INVOICES - Complete Invoice task in bulk

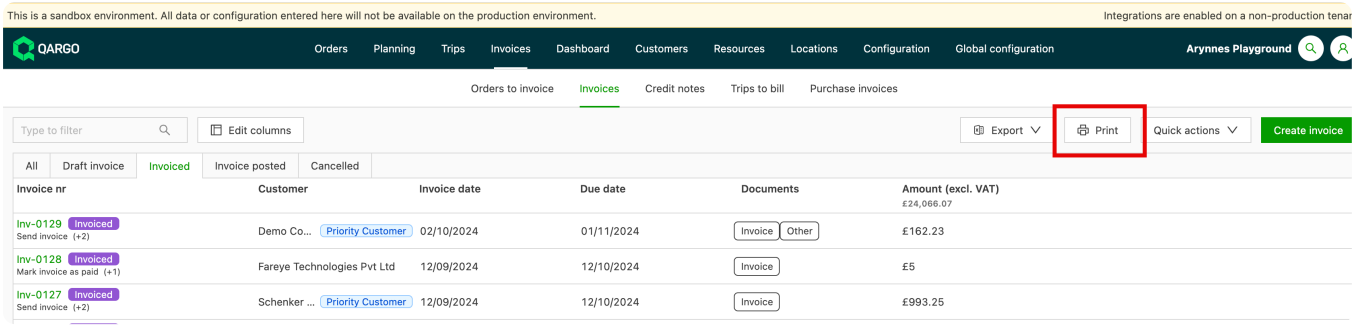
Using Quick Action and Print functions to complete tasks in bulk introduces efficiency into the Invoicing process.

Updated 22 August 2025

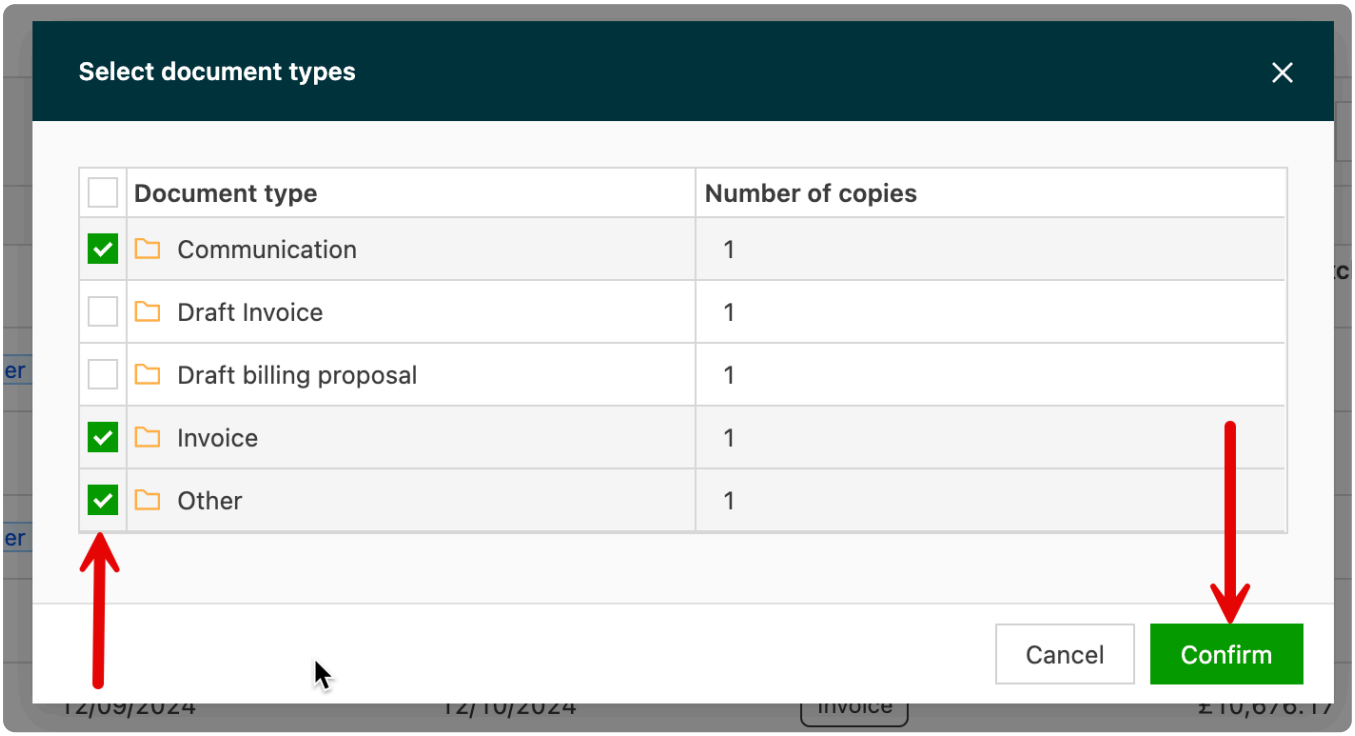
Print invoices in bulk

Use the **PRINT** button on the invoice screen for a more streamlined process to print multiple invoices at once. Users now have the ability to Print invoices, and associated documents in bulk, directly from the invoice screen.

- Navigate to **INVOICES**, and Invoice sub-menu.
- Click **PRINT** button.

