

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.

Contact Information

Maintain Contacts

SetID G1001 Contact ID 182

Contact Information [Search] | [Navigation] | 1 of 1 | View All

*Effective Date 07/01/2024 [Calendar]

*Name Accounts Payable

Title

Email Address Swift.project@state.mn.us

Salutation Code [Search]

Salutation

*Preferred Communication Email & Print

Language Code English

*Status Active

*Contact Flag External Contact

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.

Header - Info 1 Line - Info 1

Unit G1001 Invoice TRN07EMAIL-BI01 Pretax Amt 0.00 USD

Status NEW [Search]

*Type MSC [Search]

*Customer 0000000001 [Search] View Activity

Hennepin County Research, Planning & Dev

*Invoice Form XMLPUB [Search]

Accounting Date [Calendar]

Remit To G1001 [Search]

Sales DEFAULT [Search]

Credit DEFAULT [Search]

Billing Specialist BISPEC [Search]

Invoice Date [Calendar]

Source ONLINE [Search]

SubCust1

From Date [Calendar]

Pay Terms NET30 [Search]

Bank Account 0001 [Search]

Bill Inquiry Phone [Search]

Collector DEFAULT [Search]

Billing Authority BISUP [Search]

Cycle ID DAILY [Search]

*Frequency Once

SubCust2

To Date [Calendar]

Pay Method Check

Go to: [Search]

Notes

Header Info 2

Express Entry

[Address](#)

Copy Address

Attachments

Go To Address

Navigation Header - Info 1

Page Series

Prev Next

Save Notify Refresh Add Update/Display

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

Look Up Attention To

SetID: G1001
 Customer ID: 000000001
 Contact Sequence Number: [=]
 Contact ID: [begins with] [Search]
 Name 1: [begins with]

[Search] [Clear] [Cancel] Basic Lookup

Search Results

Contact Sequence Number	Contact ID	Name 1	Title	Address Sequence Number	Effective Date
1	182	Accounts Payable	(blank)	1	07/01/2024

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

Header - Info 1 **Address Info** Line - Info 1

Unit: G1001 Bill To: 000000001 Pretax Amt: [blank]
 Invoice: TRN07EMAIL-BI01 Hennepin County Research, Planning & Dev

Attention To: [1] [Search]
 *Location: [1] [Search]
 Language Code: ENG
 Email Address: Swift.project@state.mn.us

Contact Name: Accounts Payable
 Number of Copies: 1

*Invoice Media: [Print Copy] [v]
 EDI
 Electronic Invoice File
 Email Invoice as Attachment
 Email Notification
 Federal Highway File
 Print Copy

Country: USA United States
 * Address 1: A-2308 Government Center
 300 South 6th Street MC 238
 Address 2: [blank]

- Select the **Save** button.
- Select either the **Header – Info 1** tab or the **Line – Info 1** tab.
- 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.
- After entering all bill information and ensuring it is correct, select the **Lookup** icon in the **Status** field.
- 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.

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

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
<input type="checkbox"/>	45549565		Default	PSJob	BIJOB03K	TRN07	11/08/2024 4:57:00PM CST	Success	Posted	Details	Actions
<input type="checkbox"/>	45549562		B1WC36982	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 Name BIJOB03K

Main Job Instance 45549565

Left | Right

- 45549565 - BIJOB03K Success
- 45549566 - B1VC000 Success
- 45549567 - BI_IVCEXT Success
- 45549568 - BIXPJ00 Success
- 45549575 - BI_PRNXPNO1 Success
- 45549576 - BI_XMLPBURST Success
- 45549569 - BIOURGNV Success
- 45549570 - B1PRELD Success
- 45549571 - B1LDGL01 Success
- 45549572 - FS_BP Success
- 45549573 - B1LDAR01 Success
- 45549574 - B1GNAP01 Success

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

Process Detail

Run

Run Control ID: Default

Location: Server

Server: PSUNX

Recurrence:

Update Process

Hold Request

Queue Request

Cancel Request

Delete Request

Re-send Content

Restart Request

Date/Time

Request Created On: 11/08/2024 4:57:07PM CST

Run Anytime After: 11/08/2024 4:57:00PM CST

Began Process At: 11/08/2024 4:57:26PM CST

Ended Process At: 11/08/2024 4:57:28PM CST

Actions

[Parameters](#)

[Message Log](#)

[Batch Timings](#)

[View Log/Trace](#)

[Transfer](#)

[View Locks](#)

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

Message Log

Instance: 45549576 Type: Application Engine
 Name: BI_XMLPBURST Description: Invoice Bursting Program

1-9 of 9
View All

Severity	Log Time	Message Text	Explain
	4:57:26PM	Calling BI_PRNXPN01 program in burst mode.	Explain
	4:57:26PM	Invoice generated successfully for language: ENG	Explain
10	4:57:26PM	Total invoices processed: 1	Explain
10	4:57:27PM	Invoice Images attached: 1	Explain
10	4:57:27PM	Invoice Images that failed to attach: 0	Explain
10	4:57:27PM	Emails sent: 1	Explain
10	4:57:27PM	Emails failed: 0	Explain

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

Invoice TRN07EMAIL-BI01 has been generated for your review.

MMB-SWIFT-Notification@state.mn.us
To: Project, SWIFT (ADM)

Fri 11/8/2024 4:57 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

G1001TRN07EMAIL-BI010.pdf
19 KB

Invoice TRN07EMAIL-BI01 has been generated for your review.

Details

A new invoice TRN07EMAIL-BI01 has been generated and is attached for your review and payment.