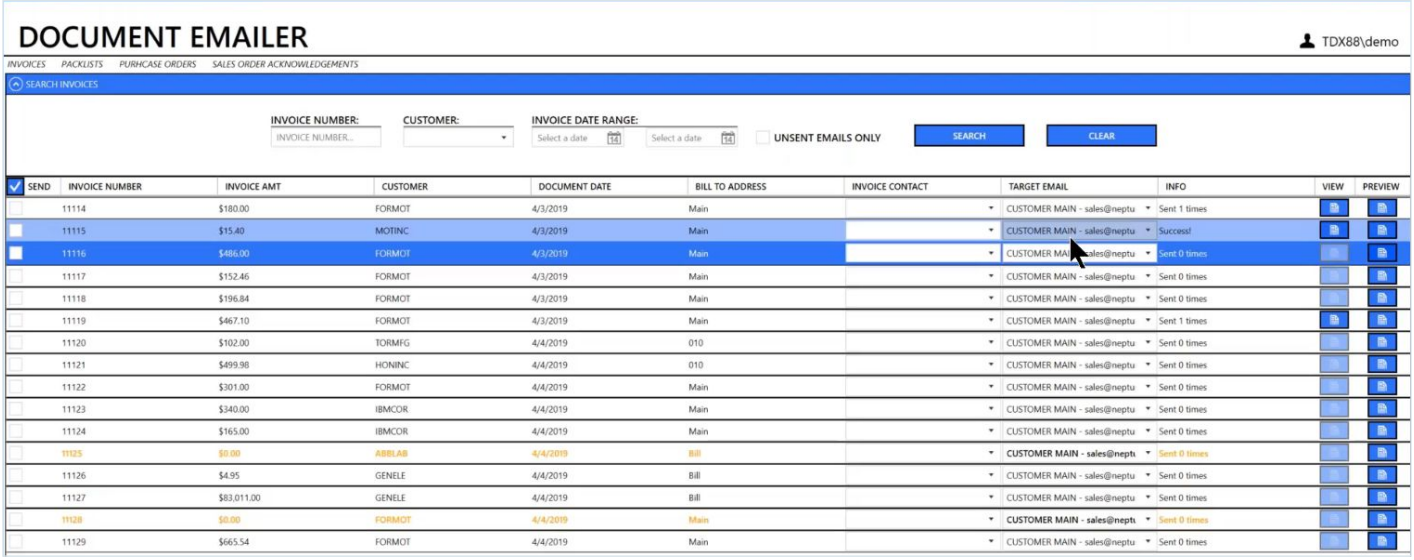
Invoice creation and email delivery can be used independently. If invoices need approval, adjustments or posting before release, complete and verify those stages before selecting the email action.

Other Document Emailer tabs may depend on the modules enabled for your installation. This guide focuses on Accounts Receivable.

PRODUCT ORIENTATION

Recognize the application

The application is titled Document Emailer.



Actual application view from the supplied webinar at approximately 08:02.

The recording shows an earlier layout with separate **INVOICES** and **PACKLISTS** tabs. This guide uses the combined **ACCOUNTS RECEIVABLE** layout and its current action labels. The underlying tasks are invoice selection, recipient review, PDF preparation and sending.

Control area	What to look for in Accounts Receivable
Search	TARGET PACKLIST, CUSTOMER, date fields and the uninvoiced, unsent and unposted filters.
Row identification	PACKLIST, CUSTOMER, INVOICE, POSTED? and the selected TARGET EMAIL.
Selected actions	INVOICE?, POST?, EMAIL? and PRINT? determine the work requested for each row.
Document actions	PREVIEW INVOICE and EMAIL HISTORY open review information. STATEMENT and PAST DUE are immediate sends.
Batch execution	PROCESS SELECTED OPERATIONS starts the selected create, post, email and print work.

SETUP AND FIRST USE

Confirm the sender and reports

Complete this handoff with the person responsible for configuration.

1. **Confirm the JobBOSS environment**
   Open the intended installation and database. Confirm that customer contacts and billing records are available and that the configured invoice report opens correctly.

