

# How to Email an Invoice

**NOTE:** The PMS needs to be setup to send emails prior to attempting to email an invoice. To learn how to configure the PMS to send emails, please see the article [How to Setup your PMS to Send Email Confirmations](#) in the **System Configuration** manual.

There are two ways to email an Invoice:

- Locate the Invoice you wish to email in the **Open Invoices** tab and then go to **Reports > Invoice > Select Custom Invoice**
- Locate the Invoice you wish to email, double click on the Invoice to open the **Details for Invoice** screen, then click the **Print Invoice** button. When asked if you would like to print the default invoice, click **No**

The City Invoice Designer will appear. The default invoice for the City Ledger is **Def.frf**. If this is the invoice you wish to send, click on it so it highlights in blue.

The screenshot shows the 'City Invoice Designer' window. At the top, it displays 'City Account' as 'Addidas Corporation'. Below this, it shows 'Invoice Name' as 'Addidas Corporation', 'Invoice ID' as '1046', and 'Invoice Date' as '26-Feb-2016 02:17 PM' with a 'P/O #' field. A file path is shown: 'C:\Program Files (x86)\RoomKey by RSI\Reports\City\Invoice\'.

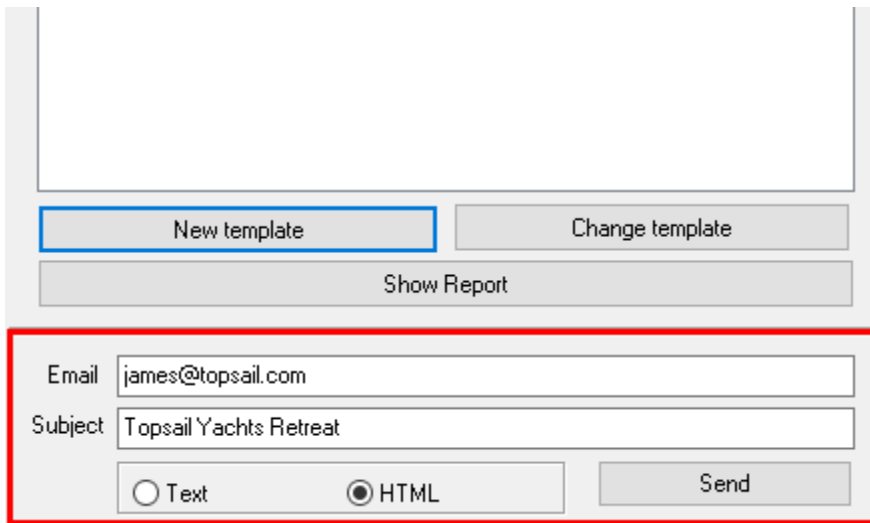
A list of templates is displayed below the path, with 'Custom Invoice #1.frf' and 'Def.frf' visible. 'Def.frf' is highlighted in blue. A red-bordered box with a red background and white text contains a note: 'NOTE: If your property has custom invoices created and you wish to send a custom invoice, ensure that you click on the desired invoice so that it highlighted in blue'.

At the bottom of the window, there are buttons for 'New template', 'Change template', and 'Show Report'. Below these, there are fields for 'Email' and 'Subject' (which is populated with 'Addidas Corporation'). At the very bottom, there are radio buttons for 'Text' and 'HTML' (which is selected), and a 'Send' button.

At the bottom of the City Invoice Designer is the email information:

- **Email** – this field will auto populate with the email address located on the City Ledge Account. It can be edited to send to a different email address if needed.
- **Subject** – this field will auto populate with the Invoice Name. This field may be edited if needed

- **Text vs. HTML** – allows you to select if you wish to send the email in a Text Format or an HTML format (HTML is recommended)
- **Send** – select this button to email the client a copy of their Invoice



The screenshot shows a web interface for sending an email. At the top, there is a large empty rectangular box. Below it are three buttons: 'New template' (highlighted with a blue border), 'Change template', and 'Show Report'. Below these buttons is a red-bordered box containing the email details. Inside this box, there are two text input fields: 'Email' with the value 'james@topsail.com' and 'Subject' with the value 'Topsail Yachts Retreat'. Below the 'Subject' field are two radio buttons: 'Text' (unselected) and 'HTML' (selected). To the right of the radio buttons is a 'Send' button.

A message will appear to confirm the email was successfully sent.