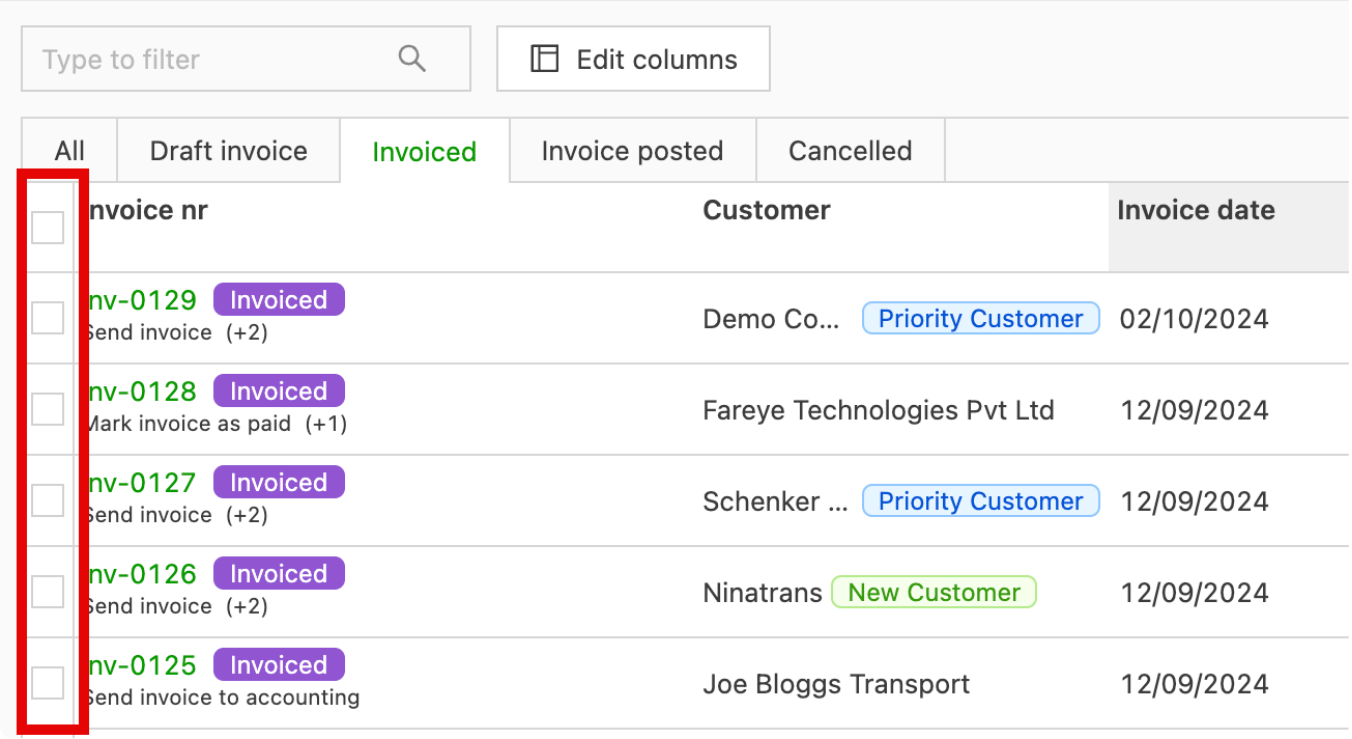


- From the pop-up screen, select which documents to include.
- Use the check box at the top to select ALL, or click each box individually.
- Click **Confirm** to complete the selection.

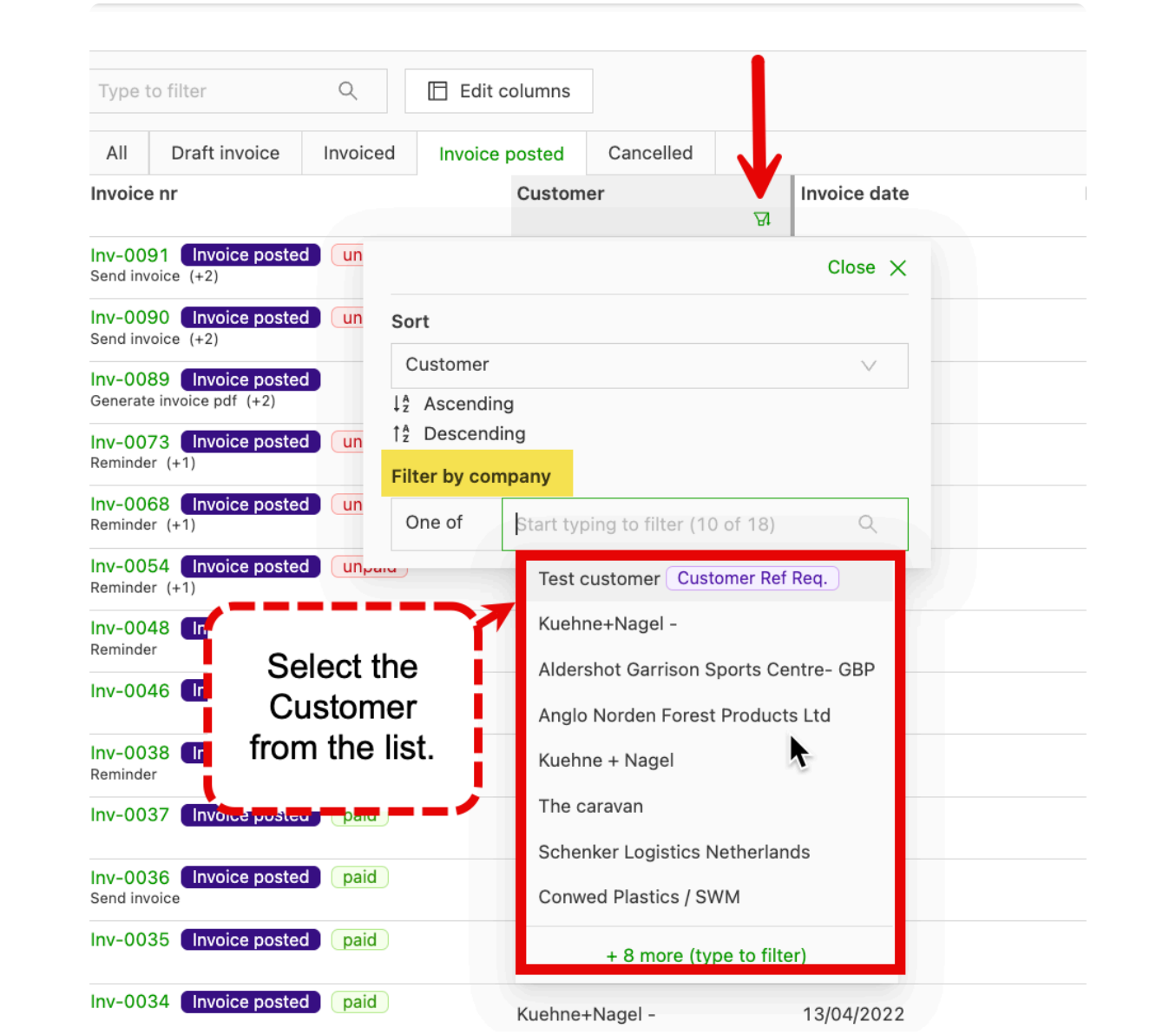


You will be redirected back to the Invoice screen, and you will now have selection boxes to the left of the invoice number.

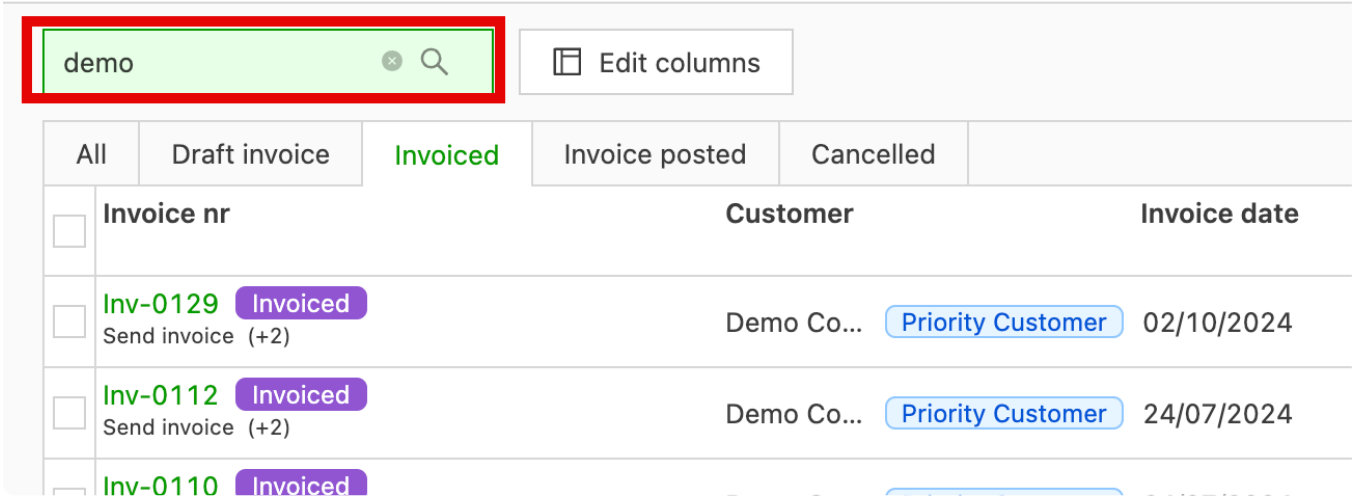
- Use the check box at the top to select **ALL**, or click each box for the invoice(s) you want to print.



