

How to Print Invoices in the Print Queue

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Follow the instructions below to print a group of invoices listed in the Invoice Print Queue.

1. Navigate to the main application menu and select the Accounts Receivable / Print Invoices menu option.
2. The Select Invoices form will be displayed. This form contains several options from which the User may select to compile a list of invoices to be printed. The User may select one or a combination of options to arrive at the list of invoices to be printed. If the User clicks the Create List button without making any selections on this form, all invoices in the print queue except EFT Pending, BFIS Pending, Master Account invoices and any invoices dated beyond today's date will appear in the Invoice Printing List. Each selection option found on the Select Invoices form will be described on the following pages of this topic section.

Note: Invoices for regular customers and master accounts must be printed separately.

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Branch – If your company is operating under multiple Branches you have the option of selecting one, multiple or all branches in the list. To select multiple branches, click the Invert Selection button then check the box to the left of each Branch for which you want to print invoices. If you do not want to see inactive branches, select the Hide Inactive Branches checkbox.

Invoice Type – This option allows the selection one or multiple types of invoices to be printed. Some companies use a different invoice form for different types of invoices; using this option allows you to select a particular group of invoices before proceeding to a different type to be printed on a different invoice form.

Bill-To Type – This option allows the selection Residential, Commercial or both types of customers. The default is both.

Dates – This option allows the selection of invoices within a specific invoice date range. This is typically used if invoices need to be re-printed after they have already been marked as printed during a prior printing session. If using this option, make certain to un-check the Only Show Invoices in Print Queue option. If you are wanting to print all the invoices currently in the print queue, do not select a date range.

Invoice Numbers – This option allows the selection of invoices within an invoice number range. This is mainly used if you need to re-print invoices and the invoices have already been marked as printed. If using this option, make certain to un-check the Only Show Invoices in Print Queue option. You may also include a date range as a part of your invoice selection options in conjunction with the invoice number range option. If you are wanting to print all the invoices currently in the print queue, do not select an invoice number range.

Filter Options

These options will either include or exclude certain invoices from the printing list.

Show Master Cycle Invoices - Selecting this option will include only any un-printed Master Account Cycle Invoices. If you are not printing Master Account cycle invoices, do not select this option.

Only Show Invoices In Print Queue – By default, this option is always selected. You would only de-select this option if performing invoice reprints for a date and/or invoice number range.

Show ACH Pending Invoices – By default this option is not selected. If you do have ACH or Credit Card processed customers that need a printed invoice, select this option.

Show BFIS Pending Invoices – By default this option is not selected. If your company is using BFIS to out-source your invoice printing, this option should be selected when printing invoices in-house.

Hide Invoices with \$0 Balance Due – By default this option is not selected. If the customer invoice balance is zero and you do not want to print these types of invoices, this option must be selected; otherwise zero balance invoices will

appear in the printing list.

Filter for Emailing - This option is only available for SedonaOffice customers who have subscribed to the add-on feature of emailing invoices to customers (SedonaEmail). Select this option to generate a list of customer invoices that qualify for emailing.

Customer Group - If your company is activated and is using the Customer Groups feature, you may choose to print invoices for one, several or all Customer Groups. To select multiple Customer Groups, click the Invert Selection button then check the box to the left of each Customer Group for which you want to print invoices. If you do not want to see inactive Customer Groups, select the Hide Inactive Customer Groups checkbox.

Sort By - The Sort By option controls the order in which the invoices will be printed. Make a selection from the drop-down list. The default option is to sort by Customer Number.

Export List Button - This option is only used by SedonaOffice customers who have subscribed to use BFIS for out-source printing. Please refer to the topic [How to Export Invoices to Bridgestone](#) for more information.

Print Setup Button - This option is used to set page margins and select the invoice printer. If selected, the Print Background option will print a gray background on the invoice. This option is not available for all invoice forms. Once these options have been selected, the application will remember these settings at the Users workstation for future printing.

3. Once all options have been selected, click the Create List button located at the lower right of the Select Invoices form.

4. The Invoice List will be displayed in a grid with all the invoices that met the criteria for the options selected. By default, all invoices are "Tagged" for printing. Tagging an invoice indicates which invoices will be sent to the printer. From the list of invoices displayed, You have the option of removing one or many invoices from the list that will be sent to the printer by using the "Un-Tag" option button or un-checking the Tag checkbox to the left of the invoices that will not be printed at this time.

There are several function buttons located at the bottom of the Invoice List. The functionality of each button will be described on the following pages.

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Print On - The form will default to the last selected form used. If this needs to be changed, from the drop-down list select which printing form will be used to print this group of invoices. There are several forms available; check with your administrator for the correct form your company has decided to use. Some of the invoice printing forms have an option to calculate late fees at the time of printing. If calculating Late Fees or using an Invoice/Statement option, consult with your management team for your companies policy on these settings.

For those customers subscribing to Sebis for printing, select the BFIS Export form. Exporting invoices to Sebis is covered under a separate topic; please refer to the topic [How to Export Invoices to Sebis](#) for more information.

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Tag All - Clicking this option button will tag (select) all invoices in the list for printing.

Un Tag All - Clicking this option button will un-tag (de-select) all invoices in the list (nothing will be printed).

Invert Tags - If the User has clicked the Un-Tag All button, clicking this button will reverse the last selection.

Tag Selected - If the User has clicked the Un-Tag All button and has made manual selections in the Tag field next to particular invoices, this button will select those invoices for printing.

Un Tag Selected - If the User has clicked the Tag Selected button, this button will de-select those invoices for printing.

Remove From List – If the User has tagged certain invoices that are desired to be removed from the Print List, this button will remove those tagged items. The next time invoice printing is performed, removed invoices will return to the Print List. If you never want to print these invoices, then use the Mark as Printed option button to accomplish this.

Mark As Printed – This option is used when you never want to print the invoices listed and want to remove them from the printing queue or if the User did not select the Yes option to the prompt received at the end of invoice printing which asks the User if they want to mark all the invoices as printed.

Preview – This option will display the invoices on the User’s screen to review prior to clicking the print button. If the form selected has printing options available, then the Printing Preferences form will first be displayed to make your selections.

Print – For certain printing formats, clicking this button will send the invoices directly to the printer. If the form selected has printing options available, then the Printing Preferences form will first be displayed to make your selections. The printer used will be that which is set up in the Printer Setup form.

5. Once the invoice form has been selected and the desired invoices have been tagged to print, click the Print Preview button located on the lower button bar of the Invoices List. If the form selected has printing options available, then the Printing Preferences form will first be displayed to make your selections. Click OK on the Printing Preference form once you have made your selections.

6. The selected invoices will be displayed in the Invoice Preview form. When ready to send the invoices to the printer, click the Print & Close button located on the upper left toolbar. A confirmation message will be displayed asking the User if the invoices printed correctly and should be marked as printed. Wait until all of the invoices have finished printing, then click the Yes button to confirm.

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