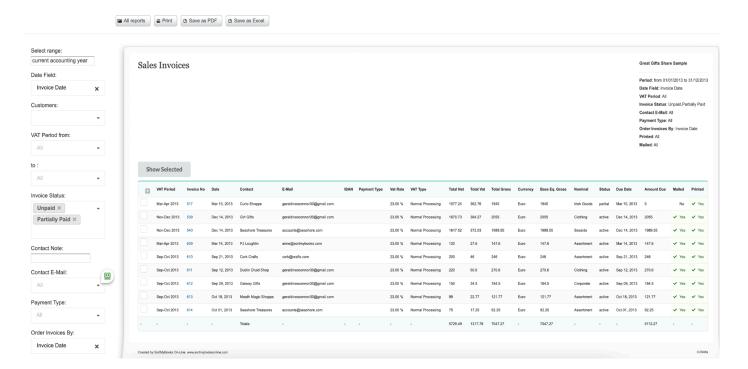


## How to Print or Email Sales Invoices in Bulk in SortMyBooks

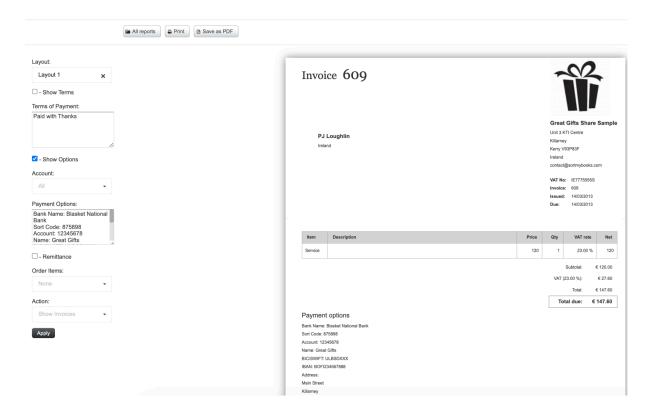
- 1. Navigate to Sales Invoices:
  - Go to SortMyBooks.
  - Click on Reports > Sales Report > Sales Invoices.
- 2. Filter Your Invoices:
  - On the left-hand side of the screen, you can filter by:
    - Accounting Year
    - Customer
    - VAT Period
    - Invoice Status
    - Contact Note
    - Contact 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.





## 3. Select and Process Invoices:

- o 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.



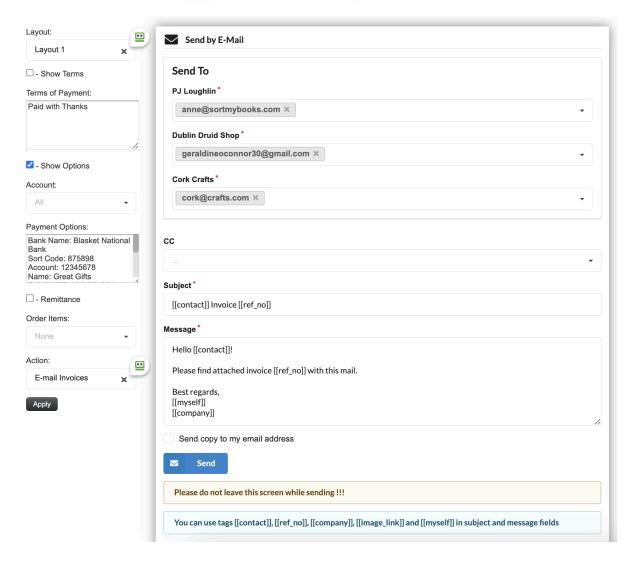
## 4. Print or Email Invoices:

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

## 5. Review and Send Emails:

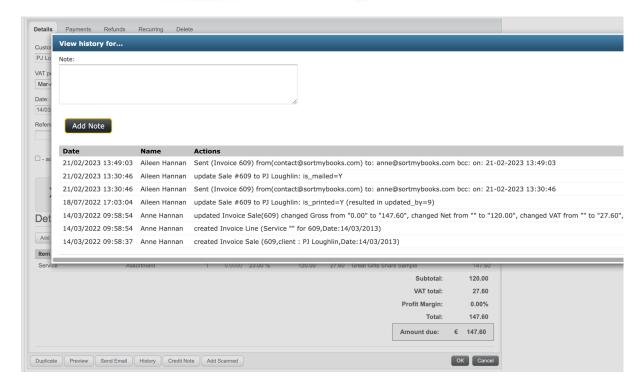
- o A PDF file will be generated to review or share with your accountant.
- Select Email Invoices to view the email addresses assigned to the invoices.
- Apply tags such as Contact Name, Reference Number, Company, Image Link and Your Name.
- Optionally, send a copy of the email to your address.
- o Click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





- 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.





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