

## Finalize and Print an Invoice

There are various situations where invoices do not need to be printed and mailed to the customer. Invoices in Ready (RDY) status can be finalized and printed in order to prevent them from being mailed. This can be useful for foreign customers, credit invoices, or customers that prefer to receive invoices via email.

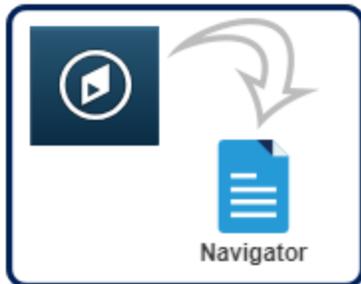
Once finalized, a PDF copy of the invoice will be emailed to the user. The invoice will not be mailed so it is the responsibility of the user to provide a copy to the customer if needed. **Note that no further changes can be made to finalized invoices.** An adjustment invoice will need to be processed if changes are necessary.

### Navigation Options



#### Navigation Collection Tile

Billing | Create Billing Invoices | Standard Billing



#### NavBar:Navigator

Billing | Maintain Bills | Standard Billing

1. Navigate to the **Find an Existing Value** tab on the **Bill Entry** search page.

**Bill Entry**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | **Add a New Value**

**Search Criteria**

Business Unit =

Invoice begins with   **a**

Bill Status =

Customer begins with

Contract begins with

Bills in Business Unit =

Template Invoice Flag =

Case Sensitive

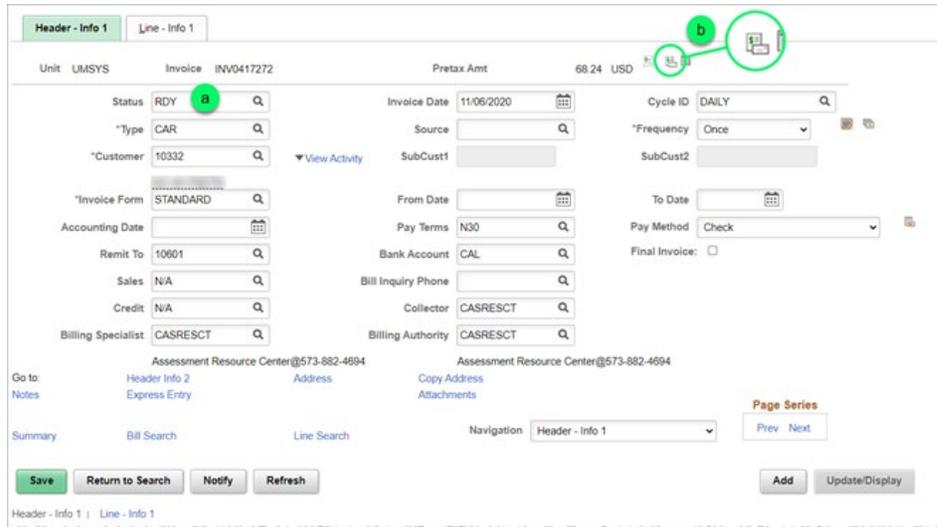
**Search** **Clear** [Basic Search](#)

**b**

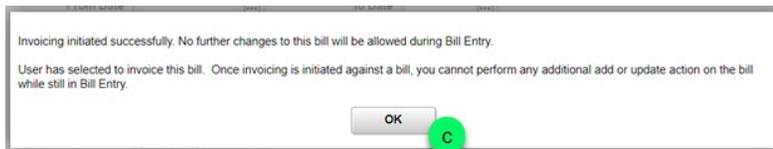
[Find an Existing Value](#) | [Add a New Value](#)

- a. Enter or search for an invoice number in the **Invoice** field.
- b. Click the **Search** button.

2. The **Header - Info 1** page for the selected invoice opens.



- a. If needed, change the **Status** to RDY (Ready) and press Save.
- b. Click the **Invoice** icon (located between the Pro Forma and Calculate Taxes buttons near the top of the page).
- c. A dialog window appears, confirming that the Finalize and Print process has been submitted. Click the **OK** button.



3. You will receive an email with a PDF of the invoice attached momentarily. The invoice will not be mailed.

END OF PROCEDURE.