

Email & Print Invoices

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CST

When you create an invoice, you have the option of automatically emailing it to the payer. However, you can also print and email invoices at any time via the Invoice List and the View Invoice page. You can also update payer information and re-send invoices from the Invoices list.


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- [Email & Print Invoices from the View Invoice Page](#)
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Email & Print Invoices from the Invoices List

1. From the menu to the left, click **Accounting**. Feasyay
2. Click **Income**.
3. Enter your Accounting PIN and click **Go**.

Note: If you do not have an Accounting PIN set, you are prompted to set one.


4. Check the box next to the invoice(s) to print or email. To select all invoices, check the box at the top of the table.
5. To email invoices:
 - a. Click . The Review pop-up opens.
 - b. Review the invoice numbers, recipient, and email addresses listed in the pop-up.

Review the following before sending the invoices link. ✕

Invoice #	Send To	Email	Email address
10044	Fresh Carrot	<input checked="" type="checkbox"/>	freshCarrot@yopmail.com
10045	Count Rugen	<input checked="" type="checkbox"/>	countrugen@yopmail.com

Send

Cancel

- c. Clear the **Email** box for any invoices you do not need to include.
 - d. Click **Send**. The invoices are sent and a confirmation message displays.
6. To print invoices:
 - a. Click . Your browser's printing options open.
 - b. Select your printer and adjust your printing settings, as needed.
 - c. Click **Print**.


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Email & Print Invoices from the View Invoice Page

You can also email and print invoices when viewing invoice details.

1. From the menu to the left, click **Accounting**.
2. Click **Income**.
3. Enter your Accounting PIN and click **Go**.

Note: If you do not have an Accounting PIN set, you are prompted to set one.


4. Click the invoice to email or print. The View Invoice page opens.
5. To email the invoice:
 - a. Click . The Review pop-up opens.

Review the following before sending the invoices link. 

Invoice #	Send To	Email	Email address
10044	Fresh Carrot	<input checked="" type="checkbox"/>	freshCarrot@yopmail.com
10045	Count Rugen	<input checked="" type="checkbox"/>	countrugen@yopmail.com

Send

Cancel

- b. Review the invoice number, recipient, and email address listed in the pop-up.
 - c. Click **Send**. The invoice is sent and a confirmation message displays.
6. To print the invoice:
 - a. Click . Your browser's printing options open.
 - b. Select your printer and adjust your printing settings, as needed.
 - c. Click **Print**.

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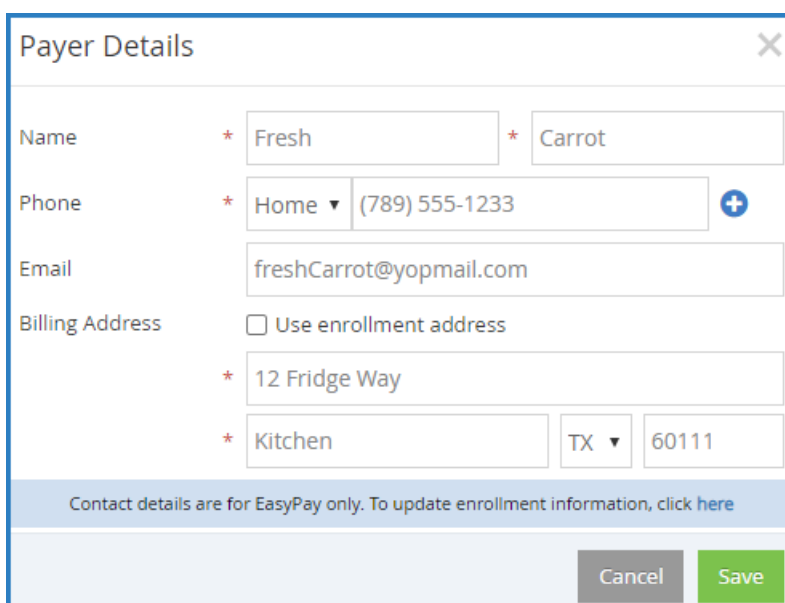
Update Payer Contact Information & Resend Invoices

If a payer advises that they did not receive an invoice, you can quickly update their email address and re-send the invoice email from the Invoices List.

1. From the menu to the left, click **Accounting**.
2. Click **Income**.
3. Enter your Accounting PIN and click **Go**.

Note: If you do not have an Accounting PIN set, you are prompted to set one.

4. Locate the affected invoice or Payer. Use the **Invoice #** and/or **Payer(s)** column to filter.
5. Click the Payer's name in the **Payer(s)** column. The Payer Details pop-up opens.




The screenshot shows a 'Payer Details' pop-up window with a close button (X) in the top right corner. The form contains the following fields:

- Name:** Two text boxes, the first containing 'Fresh' and the second containing 'Carrot'. Both are preceded by a red asterisk (*).
- Phone:** A dropdown menu set to 'Home' with a downward arrow, followed by a text box containing '(789) 555-1233'. A blue plus icon (+) is to the right of the text box.
- Email:** A text box containing 'freshCarrot@yopmail.com'.
- Billing Address:** A checkbox labeled 'Use enrollment address' is unchecked. Below it is a text box containing '12 Fridge Way' with a red asterisk (*).
- City/State/Zip:** A text box containing 'Kitchen' with a red asterisk (*), followed by a dropdown menu set to 'TX' with a downward arrow, and a text box containing '60111'.

At the bottom of the form, there is a blue bar with the text: 'Contact details are for EasyPay only. To update enrollment information, click [here](#)'. Below this bar are two buttons: 'Cancel' (grey) and 'Save' (green).

6. Click the **Email** box and enter the correct email address. You can also update the Payer's phone number and billing address, if needed.

Note: Contact details entered in the Payer Details pop-up are for accounting purposes only. This information does not affect enrollment data. To update enrollment data, see **Manage Child Contacts**.

7. Click **Save**.
8. Click  in the Invoice # column. The invoice is sent again.

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