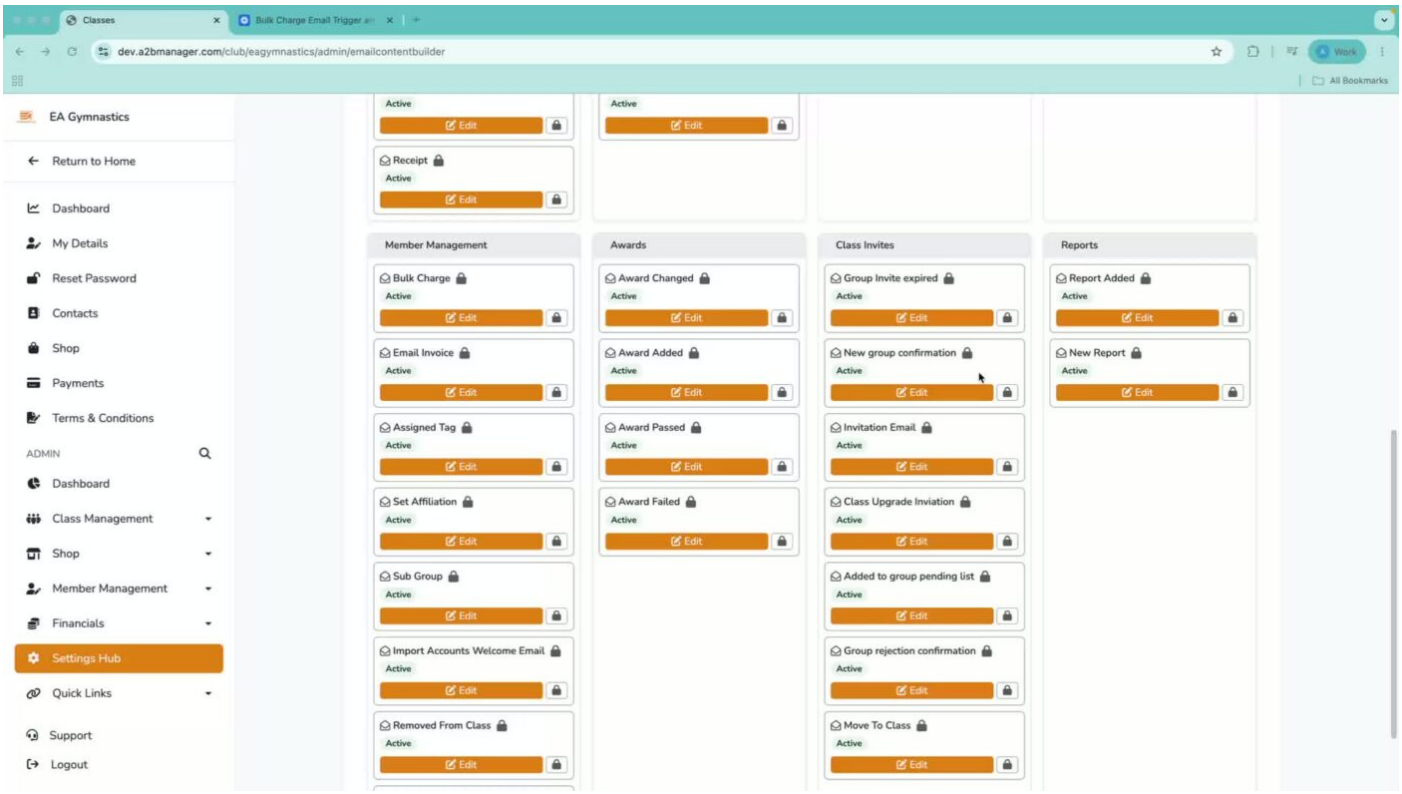
Email Invoice

Emails · https://a2bmanager.com/docs/email-invoice/

Embedded media: https://www.loom.com/embed/5b0bfb2b794e400dbaf71d0153410be0

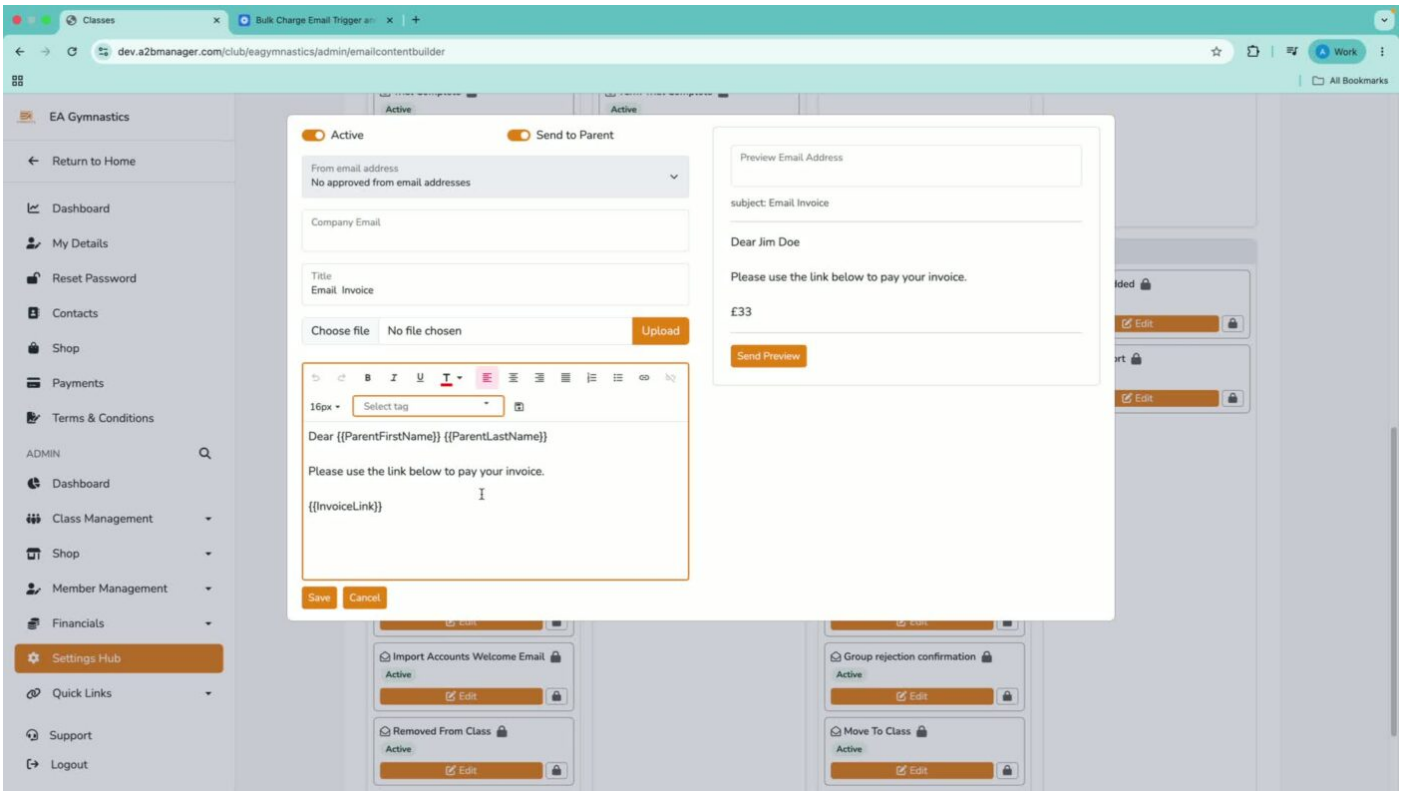
