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 S	earch. Leave fields blank	for a list of all values.			
Find an Existing Value Add a New Value						
▼ Search Criteria						
Business Unit	= 🗸	UMSYS	Q			
Invoice	begins with \checkmark	a	Q			
Bill Status	= ~		~			
Customer	begins with \mathbf{v}		Q			
Contract	begins with \mathbf{v}					
Bills in Business Unit	= 🗸		Q			
Template Invoice Flag	= ~		~			
□ Case Sensitive						
Search Clear	Basic Search	Save Search Criteria				
Find an Existing Value	Add a New Value	e				

- 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.

Unit UMSYS	Invoice I	NV0417272	Pret	ax Amt	68.2	4 USD	1.1			
Status	RDY a	Q	Invoice Date	11/06/2020	(iii)	Cycle ID	DAILY	0	2	
*Туре	CAR	۹	Source		Q	"Frequency	Once	¥		
*Customer	10332	۹	▼View Activity SubCust1			SubCust2				
"Invoice Form	STANDARD	Q	From Date		ŝ	To Date		1		
Accounting Date			Pay Terms	N30	Q	Pay Method	Check		~	
Remit To	10601	۹	Bank Account	CAL	Q	Final Invoice				
Sales	N/A	٩	Bill Inquiry Phone		Q,					
Credit	N/A	Q	Collector	CASRESCT	Q					
Billing Specialist	CASRESCT	٩	Billing Authority	CASRESCT	۹					
	Assessment R	lesource Cent	er@573-882-4694	Assessment Re	esource Center	@573-882-4694				
oto: Hea ites Expr	der Info 2 ress Entry		Address Copy Address Attachm	ddress nents				Page Series		
immary Bill S	Search		Line Search	Navigation	Header - Info	1	•	Prev Next		
Save Return to Se	arch No	tify Rel	Inash					Add	Update/Dis	olav

- 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.

1 TOTIL Date	[A.A.]	IV Date	[888]	
Invoicing initiated successfully. N	lo further changes to this	bill will be allowed during	g Bill Entry.	
User has selected to invoice this while still in Bill Entry.	bill. Once invoicing is in	itiated against a bill, you	cannot perform any additi	onal add or update action on the bill
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3. You will receive an email with a PDF of the invoice attached momentarily. The invoice will not be mailed.

END OF PROCEDURE.