

Send Invoices to Payee User Guide

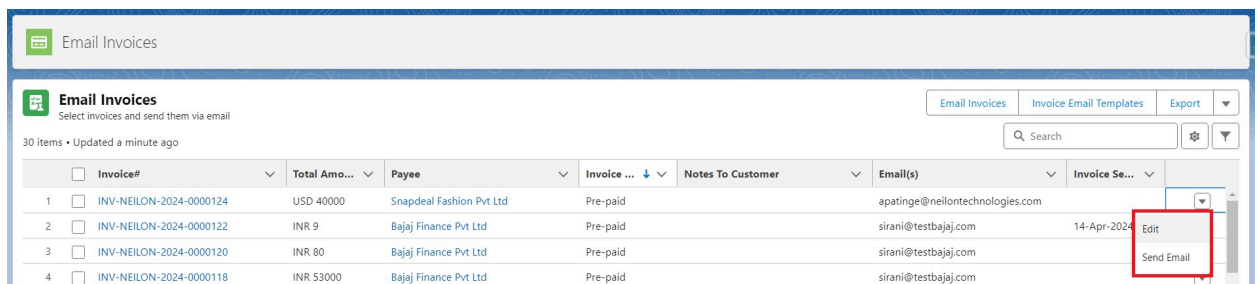
Introduction

We have a feature in which you can send invoices to the payee.

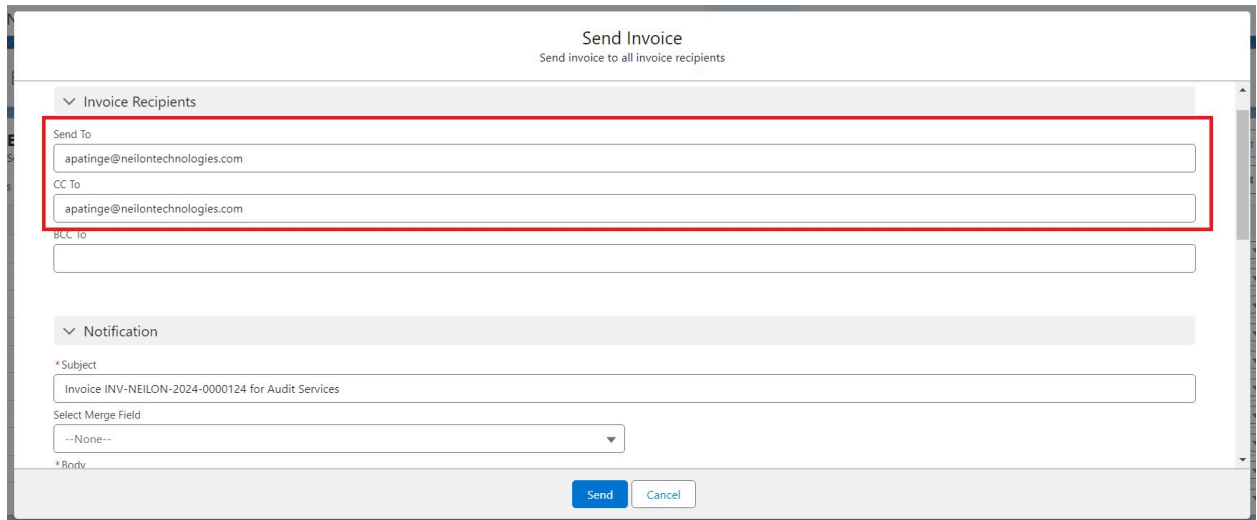
Functionality Overview

Follow the below steps to send invoices to the payee.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Open the **Email Invoices** tab.
3. Click on the **Send Email** row-level action of the invoice, for which you want to send an invoice.



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



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).

Send Invoice
Send invoice to all invoice recipients

Notification

* Subject
Invoice INV-NEILON-2024-0000124 for Audit Services

Select Merge Field
Payee

Merge Field API Name
(!NEILON1_Payee__c)

* Body

Salesforce Sans 12 B I U

Below are our bank account details.
Bank Account Name: Royal India Private Limited
Bank Account Number: 959562457832
Bank Name: HDFC Bank Limited
SWIFT Code: HDFCININ356
Payee: (!NEILON1_Payee__c)

If you have any questions, feel free to reach out using my email apatinge@neilontechnologies.com.

