Printing a tax invoice

Once you have created and completed your tax invoice in Themis, you will need to print it (the invoice will not print automatically when completed).

There are two methods available to print an invoice. **Note:** you will only be able to print invoices you have created.

Important: if you are printing an invoice related to Research deliverables, you must print via the Request screen (Option 2).

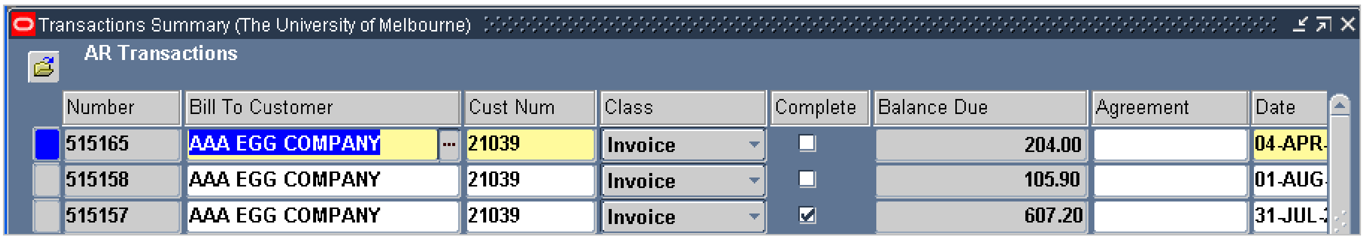
Option one – printing via the invoice transaction screen

1 Navigate to **Receivables > UOM Invoices**.

The Transaction Summary screen will display.

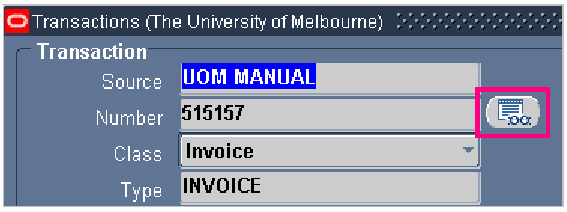
2 Retrieve the invoice you wish to print.

- Press **F11** to enter query mode (or select **View > Query by Example > Enter** from the menu bar)
- Enter your search parameters (e.g.: invoice number, customer, invoice date, etc)
- Press **Ctrl + F11** to retrieve the invoice/s matching your search criteria (or select **View > Query by Example > Run** from the menu bar)



3 Select the appropriate invoice and click on the **Open** button to display the invoice details.

4 Click on the  icon located next to the invoice number.



The invoice will print to your default Themis printer.

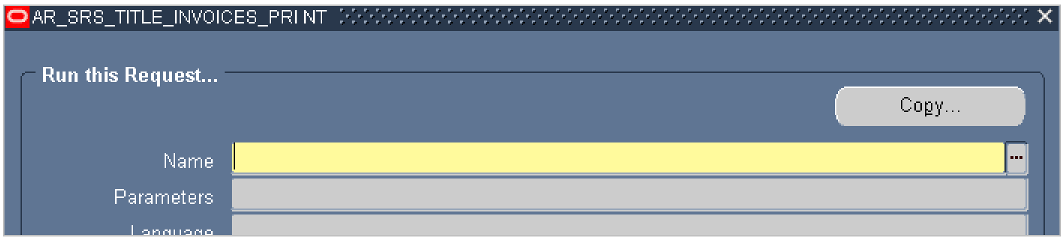
Option two – printing via the requests screen

This method is mainly used for invoices related to research deliverables.

1 Navigate to **Receivables > Print Invoices**.

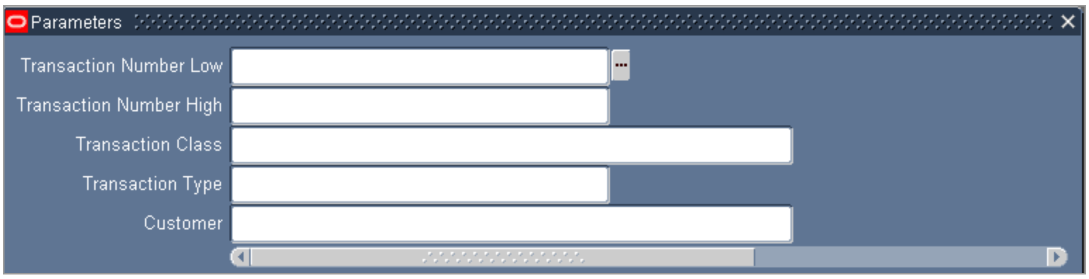
2 Click **OK** to submit a single request.

The accounts receivable request screen will display.



3 In the Name field click on the **List of Values** (LOV) and select the *UOM Print Selected Invoices* report.

The Parameters screen will display.



4 Enter the report parameters.

Field	Action	Comment
Transaction Number Low	Enter the number of the lowest invoice for which you wish to search.	
Transaction Number High	Enter the number of the highest invoice for which you wish to search.	**Note:** if only searching for one invoice this will be the same as the Transaction Number Low field.
Transaction Class	Select *Invoice* from the LOV.	**Note:** if you are printing a credit memo at the request of a customer, select *Credit Memo* from the LOV.
Transaction Type	Select *Invoice* from the LOV.	**Note:** if you are printing a credit memo at the request of a customer, select *Credit Memo* from the LOV.

5 Click the **OK** button to close the Parameters screen.

6 Click on the **Options** button in the Upon Completion section and ensure your print copies are set to *1*.

7 Click the **Submit** button to run the report.

Select **No** when prompted to run another request.

Viewing the status of your request

You may view the status of progress of the request.

1 Select **View > Requests** from the Menu bar.

The Find Requests screen will display.

2 Click the **Find** button to retrieve all your requests.

The Requests screen will display the progress of your request (Phase). Your most recent request will display at the top of the listed reports.
If the Phase field indicates that the report is pending or running, click on the **Refresh Data** button until the report is completed.

3 When the Phase field indicates that the report has completed, click on the **View Output** button.

The AR Invoice report will open in PDF format (in Adobe Acrobat Reader).

4 Check the report to ensure the details are accurate then close the record.

5 Select **Tools > Reprint/Republish** from the Toolbar to print the invoice, if desired.

Note: you may only print an original version of the invoice once. Each subsequent reprint will be printed with a watermark stating that it is a copy. It is advised that you save the original invoice as a PDF document to an appropriate location on your local computer or network or keep a photocopy of the invoice on file in case the customer requests you to send another *original*.

Sending an invoice via email

If you wish to, you may send a tax invoice to the customer via email.

1 Run the invoice print request (as described in **Option 2** above).

2 Click on the **View Output** button to review the PDF version of the document.

3 If you are satisfied that the invoice is correct, select **File > Save As** from the Toolbar.

A Save dialog box will display.

4 Confirm the location where the document will be saved, and enter an appropriate name for the file.

For example, *Uni Invoice 12-Apr-08*

5 Use your standard email application to create a new email message for the recipient and attach the saved PDF file.