

Send Invoice Reminders User Guide

Introduction

We have a feature in which you can send invoice reminders to the payee for all invoices which are already been sent to the payee but the payment is pending.

Functionality Overview

Follow the below steps to send invoice reminders to the payee for the invoice.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Open the **Invoice Reminders** tab.

The screenshot shows the 'Invoice Reminders' section of the Neilon Project Management application. The header includes a search bar and navigation tabs. The main content area displays a table of pre-paid invoices with the following columns: Invoice Number, Payee, Invoice Type, Next Remi..., Last Email Type, Payment Information Received?, Exclu..., Next Remi..., and Invoice Se... The table lists five invoices, each with a 'Send Email' button in the rightmost column.

Invoice Number	Payee	Invoice Type	Next Remi...	Last Email Type	Payment Information Received?	Exclu...	Next Remi...	Invoice Se...
1 INV-NEILON-2024-0000122	Bajaj Finance Pvt Ltd	Pre-paid	Reminder 2	Reminder 1			17-Apr-2024	14-Apr-2024
2 INV-NEILON-2023-0000098	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			26-Dec-2023	23-Dec-2023
3 INV-NEILON-2023-0000086	Patil foundation Pvt Ltd	Pre-paid	Reminder 4	Reminder 3			20-Oct-2023	31-Oct-2023
4 INV-NEILON-2023-0000079	Ernst & Young Private Limited	Pre-paid	Reminder 4	Reminder 3			30-Aug-2023	28-Sept-2023
5 INV-NEILON-2023-0000014	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			23-Aug-2023	20-Aug-2023

3. Click on **Send Email** row-level action of the invoice, for which you want to send an invoice reminder. It will open the UI to send an invoice reminder.

This screenshot is similar to the previous one, but it highlights the 'Send Email' button for the first invoice (INV-NEILON-2024-0000122) with a red box. The button is located in the rightmost column of the table, next to the 'Invoice Se...' column.

Invoice Number	Payee	Invoice Type	Next Remi...	Last Email Type	Payment Information Received?	Exclu...	Next Remi...	Invoice Se...
1 INV-NEILON-2024-0000122	Bajaj Finance Pvt Ltd	Pre-paid	Reminder 2	Reminder 1			17-Apr-2024	14-Apr-2024
2 INV-NEILON-2023-0000098	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			26-Dec-2023	23-Dec-2023
3 INV-NEILON-2023-0000086	Patil foundation Pvt Ltd	Pre-paid	Reminder 4	Reminder 3			20-Oct-2023	31-Oct-2023
4 INV-NEILON-2023-0000079	Ernst & Young Private Limited	Pre-paid	Reminder 4	Reminder 3			30-Aug-2023	28-Sept-2023
5 INV-NEILON-2023-0000014	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			23-Aug-2023	20-Aug-2023

4. It will auto-populate the emails, subject, and body as per the invoice template applicable to the invoice.

The screenshot shows the 'Send Invoice' interface. At the top, it says 'Send Invoice' and 'Send invoice to all invoice recipients'. Below this is a section titled 'Invoice Recipients'. Under 'Send To', the email 'sirani@testbajaj.com' is entered. There are also empty fields for 'CC To' and 'BCC To'. Below the recipients section is a 'Notification' section with a '* Subject' field containing 'Invoice INV-NEILON-2024-0000122 for Audit Services' and a 'Select Merge Field' dropdown. At the bottom are 'Send' and 'Cancel' buttons.

5. Here, merge fields are replaced with invoice field values (highlighted in yellow). You can add merge fields in the subject and body. Select the merge field you want to add from the dropdown. It will show the **Merge Field API Name**. Copy and use it in the subject and body (highlighted in red).

