SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 27, 2025

Emailing Invoices

For efficiency or by request, you may need to have invoices emailed directly from SWIFT. This guide covers how to choose email as the delivery method for an invoice. Use the Single Action Invoice Process (SAIP) to generate the invoice and automatically email the customer contact.

Before you can have SWIFT automatically email an invoice, you must have a customer contact set up with an email address in their contact details. An invoice date cannot precede the contact Effective Date. For detailed instructions on setting up a customer contact refer to the Create and Update Customer Contacts Quick Reference Guide.

For detailed instructions about creating bills and generating invoices, refer to the Enter a Bill with Standard Bill Entry Quick Reference Guide.

Step 1. Verify the Customer Contact's Email

1. Navigate to the **Contact Information** page.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact, left menu, Contact Information.
WorkCenter	Accounting, Billing, Billing WorkCenter, left menu, Links section, Customer & Contact Information, Contact Info.

2. The Maintain Contacts page displays for Contact Information. View the contact information and verify:

    a. There is a valid email in the **Email Address** field.
    b. Either "Email Only" or "Email & Print" display in the ***Preferred Communication** field. One of these options is required. If not, the invoice generates, and the email fails even if there is a valid email in the **Email Address** field.
    c. Note the effective date of the contact. You cannot invoice a contact prior to the contact's **Effective Date**. Consider backdating the Effective Date to July 1 of the current fiscal year.

Note: You can also access the Contact Information feature through the Accounts Receivable module. The navigation path is Accounting, Accounts Receivable, Customer Interactions, Contact Information.

Step 2. Update the Address Information on the Bill

1. Navigate to the **Standard Billing Bill Entry** page.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Maintain and Process Bills, left menu, Standard Billing.
WorkCenter	Accounting, Billing, Billing WorkCenter, left menu, Links section, Maintain Invoices, Standard Billing.

3. Search for an existing bill or enter a new one. "New" should display in the **Status** field.
4. Select the **Address** hyperlink in the **Go to:** section.

5. The Address Info page displays. Verify or select the correct contact in the **Attention To** field. Use the **Lookup** icon if necessary.
6. If there is more than one option, select the appropriate one.

7. Ensure there is a valid email in the **Email Address** field.
8. Select the drop-down menu in the ***Invoice Media** field. Select the "Email Invoice as Attachment" option.

9. Select the **Save** button.
10. Select either the **Header – Info 1** tab or the **Line – Info 1** tab.
11. The **Address Info** page disappears. Enter any other bill information as you normally would. Refer to the Enter a Bill with Standard Bill Entry Quick Reference Guide for detailed instructions about entering a bill.
12. After entering all bill information and ensuring it is correct, select the **Lookup** icon in the **Status** field.
13. The Look Up Status window displays. Select the "RDY - Ready to Invoice" option.

14. Select the **Save** button.

Step 3. Run SAIP

The next step is to run the bill through SAIP. For detailed instructions about running SAIP, refer to the Single Action Invoice Quick Reference Guide.

1. From the left menu, expand the **Generate Invoices** folder.
2. Select **Single Action Invoice**.
3. Enter a **Run Control ID** or create a new Run Control ID.
4. From the Single Action Invoice page, enter a Range Selection to include the Ready bill. For example, enter the Invoice ID in the **From Invoice** field and allow it to populate the **To Invoice** field.
5. Select the **Bills To Be Processed** icon. It is a tiny yellow icon located to the right of the Run button.

6. The Bills to Be Processed window displays. Ensure your invoice is listed in the **Bills To Be Processed** list.

7. Ensure that "Email Invoice as Attachment" is showing in the **Bill To Media** column. If you see "Print," stop here. Go back to your bill and check the address information is as described above in **Step 2**.

8. Select the **Return** button.

Bills To Be Processed						

BI Unit	**Invoice**	**Status**	**Customer**	**Inv Layout**	**Layout Type**	**Bill To Media**
G1001	TRN07EMAIL-BI01	RDY	0000000001	XMLPUB	X	Email Invoice as Attachment

Return

9. Select the **Run** button to launch SAIP job. For detailed instructions about running SAIP, refer to the Single Action Invoice Quick Reference Guide.

Step 4. Verify Email Successfully Sent in the Process Monitor.

1. When you see "Success" in the Run Status and "Posted" in the Distribution Status, SAIP is complete.
2. Select the **BIJOB03K** hyperlink in the Process Name column.

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
☐	45549565		Default	PSJob	BIJOB03K	TRN07	11/08/2024 4:57:00PM CST	Success	Posted	Details	∨ Actions
☐	45549562		BIWC36982	PSJob	BIXPJ11	Job Details	11/08/2024 2:42:25PM CST	Success	Posted	Details	∨ Actions

3. Expand the **# - BIXPJ00** link.
4. Select the **# - BI_XMLPBURST** link.

Process Detail

Print | Help
Refresh

Process Name BIJOB03K
Main Job Instance 45549565

Left | Right

45549565 - BIJOB03K Success
   45549566 - BIIVC000 Success
   45549567 - BI_IVCEXT Success
   45549568 - BIXPJ00 Success
      45549575 - BI_PRNXPN01 Success
      45549576 - BI_XMLPBURST Success
   45549569 - BIGURGNV Success
   45549570 - BIPRELD Success
   45549571 - BILDGL01 Success
   45549572 - FS_BP Success
   45549573 - BILDAR01 Success
   45549574 - BIGNAP01 Success

5. The Process Detail window displays, select the **Message Log** link.

6. Verify the number of **Emails sent** and that no **Emails failed**.

7. The customer receives an invoice like the one displayed below. There is a PDF of the invoice attached.