

Print and Email Customer Invoice Overview

This Quick Reference Guide (QRG) is designed to walk a **Customer Billing Specialist** or a **Customer Contract Specialist** through the process of printing and/or emailing a Customer Invoice. The Accounts Receivable Specialist in Central Finance sends customer invoices created the day before to the customers each morning. There are times when a Customer Billing Specialist or a Customer Contract Specialist may want to send/email the customer invoice to the customer, or you need a copy of an invoice that has already been sent/emailed. By the end of this QRG, you will be able to print and/or email a customer invoice in Workday.



Remember: The Customer ID will always start with “CST-“ and the Customer Name has the Customer ID in parentheses at the end of the name. Ex. Dragonfly Inn (CST-00893). If you need to find the customer number, you can use the **Find Customers with Facet Search** report.

Procedure

On the Workday **Home** screen:

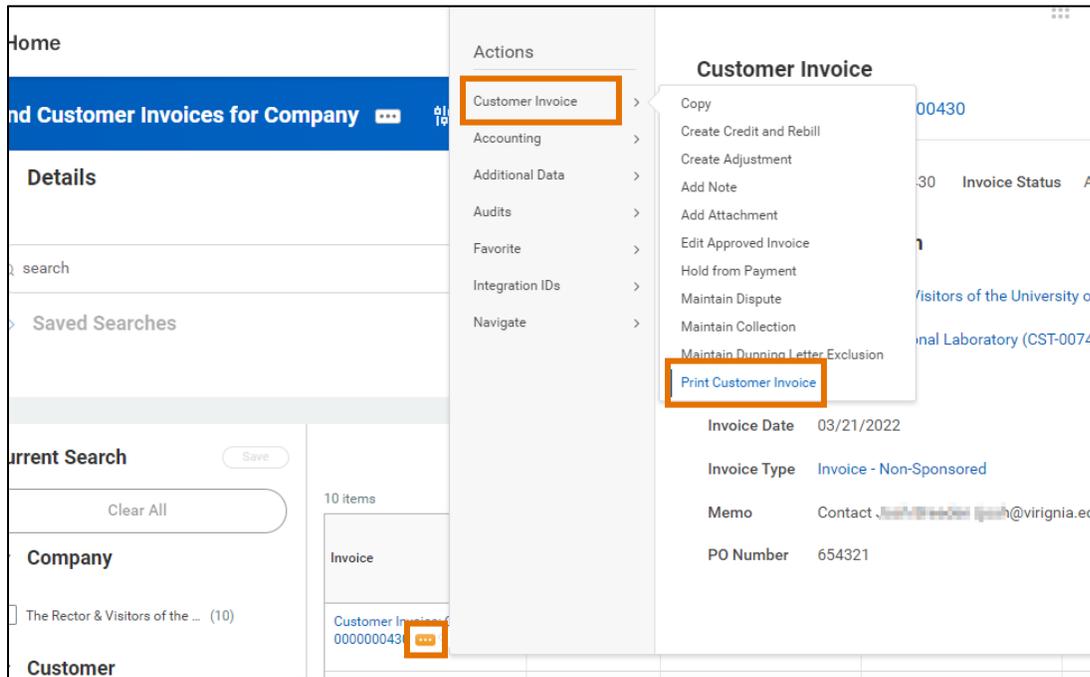
1. Type **Find Customer Invoices for Company** in the search field.
2. Select **Find Customer Invoices for Company** from the Search Results.

On the **Find Customer Invoices for Company** screen:

3. Complete any of the fields on the Customer Invoice for Company screen to narrow your search results.
4. Select **OK** to filter the results.

On the second **Find Customer Invoices for Company** screen:

5. Select the **Related Actions** button (...) beside the customer invoice number of the invoice that you want to print or email.
6. Select **Customer Invoice > Print Customer Invoice**.



On the **Print Customer Invoice** screen:

7. Select the **Refresh** button to refresh the screen until the **Percent Complete** bar is 100% complete.

<p>NOTE</p>	<p>Take note of the Print Run Type field in the Customer Invoices table:</p> <ul style="list-style-type: none"> • Final – You created the first invoice print run, and you are responsible to distribute the document to the customer (either by mail or email). This invoice will not print in the next day’s batch run by Central Finance. • Copy – The invoice has already been printed/mailed to the customer and you created a copy of the invoice. You can use this PDF to print and mail or for your records.
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To email a customer invoice to the Customer:

8. Select the **Email Customer Invoice** button to email the customer invoice.

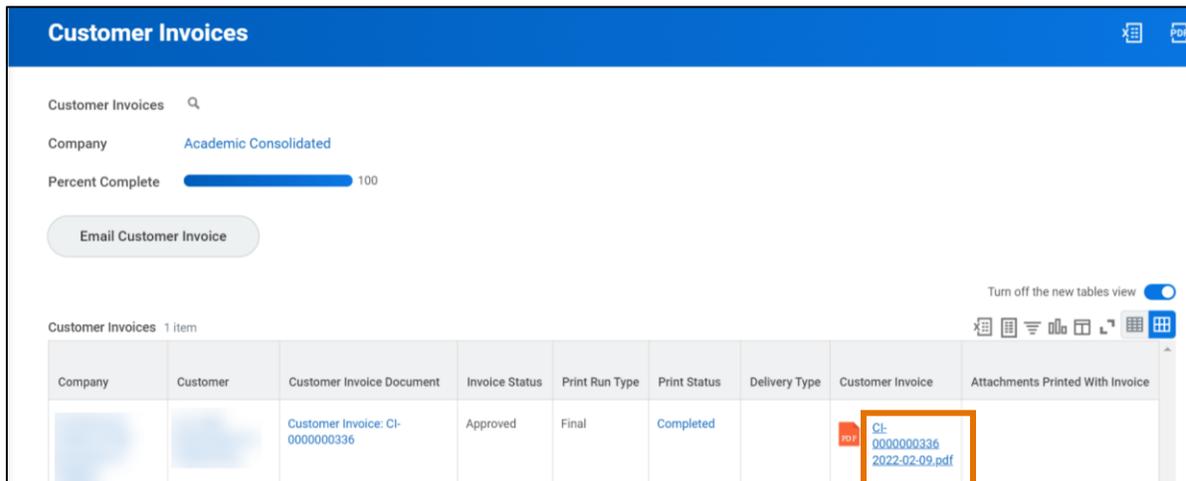
<p>NOTE</p>	<p>If you did not have email selected in document delivery setup, you can select the box next to Change Delivery Method to allow the invoice to be sent via email.</p> <p>If there is not an email address setup on your customer, you will see a note saying that invoices for these customers will not be emailed. You will have to add an email to the customer or a Bill-to Contact before you will be able to email the invoice to the customer.</p>
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9. Select **OK** to confirm.

 NOTE	<p>All emailed customer invoices will go to the Account Receivable Specialist in central finance for review before they get emailed to the customer.</p>
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To print or save a customer invoice:

10. Select the link in the **Customer Invoice** column to open the customer invoice PDF.



The screenshot shows the 'Customer Invoices' interface. At the top, there is a search bar and a filter for 'Company' set to 'Academic Consolidated'. Below this is a 'Percent Complete' progress bar at 100% and an 'Email Customer Invoice' button. A table with one item is displayed. The table has columns for Company, Customer, Customer Invoice Document, Invoice Status, Print Run Type, Print Status, Delivery Type, Customer Invoice, and Attachments Printed With Invoice. The 'Customer Invoice' column contains a link to a PDF file: 'CI-0000000336 2022-02-09.pdf'. A red box highlights this link.

Company	Customer	Customer Invoice Document	Invoice Status	Print Run Type	Print Status	Delivery Type	Customer Invoice	Attachments Printed With Invoice
		Customer Invoice: CI-0000000336	Approved	Final	Completed		CI-0000000336 2022-02-09.pdf	

11. Select the print icon to print the invoice or the download icon to download a copy to your computer.

Mystery Incorporated, CI-0000000665 2022-04-08.pdf 1 of 1

Customer Invoices

Company

Run by

Percent Complete

Email Customer

Invoice

Make payments and address inquiries to:

UNIVERSITY OF VIRGINIA
 PO Box 400201, ATTN: Accounts Receivable
 Charlottesville, VA 22904
 United States of America
 PHONE: 434-924-7180 FAX: 434-924-1034
 EMAIL: UVA-AR@virginia.edu
 FEDERAL ID NO: 54-600-1796

Bill to:

Mystery Incorporated
 ATTN To: Fred Jones
 420 Mystery Van Way
 Coolville, OH 45723
 United States of America

Customer Number: **CST-00811**

Invoice Number: **CI-0000000665**

Invoice Date: **08-Apr-22**

Due Date: **08-May-22**

To pay by credit card (MC, VISA, DISCOVER, or AMEX) or to charge your bank account go to:

<http://fro.vpfinance.virginia.edu/ar-customer>

If payment by check: Amount Paid: \$

Make checks payable to **University of Virginia**

Please detach and return top portion with your payment. Do not staple or clip your check to the form.

Customer Name: **Mystery Incorporated** *Invoice Number:* **CI-0000000665** *Invoice Date:* **08-Apr-22**

INVOICING ORGANIZATION	P.O. NUMBER	TERMS
CC0498 FI-VP Finance		Net 30

LINE NO	DESCRIPTION	QTY	UNIT PRICE	AMOUNT
1	100% of Invoice due in this installment ***** The services invoiced hereunder are subject to the University of Virginia's standard terms and conditions found at https://fro.vpfinance.virginia.edu/system/files/UVA_STC.pdf and shall not be varied, modified or amended by any	1	500.00	500.00

Attachments
Printed With Invoice

You have successfully completed this task.