2. **Test the sending account**
   In SENDING EMAIL ACCOUNTS, confirm the approved sender, reply-to and mail-server settings with your setup contact. Save the account, enter an approved internal address in SEND TEST EMAIL TO and select SEND TEST EMAIL.



The supplied settings view includes a test-recipient field and a separate test-email action.

3. **Inspect the received message and invoice PDF**
   Confirm that the internal test arrives. Separately use PREVIEW INVOICE to check the company presentation, invoice number, values, totals and required references in a real invoice report.

4. **Confirm the linked templates**
   The invoice, account-statement and past-due templates must point to their intended sending account and compatible report. Each document type needs the correct template.

Settings scope: sender accounts, templates and recipient defaults are shared within the database. The invoice-date preference is specific to the user. Coordinate shared changes with the billing team.

Use the supplied installation references for setup context. Mail-server details come from your IT team or provider; the example settings in a screenshot are not values to copy.

DAILY WORKFLOW

Email invoices already in JobBOSS

Keep invoice preparation and approval in your established process.

1. **Find existing invoices**
   In ACCOUNTS RECEIVABLE, clear UNINVOICED PACKLISTS ONLY. Choose the relevant CUSTOMER and INVOICE DATE, review the remaining filters, then select SEARCH.

2. **Review the search scope**
   Normal date searches begin on the selected date. Check the returned INVOICE and customer values. TARGET PACKLIST is not an invoice-number search field; use customer/date search to locate existing invoices.

3. **Preview and confirm the target**
   Use PREVIEW INVOICE to inspect the PDF. Review TARGET EMAIL for the intended recipient or address list. If your process requires posting before sending, verify POSTED? first.

4. **Select each invoice once**
   Select EMAIL? for the intended existing invoices. Leave creation, posting and printing clear when this run is for email only. If several rows refer to the same consolidated invoice, choose one row for that invoice.

5. **Send and review the result**
   Select PROCESS SELECTED OPERATIONS when the selection is ready. Read the completion and error messages, then use EMAIL HISTORY and your normal mail checks to review the outcome.

How the customer receives the batch

Selected invoices for the same customer are sent in **one message with separate PDF attachments**. To send one invoice per message, select and process one invoice at a time. Use separate sends when one customer needs different recipients for different invoices.

Finding a resend: review UNSENT INVOICES ONLY. It is a history-based filter and can hide an invoice after a failed mail attempt. See page 10 before retrying.

INVOICE PREPARATION

Create invoices from packlists

Batch creation produces one invoice for each selected packlist.

1. **Review the invoice date preference**
   Confirm PACK LIST DATE or CURRENT DATE with the billing team before creating invoices. Check that the intended date has the necessary JobBOSS fiscal-period and, where applicable, currency-rate setup.

2. **Search uninvoiced packlists**
   Use UNINVOICED PACKLISTS ONLY and the intended customer/packlist-date scope. The default search starts with today's uninvoiced packlists, so change the date when working through older shipments.

3. **Choose a small creation batch**
   Check the packlists and select INVOICE? for the intended rows. For a first review run, leave POST?, EMAIL? and PRINT? clear.

4. **Create and inspect**
   Select PROCESS SELECTED OPERATIONS. Review the result and new invoice numbers, then open PREVIEW INVOICE or inspect the invoices in JobBOSS.

5. **Complete the billing review**
   Review invoice values, dates and required references. Make any billing adjustments in JobBOSS and verify them before the invoice is released.

6. **Post and send at the appropriate stage**
   If posting is required, select POST? and process, then confirm POSTED?. Select EMAIL? in a subsequent run when the approved invoice and recipient are ready.

When several packlists belong on one invoice

Create that consolidated invoice in JobBOSS. Use the utility afterward to email it, selecting the existing invoice once even if it appears against more than one packlist row.

If creation fails, read the specific message and resolve the underlying packlist, customer, billing-address or date setup. Check which invoices were created before repeating the run.

BATCH CONTROL

Review the selected actions

The process button performs live work immediately.