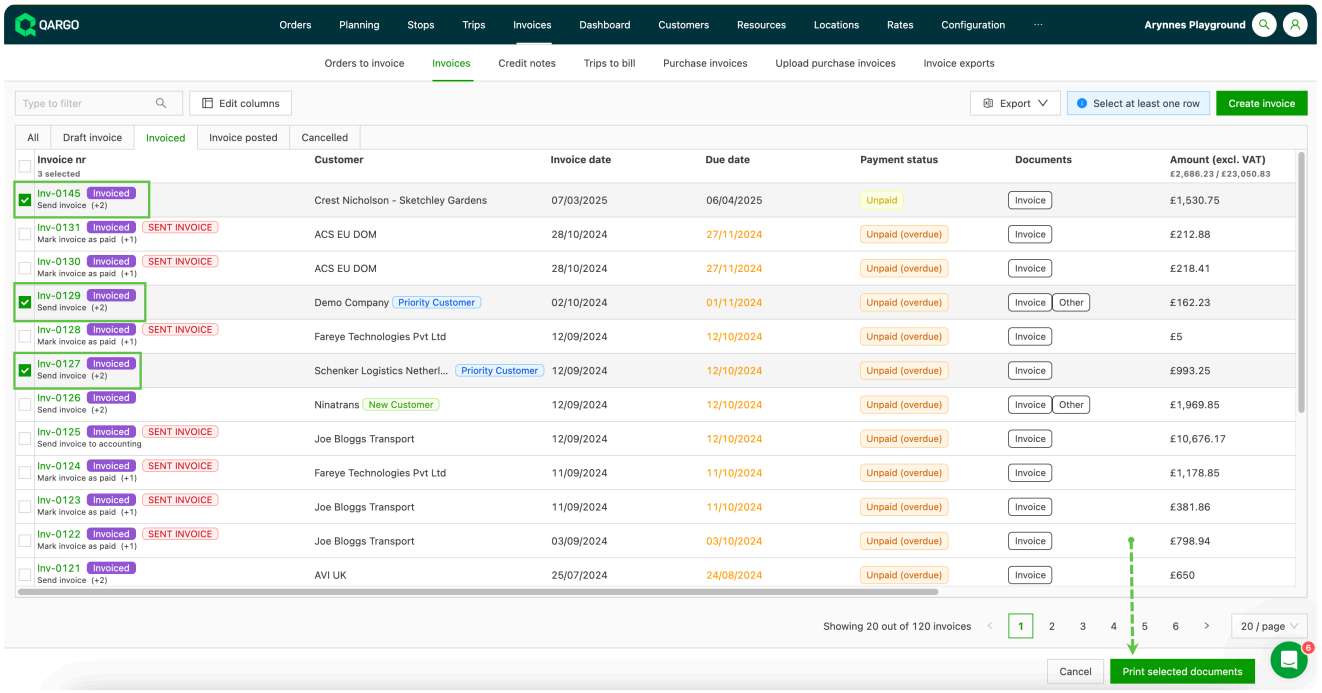
Pro Tip: Search or filter by Customer, so you can easily find all the associated invoices; select ALL or individual invoices to Print.



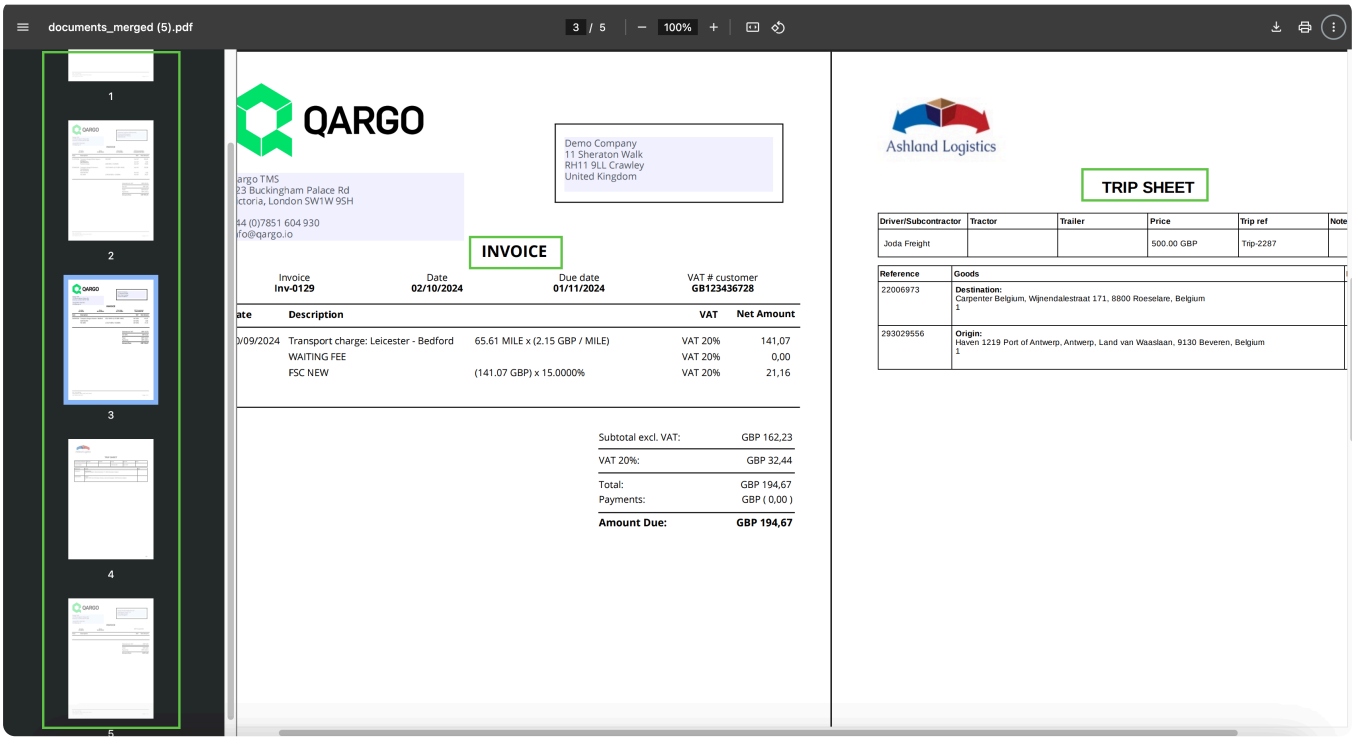
Orders to



- Select invoices to print
- Click ***'Print Selected Documents'***.

