

Issue Invoices (in Express Actions)

Last Modified on 06/03/2024 4:00 am EDT

This Express Action lets you issue attendee invoices in bulk. [You can read more about invoices here.](#)

- First, choose output (Email or Print if re-issuing invoices or Generate for new invoices).
- Choose whether you want to email/print/issue normal invoices, Miscellaneous invoices, or both.
- Choose the order you want them displayed in.
- Click on the **Selected Records** tab to filter. If you choose "Generate", only records with invoices that haven't yet been issued will be shown. Otherwise, all attendee records with invoices will be shown (, all records with unprinted invoices pending will be listed).

If you selected **Email**:

- Complete the email details as displayed.
- Select **Queue** or **Send Now** to complete your email submission.

If you selected **Print**:

- Select **Print** to complete, and your invoice(s) will be available as PDF files.

Issue Invoices

Details Selected Records

Output Email Print

Invoice Type Both Invoice Miscellaneous Invoice

Order By ID

Target Group

57 Records Selected

From Name* Events Management

From Address* events@eventmanagement.com

BCC

Subject* Outstanding Invoice - Please Pay by 4th December

Body* Dear <FirstName>
Please find your attached invoice to be paid by no later than December 4th.
You will find details on paying the outstanding balance on your invoice and if you are having any issues, please contact us directly.
Thank you.

Merge Fields First Name

Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

Details		Selected Records	
ID	NAME	ORGANIZATION	
<input checked="" type="checkbox"/>	1	Santos, Aditya	Aurora Foundation
<input checked="" type="checkbox"/>	2	Lee, Aditya	Global Horizons Initiative
<input checked="" type="checkbox"/>	3	Khan, Ahmed	Momentum Ventures
<input checked="" type="checkbox"/>	5	Tanaka, Aaliyah	Pinnacle Ventures
<input checked="" type="checkbox"/>	7	Ma, Aditya	Blossom Innovations
<input checked="" type="checkbox"/>	9	Silva, Aditya	Rising Sun Technologies
<input checked="" type="checkbox"/>	10	Takahashi, Aditya	Evergreen Alliance
<input checked="" type="checkbox"/>	11	Gonzalez, Aaliyah	Spectrum Solutions
<input checked="" type="checkbox"/>	12	Bianco, Aditya	Harmony Enterprises
<input checked="" type="checkbox"/>	13	Ma, Aaliyah	Phoenix Foundation
<input checked="" type="checkbox"/>	14	Coste, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	16	Wu, Aditya	Bright Future Foundation
<input checked="" type="checkbox"/>	18	Ma, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.
- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

Save as Data Snapshot

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or "remembers" the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots [in this article](#).

Note: **Save As Data Snapshot** saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.

Create Data Snapshot ✕

Create New

Name

Remove After ▼

Append to existing ▼

Replace existing ▼

About Invoice Dates

In order to be fully consistent across all global regions, all Invoice Created dates will be recorded in Coordinated Universal Time (UTC). Whenever an Invoice, or a report that shows the Invoice Created Date is displayed, EventsAir will automatically convert the date to the local time as indicated in your EventsAir instance. (These settings have applied from V5 onwards.)
