



# **Invoice File Attachments**

January 2023

## Overview

Job attachments, located in the job gallery tab, can be included to the invoice emails directly from Rapid ERP.

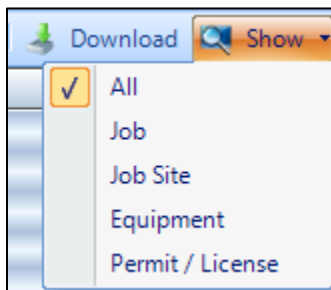
## Benefits

- The user has the job-related files in one place and can decide which ones to attach to the invoice email.
- Everyone who opens the job gallery can see who, when and from where the attachments are made.
- Prior to sending the email the user can check the attached files and decide which one to include or not.

## Specifics

### Attach/Remove files

1. Go to **Jobs -> Dispatch**.
2. Double-click on a job and go to its **Gallery** tab.  
Here you can see the attached files and information about them.
3. There is a setting to filter out the attachments based on their type.



4. If there aren't any attached files or you want to upload new ones there are two options. You can add files by drag and drop in this field or press the **Upload** button and browse to the desired files from your computer.

### Note

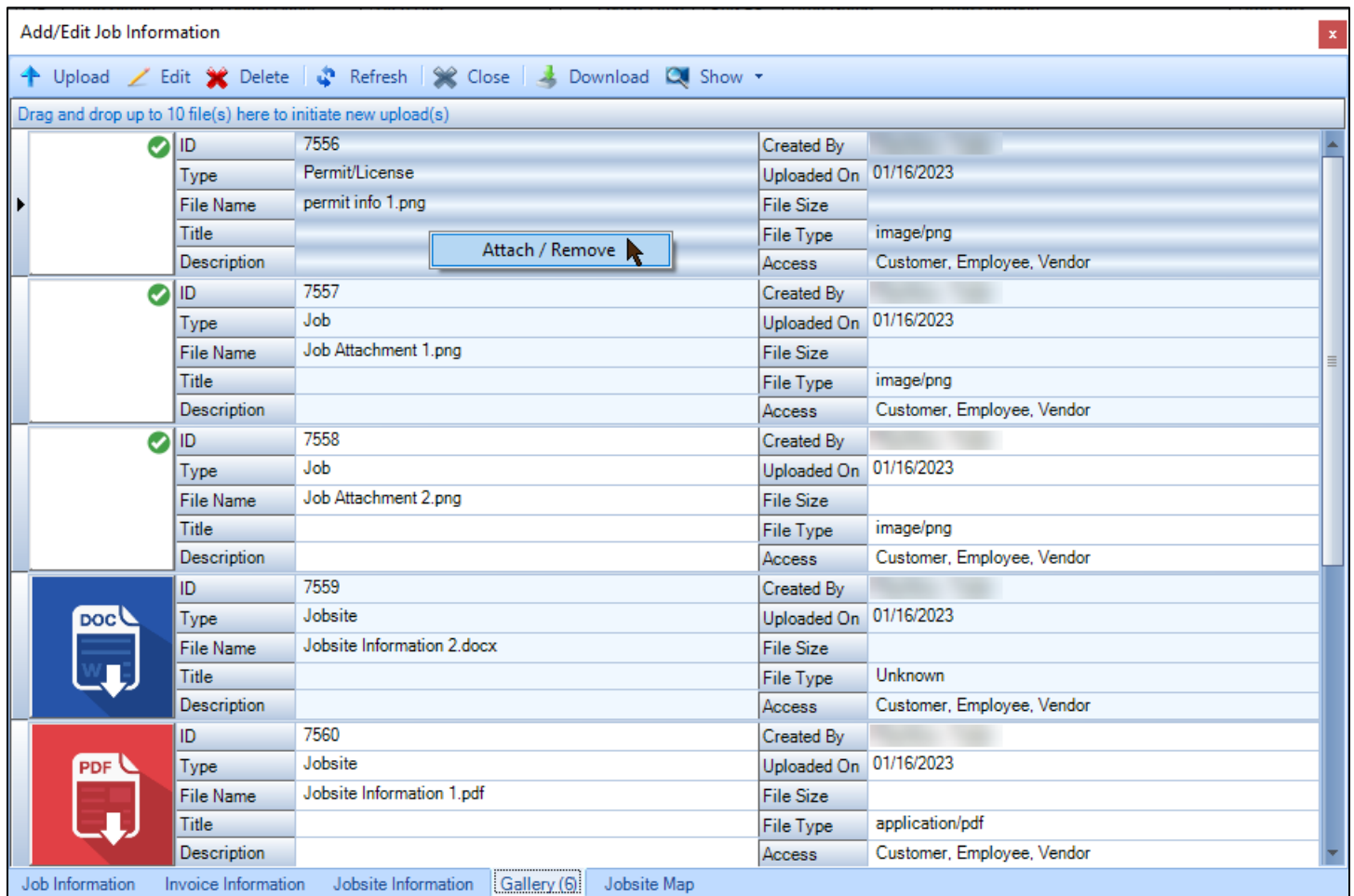
If you upload files from this tab they will have the type - "Job".