This screenshot shows the 'Send Invoice' form with the 'Subject' and 'Body' sections expanded. The '* Subject' field contains 'Invoice INV-NEILON-2024-0000122 for Audit Services', where the invoice number is highlighted in yellow. Below it is a 'Select Merge Field' dropdown showing 'Payee' and a 'Merge Field API Name' field showing '{NEILON1__Payee__c}', both highlighted in red. The '* Body' section has a rich text editor with a toolbar. The body text includes bank details: 'Bank Account Name: Royal India Private Limited', 'Bank Account Number: 959562457832', 'Bank Name: HDFC Bank Limited', and 'SWIFT Code: HDFCININ556', all highlighted in yellow. The 'Payee' field is also highlighted in red. At the bottom, there is a note about contacting the team via email 'apatinge@neilontechnologies.com' (highlighted in yellow) and a 'Click here' link. 'Send' and 'Cancel' buttons are at the bottom.

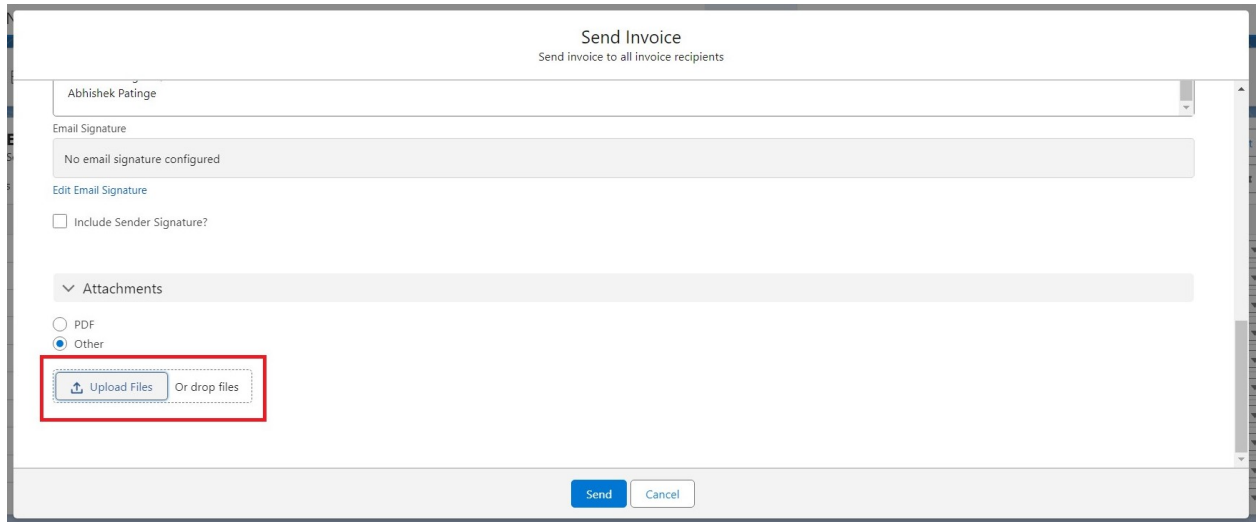
6. If you want to add additional emails, you can add semi-colon-separated emails in the **Send To**, **CC To**, and **BCC To**.

The screenshot shows the 'Send Invoice' interface. At the top, it says 'Send Invoice' and 'Send invoice to all invoice recipients'. Below this is a section titled 'Invoice Recipients'. Inside this section, the 'Send To' field is highlighted with a red rectangle and contains the email address 'sirani@testbajaj.com:support@amazon.com'. Below 'Send To' are fields for 'CC To' and 'BCC To'. Further down is a 'Notification' section with a 'Subject' field containing 'Invoice INV-NEILON-2024-0000122 for Audit Services' and a 'Select Merge Field' option. At the bottom right are 'Send' and 'Cancel' buttons.

7. If you want to edit the user signature then click on **Edit Email Signature**.
8. Set the **Include Sender Signature?** checkbox to true, if you want to add the sender's signature in the invoice reminder email.
9. Here, you can preview the invoice. Click on this preview icon. The invoice preview will be open in the new tab.

