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Print and Email Customer Statements Overview

This Quick Reference Guide (QRG) is designed to walk a **Customer Billing Specialist** or **Contract Billing Specialist** through printing Customer Statements in Workday. Occasionally, a customer will ask to see everything on their account. The Customer Statement provides a full snapshot of the Customer's activity including invoices, invoice adjustments, and payment activity. By the end of this QRG, you will be able to successfully create a Customer Statement for printing and emailing.

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 **Print Customer Statements** in the search field.
2. Select the **Print Customer Statements** task from the **Search Results**.

On the **Print Customer Statements** screen:

3. Complete the following required fields:
   - **Company** – select the relevant company from the drop-down list.
   - **Statement Date** – will auto-populate to current day's date. All activity up to this date will pull into the Customer Statement
4. Complete the following recommended field in the **Customer Selection Criteria** section to narrow down statement search.
   - **Customers**

NOTE	All fields in the **Customer Selection Criteria** and **Statement Creation Options** are optional. The Customer Name will always have the Customer number at the end. Ex. Dragonfly Inn (CST-00893).

5. Select **OK** to filter the results.

On the second **Print Customer Statements** screen:

6. Select the box on the left of the Customer Statement(s) to print and/or email.
7. Select **OK** to initiate the background process for generating Customer Statements.

On the **Customer Statements** Screen:

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

NOTE	You will be able to email the Customer Statement through Workday if **Email** is listed in the **Delivery Type** column of the Customer Statement table. If **Email** is not listed and you want to email the Customer Statement through Workday, you will have to go back to the Customer and update the Document Delivery settings.

To email a Customer Statement to the Customer:
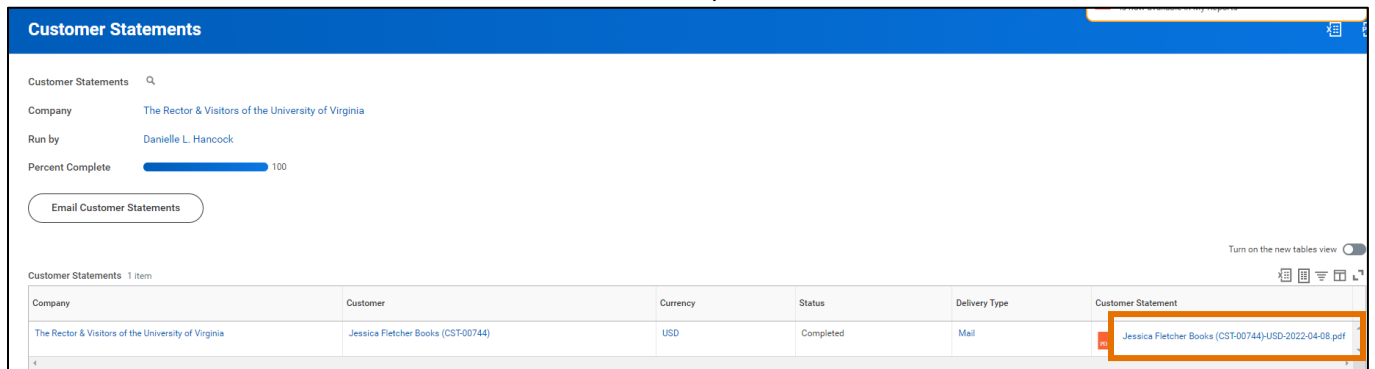
9. Select the **Email Customer Invoice** button to email the customer invoice.
10. Select the checkbox for the Customer Statements you want to email.
11. Select **OK** to confirm.

NOTE	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 Statement:

12. Select the link in the **Customer Statement** column to open the Customer Statement PDF.

13. Select the print icon to print or the download icon to download a copy of the Customer Statement to your computer.

You have successfully completed this task.