Selection	Action and dependency
INVOICE?	Creates an invoice for an eligible uninvoiced packlist.
POST?	Posts the selected invoice. On an uninvoiced row, selecting POST? also selects creation.
EMAIL?	Emails an existing invoice. On an uninvoiced row, this can also select creation and posting; review all checked actions.
PRINT?	Prints an existing invoice with the configured report to the Windows default printer.

Clearing INVOICE? on a still-uninvoiced row also clears its posting and email selections. Recheck the row after changing any action.

Execution order

Create invoices → post invoices → email invoices → print invoices. PROCESS SELECTED OPERATIONS starts this work; it is not a preview or an additional approval screen.

Use stages when approval or posting must precede email

1. **Create and review**
   Create only, then inspect the invoice and its PDF. Complete any approval or adjustment in your normal billing process.
2. **Post and confirm**
   Run the posting action and verify POSTED? for the intended invoices.
3. **Release the customer email**
   Review TARGET EMAIL, select EMAIL? for the approved invoices and process the send.

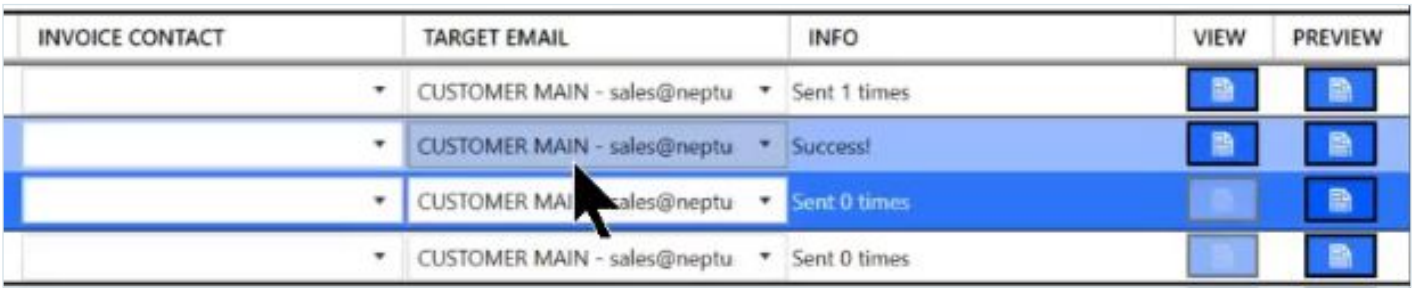
Review partial results. Selected operations can succeed or fail independently. A posting error does not necessarily stop a later selected email action. Read the error and resulting invoice state before repeating any work.

For printing, preview the report and check the Windows default printer before selecting PRINT?.

RECIPIENT SELECTION

Confirm who receives the invoices

The visible TARGET EMAIL is the address used for the selected send.



Recorded demonstration detail: target-recipient selection beside the invoice document controls.

Configured default source	Where the address comes from
CUSTOMER GENERAL EMAIL	The customer's main/general email field.
USER VALUES FIELD	A configured customer Text 1-5 or Notes field containing the intended address list.
Default billing contact	An email-bearing contact associated with the billing address and matched by the configured Contact Name or Title.

Review the displayed target for every customer in the batch. If the preferred source is missing, an available billing contact may still be selected. Do not assume an unexpected target will block the send.

Multiple people or different recipients

For several recipients of the same message, use a **plain comma-separated address list in one supported field**, for example **accounts@example.com, purchasing@example.com**. Remove labels, comments and stray quotes.

The utility does not automatically merge General Email, Contact Email and User Values into one list. If invoices for the same customer need different recipients, process those invoices in separate sends.

After correcting customer contact data

Save the change in JobBOSS, refresh the utility's data and search again. Confirm TARGET EMAIL before selecting the send. Choosing a target in the utility is a selection for that run; it does not edit the stored JobBOSS contact.

TEMPLATE REFERENCE

Prepare the email text and report

An invoice template connects the sending account, PDF report and message.

1. **Link the sending account**
   In EMAIL TEMPLATES, choose or create the invoice template and associate the approved sending email account.

2. **Confirm the report and message**
   Set the intended REPORT PATH, EMAIL SUBJECT and EMAIL BODY. Use a compatible invoice report prepared for this workflow, then select SAVE EMAIL TEMPLATE.

3. **Select the AR templates**
   In ACCOUNTS RECEIVABLE SETTINGS, select the intended invoice, account-statement and past-due templates. Save the settings and test the applicable document type.

Invoice template variables

Variable	Result in an invoice email
%INVOICE%	The selected invoice number, or the invoice numbers separated by commas for a grouped customer message.
%CUSTOMER%	The customer's full name.

Use the uppercase variable exactly as shown, including both percent signs. These variables can be used in the subject and body.

Example plain-text invoice message

Subject: Invoices %INVOICE% for %CUSTOMER%

Hello,
Please find attached invoices %INVOICE% for %CUSTOMER%.
Thank you,
Your Accounts Receivable team

Use a text signature in the email body and the company's prepared branding in the PDF report. The invoice message path uses plain text.

Check each template separately. A working invoice template does not establish that the statement or past-due report is configured correctly. Coordinate shared template changes with other users.

CUSTOMER FOLLOW-UP

Send statements and past-due notices

These buttons send immediately for the selected customer.

STATEMENT and PAST DUE are email actions. They do not open a preview and are not queued for PROCESS SELECTED OPERATIONS. Verify the customer, target address and report before clicking.

1. **Review the appropriate report**
   Preview the supplied statement or past-due report through JobBOSS User Defined reports. Check its customer information, balances and presentation. Ask your setup contact if the report is not available.

2. **Confirm the separate template**
   Check that the intended statement or past-due template is selected in Accounts Receivable Settings and uses the approved account and report.

3. **Identify the customer and recipient**
   Use a row belonging to the intended customer and confirm TARGET EMAIL. The statement or past-due report is for that customer, not just the invoice shown on the row.

4. **Send once and check the outcome**
   Select STATEMENT or PAST DUE when ready. Confirm the mail outcome through your normal mail checks. If an error appears or the outcome is unclear, investigate before repeating the action.

Questions from training

Can I preview with the send button?
Use the report preview in JobBOSS first. The utility's statement and past-due buttons send the configured report immediately.

Do these sends appear in invoice history?
Statement and past-due sends are not recorded in this invoice history. Use the company's normal mail checks to confirm the outcome.

Can the team use a recurring follow-up routine?
Yes. Agree when staff should review and send the reports, then run the appropriate action for each intended customer. This guide describes operator-initiated sending.

RESULTS AND RECOVERY

Review history and handle a resend

Use the processing result, invoice state and history together.

Open **EMAIL HISTORY** for an existing invoice to inspect its recent communication records. Use **VIEW** to open the PDF stored with a history entry.

History information	How to use it
Sending and receiving accounts	Check the recorded sender and target recipient.
Time	Identify the recorded attempt. The TIME SENT label does not establish inbox delivery.
Stored PDF	Review the invoice PDF saved with that history entry.

After a mail error: a history entry can already exist because the invoice history and PDF are saved before mail submission. UNSENT INVOICES ONLY can therefore hide the affected invoice. Confirm the mail outcome before sending it again.

Retry only the affected work

1. **Record the problem**
   Note the invoice numbers, exact error and actions that were selected. Check whether creation or posting already succeeded.

2. **Correct the cause**
   Fix the recipient, report or sending-account issue with the appropriate setup contact. Recheck the intended message and target.

3. **Find and select the affected invoices**
   Search the relevant customer/date scope, clearing the unsent-only restriction if necessary. Select each affected existing invoice once and choose email only when the other work is already complete.

4. **Process and verify**
   Run the corrected selection, read the result and confirm the expected email/PDF through the appropriate mail check.

Keep business records separately. Recent history is retained for one year in this workflow. The application does not replace the company's required invoice and correspondence archive.

TROUBLESHOOTING

Resolve common operating questions

Start with the affected document and the exact result.