5. If there are files attached to the jobsite, equipment or to the permit/license they also will be visible here but with different type.

### Note

Click once on the file avatar to open it.

- Right-click on a file and select the option **Attach / Remove**.



The screenshot shows a window titled "Add/Edit Job Information" with a toolbar containing "Upload", "Edit", "Delete", "Refresh", "Close", "Download", and "Show". Below the toolbar is a message: "Drag and drop up to 10 file(s) here to initiate new upload(s)".

ID	Type	File Name	Title	Description	Created By	Uploaded On	File Size	File Type	Access
7556	Permit/License	permit info 1.png				01/16/2023		image/png	Customer, Employee, Vendor
7557	Job	Job Attachment 1.png				01/16/2023		image/png	Customer, Employee, Vendor
7558	Job	Job Attachment 2.png				01/16/2023		image/png	Customer, Employee, Vendor
7559	Jobsite	Jobsite Information 2.docx				01/16/2023		Unknown	Customer, Employee, Vendor
7560	Jobsite	Jobsite Information 1.pdf				01/16/2023		application/pdf	Customer, Employee, Vendor

At the bottom of the window, there are tabs for "Job Information", "Invoice Information", "Jobsite Information", "Gallery (6)", and "Jobsite Map".

A green check mark will appear in the upper right corner of the file avatar, which means it will be attached to the email.

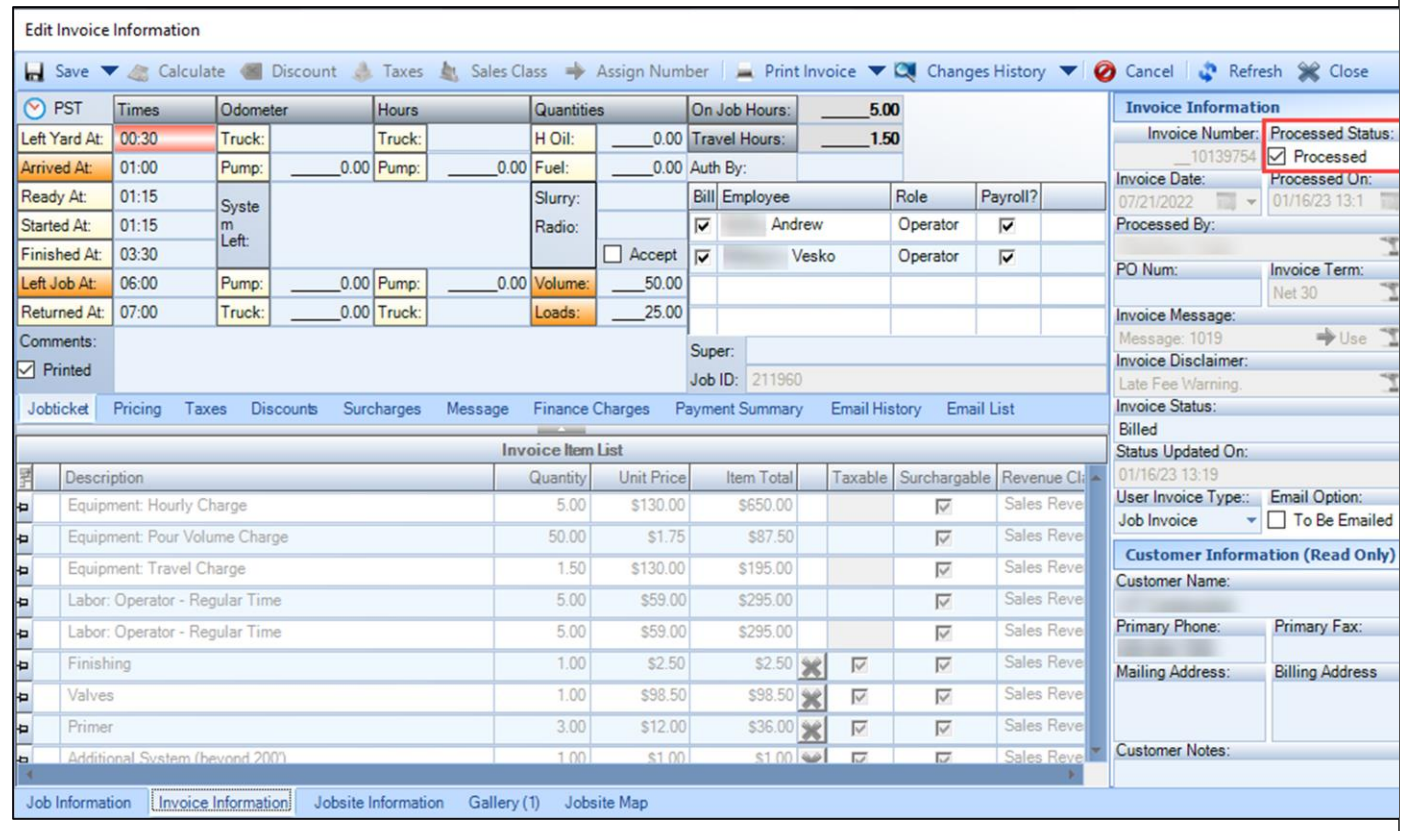
- If the file is already attached it will be removed as an email attachment.
- Save** and **Close** the **Add/Edit Information** window.

