

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.

City Invoice Designer

City Account Addidas Corporation
Invoice Name Addidas Corporation
Invoice ID 1046
Invoice Date 26-Feb-2016 02:17 PM P/O#

C:\Program Files (x86)\RoomKey! by RSI\Reports\City\Invoice\
Custom Invoice #1.frf
Def.frf

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

New template Change template
Show Report

Email
Subject Addidas Corporation
 Text HTML Send

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 an email composition window. At the top, there are two buttons: 'New template' (highlighted with a blue border) and 'Change template'. Below them is a 'Show Report' button. The main area contains an 'Email' field with the text 'james@topsail.com' and a 'Subject' field with the text 'Topsail Yachts Retreat'. Below the subject field are two radio buttons: 'Text' (unselected) and 'HTML' (selected). To the right of these radio buttons is a 'Send' button. A red rectangular box highlights the 'Email' field, 'Subject' field, radio buttons, and 'Send' button.

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

