

How To Email an Invoice Directly from an Invoice

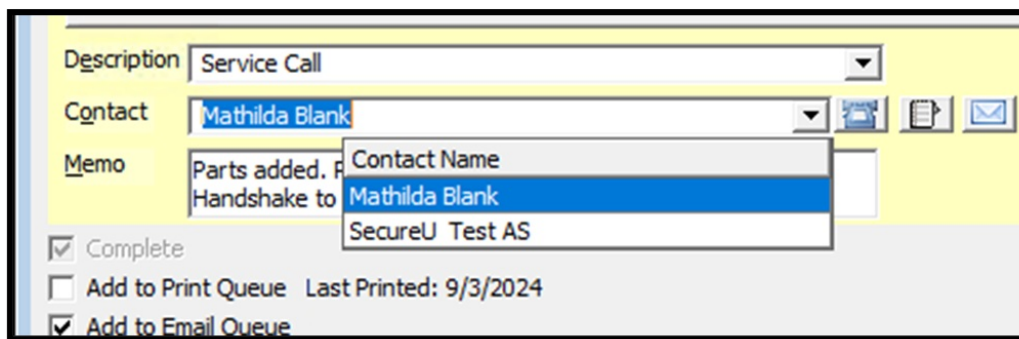
09/23/2024 2:42 pm EDT

Is there a way to email an invoice directly to a customer?

Yes. To email an invoice directly to a customer:

The easiest way to do this is to open the invoice and locate the Contact area at the bottom of the invoice.

Make sure there is a contact selected in the Contact field.

A screenshot of a software interface for creating an invoice. The form has a yellow background. At the top, there is a 'Description' dropdown menu with 'Service Call' selected. Below it is a 'Contact' dropdown menu with 'Mathilda Blank' selected. To the right of the 'Contact' field are three icons: a telephone, a document, and an envelope. Below the 'Contact' field is a 'Memo' section with a text area containing 'Parts added. P' and 'Handshake to'. A dropdown menu is open next to the 'Contact' field, showing a list of contact names: 'Contact Name', 'Mathilda Blank' (highlighted in blue), and 'SecureU Test AS'. At the bottom of the form, there are three checkboxes: 'Complete' (checked), 'Add to Print Queue' (unchecked), and 'Add to Email Queue' (checked). To the right of the 'Add to Print Queue' checkbox, it says 'Last Printed: 9/3/2024'.

Select the button next to the Contact field that looks like an envelope. That icon is the Email this Invoice button.

As long as a contact is selected in the Contact field, if the button is clicked, another window will open to allow for the addition of more notes on the email or more email contacts.

If needed, the Remittance Coupon and Statement Detail can be included by checking the selectable boxes before sending.

Invoice #498089 (Sedona Security)

From
Sedona Email SedonaEmail@SedonaOffice.com

Reply To
SedonaEmail@SedonaOffice.com

To
ashlee.simmons@test.com; mblank@securetest.com;

Template
Sedona Office Invoice Test

Subject
Sedona Security Invoice #498089

Additional Note On This Email
Additional Notes :|

☐ Include Remittance Coupon
☐ Include Statement Detail ☐ Recalculate Late Fees As of Date 09/13/2024

 Send  Send & Close  Cancel

Updated status for 0 items.

To send the invoice, the options are to Send or Send & Close.

Send: This option will send the email but keep the window open.

Send & Close: This option will send the email and close the window.