Send an email with attachments.

- Right-click on a job.
- Select **Customer -> Email Invoice & Job Ticket**.

### Note

You cannot email invoice if the job is not processed.  
 To process a job open it, go to **Invoice Information** and tick **Processed** in **Processed Status** field.



**Edit Invoice Information**

Save Calculate Discount Taxes Sales Class Assign Number Print Invoice Changes History Cancel Refresh Close

PST Times Odometer Hours Quantities On Job Hours: **5.00**

Left Yard At: 00:30 Truck: Truck: H Oil: 0.00 Travel Hours: **1.50**

Arrived At: 01:00 Pump: 0.00 Pump: 0.00 Fuel: 0.00 Auth By:

Ready At: 01:15 System Left: Slurry: Bill Employee Role Payroll?

Started At: 01:15 Radio:  Andrew Operator

Finished At: 03:30  Accept  Vesko Operator

Left Job At: 06:00 Pump: 0.00 Pump: 0.00 Volume: 50.00

Returned At: 07:00 Truck: 0.00 Truck: Loads: 25.00

Comments:  Printed Super: Job ID: 211960

Jobticket Pricing Taxes Discounts Surcharges Message Finance Charges Payment Summary Email History Email List

Description	Quantity	Unit Price	Item Total	Taxable	Surchargeable	Revenue Cl.
Equipment: Hourly Charge	5.00	\$130.00	\$650.00		<input checked="" type="checkbox"/>	Sales Reve
Equipment: Pour Volume Charge	50.00	\$1.75	\$87.50		<input checked="" type="checkbox"/>	Sales Reve
Equipment: Travel Charge	1.50	\$130.00	\$195.00		<input checked="" type="checkbox"/>	Sales Reve
Labor: Operator - Regular Time	5.00	\$59.00	\$295.00		<input checked="" type="checkbox"/>	Sales Reve
Labor: Operator - Regular Time	5.00	\$59.00	\$295.00		<input checked="" type="checkbox"/>	Sales Reve
Finishing	1.00	\$2.50	\$2.50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Reve
Valves	1.00	\$98.50	\$98.50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Reve
Primer	3.00	\$12.00	\$36.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Reve
Additional System (beyond 200)	1.00	\$1.00	\$1.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Reve

Invoice Information

Invoice Number: 10139754 Processed Status:  Processed

Invoice Date: 07/21/2022 Processed On: 01/16/23 13:1

Processed By:

PO Num: Invoice Term: Net 30

Invoice Message: Message: 1019 Use

Invoice Disclaimer: Late Fee Warning.

