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.

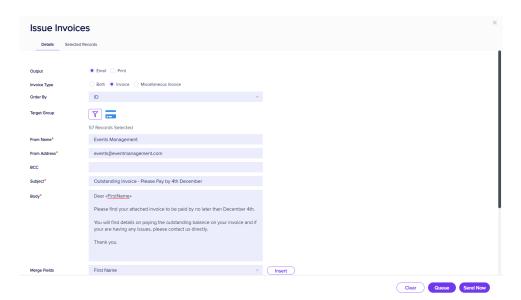
- First, choose output (Email or Print if re-issuing invoices or Generate for new invoices).
- Choose whether you want to email/print/issue normal invoices, Miscellaneous invoices, or both.
- Choose the order you want them displayed in.
- Click on the Selected Records tab to filter. If you choose "Generate", 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.

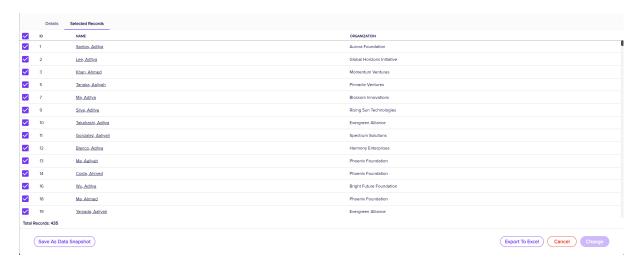
If you selected Print:

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



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.



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.

- o 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).

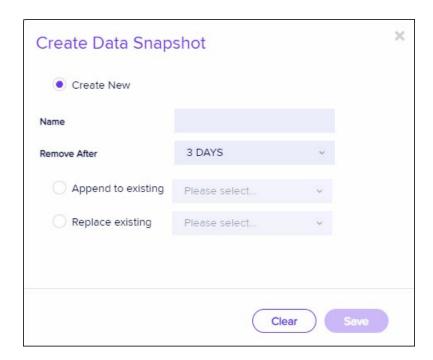
Save as Data Snapshot

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.



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.)