Send Cancel

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

Send Invoice
Send invoice to all invoice recipients

Invoice Recipients

Send To
apatinge@neilontechnologies.com;support@amazon.com

CC To
apatinge@neilontechnologies.com

BCC To

Notification

* Subject
Invoice INV-NEILON-2024-0000124 for Audit Services

Select Merge Field
Merge Field API Name

Send Cancel

7. Set the **Include Sender Signature?** checkbox to true, if you want to add the sender's signature in the invoice notification email.

8. Here, you can preview the invoice. Click on this preview icon. The invoice preview will be open in the new tab.

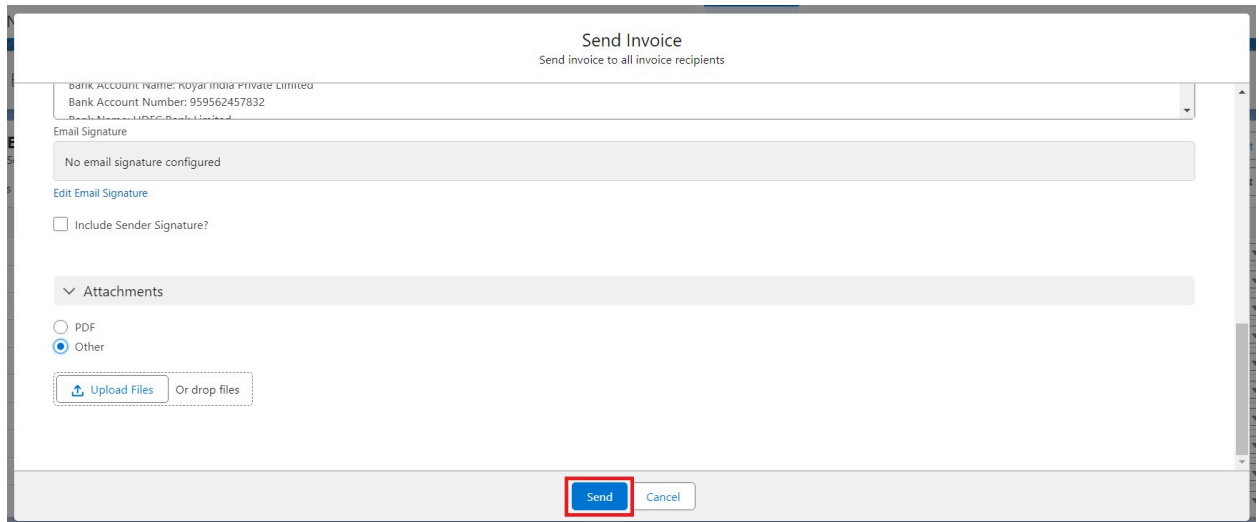
The screenshot shows the 'Send Invoice' interface. At the top, it says 'Send Invoice' and 'Send invoice to all invoice recipients'. Below this is a dropdown menu for 'Bank Account Number: 959562457832'. The 'Email Signature' section shows 'No email signature configured' with an 'Edit Email Signature' link and an 'Include Sender Signature?' checkbox. The 'Attachments' section has a dropdown arrow and two radio buttons: 'PDF' (selected) and 'Other'. Below this is a table with columns 'Name', 'Size', and 'View'. The table contains one row: 'INV-NEILON-2024-0000124.pdf' with a size of '83.91 KB'. The 'View' column for this row contains an eye icon, which is highlighted with a red box. At the bottom, there are 'Send' and 'Cancel' buttons.

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

This screenshot shows the 'Send Invoice' interface with the 'Other' radio button selected in the 'Attachments' section. The 'Upload Files' button, which has an upload icon, is highlighted with a red box. The 'Or drop files' text is also visible next to it. The rest of the interface, including the 'Bank Account Number' dropdown, 'Email Signature' section, and 'Send/Cancel' buttons, remains the same as in the previous screenshot.