Invoice Status: Billed

Status Updated On: 01/16/23 13:19

User Invoice Type: Job Invoice Email Option:  To Be Emailed

Customer Information (Read Only)

Customer Name:






Primary Phone: Primary Fax:

Mailing Address: Billing Address

Customer Notes:

Job Information Invoice Information Jobsite Information Gallery (1) Jobsite Map

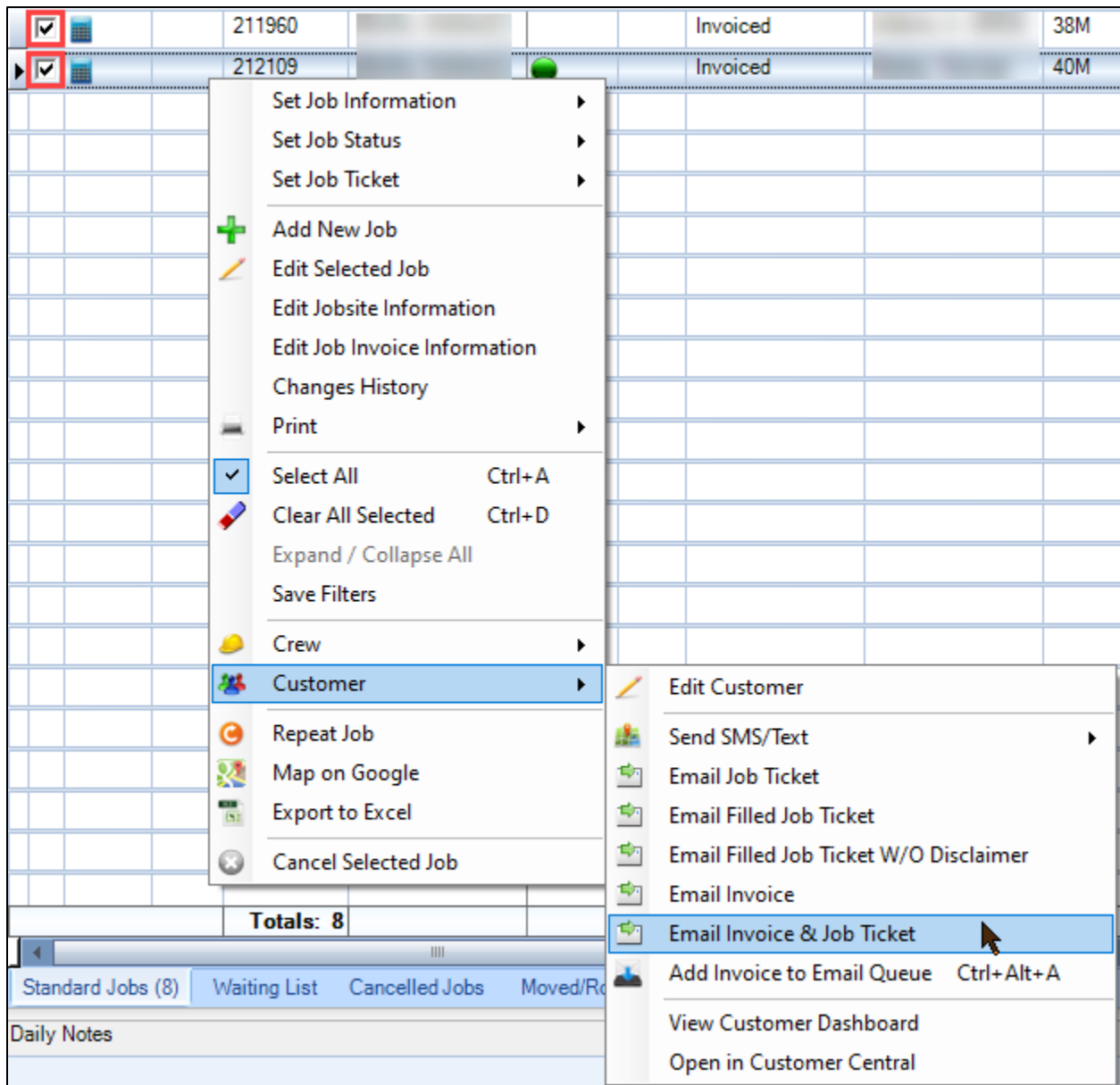
- In the lower right corner of the window, the user can see the attached files, which will be sent with the email. The generated invoice is also included in the email.

Attachment(s):	
	Name
	Important Document 3.jpg
	permit info 1.png
	Job Attachment 1.png
	Job Attachment 2.png
	Invoice_10139762_JobTicket_212109_2301171537.pdf

- Every file can be reviewed by clicking on the **Open file** button.

