

How to Print or Email Sales Invoices in Bulk in SortMyBooks

1. Navigate to Sales Invoices:

- Go to **SortMyBooks**.
- Click on **Reports > Sales Report > Sales Invoices**.

2. Filter Your Invoices:

- On the left-hand side of the screen, you can filter by:
 - **Accounting Year**
 - **Customer**
 - **VAT Period**
 - **Invoice Status**
 - **Contact Note**
 - **Contact Email**
 - **Payment Type**
- To email invoices, choose **"With email addresses"** from the **Contact E-mail** drop-down menu.
- You can order invoices by **Invoice date** or **Customer**
- You can also filter by:
 - **Printed Status:** Select **Only Printed** or **Only Not Printed**.
 - **Mailed Status:** Select **Only Mailed** or **Only Not Mailed**.
- Click **Apply**.

Select range:
current accounting year

Date Field:
Invoice Date x

Customers:
▼

VAT Period from:
All ▼

to :
All ▼

Invoice Status:
Unpaid x
Partially Paid x

Contact Note:
▼

Contact E-Mail:
All

Payment Type:
All ▼

Order Invoices By:
Invoice Date x

Sales Invoices

Great Gifts Share Sample

Period: from 01/01/2013 to 31/12/2013
 Date Field: Invoice Date
 VAT Period: All
 Invoice Status: Unpaid Partially Paid
 Contact E-Mail: All
 Payment Type: All
 Order Invoices By: Invoice Date
 Printed: All
 Mailed: All

Show Selected

VAT Period	Invoice No	Date	Contact	E-Mail	IBAN	Payment Type	Vat Rate	VAT Type	Total Net	Total Vat	Total Gross	Currency	Base Eq. Gross	Nominal	Status	Due Date	Amount Due	Mailed	Printed
Mar-Apr 2013	517	Mar 10, 2013	Curio Shoppe	geraldineconnor30@gmail.com			23.00 %	Normal Processing	1577.24	362.76	1940	Euro	1940	Irish Goods	partial	Mar 10, 2013	5	No	Yes
Nov-Dec 2013	539	Dec 14, 2013	Girl Gifts	geraldineconnor30@gmail.com			23.00 %	Normal Processing	1670.73	384.27	2055	Euro	2055	Clothing	active	Dec 14, 2013	2055	Yes	Yes
Nov-Dec 2013	540	Dec 14, 2013	Seashore Treasures	accounts@seashore.com			23.00 %	Normal Processing	1617.52	372.03	1989.55	Euro	1989.55	Seaside	active	Dec 14, 2013	1989.55	Yes	Yes
Mar-Apr 2013	609	Mar 14, 2013	PJ Loughlin	anne@sortmybooks.com			23.00 %	Normal Processing	120	27.6	147.6	Euro	147.6	Assortment	active	Mar 14, 2013	147.6	Yes	Yes
Sep-Oct 2013	610	Sep 21, 2013	Cork Crafts	cork@crafts.com			23.00 %	Normal Processing	200	46	246	Euro	246	Assortment	active	Sep 21, 2013	246	Yes	Yes
Sep-Oct 2013	611	Sep 12, 2013	Dublin Druid Shop	geraldineconnor30@gmail.com			23.00 %	Normal Processing	220	50.6	270.6	Euro	270.6	Clothing	active	Sep 12, 2013	270.6	Yes	Yes
Sep-Oct 2013	612	Sep 09, 2013	Galway Gifts	geraldineconnor30@gmail.com			23.00 %	Normal Processing	150	34.5	184.5	Euro	184.5	Corporate	active	Sep 09, 2013	184.5	Yes	Yes
Sep-Oct 2013	613	Oct 18, 2013	Meath Magic Shoppe	geraldineconnor30@gmail.com			23.00 %	Normal Processing	99	22.77	121.77	Euro	121.77	Assortment	active	Oct 18, 2013	121.77	Yes	Yes
Sep-Oct 2013	614	Oct 01, 2013	Seashore Treasures	accounts@seashore.com			23.00 %	Normal Processing	75	17.25	92.25	Euro	92.25	Assortment	active	Oct 01, 2013	92.25	Yes	Yes
Totals:									5728.49	1317.78	7046.27	-	7047.27	-	-	5112.27	-	-	

Created by SortMyBooks On-Line. www.sortmybooksonline.com 0.0946

3. Select and Process Invoices:

- Select some or all invoices on the top-right corner of the invoice list.
- Click the **Show Selected** button.
- A new screen will appear where you can:
 - Customize your email template.
 - Choose the invoice layout and terms.
 - Add a remittance if needed.
 - Arrange invoice details in a specific order.

