



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Print / Email Customer Invoices

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■ Purpose

This guide provides step-by-step instructions for printing and emailing customer invoices in Workday. This feature allows you to generate PDF copies for your records and email invoices directly to customers to ensure faster delivery and payment.

■ Prerequisites

To effectively *Print or Email Customer Invoices*, ensure the following:

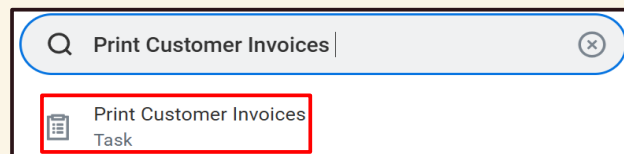
- You have the appropriate Workday Security role(s) (e.g. Customer Billing Specialist)
- Create customer invoices
- At the tenant, Allow Attachments within Emails
- Maintain Document Delivery Types and Document Delivery Options
- At the customer, ensure that a primary mailing and Email *address* are configured
- Configure the *Customer Invoice Email Event* business process and security policy (e.g. Custom Business Process Notification)

■ Print / Email Customer Invoices

➤ Search for *Print Customer Invoice* and select the related task.

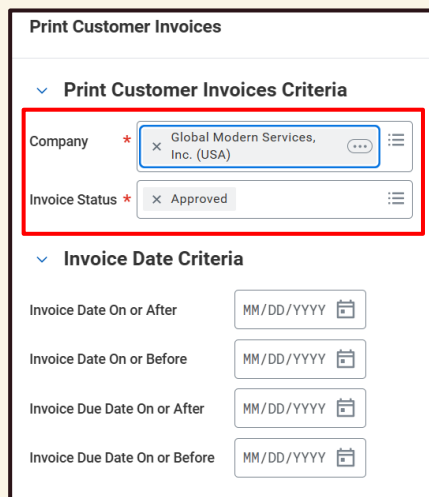
➤ Populate the **required** fields including *Company* and *Invoice Status*.

Optional: Utilize additional filters for *Invoice Date Criteria*, *Customer Selection Criteria*, and *Other Criteria* to filter customer invoice results.



Search bar: Print Customer Invoices

Result: Print Customer Invoices Task



Print Customer Invoices

▼ **Print Customer Invoices Criteria**

Company *

Invoice Status *

▼ **Invoice Date Criteria**

Invoice Date On or After

Invoice Date On or Before

Invoice Due Date On or After

Invoice Due Date On or Before



- Select the customer invoices you wish to print and click *OK*.

Customer Invoices
1443 items
1 selected

☐	Company	Customer Invoice Document
☒	Global Modern Services, Inc. (USA)	Customer Invoice: 13322
☐	Global Modern Services, Inc. (USA)	Customer Invoice: 13324
☐	Global Modern Services, Inc. (USA)	Customer Invoice: 13087
☐	Global Modern Services, Inc. (USA)	Customer Invoice: 13323

- Click the *Refresh* until the *Percent Complete* equals 100.

Customer Invoices


Company
Global Modern Services, Inc. (USA)

Run by
Teresa Serrano

Percent Complete

0



- Click on the Customer Invoice PDF shown in the results. Review the generated invoice presentation for formatting accuracy and completeness.

Individual Printed Customer Invoices 1 item

Company	Customer	Customer Invoice Document	Invoice Status	Print Run Type	Print Status	Delivery Type	Customer Invoice PDF
Global Modern Services, Inc. (USA)	O'Hare Technologies	Customer Invoice: 13322	Approved	Final	Completed		 O'Hare Technologies 13322 2022-07-01.pdf

INVOICE

Date	Invoice Number
07/01/2022	13322

Payment Terms	Due Date
Net 30	07/31/2022

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Bill To		Remit To	
O'Hare Technologies 1 Federal St. Boston, MA 02110 United States of America		Global Modern Services, Inc. (USA) 3630 The Embarcadero San Francisco, CA 94111 United States of America +1 415-625-2700	

Purchase Order Number				Customer ID
				C-0025
Quantity	Sales Item	Item Description	Price Each	Amount
22.4		Project Time	144.02	3,225.99
23.9		Project Time	187.89	6,312.10
3.2		Project Time	146.82	475.25
6.4		Project Time	145.84	933.38
0.8		Project Time	173.44	138.75
3.2		Project Time	144.43	462.16
90		Project Time	190.00	15,200.00
4.8		Project Time	187.89	901.73
19.2		Project Time	187.89	3,606.91
139		Project Time	190.00	26,540.00
49		Project Time	187.89	9,017.28
19.2		Project Time	146.84	2,848.22
0.8		Project Time	173.44	138.75
14.4		Project Time	187.89	2,706.18
4.8		Project Time	187.89	901.73
35.2		Project Time	144.84	5,098.38
88.4		Project Time	187.89	16,231.10



➤ Email invoices by clicking *Email Customer Invoice*.

Customer Invoices

Company

Global Modern Services, Inc. (USA)

Run by

Teresa Serrano

Percent Complete

100

Email Customer Invoice

➤ To ensure that the invoice will be emailed, you should have a *Delivery Type of Email*. Click *OK*.

Individual Printed Customer Invoices 1 item					
Document	Invoice Status	Print Run Type	Print Status	Delivery Type	Customer Invoice PDF
13322	Approved	Final	Completed	Email	 O'Hare Technologies 13322 2022-07-01.pdf

■ Common Errors and Resolutions

Issue	Description	Resolution
Email Not Received	The Document Delivery Option on the Customer Profile is set to 'Paper' or 'None'.	Update the Customer's Delivery Option to 'Email'.
Missing PDF Document	The Customer Invoice Email Event business process does not include the attachment step.	Configure the custom notification in the business process to include the Invoice PDF.
'Draft' Status	The Customer Invoice has not been finalized or approved.	Ensure invoices are in 'Approved' or 'Posted' status to trigger the automated email event.
Missing Email Address	The customer configuration does not have a Primary Email Address with the 'Billing' or 'Work' usage type.	Add a valid Primary Email to the customer's contact information.
Incorrect Invoice Layout	The system is using a default layout instead of the company's branded template.	Verify the correct Customer Invoice Layout is assigned to the Company or Company Hierarchy.

■ Best Practices

- Enable email notifications and attachments in the **tenant** settings.
- Set up primary mailing and email addresses in the **Customer Profile**.
- Configure ***Document Delivery*** to 'Email'.
- Grant necessary permissions to users and approvers to trigger automated service steps.
- Regularly **test** manual and automated processes to ensure successful delivery.
- Create **custom print layouts** to include company branding, logos, and specific messaging (Optional).



Thank You

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