How to Send and Review an Email Invoice

1. Open the email invoice template 0:00



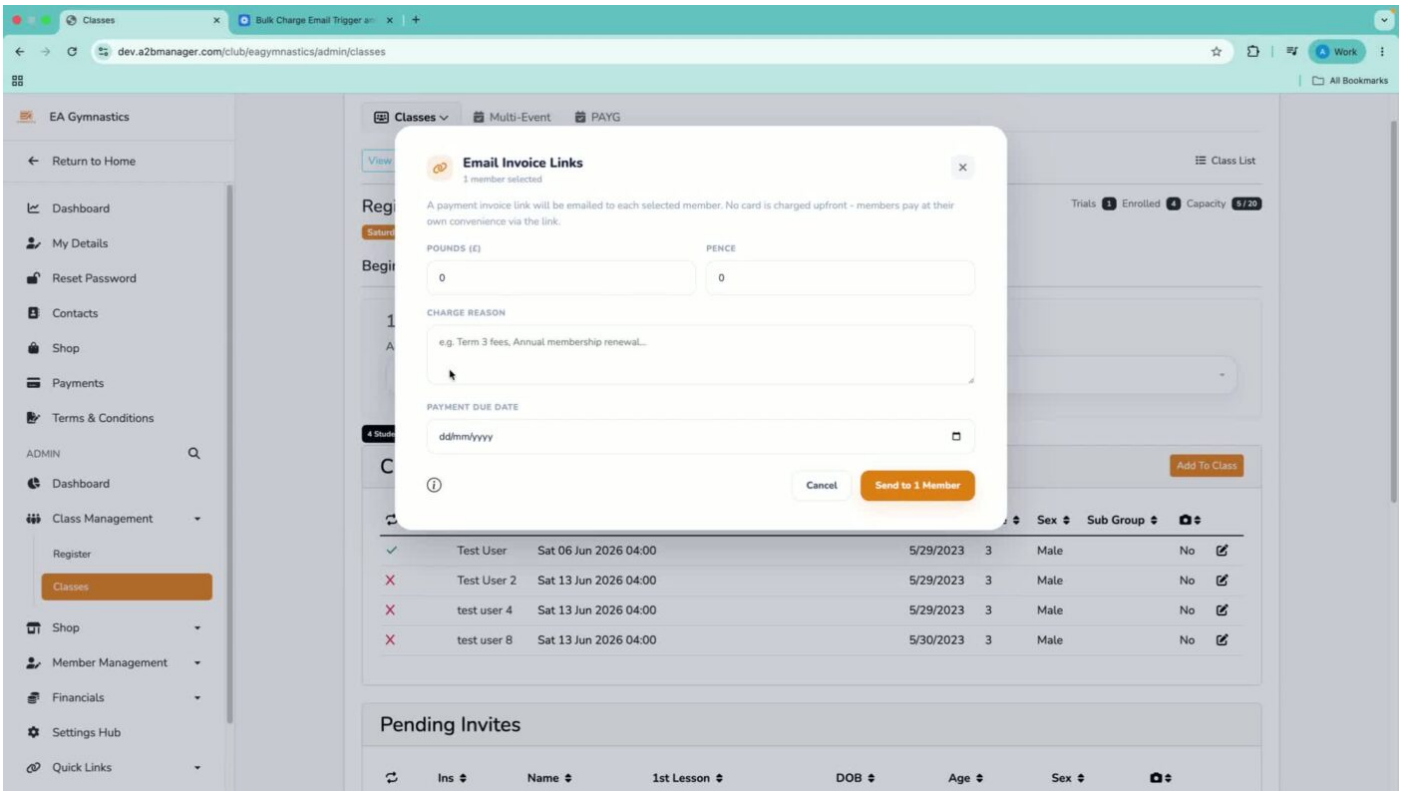
- Go to the **email invoice** template.
- Click **Edit** to view or modify the message.
- The default template includes a simple message such as:
  - **Dear [first name] [last name]**
  - **Use the link below to pay your invoice**
- This template can be expanded with more club-specific information if needed.