10. Select the files from your local storage. Once a file is uploaded, It will show in the list.

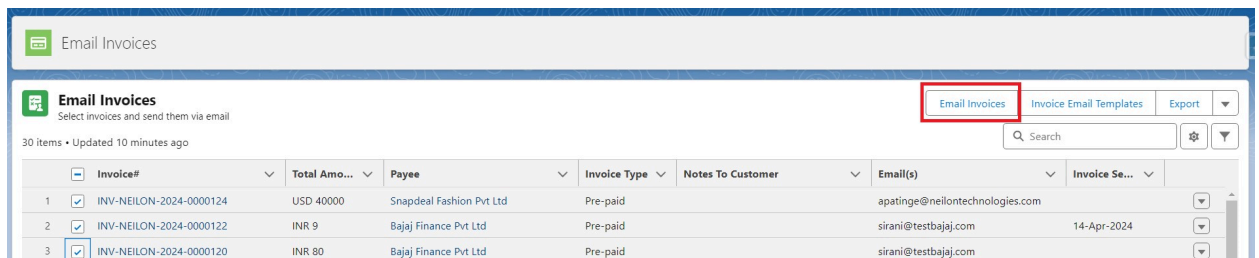
11. Now click on the **Send**.



The 'Send Invoice' dialog box is shown. It contains a dropdown menu for 'Bank Account Name' (Koyar India Private Limited) and 'Bank Account Number' (959562457832). Below this is an 'Email Signature' section with a text area containing 'No email signature configured' and a link to 'Edit Email Signature'. There is a checkbox for 'Include Sender Signature?'. An 'Attachments' section has a dropdown menu and radio buttons for 'PDF' and 'Other' (selected). Below this is an 'Upload Files' button and a text area for 'Or drop files'. At the bottom, there are 'Send' and 'Cancel' buttons. The 'Send' button is highlighted with a red box.

12. The invoice notification email will be sent to the email addresses that are added in **Send To**, **CC To**, and **BCC To** emails.

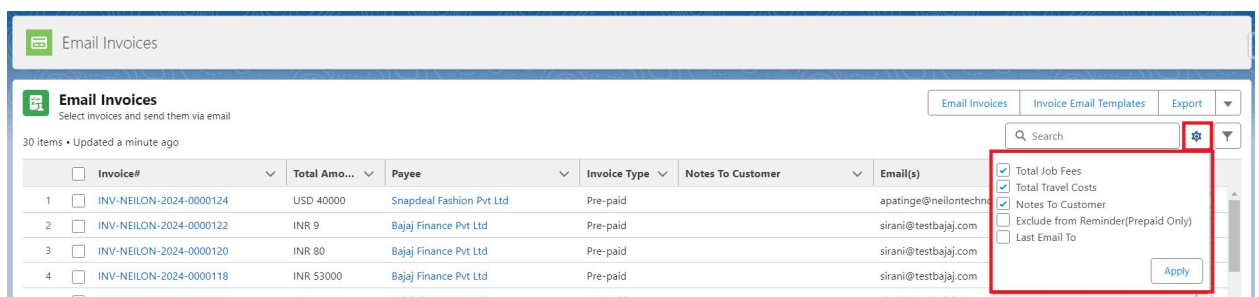
13. If you want to send multiple invoices to the payee in one go, then select the multiple invoices and click on the **Email Invoices** button. A background job will be started to send emails for selected invoices.



The 'Email Invoices' table is shown. It has columns: Invoice#, Total Amo..., Payee, Invoice Type, Notes To Customer, Email(s), and Invoice Se... The table contains 3 items. The first three items are selected with checkboxes. The 'Email Invoices' button is highlighted with a red box.

	Invoice#	Total Amo...	Payee	Invoice Type	Notes To Customer	Email(s)	Invoice Se...
1	☒	INV-NEILON-2024-0000124	USD 40000	Snapdeal Fashion Pvt Ltd	Pre-paid	apatinge@neilontechnologies.com	
2	☒	INV-NEILON-2024-0000122	INR 9	Bajaj Finance Pvt Ltd	Pre-paid	sirani@testbajaj.com	14-Apr-2024
3	☒	INV-NEILON-2024-0000120	INR 80	Bajaj Finance Pvt Ltd	Pre-paid	sirani@testbajaj.com	

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.