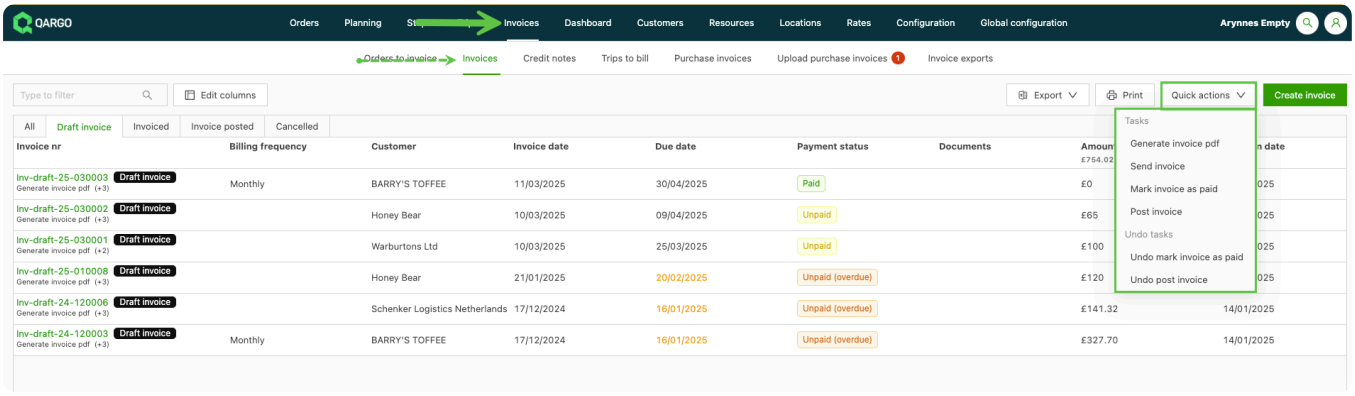


The documents will be consolidated to a single PDF file, which can downloaded and / or printed. The file will include all the documents associated with the invoice that were included in the initial selection to print.



Quick Actions

From the Invoices List page, the ***'Quick Actions'*** allows users to perform tasks on multiple records in one action.



Actions available:

- Generate invoice pdf.
- Send invoice
- Mark invoices as paid / Undo Mark invoice as paid
- Post invoice / Undo Post Invoice

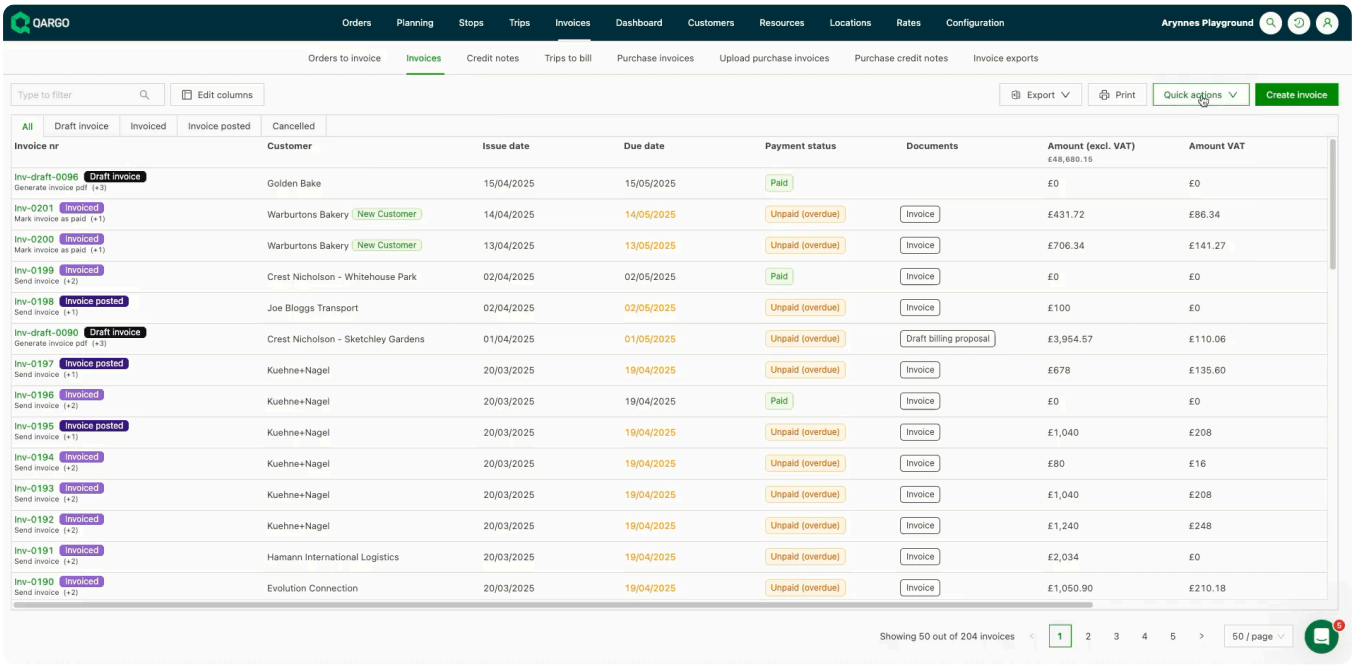
Once a quick action is selected, there are 3 options for which records to include:

- Don't include completed/skipped tasks - this will only include outstanding tasks
- Include skipped tasks - will include any invoices where this task might be configured to be skipped.
- Include completed tasks - will include invoices that have already had the task completed.

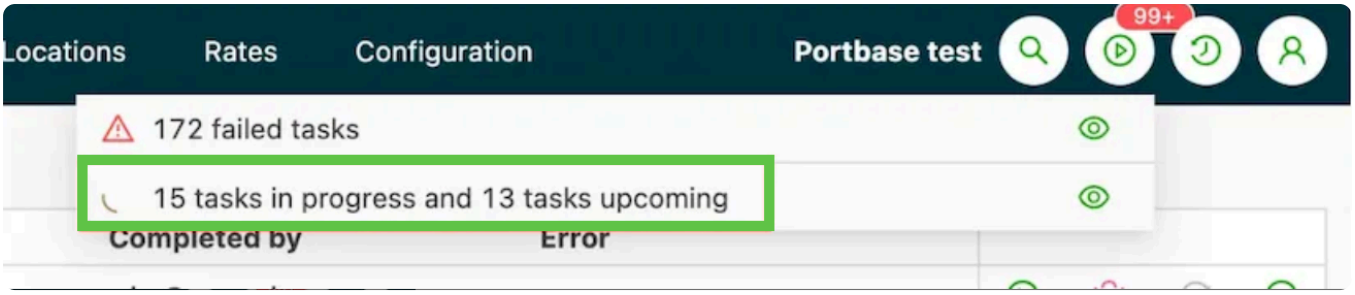
The system uses asynchronous processing which allows a large number of invoices or charges to be created at the same time, while reducing potential for timeout errors.

When executing tasks in bulk select all records for processing.

- Not all tasks will process at the same time.
- To distinguish, tasks will show status of 'in progress' and 'upcoming' - those indicated as 'upcoming' are tasks waiting to be put in progress.
- This will happen automatically, once you have selected the records, no further action is required.