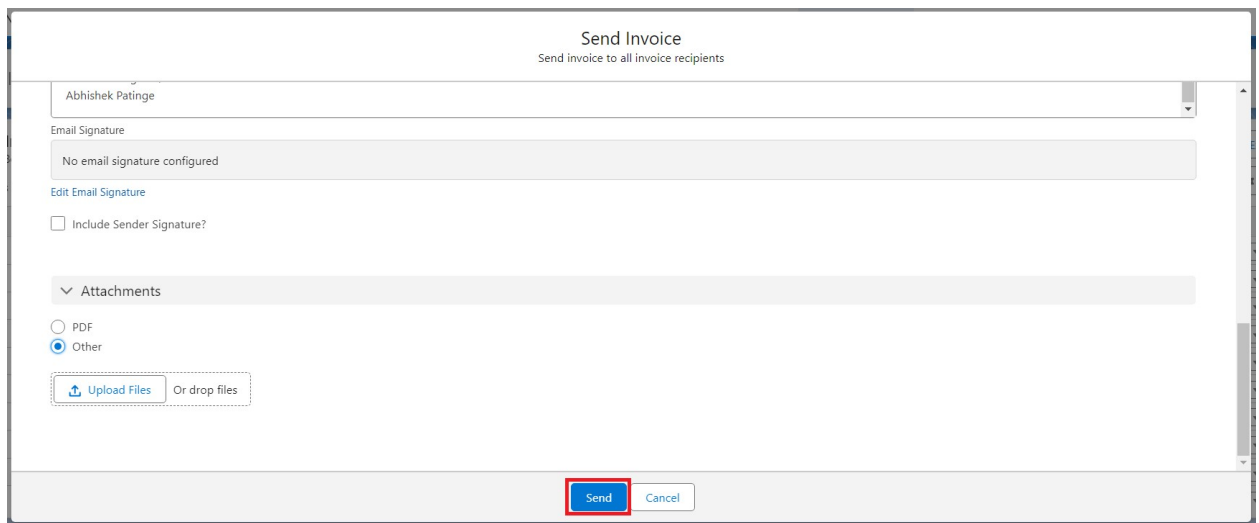
The screenshot shows the 'Send Invoice' interface. At the top, it says 'Send Invoice' and 'Send invoice to all invoice recipients'. Below this is a dropdown menu showing 'Bank Account Number: 959562457832'. Underneath is the 'Email Signature' section, which says 'No email signature configured' and has an 'Edit Email Signature' link. Below that is a checkbox labeled 'Include Sender Signature?'. The 'Attachments' section is expanded, showing a table with columns 'Name', 'Size', and 'View'. The table has one row: 'INV-NEILON-2024-0000122.pdf' with a size of '83.9 KB'. The 'View' column for this row contains a preview icon, which is highlighted with a red rectangle. At the bottom right are 'Send' and 'Cancel' buttons.

10. If you want to include other local files, then select **Other** Radio in the **Attachments** section here and click on **Upload Files**.



The screenshot shows the 'Send Invoice' interface. At the top, it says 'Send Invoice' and 'Send invoice to all invoice recipients'. Below this is a dropdown menu showing 'Abhishek Patinge'. Under 'Email Signature', it says 'No email signature configured' with a link to 'Edit Email Signature'. There is a checkbox for 'Include Sender Signature?'. The 'Attachments' section is expanded, showing two radio buttons: 'PDF' and 'Other'. The 'Other' radio button is selected. Below the radio buttons, there is a button labeled 'Upload Files' with an upload icon, and a text link 'Or drop files'. The 'Upload Files' button is highlighted with a red rectangle. At the bottom right, there are 'Send' and 'Cancel' buttons.

11. Select the files from your local storage. Once a file is uploaded, It will show in the list.
12. Now click on the **Send**. The invoice reminder email will be sent.



This screenshot is identical to the previous one, showing the 'Send Invoice' form with 'Other' selected under Attachments. In this version, the 'Send' button at the bottom right is highlighted with a red rectangle, indicating the next step in the process.

