



Finance Transformer

Order to Cash

Automated Email Issue of Sales Invoices

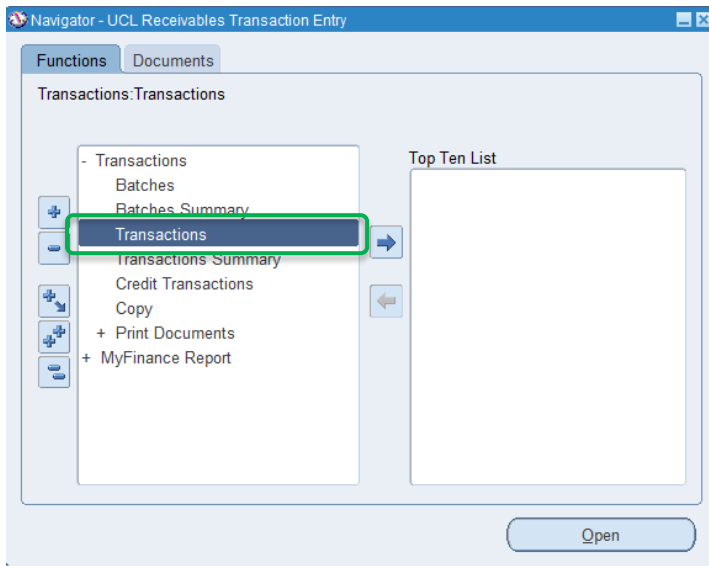
Introduction

From 29 April, new functionality has been introduced to MyFinance that enables a sales invoice to be automatically emailed to the relevant customer following financial approval. Staff with the appropriate Accounts Receivable (AR) system responsibility will be able to attach an email address of their choice on the sales invoice itself, replacing the previous multi-step process required to issue and reducing the administration attached to 20,000 sales invoices per annum.

This guide explains how to use this new functionality. It assumes you have the UCL Receivables Transaction Entry responsibility within MyFinance (if you do not have this responsibility, please liaise with your Departmental Administrator who can request you are given access if appropriate).

Automated Email Issue of Sales Invoices

1. Go to your UCL Receivables Transaction Entry responsibility in MyFinance and select **Transactions**.



2. Enter the details of the sales invoice using the standard process.

The screenshot shows the 'Transactions (UCL - GBP)' form. The 'Transaction' section is filled with the following details:

Source	Sales Invoice- Auto Num(SINV)	Date	31-MAR-2020
Number		GL Date	31-MAR-2020
Class	Invoice	Currency	GBP
Type	Sales Invoice	Document Num	
Reference		Transaction	[]
Legal Entity	University College London	Complete	<input type="checkbox"/>

The 'Balance Due' section is empty.

The 'Main' tab is active, showing the following details:

Ship To	Bill To	Sold To
Name: PUBLIC HEALTH ENGLAND	Name: PUBLIC HEALTH ENGLAND	Name: PUBLIC HEALTH ENGLAND
Number: GEN002915	Number: GEN002915	Number: GEN002915
Location: MANOR FARM ROAD	Location: MANOR FARM ROAD	Location: MANOR FARM ROAD
Address: PHE ACCOUNTS PAYABLE TEAM	Address: PHE ACCOUNTS PAYABLE TEAM	Address: PHE ACCOUNTS PAYABLE TEAM
Address: FINANCIAL ACCOUNTING SERVICES	Address: FINANCIAL ACCOUNTING SERVICES	Address: FINANCIAL ACCOUNTING SERVICES
Address: PHE PORTON DOWN, MANOR FARM F	Address: PHE PORTON DOWN, MANOR FARM F	Address: PHE PORTON DOWN, MANOR FARM F
Contact: Payables, Accounts	Contact: Payables, Accounts	Contact: Payables, Accounts

The 'Payment Details' section is empty.

- Click on the **Transaction Details** box and the **Customer Email Address** is displayed. Enter the customer email address, **this is a mandatory field**. There is no auto-population of email addresses from the customer record, on the basis that points of contact are more likely to differ from transaction to transaction. Email addresses added to this field are sales invoice specific and are not retained in the system against the customer record.

- More than one address can be entered separated by a comma (there is a 150 character limit). For example, the person raising the sales invoice may wish to receive a PDF of the invoice as well as sending to the customer. **Please ensure an external customer email address is included.**

- Please continue to process the sales invoice using the standard process. Following approval an overnight programme will send a PDF of the sales invoice to the customer and all email addresses included. Therefore, **the customer will not receive the invoice until the day after approval.**