The task indicator will display while the tasks are being updated:



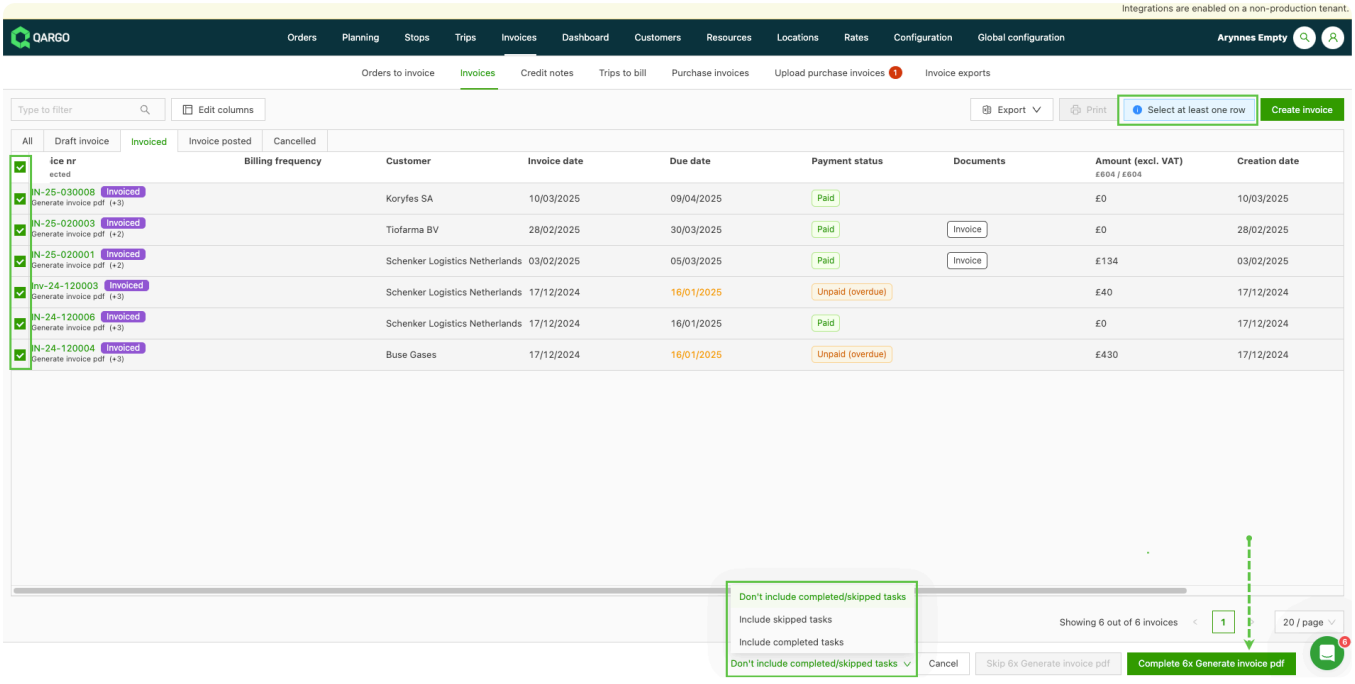
Selecting multiple records is available across the following pages:

- Orders
- Trips
- Invoices
- Purchase Invoices
- Credit Notes
- Purchase credit notes

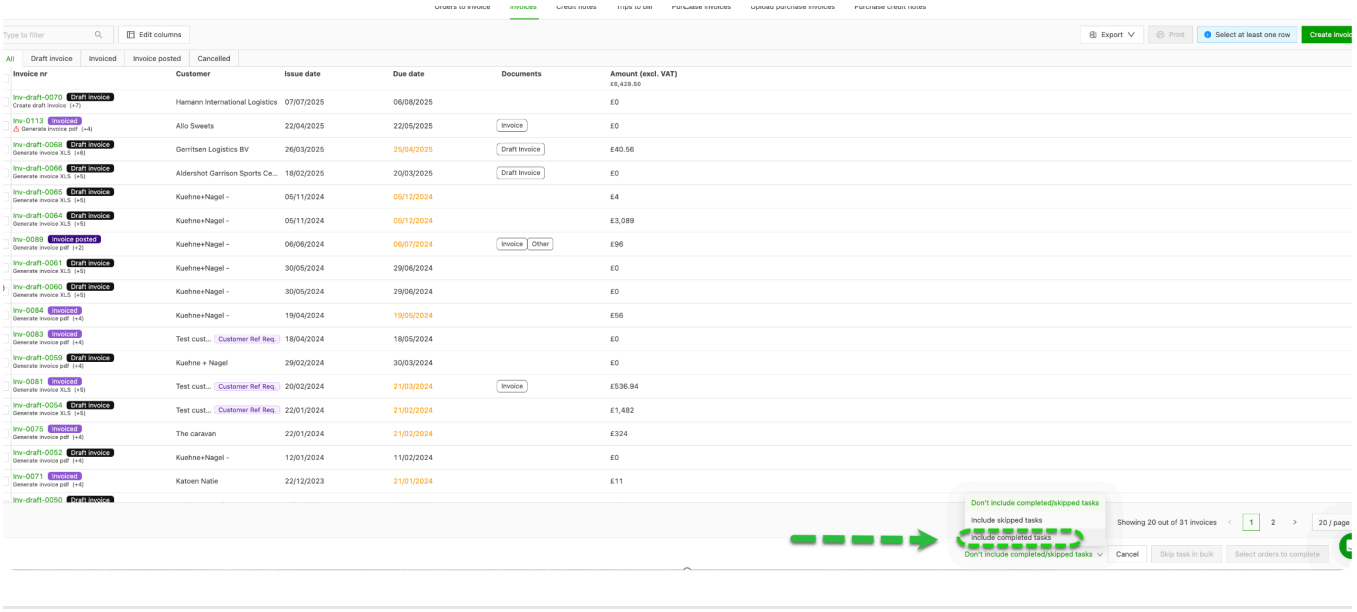
Generate Invoice pdf.

Use this option to create the invoice pdf file.

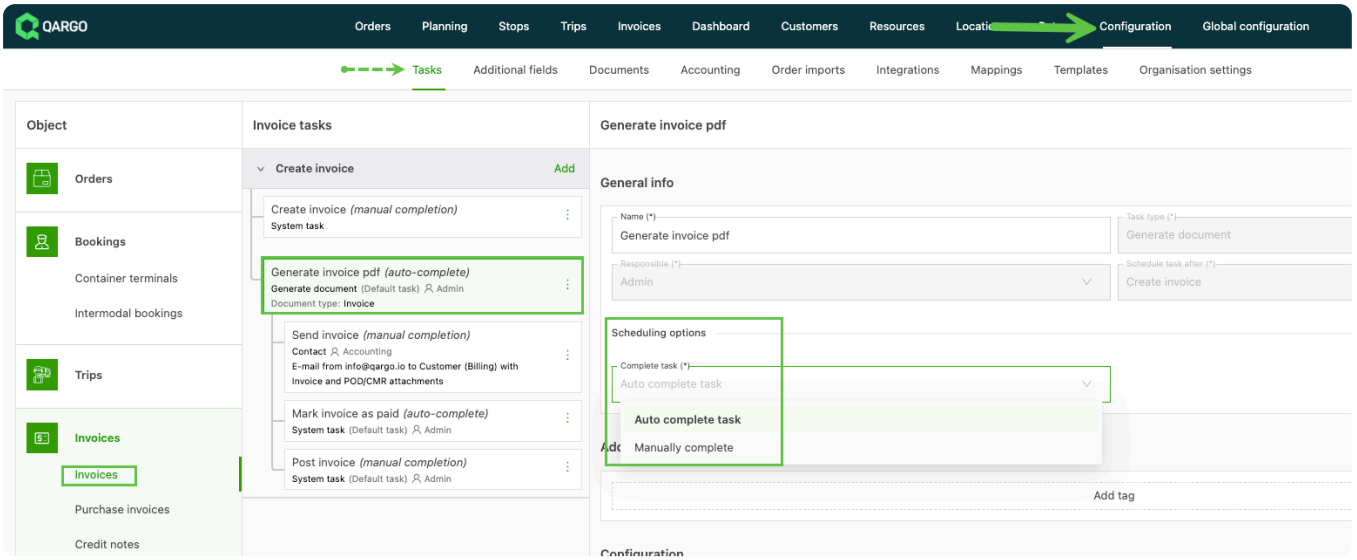
- Use the checkbox to select the invoices to generate the file for.
- Click the *'Complete'* button. This button will show the number of records that will be upated.