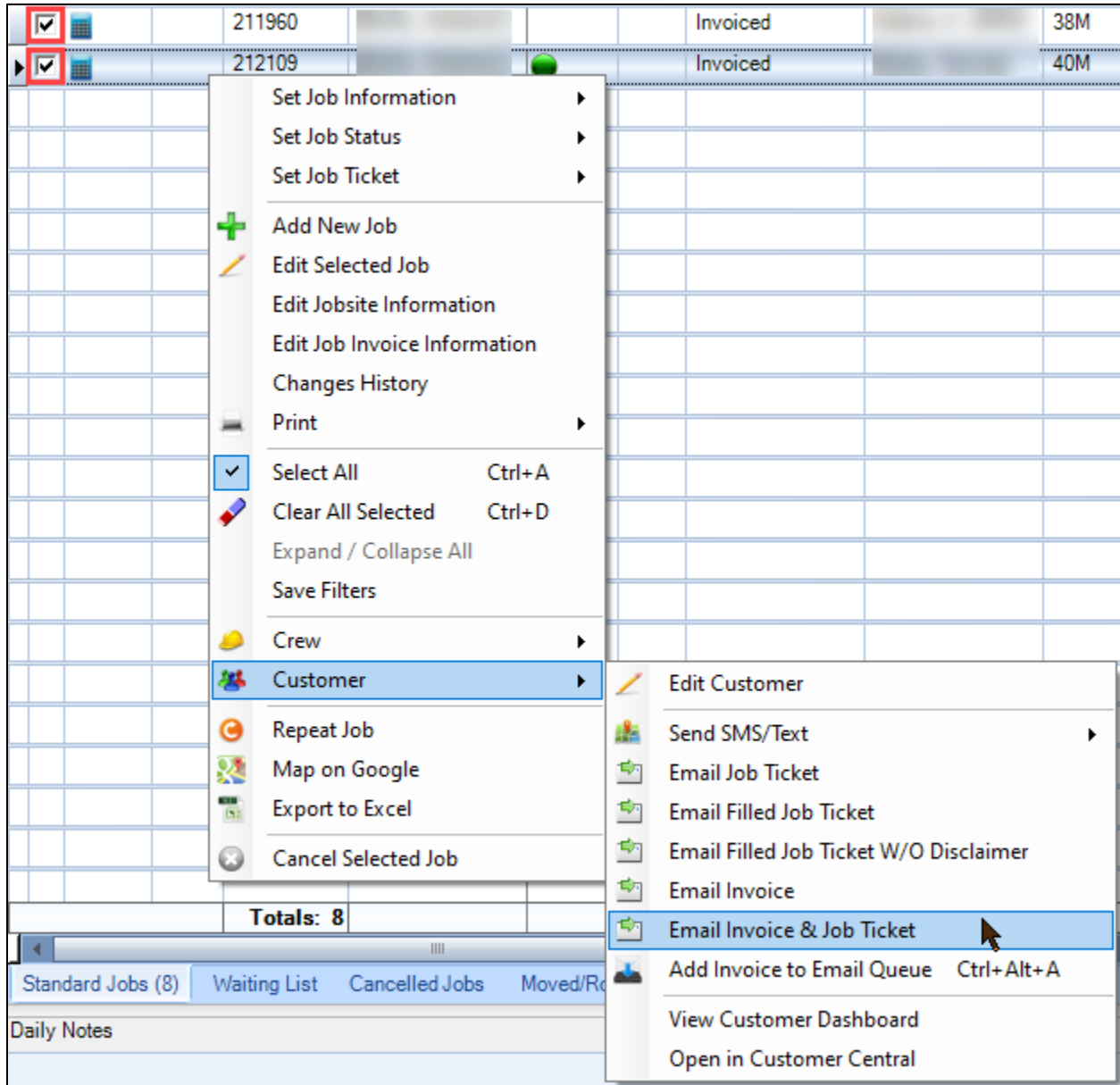
Send two or more emails with attachments in one go.

1. Go to **Dispatch -> Jobs**.
2. Put a check mark in front of two or more jobs.  
Bear in mind that all selected jobs must be processed in order to generate invoice.
3. Right-click on one of the selected jobs and go to **Customer -> Email invoice & Job Ticket**.



4. Click **Yes** in the two windows, which will ask you to confirm your actions.
5. In the **Email Invoice Queue** window the user can include or remove all attachments prior to sending the emails.

- Go to **Tools** and check/uncheck the **Include Attachments** option. By default this option is enabled.



- Click **Start Batch** to send the selected emails.