2. Understand how the invoice email is triggered 0:22



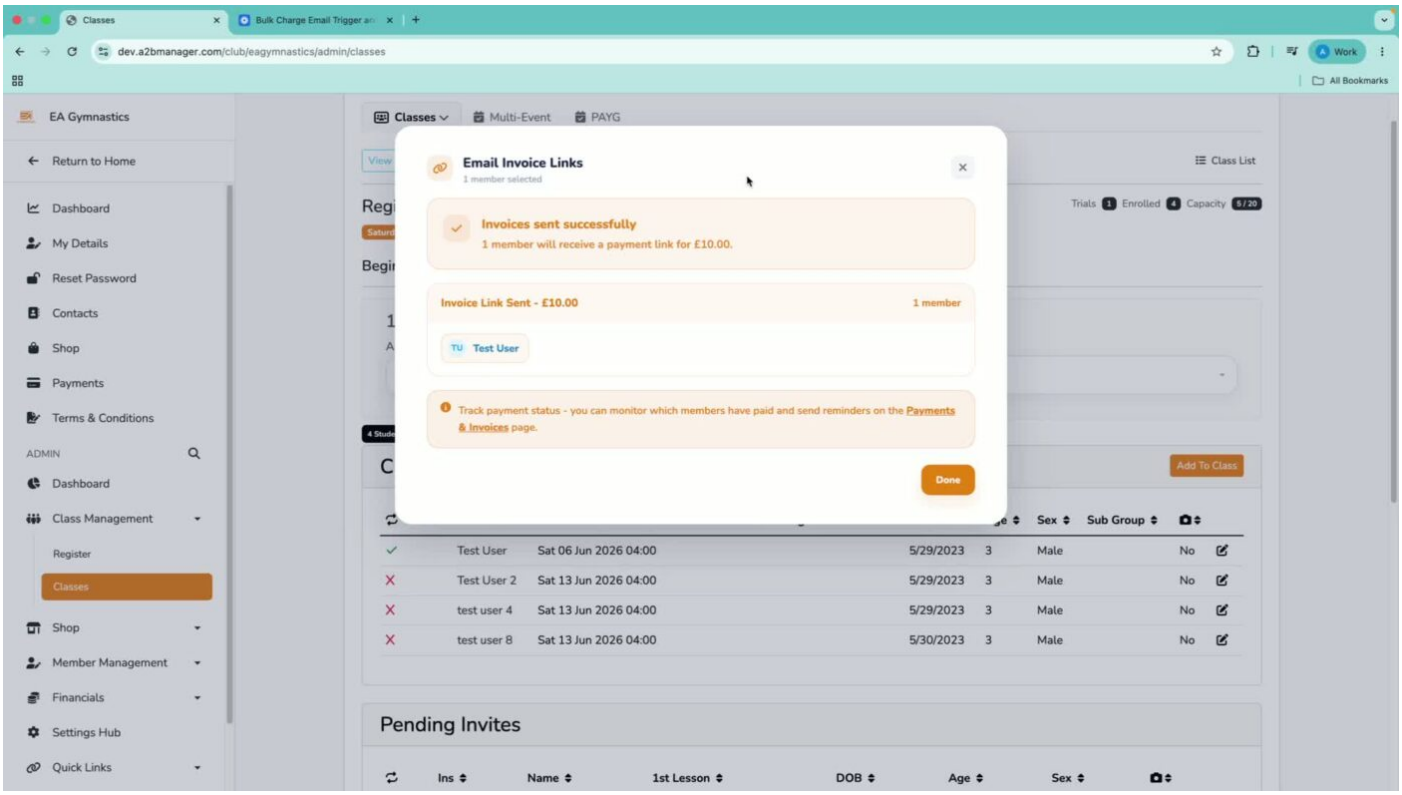
- The invoice email is sent from within the **class** after selecting a user.
- There are **two ways** it can be triggered:
  - **Bulk charge** a group of users who have no money on their account.
  - Send an invoice **manually/straight away** without charging immediately.
- In both cases, the system sends an invoice email to the member.

3. Enter invoice details before sending 0:45



- Fill in the invoice details before sending it out.
- Example fields mentioned in the Loom:
  - **Reason**: e.g. `boots`
  - **Payment due date**
- Once submitted, the invoice is sent to the member.

4. Confirm the member receives the invoice email 1:02



- After sending, check your email account for the message.
- The received email should include a **link to pay the outstanding invoice**.
- This confirms the invoice was successfully generated and delivered.
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