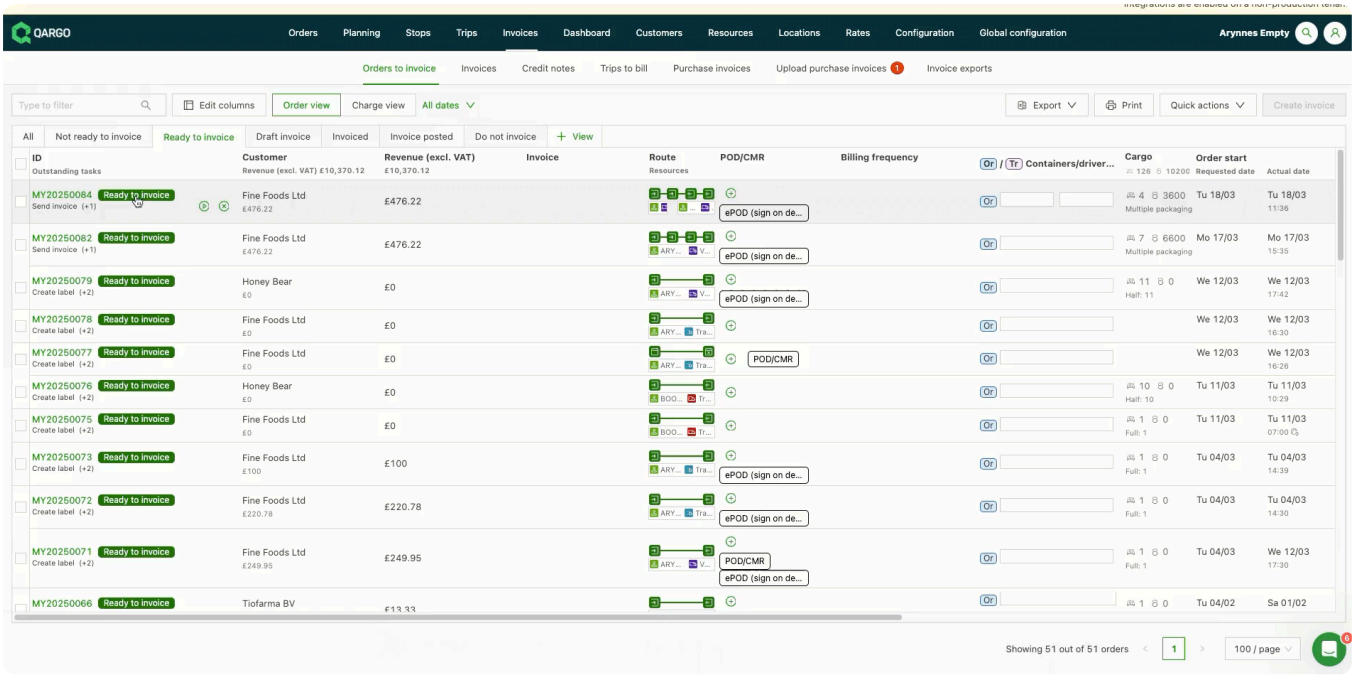


If you want to re-generate already generated PDFs, make sure you select **"include completed tasks"** option to include those in the list located at the bottom of the page:



If this task is configured to *auto-complete* the pdf file will automatically be generated when the invoice is created.

