

# **Invoice File Attachments**

January 2023



### Overview

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

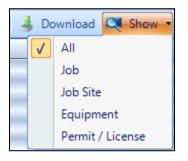
## Benefits

- 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**.
- 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

Click once on the file avatar to open it.

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

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		Title		File Type	image/png
		Description	Attach / Remove	Access	Customer, Employee, Vendor
	0	ID	7557	Created By	
		Туре	Job	Uploaded On	01/16/2023
		File Name	Job Attachment 1.png	File Size	
		Title		File Type	image/png
		Description		Access	Customer, Employee, Vendor
	0	ID	7558	Created By	
	-	Туре	Job	Uploaded On	01/16/2023
		File Name	Job Attachment 2.png	File Size	
		Title		File Type	image/png
		Description		Access	Customer, Employee, Vendor
		ID	7559	Created By	The second se
DOC		Туре	Jobsite	Uploaded On	01/16/2023
		File Name	Jobsite Information 2.docx	File Size	
w T	IJ	Title		File Type	Unknown
		Description		Access	Customer, Employee, Vendor
		ID	7560	Created By	The second se
PDF		Туре	Jobsite	Uploaded On	01/16/2023
		File Name	Jobsite Information 1.pdf	File Size	
		Title		File Type	application/pdf
		Description		Access	Customer, Employee, Vendor

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

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

Send an email with attachments.

- 1. Right-click on a job.
- 2. 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.

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3. 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.

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

4. 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**.
- 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**.

2	211960		Invoiced	38M	
	212109		Invoiced	40M	
	Set Job Information				
	Set Job Status				
	Set Job Ticket				
4	<ul> <li>Add New Job</li> </ul>				
	Edit Selected Job				
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	Edit Job Invoice Information				
	Changes History				
	Print •				
	Select All Ctrl+A				
	Clear All Selected Ctrl+D				
	Expand / Collapse All				
	Save Filters				
	Crew				
		/	Edit Customer	-	
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C		繡	Send SMS/Text		
		<b>*</b>	Email Job Ticket		
5	Export to Excel	<b>*</b>	Email Filled Job Ticket		
	Cancel Selected Job	<b>*</b>	Email Filled Job Ticket W/O Disclaimer		
	Totals: 8	*	Email Invoice		
		2	Email Invoice & Job Ticket 🛛 📐		
	aiting List Cancelled Jobs Moved/Ro	*	Add Invoice to Email Queue Ctrl+Al	t+A	
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cally notes			Open in Customer Central		

- 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.



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

	2119	60			Invoiced		38M
	2121	09			Invoiced		40M
	S	Set Job Information	- +				
	5	Set Job Status					
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Standard Jobs (8)	Waiting		oved/Ro	*	Add Invoice to Em	ail Queue Ctrl+Alt	+A
Daily Notes					View Customer Da	shboard	
Daily Notes					Open in Customer	Central	
			l	-			

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