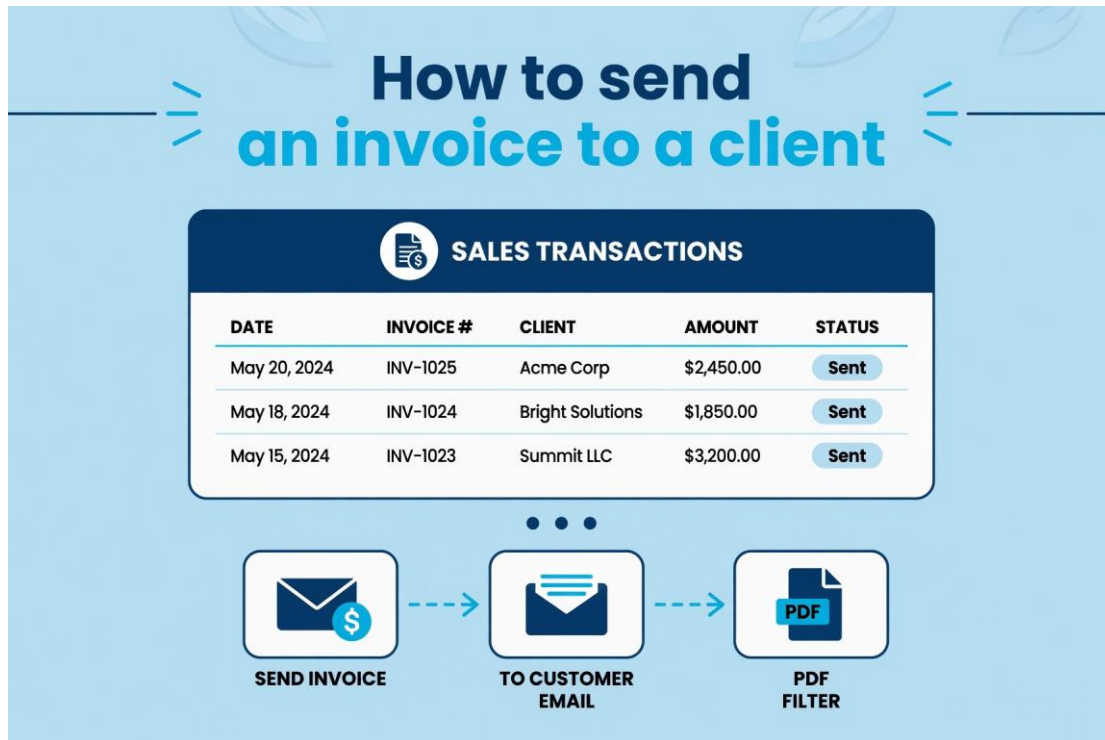


# How to Send an Invoice to a Client



## Introduction

Most sales on [systeme.io](https://systeme.io) can trigger **automatic** invoice emails—but accountants, B2B buyers, and support tickets often need a **manual resend**. This guide shows how to email a fresh invoice from **Sales** → **Transactions** in one click.

It complements [How to send an invoice to a client](#) and [How to receive invoices automatically](#) (for your own subscription bills vs buyer-facing documents).

## What You Need

- A [systeme.io](#) account with selling enabled ( [plan](#) )
- **At least one sale** recorded in Transactions (payment completed through a connected gateway)
- Correct **customer email** on the contact tied to the transaction

If the sale never appeared, fix payments first ( [PayPal](#), [Stripe](#), [Razorpay](#) ).

# Automatic vs Manual Invoices

By default, many checkouts already email invoices when receipt settings allow it ( [receipt & notification settings](#)). Use **Send invoice to customer** when:

- The buyer lost the email or it landed in spam
- You updated company billing details after purchase
- Finance requests an official copy for a specific charge ID
- Automatic delivery was disabled for individual/company purchases

## Step 1: Open Transactions

1. Log in to your dashboard
2. Open the **Sales** tab
3. Click **Transactions**

You see a table of payments: amounts, customers, dates, and processors—each row is one billable event you can invoice from.

## Step 2: Find the Right Sale

Use the **left filter panel** to narrow the list:

- **Customer email**—fastest for support tickets
- **Country**—regional bookkeeping
- **Customer type**—company vs individual (invoice layout differs)
- **Payment processor charge ID**—match Stripe/PayPal/Razorpay reference
- **Select a price plan**—specific offer or subscription tier

Locate the row for the payment you need to document on [your account](#).

## Step 3: Send Invoice to Customer

1. Hover the **three dots** (⋮) on the right of the transaction row
2. Choose **Send invoice to customer**
3. Confirm if the system prompts you (**Yes / Confirm**)

systeme.io **generates and emails** the invoice immediately to the email address linked to that transaction—no separate PDF upload step.

## Several Invoices for One Client

**Multiple sends:** Repeat Step 3 for *each* transaction row—there is no multi-select “send all” in this menu.

**Bulk alternative:** Export invoices for a client ( [export multiple customer invoices to PDF](#)) and email the ZIP/PDFs from your mail client. For spreadsheet analysis, use [export transactions to CSV](#).

## Invoice Content & Profile Settings

Line items, tax display, and seller legal details typically come from your **account / business profile** and the offer sold. If invoices show wrong company name or VAT ID, update profile and subscription billing info before resending ( [subscription & billing management](#) concepts apply to seller profile data).

## Troubleshooting

### Send invoice grayed out or missing

Confirm the transaction exists and payment status is successful—not pending or failed.

### Customer says wrong email

Update contact email in CRM, then resend from the correct transaction row.

### No transactions at all

Webhook/IPN misconfiguration—see [PayPal payments not appearing](#).

[Contact systeme.io support](#) with charge ID and customer email.

## Frequently Asked Questions

### Does sending create a new charge?

**No**—it only emails documentation for an existing payment.

### Refunds and invoices?

Send or export based on the original sale row; refund handling depends on processor—check Transactions after refund events.

## Pro forma before payment?

This flow assumes a completed sale; unpaid quotes usually need a different commercial process outside this menu.

## Related Resources

- [How to send an invoice to a client](#)
- [How to receive invoices automatically](#)
- [How to export multiple customer invoices to PDF](#)
- [How to create an order form/payment page](#)

[systeme.io](#) — record the sale once, resend the invoice anytime from Transactions.

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**Last updated:** July 11, 2026 · Based on *How to send an invoice to a client*