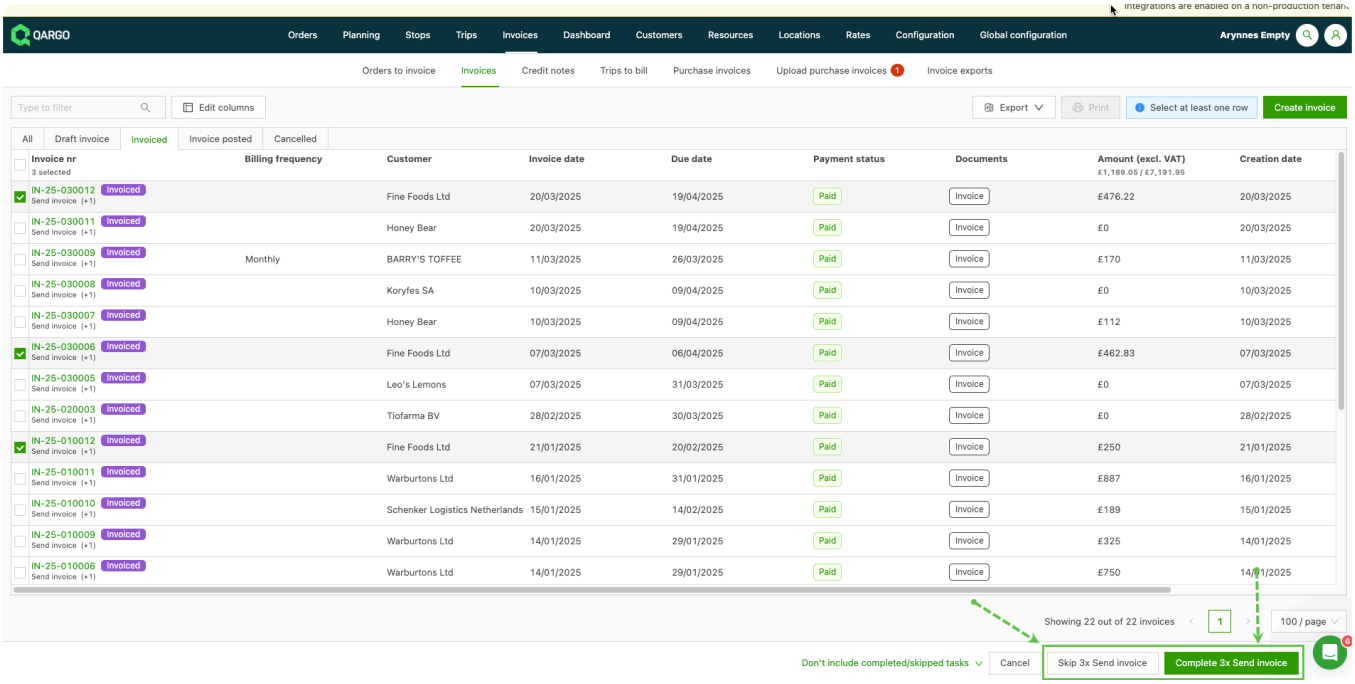




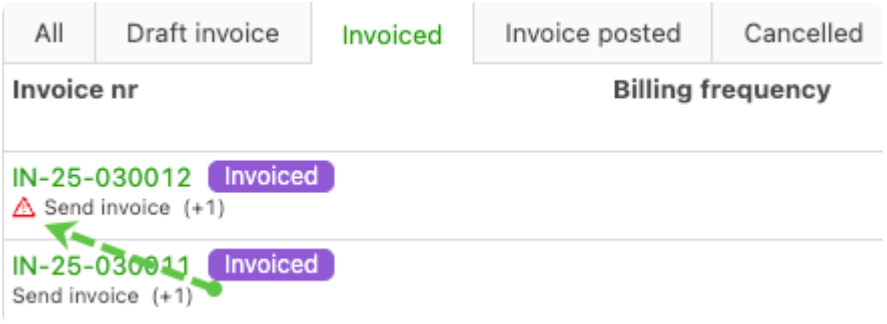
The *'generate invoice pdf'* task must be completed before the Send Invoice option becomes available.

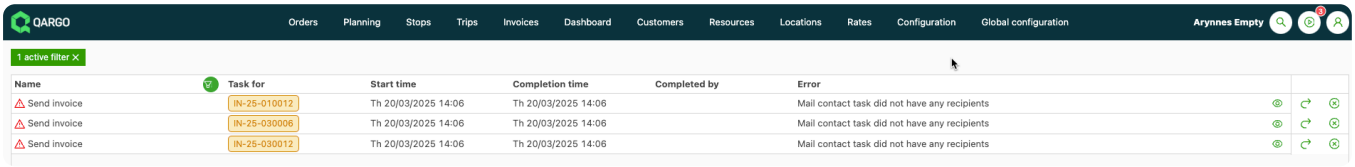
Send Invoice

Once the invoice file is available, it can be sent to the customer, or if sending a batch of invoices, use this option to **SKIP** sending specific invoices.



If sending invoices in bulk, the typical default will be to send via email. If the customer does not have the appropriate billing contact email entered, the task will fail and an error will be generated. Use the re-trigger to update the email and resend the email.

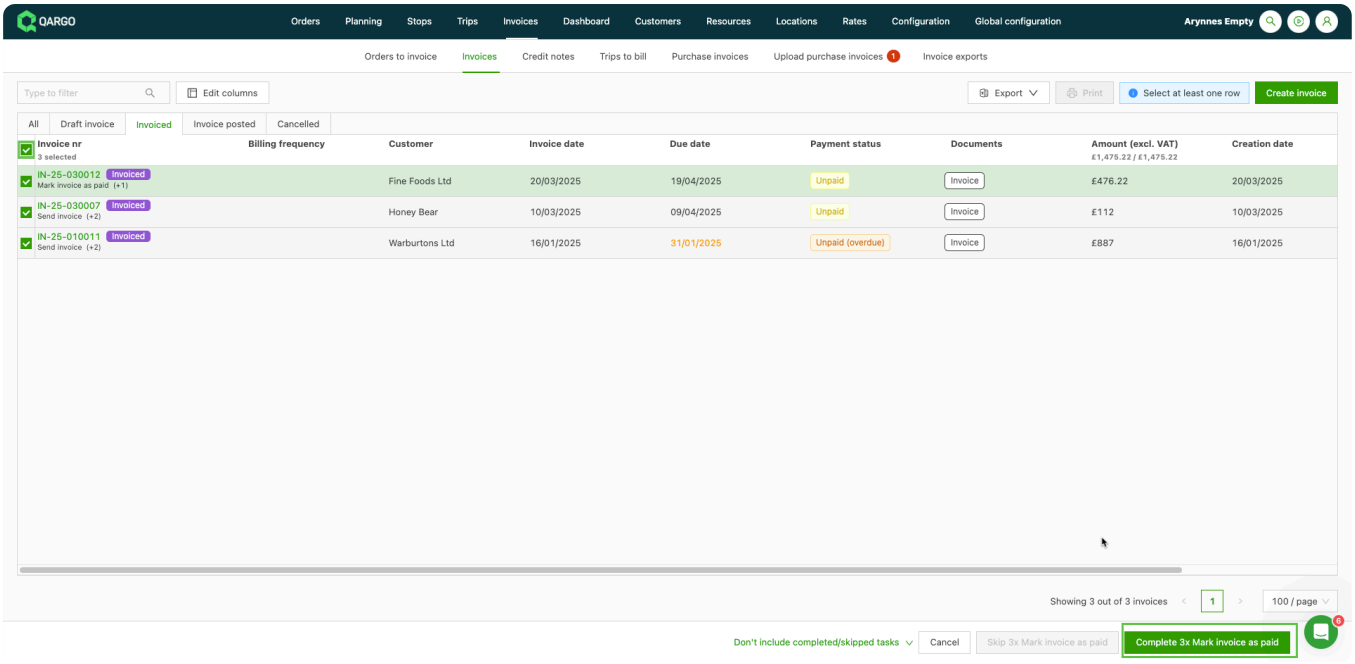




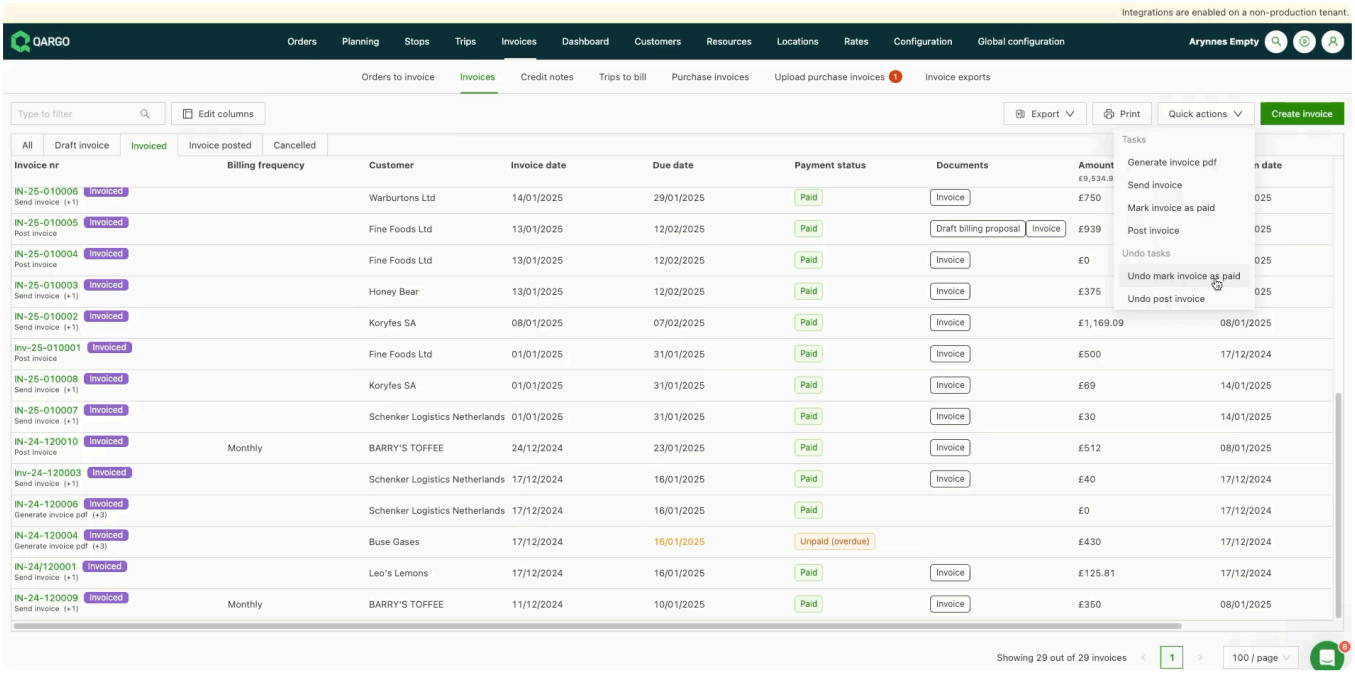
Method for sending invoice can be adjusted to a customer specific option (EDI / Post) if required.

