

BULK-EMAIL DUNNING

INVOICING SOLUTION FOR NETSUITE

Built on the NetSuite platform, Bulk-email Dunning is designed to make your invoicing and collections process a breeze! With four levels of dunning, this solution automates follow-ups with emails scheduled at your desired frequency. Bulk-email Dunning removes friction and pain from the collections process, improves customer experience, and shortens time-to-cash.

FEATURES

- ✓ Interactive screen to view open invoices
- ✓ Four levels of dunning to schedule automatic follow-ups
- ✓ Send invoice emails to multiple recipients
- ✓ Option to merge multiple invoices into a single PDF
- ✓ Custom filters to view open invoices based on attributes
- ✓ Metadata & analytics



USE CASES

- ✓ Recover more on unpaid invoices
- ✓ Bring automation to your collections process
- ✓ Easily follow up on open invoices using customizable templates
- ✓ Send bulk transaction emails with multiple attachments
- ✓ CC your own employees on bulk automated emails as needed
- ✓ Unique email templates for the first, second and third follow-ups

ABOUT

Bulk-email Dunning, was built as a convenient way for NetSuite users to follow up with their customers on open invoices. NetSuite's native email functionality allows you to send invoices to the primary email address on a customer record. This solution allows you to send invoice emails to multiple addresses!

There is a manual version of the Bulk-email Dunning solution, as well as an automated version which allows you to set up rules so that dunning happens automatically in your account. Bulk email addresses can be setup for each customer record. Then, any invoices created for a customer will have those bulk email addresses associated with them.

You can set up different email templates for each dunning level! Send customers a single email with each of their unpaid invoices attached. Or, as a further customization, merge invoices into a single PDF! Choose to exclude partially paid invoices, or set threshold amounts.

With the automated version of this solution, you can also specify when emails should send in relation to the due date of the invoices. The solution will then send out emails automatically for invoices meeting the criteria you establish.

View the emails that have been sent on the messages tab on both the customer records and the invoice records in NetSuite.

A screenshot of the 'Bulk Email Invoices' interface in NetSuite. It features a search bar with 'Search' and 'Process' buttons. Below is a 'Main Filters' section with dropdown menus for 'CUSTOMER', 'SUBSIDIARY', 'DEPARTMENT', 'CLASS', and 'LOCATION'. To the right, there are input fields for 'FROM DATE' (11/06/2023), 'TO DATE *' (11/07/2023), and 'DUE DATE'. On the far right, there are checkboxes for 'SHOW ONLY OPEN INVOICES', 'SHOW INVOICES', 'SHOW PAID INVOICES', and 'SHOW DUNNING'. The interface is clean and professional, typical of a business software application.