



emailing Invoices in Bulk

Bulk eMailing of Invoices

An overview of how it works ...

Create a list of invoices using the
Invoice Advanced Search



Select what you would like to do with
these invoices

- *email*
- *print*
- *view on screen*



How to get there ...

Financials → Advanced Search → Invoice

emailing Invoices in Bulk

Invoice Search

 Search

Invoice Filter

Relates To

- Relates To Business
- Relates to Person
- Project
- Area
- Relationship Manager (Business)

 
 
 2008 review
 2356
 5362
 5472

 Agency 1
 Agency 2
 Agency 3

 Blogs, Jo
 Duck, Cordelia
 Duck, Daffy
 User, Demo

Use the filters provided to select your desired invoices, then click 'Search'.

Details

- Reference
- Sent Date 
 and (valid when using between)
- Due Date 
 and (valid when using between)
- Description
- Amount
- GST
- Sent

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Select 'Print/View/Send' from the Option box

Invoice Search



Search Results Invoice Filter

Report: Invoice Search
 Report By: demo@myworkspace
 Date: 5 Dec 2009 11:41:26
 Records: 51 to 53 of 53

Relates To Business	Relates to Person	Project	Area	Reference	Sent Date	Due Date	Description	Amount	Print/View/Send	Go
myworkspace	Jones, Gayle	PRJ000001		INV000278	15 Sep 2009	15 Sep 2009	event	38,50	<input checked="" type="checkbox"/>	
Olivia's Toy Shop	Toymaker, Olivia	Recruitment Process		INV000292	10 Nov 2009	10 Nov 2009	Order: ODR000070	10,00	<input checked="" type="checkbox"/>	
Smarties Fun Centre	Marchant, Melanie	Recruitment Process		INV000279	15 Sep 2009	15 Oct 2009	event	45,00	<input checked="" type="checkbox"/>	

< Back Show All Save as My Report Save Data Mail Merge Graph View as PDF eMail as PDF

You can deselect any invoice

emailing Invoices in Bulk

Select an invoice template
(the default template is displayed)

Select Template...

[Next](#) [?](#) [⚙️](#)

Template	Invoice ▾ Set As Default
Select Option	Send As Quick Email (no confirmation) ▾
Copies	<input type="text" value="1"/>
Maximum Rows per Page	<input type="text" value="1"/>
Maximum Columns per Page	<input type="text" value="1"/>
Save as Activity?	No ▾

Select what action you wish to perform on the selected invoices

Create A New Template

To create your own standard template for viewing, emailing or printing, click here.

Change this option to 'Yes' if you wish to record this action against the selected invoices



What if I have more questions?

- Click on the red question mark within any form for help on that particular page
- Call your support partner (if you have one)
- Log a support issue via the 'Help' link located at the bottom of the myworkspace screen
- Contact myworkspace Help Assist on 1300 131 848