Mark invoices as paid / Undo Mark invoice as paid

The *'Generate invoice pdf'* task must be completed first. Selecting this option will automatically filter to only show invoices that have the invoice file generated and that are not yet marked as paid.



To UNDO the action, select the invoices to set back to 'UNPAID'. Click the ***'Undo Mark invoice as paid'*** button. The Payment status label will update to unpaid.



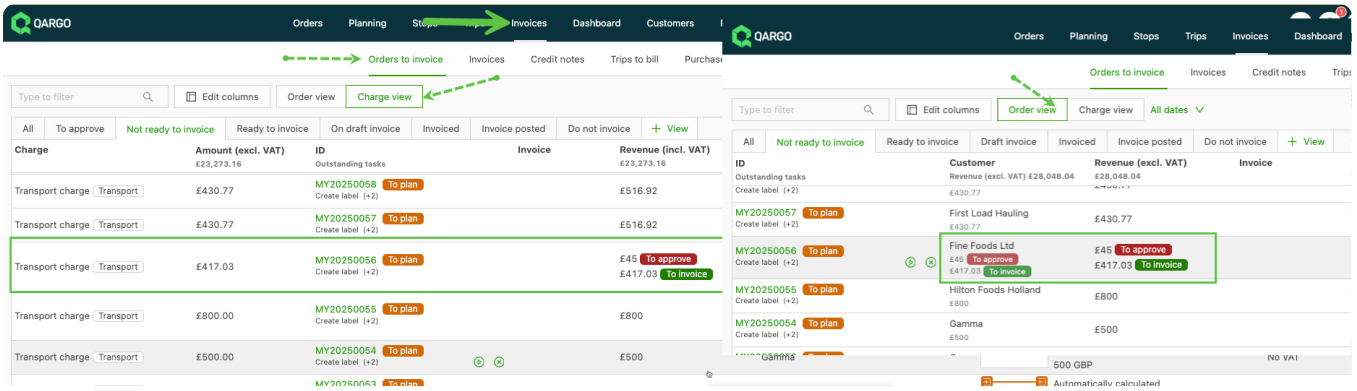
Post invoice / Undo Post Invoice

Invoices can be posted any point after the pdf file has been generated.
In order to transfer the sales revenue from an invoice to accounting software, the invoice must be in a POSTED status.
Unless using an integration to transfer directly to the accounting software, Posted invoices can be exported to a file format that will then be uploaded.
Click the link below to read more about importing to accounts.

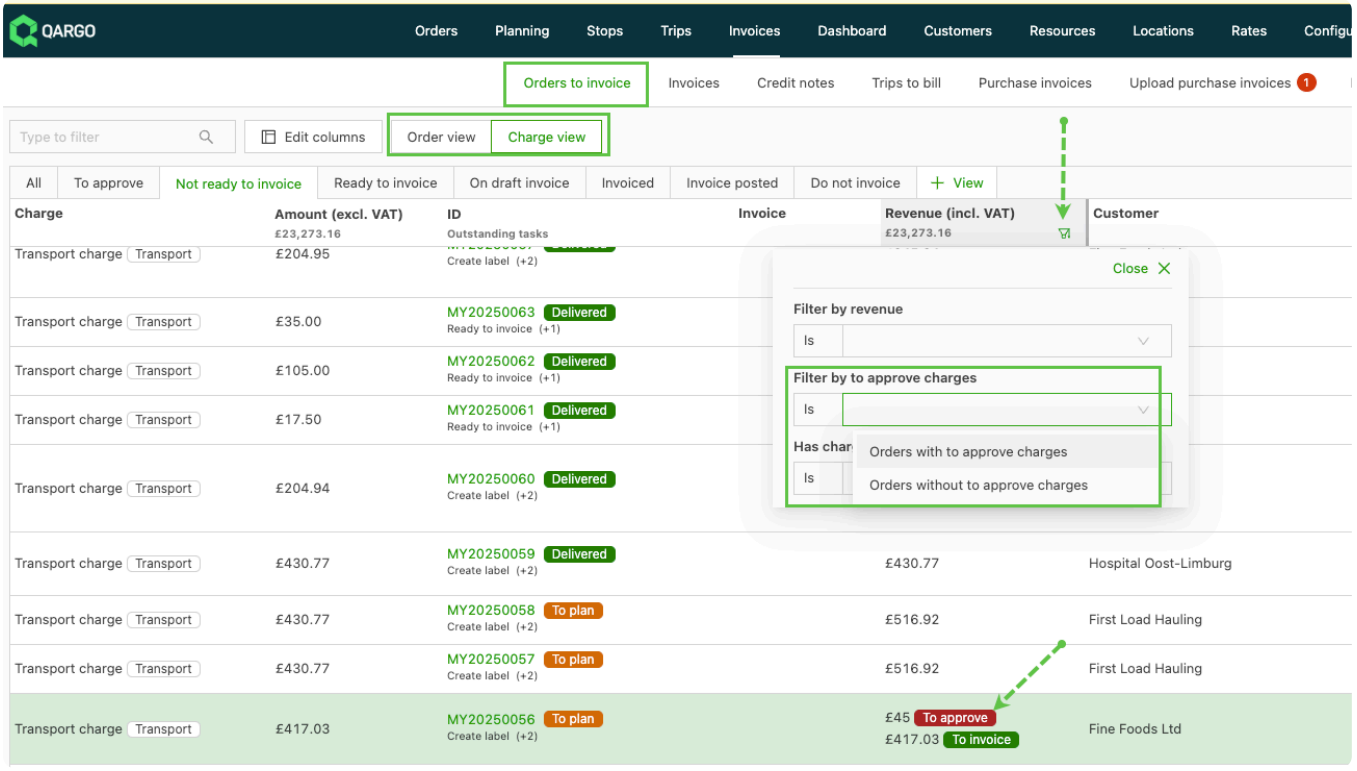
Importing invoices to accounts

Approve charges

When processing invoices, if a charge is present that requires approval, it will show with a red 'To Approve' label next to the line item.



Use filtering on the **REVENUE** column to show all the orders with charges to approve:



Click anywhere in the line to open the order details. Click or Hover on the 'To Approve' label and the option to approve or decline the charge will show:

