UVAFinance · workday.

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.

NOTE	**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.
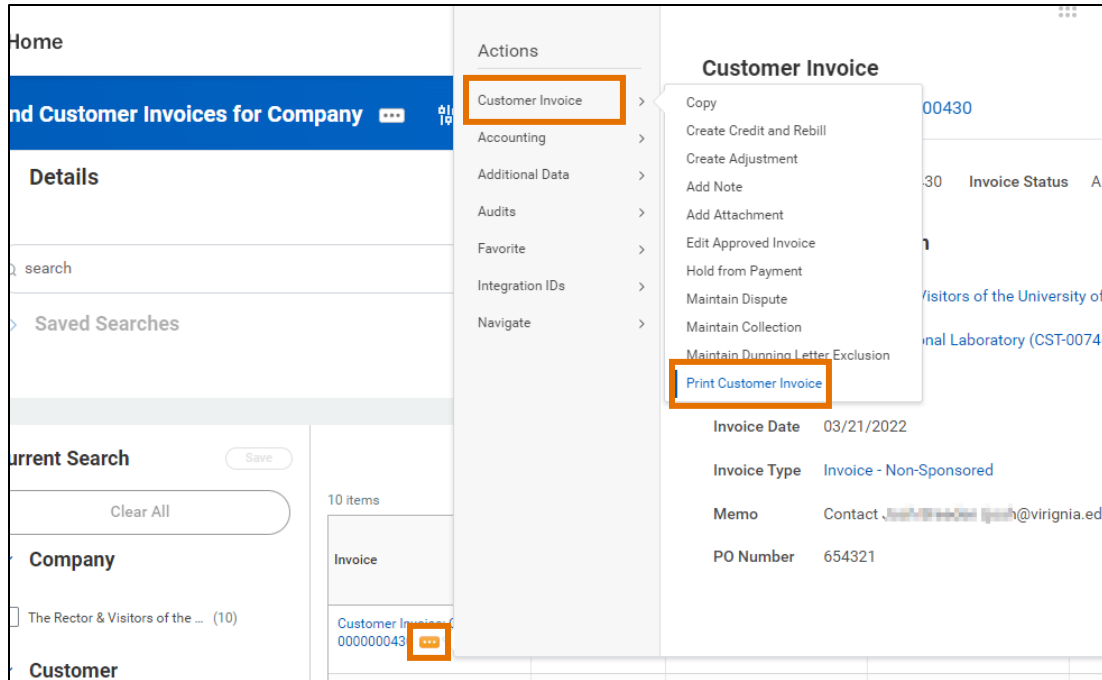2. Select **Find Customer Invoices for Company** from the Search Results.

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.

NOTE	Take note of the **Print Run Type field** in the **Customer Invoices** table: • **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/emailed to the customer and you created a copy of the invoice. You can use this PDF to print and mail or for your records.

To email a customer invoice to the Customer:

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

NOTE	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. 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.

9. Select **OK** to confirm.

	All emailed customer invoices will go to the Account Receivable Specialist in central finance for review before they get emailed to the customer.

To print or save a customer invoice:

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

11. 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.