


Create, Print, & Email Consolidated Customer Invoice Overview

This Quick Reference Guide (QRG) is designed to walk a **Customer Billing Specialist** and **Contract Billing Specialists** through the process of emailing a Consolidated Customer Invoice in Workday. Workday enables users to consolidate up to 1,000 individual invoices into 1 invoice. This helps simplify presentation and payment. You can use the **Create Consolidated Customer Invoice** task to create a Consolidated Customer Invoice. Once consolidated invoices are created, it can be emailed to Customers using the **Email Consolidated Customer Invoice** task. By the end of this QRG, you will be able to successfully initiate the process to create and subsequently email Consolidated Customer Invoices to selected Customers.

| | |
|--|--|
|  NOTE | <p>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.</p> |
|--|--|

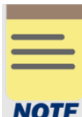
Procedure

On the Workday **Home** screen:

1. Type **Create Consolidated Customer Invoice** in the search field.
2. Select the **Create Consolidated Customer Invoice** task from the Search Results.

On the **Create Consolidated Customer Invoices** screen:

3. Complete the following required fields:
 - **Company**
 - **Customer**
 - **Currency**

| | |
|--|--|
|  NOTE | <p>The Customer Name will always have the Customer number at the end. Ex. Dragonfly Inn (CST-00893).</p> |
|--|--|

4. Select **Ok**.

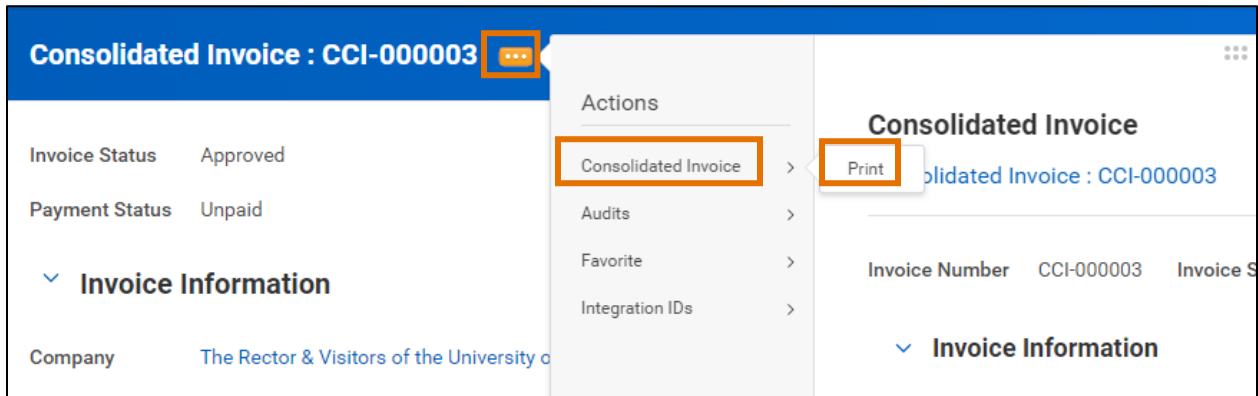
On the second **Create Consolidated Customer Invoices** screen:

5. Select the checkbox on the left of the invoices you want to consolidate.
6. Select **Ok**. Do not select **Done**.
7. Select the **Related Actions (...)** button next to Consolidated Invoice number in the blue bar at the top.

On the **Related Actions** menu:

Create, Print, & Email Consolidated Customer Invoice – Quick Reference Guide

8. Select **Consolidated Invoice > Print**.



On the **Confirm Print Consolidated Invoice** screen:


9. Select the box next to **Include Individual Customer Invoices**, if desired.
10. Select **OK**.

On the **View Consolidated Invoice Printing Run Group** screen:


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

To email a Consolidated Customer Invoice to the Customer:

12. Select the **Email Customer Invoice** button to email the Customer invoice.

| | |
|--|--|
|  NOTE | <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 set up for 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> |
|--|--|

13. Select **OK** to confirm.

| | |
|--|---|
|  NOTE | <p>All emailed Consolidated Customer Invoices will go to the Account Receivable Specialist in central finance for review before they get emailed to the Customer.</p> |
|--|---|

To print or save a Consolidated Customer Invoice:

14. Select the link in the **Consolidated Invoice File** column to open the Customer invoice PDF.

Create, Print, & Email Consolidated Customer Invoice – Quick Reference Guide

View Consolidated Invoice Printing Run Group

Consolidated Invoice Printing Run Group

Percent Complete 100

Email Consolidated Invoices

Turn on the new tables view

Consolidated Invoices 1 item

| Company | Customer | Locale | Consolidated Invoice | Status | Delivery Type | Consolidated Invoice File | Individual Customer Invoice Files |
|---|----------------------------------|---------------------------------|-----------------------------------|-----------|---------------|---------------------------|--|
| The Rector & Visitors of the University of Virginia | Mystery Incorporated (CST-00811) | English (United States) - en_US | Consolidated Invoice - CCI-000004 | Completed | Email Mail | CCI-000004 2022-04-08.pdf | CCI-000004 2022-04-08 Customer Invoices .pdf |

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

You have successfully completed this task.