The 'Email Invoices' table is shown with the settings icon (gear) highlighted with a red box. The settings menu is open, showing options: Total Job Fees, Total Travel Costs, Notes To Customer, Exclude from Reminder(Prepaid Only), and Last Email To. The 'Apply' button is also highlighted with a red box.

	Invoice#	Total Amo...	Payee	Invoice Type	Notes To Customer	Email(s)	Invoice Se...
1	☐	INV-NEILON-2024-0000124	USD 40000	Snapdeal Fashion Pvt Ltd	Pre-paid	apatinge@neilontechnologies.com	
2	☐	INV-NEILON-2024-0000122	INR 9	Bajaj Finance Pvt Ltd	Pre-paid	sirani@testbajaj.com	
3	☐	INV-NEILON-2024-0000120	INR 80	Bajaj Finance Pvt Ltd	Pre-paid	sirani@testbajaj.com	
4	☐	INV-NEILON-2024-0000118	INR 53000	Bajaj Finance Pvt Ltd	Pre-paid	sirani@testbajaj.com	

15. You can find the invoices using their type. Click on the filter icon and provide the invoice type. Click on **Apply**. It will display the invoices whose type is provided in the invoice type.

If you want to search for specific invoices by their number, Enter the invoice number and hit the enter button.

The screenshot shows the 'Email Invoices' interface. At the top, there's a search bar with the placeholder text 'Search'. Below the search bar, there's a settings dropdown menu that is open, showing options like 'Total Job Fees', 'Total Travel Costs', 'Notes To Customer', 'Exclude from Reminder(Prepaid Only)', and 'Last Email To'. The 'Apply' button is at the bottom of the dropdown. The main table below shows a list of invoices with columns for Invoice#, Total Amount, Payee, Invoice Type, Notes To Customer, and Email(s).

	Invoice#	Total Amo...	Payee	Invoice Type	Notes To Customer	Email(s)
1	☐ INV-NEILON-2024-0000124	USD 40000	Snapdeal Fashion Pvt Ltd	Pre-paid		apatinge@neilontechnologies.com
2	☐ INV-NEILON-2024-0000122	INR 9	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com
3	☐ INV-NEILON-2024-0000120	INR 80	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com
4	☐ INV-NEILON-2024-0000118	INR 53000	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com
5	☐ INV-NEILON-2024-0000116	INR 76700	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com

16. If you want to see a list of all existing invoice templates, then click on the **Invoice Email Templates** button.

The screenshot shows the 'Email Invoices' interface. The 'Invoice Email Templates' button is highlighted with a red box. The main table below shows a list of invoices with columns for Invoice#, Total Amount, Payee, Invoice Type, Notes To Customer, Email(s), and Invoice Se... (Invoice Sequence). The 'Invoice Se...' column shows dates like '17-Apr-2024'.

	Invoice#	Total Amo...	Payee	Invoice Type	Notes To Customer	Email(s)	Invoice Se...
1	☐ INV-NEILON-2024-0000124	USD 40000	Snapdeal Fashion Pvt Ltd	Pre-paid		apatinge@neilontechnologies.com	
2	☐ INV-NEILON-2024-0000122	INR 9	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com	17-Apr-2024
3	☐ INV-NEILON-2024-0000120	INR 80	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com	

17. If you want to export all invoice details in an Excel sheet, then click on **Export** button.

The screenshot shows the 'Email Invoices' interface. The 'Export' button is highlighted with a red box. The main table below shows a list of invoices with columns for Invoice#, Total Amount, Payee, Invoice Type, Notes To Customer, Email(s), and Invoice Se... (Invoice Sequence). The 'Invoice Se...' column shows dates like '17-Apr-2024'.

	Invoice#	Total Amo...	Payee	Invoice Type	Notes To Customer	Email(s)	Invoice Se...
1	☐ INV-NEILON-2024-0000124	USD 40000	Snapdeal Fashion Pvt Ltd	Pre-paid		apatinge@neilontechnologies.com	
2	☐ INV-NEILON-2024-0000122	INR 9	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com	17-Apr-2024
3	☐ INV-NEILON-2024-0000120	INR 80	Bajaj Finance Pvt Ltd	Pre-paid		sirani@testbajaj.com	

18. If you want to navigate to the invoice reminders feature, then click on **Invoice Reminders** button.