13. You can find the invoices using their payee. Click on the filter icon here and provide the payee. Click on **Apply**. It will display the invoices whose payee is provided in the payee. If you want to search for specific invoices by their number, enter the invoice number in the search box and hit

the enter button.

The screenshot shows the 'Invoice Reminders' section of a software interface. At the top, there are buttons for 'Email Invoices' and 'Export'. Below these is a search bar and a settings icon. A dropdown menu is open, showing a search bar and a list of filters: 'Invoice Number', 'Payee', and 'Bajaj Finance Pvt Ltd'. The main table displays a list of invoices with columns: Invoice Number, Payee, Invoice Type, Next Remi..., Last Email Type, Payment Information Received?, Exclu..., Next Remi..., and In... The table contains 5 rows of data.

	Invoice Number	Payee	Invoice Type	Next Remi...	Last Email Type	Payment Information Received?	Exclu...	Next Remi...	In...
1	INV-NEILON-2024-0000122	Bajaj Finance Pvt Ltd	Pre-paid	Reminder 3	Reminder 2			20-Apr-2024	17
2	INV-NEILON-2023-0000098	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			26-Dec-2023	23
3	INV-NEILON-2023-0000086	Patil Foundation Pvt Ltd	Pre-paid	Reminder 4	Reminder 3			20-Oct-2023	31
4	INV-NEILON-2023-0000079	Ernst & Young Private Limited	Pre-paid	Reminder 4	Reminder 3			30-Aug-2023	28
5	INV-NEILON-2023-0000014	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			23-Aug-2023	20

14. If you want to see additional invoice fields, then click the settings icon here. Select invoice fields. Click on **Apply**. Additional field columns will be displayed in the table.

This screenshot shows the 'Invoice Reminders' section with the settings icon (gear) clicked. A dropdown menu is open, showing options: 'Total Amount', 'Email(s)', and 'CC'. The 'Apply' button is visible at the bottom of the dropdown. The table below shows the same data as the previous screenshot, but with an additional column 'Next Remi...' visible.

	Invoice Number	Payee	Invoice Type	Next Remi...	Last Email Type	Payment Information Received?	Exclu...	Next Remi...	In...
1	INV-NEILON-2024-0000122	Bajaj Finance Pvt Ltd	Pre-paid	Reminder 3	Reminder 2			20-Apr-2024	17
2	INV-NEILON-2023-0000098	Amazon India Private Limited	Pre-paid	Reminder 4	Reminder 3			26-Dec-2023	23
3	INV-NEILON-2023-0000086	Patil Foundation Pvt Ltd	Pre-paid	Reminder 4	Reminder 3			20-Oct-2023	31
4	INV-NEILON-2023-0000079	Ernst & Young Private Limited	Pre-paid	Reminder 4	Reminder 3			30-Aug-2023	28

15. If you want to send invoice reminders for multiple due invoices, then go to the **Email Invoices** tab by clicking on the **Email Invoices** button. From there you can select multiple invoices and send invoice reminders to them at one go. There will abackground job to send invoice reminders will be started.

This screenshot shows the 'Invoice Reminders' section with the 'Email Invoices' button highlighted. The table below shows the same data as the previous screenshots, but with an additional column 'Invoice Se...' visible.

	Invoice Number	Payee	Invoice Type	Next Remi...	Last Email Type	Payment Information Received?	Exclu...	Next Remi...	Invoice Se...
1	INV-NEILON-2024-0000122	Bajaj Finance Pvt Ltd	Pre-paid	Reminder 2	Reminder 1			17-Apr-2024	14-Apr-2024
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4	INV-NEILON-2023-0000079	Ernst & Young Private Limited	Pre-paid	Reminder 4	Reminder 3			30-Aug-2023	28-Sept-2023
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16. If you want to export all invoice details in an Excel sheet, then click on the **Export** button.