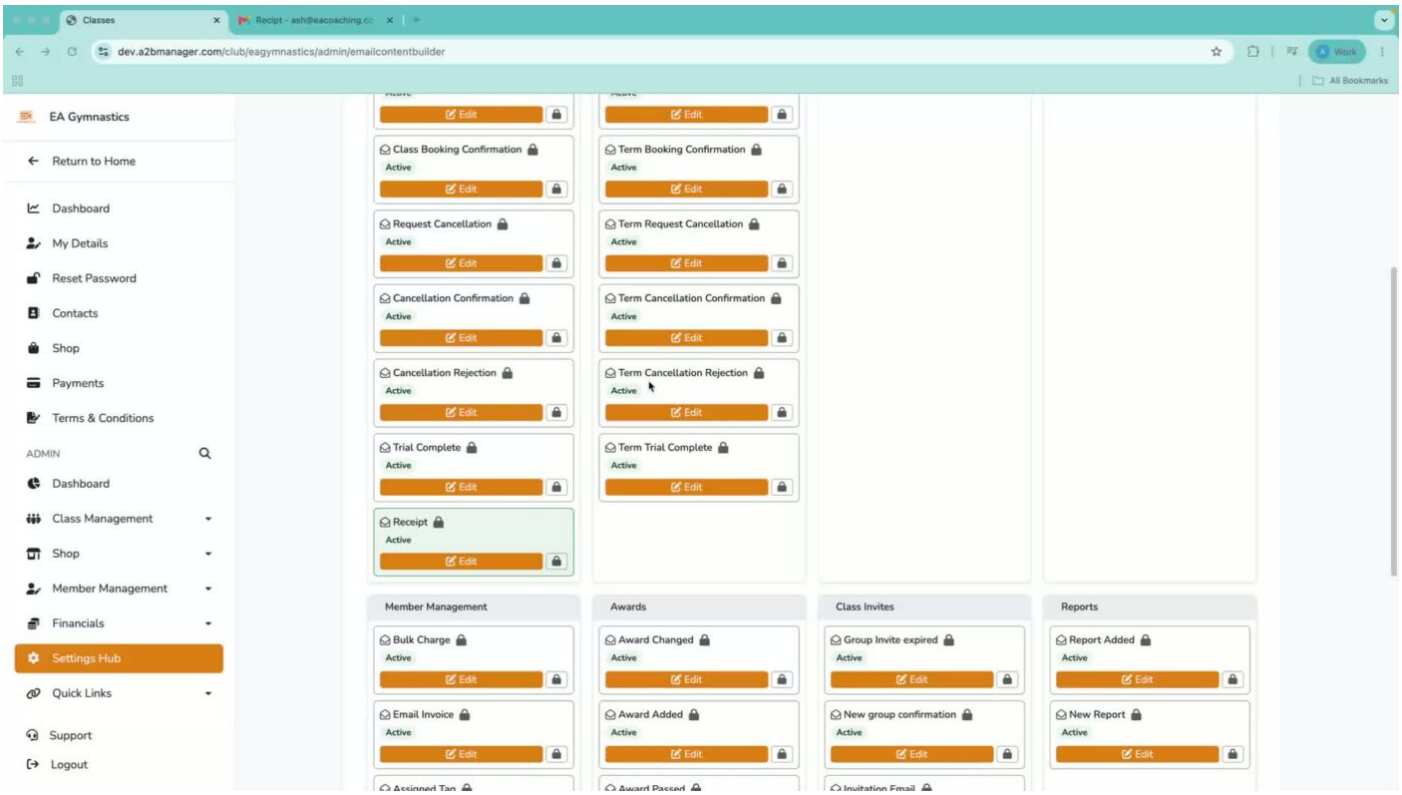
Receipt

Emails · https://a2bmanager.com/docs/receipt/

Embedded media: https://www.loom.com/embed/52c1c7adf18548bfbccb5b9509e5036e

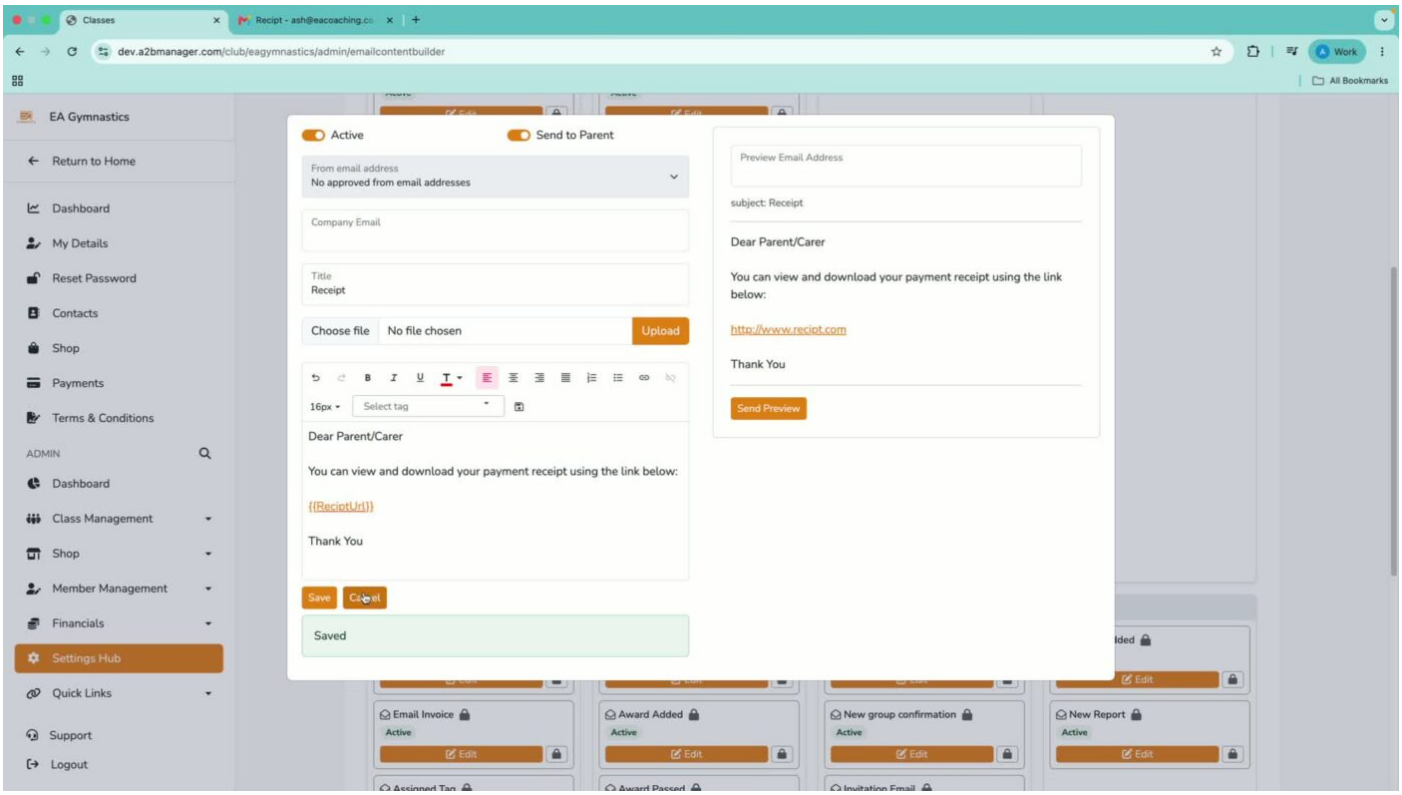
How to Send a Payment Receipt Email

1. Review the receipt email template 0:00



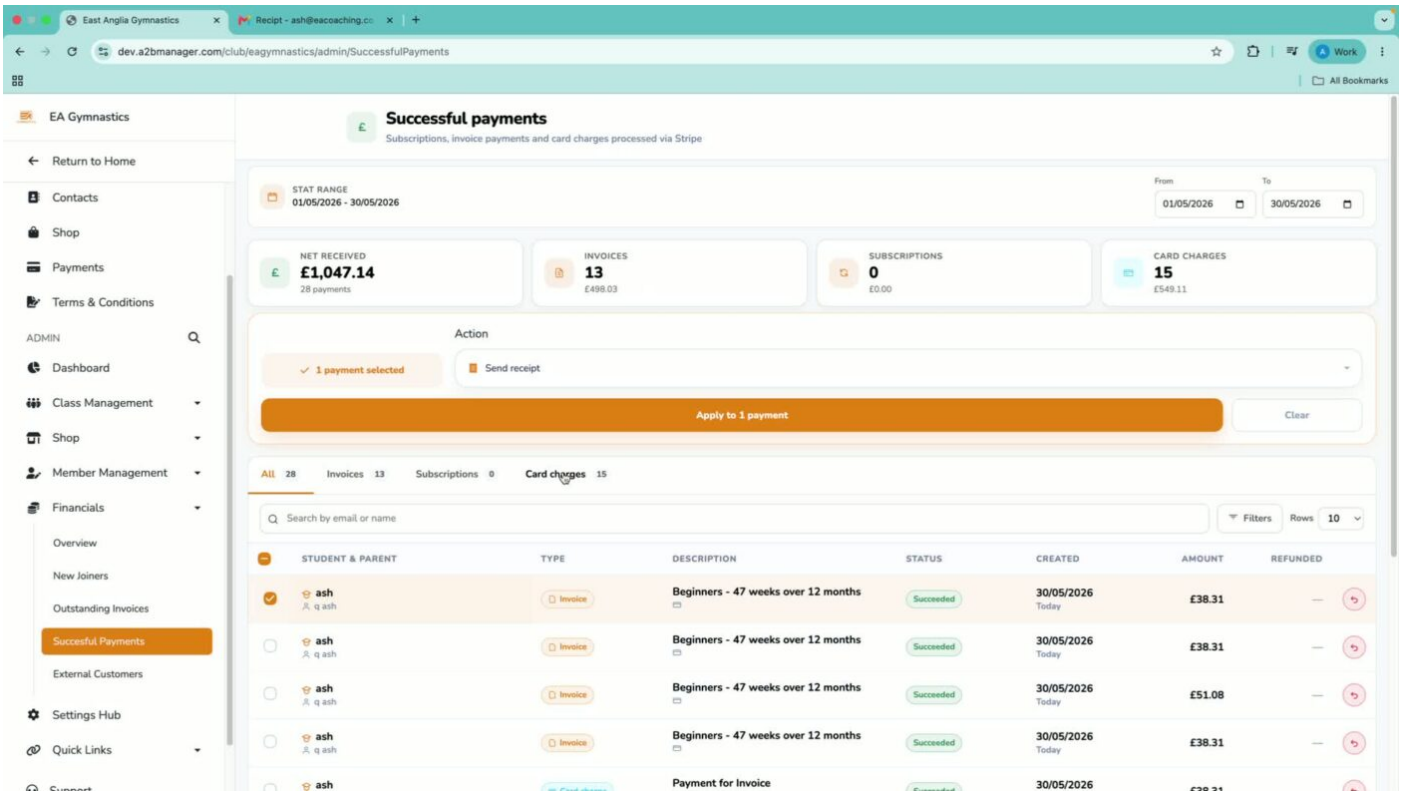
- Open the **receipt email** template and click **Edit**.
- Confirm the email content is simple and includes:
  - A message telling the recipient they can view and download their payment receipt.
  - A link that takes them to their receipt.

2. Trigger the receipt email from Financials 0:17



- Go to the **Financials** section.
- Open **Successful Payments**.
- Select the member whose receipt you want to send.
- Choose **Send the receipt** and apply the action.
- This sends **one receipt** to the selected user.

3. Verify the email and receipt download 0:41



- Check the recipient's inbox to confirm the receipt email was delivered.
- Open the email and click the receipt link.
- The link should allow the user to download:
  - The **invoice**
  - The **receipt**
-