Setting up Invoice Dispatch Run Controls

Objective

This document aims to run through the steps in updating the Run Control IDs for Finalise & Print Invoices process, as well as the Reprint Invoices process, especially around the new “email invoice” feature introduced since the 2016 Financials System Upgrade.

Background

Since the 2016 Financials System Upgrade, there are 2 dispatch methods for invoices: (1) Print, (2) Email.

If “Print Copy” is selected on the Invoice, it means the invoice will be generated in PDF format and saved to your Report Manager. You will then be able to mail out the invoice manually.

Alternatively if “Email Invoice as an Attachment” is selected, the invoice will be emailed out to the customer directly via ES Financials and the invoice will not appear on your Report Manager for review.

The steps prescribed in this document ensures that the Finalise & Print Process and Invoice Reprint process will generate and dispatch the invoice correctly.

Finalise & Print Invoices

This enables user to print an approved invoice for immediate dispatch to the customer.

You are not required to complete this, as the nightly batch process would dispatch approved invoice automatically overnight.

Should you wish to dispatch the invoice immediately, please follow the steps below:
Step 1

**Navigation:** Billing – Generate Invoices – Non-Consolidated – Finalize and Print Invoices  
Go to the “Add a New Value” tab.  
Enter ANU_BI_INV_PRINT in the Run Control ID field

<table>
<thead>
<tr>
<th>Run Control ID</th>
<th>ANU_BI_INV_PRINT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Result**

The Finalise and Print page displays
### Step 2

Enter or select the following

**Range Selection: Invoice ID**

**From Invoice:** An approved invoice to be dispatched to customer

![Selection Parameters](image)

Click on the “Note” icon next to Run in order to display the selected invoice for your run Control.

![Run and Note icons](image)

### Result

The Bills to be Processed page displays, listing out all the invoice selected for processing.

![Bills To Be Processed](image)

If the page is blank, it means no invoice selected for the Invoice entered. You may need to go back and review the invoice to see if approved.
| Step 3 | **Click on Print Options tab.**  
**Select “Email Only” for Email Invoice Options field** |
|---|---|
| Result | **By selecting “Email Only” it makes sure that those invoices with customer contact email will be emailed to customers, and those invoice without email will be printed to your Report Manager.**  
**This is the only option to be selected to ensure no duplication of invoice is generated.** |
| Step 4 | **Go back to Finalize and Print tab and click on Run to bring up the Process Scheduler Request page; then click on OK** |
| Result | **Finalise & Print process submitted successfully.**  
**If the invoice you selected is email, then you won’t receive an output. If your invoice is Print Copy, then please go to Report Manager to retrieve the invoice.** |
**Reprint Invoice**

The Reprint Invoice process enables users to acquire a copy of the Invoices after the Finalise&Print process was successfully completed.

| Step 1 | Navigation: Billing – Generate Invoices – Non-Consolidated – Reprint Invoices  
Go to the “Add a New Value” tab.  
Enter ANU_BI_INV_REPRINT in the Run Control ID field |
|---|---|
|  | Click on ![Add button](image)

**Result**

The Reprint Invoice page displays

![Reprint Invoice page](image)
Step 2

Enter or select the following

Range Selection: Invoice ID
From Invoice: An invoiced invoice to be reprinted

Click on the “Note” icon next to Run in order to display the selected invoice for your run Control.

Result

The Bills to be Processed page displays, listing out all the invoice selected for processing.

If the page is blank, it means no invoice selected for the Invoice entered. You may need to go back and review the invoice to see if approved.
Step 3

Click on **Print Options** tab.

Select “Print Only” for Email Invoice Options field

<table>
<thead>
<tr>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image-url" alt="Image" /></td>
</tr>
</tbody>
</table>

Check ☑️ for the following fields:

1. Print Only Primary Copy
2. User Current Effective Address: this will ensure the latest customer information be picked up in the reprint invoice
3. Customer Label: Enter the word “REPRINT” to identify it’s a reprint copy of the invoice

By selecting “Print Only” for Email Invoice Option, it makes sure all invoice will be generated as PDF to your Report Manager, regardless whether it was originally emailed or printed to customer.

Alternatively if you select “Email Only” an email copy of the invoice will be sent to the customer. (customer to receive duplicate invoices)
Step 4

Go back to the Reprint Invoices tab and click on Run to bring up the Process Scheduler Request page; then click on OK.

Result

Finalise & Print process submitted successfully.

Once the process is complete, navigate to Report Manager to retrieve the reprint invoice.

If the invoice you selected is email, then you won’t receive an output.