All reports
Print
Save as PDF

Layout:
Layout 1 x

- Show Terms

Terms of Payment:
Paid with Thanks

- Show Options

Account:
All

Payment Options:
Bank Name: Blasket National Bank
Sort Code: 875898
Account: 12345678
Name: Great Gifts

- Remittance


Order Items:
None

Action:
Show Invoices

Apply

Invoice 609

PJ Loughlin
Ireland



Great Gifts Share Sample
Unit 3 KTI Centre
Killarney
Kerry V93P83F
Ireland
contact@sortmybooks.com

VAT No: IE77755555
Invoice: 609
Issued: 14/03/2013
Due: 14/03/2013

Item	Description	Price	Qty	VAT rate	Net
Service		120	1	23.00 %	120
Subtotal:					€ 120.00
VAT (23.00 %):					€ 27.60
Total:					€ 147.60
Total due:					€ 147.60

Payment options

Bank Name: Blasket National Bank
Sort Code: 875898
Account: 12345678
Name: Great Gifts
BIC/SWIFT: ULBSXXXX
IBAN: BOFI234567888
Address:
Main Street
Killarney

4. Print or Email Invoices:

- You can choose **Action**:
 - Print invoices and mark them as printed.
 - Email invoices and mark them as mailed.
- Click **Apply**.

5. Review and Send Emails:

- A PDF file will be generated to review or share with your accountant.
- Select **Email Invoices** to view the email addresses assigned to the invoices.
- Apply tags such as **Contact Name, Reference Number, Company, Image Link and Your Name**.
- Optionally, send a copy of the email to your address.
- Click **Send**.

Layout:

Layout 1 x

- Show Terms

Terms of Payment:

Paid with Thanks

- Show Options

Account:

All

Payment Options:

Bank Name: Blasket National Bank
 Sort Code: 875898
 Account: 12345678
 Name: Great Gifts

- Remittance

Order Items:

None

Action:

E-mail Invoices x

Apply

Send by E-Mail

Send To

PJ Loughlin *

anne@sortmybooks.com x

Dublin Druid Shop *

geraldineoconnor30@gmail.com x

Cork Crafts *

cork@crafts.com x

CC

...

Subject *

[[contact]] Invoice [[ref_no]]

Message *

Hello [[contact]]!

Please find attached invoice [[ref_no]] with this mail.

Best regards,
[[myself]]
[[company]]

Send copy to my email address

Send

Please do not leave this screen while sending !!!

You can use tags [[contact]], [[ref_no]], [[company]], [[image_link]] and [[myself]] in subject and message fields

- You will see a message indicating how many invoices were sent.
- You can also verify sent invoices:
 - Go to the **Home** page and check the **Audit Log**.
 - Check the **invoice history** to confirm the invoice status.

Details Payments Refunds Recurring Delete

View history for...

Note:

VAT pr
Mar
Date:
14/03

Refer
Add Note

Date	Name	Actions
21/02/2023 13:49:03	Aileen Hannan	Sent (Invoice 609) from(contact@sortmybooks.com) to: anne@sortmybooks.com bcc: on: 21-02-2023 13:49:03
21/02/2023 13:30:46	Aileen Hannan	update Sale #609 to PJ Loughlin: is_mailed=Y
21/02/2023 13:30:46	Aileen Hannan	Sent (Invoice 609) from(contact@sortmybooks.com) to: anne@sortmybooks.com bcc: on: 21-02-2023 13:30:46
18/07/2022 17:03:04	Aileen Hannan	update Sale #609 to PJ Loughlin: is_printed=Y (resulted in updated_by=9)
14/03/2022 09:58:54	Anne Hannan	updated Invoice Sale(609) changed Gross from "0.00" to "147.60", changed Net from "" to "120.00", changed VAT from "" to "27.60",
14/03/2022 09:58:54	Anne Hannan	created Invoice Line (Service "" for 609,Date:14/03/2013)
14/03/2022 09:58:37	Anne Hannan	created Invoice Sale (609,client : PJ Loughlin,Date:14/03/2013)

Item	Service	Assortment	1	0.0000	23.00%	120.00	27.60	Great Girls Share Sample	147.60	
									Subtotal:	120.00
									VAT total:	27.60
									Profit Margin:	0.00%
									Total:	147.60
									Amount due:	€ 147.60

Duplicate Preview Send Email History Credit Note Add Scanned OK Cancel

More in the video: <https://vimeo.com/1057916595>