What you see	What to check or do
Expected rows are missing	Review customer/date scope and all three filters. CLEAR SEARCH does not reset every date and checkbox. For existing invoices, clear uninvoiced-only and use customer/date search.
Unexpected or missing target email	Check the selected default source and billing contact data in JobBOSS. Refresh and search again, then inspect TARGET EMAIL.
An address list fails	Use plain addresses separated by commas in one supported field. Remove notes, labels and stray quotes.
Invoice creation fails	Read the specific message. Check packlist eligibility, customer/default billing address, invoice date, fiscal period and applicable currency-rate setup.
Posting fails	Resolve the reported invoice or sales-code/account setup in JobBOSS. Confirm the posting state before releasing the email if your process requires posted invoices.
PDF preview or generation fails	Check the configured report path, access and compatible report setup. Open a known invoice preview before running a larger batch.
A mail error is reported	Check sender configuration and recipient validity with IT/setup support. Do not infer delivery from history or the unsent filter; follow the resend procedure.
Invoice PDF is attached twice	Review the INVOICE column. Select an existing consolidated invoice only once when multiple packlist rows refer to it.
Email is missing from Outlook Sent Items	Sent Items behavior depends on mail-server configuration. Use the process result and appropriate mail-server/recipient checks.

When you need Neptune's help

Provide the utility/build shown on your installation, JobBOSS environment, affected invoice or packlist numbers, exact error, selected actions and the result of a controlled test. Include a relevant screenshot or PDF example through your normal support channel. Do not include passwords.

HANDS-ON EXERCISE

Run a controlled practice batch

Confirm the complete workflow before routine customer sending.

Use a training database or an agreed internal test case. Choose an existing invoice for which an approved internal recipient is available in TARGET EMAIL. Have your setup contact prepare that case before starting.

1. **Locate and inspect one invoice**
   Search the intended customer/date scope, identify the invoice once and use PREVIEW INVOICE. Check the document number, values and report presentation.

2. **Confirm the recipient and action**
   Select the approved internal target. Choose EMAIL? only for this existing invoice. Confirm that unintended creation, posting and printing actions are clear.

3. **Process the test**
   Select PROCESS SELECTED OPERATIONS and read the result. Confirm receipt at the internal address and open the PDF attachment.

4. **Review the recorded information**
   Open EMAIL HISTORY and VIEW. Compare the recorded recipient and stored PDF with the message received.

5. **Practice customer grouping**
   If the controlled test has two approved invoices for the same customer, select each invoice once in a second test. Confirm one message containing two separate PDFs. Also practice a single-invoice run when separate messages are needed.

Before every routine batch

- Correct database and intended customer/date scope.
- Each intended invoice selected once; PDF and required posting state reviewed.
- TARGET EMAIL and message/report setup checked.
- Only the intended create, post, email and print actions selected.
- Processing results reviewed; any retry limited to the affected work.

For packlist-based creation practice, use page 5 in the agreed test environment and create first without emailing.

TRAINING AND REFERENCE

Keep the resources together

Use the current guide for operating steps and the recording for demonstration.

Watch the Batch Document Emailer demo

The supplied public recording shows the application, invoice selection and delivery setup. It uses an earlier interface; this guide explains the combined Accounts Receivable workflow.

Companion Marketing Overview
Neptune-Batch-Invoice-Emailer-Marketing.pdf explains the AR workflow, business uses and optional module scope. Keep the overview, this Training Guide and the supplied setup references together.

Supplied supporting resources

Installer Assistant PDF and Installation Guide DOCX
Keep these installation references available for the person responsible for setup. Use this guide's operating steps alongside the configuration actually in use.

Original Batch Document Emailer information sheet
A supplied product reference and source of authentic application imagery.

Reusable Neptune presentation template
An editable format reference included with the repository resources.

Confirm the workflow for your installation

This package covers Accounts Receivable. The broader Document Emailer includes optional document modules; ask Neptune which are enabled and which training applies. Invoice creation and email delivery can be used separately.

Contact Neptune

Send your question with the relevant document, the exact message shown and the steps you took. Neptune can help with training and configuration for your workflow.

NeptuneNetworking.com
Neptune Networking Inc. • Revision 2026-11-04

Application images come from the supplied public demonstration and information sheet. Operating guidance was reconciled with relevant customer training and the utility's implementation.