How to Email Invoice

The **Email Invoice button** is used to send a copy of the invoice to the customer contacts. The email will use the format defined on the default **Email** Template of the customer. Note that for this feature to work, make sure the **Company Configuration | System Manager | SMTP Email Settings** is properly configured and the contact has complete email distribution setup.

- 1. Open the Invoice that will be emailed to the customer.
- 2. Click the Email | Email Invoice button. Sending of email may take a while.





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Do you want to send this Email Invoice Report/s?



Once the email is successfully sent, a message will popup on the right side of the monitor.

The email also includes a pdf copy of the Invoice. Here is a sample email. Note that some of the details on the email is based on Email Template.

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	Dear ABC Reseller,
	The following Invoice is now available. Please review and remit payment at your earliest convenience.
	Invoice Number: SI-199 Invoice Date: 4/21/2016 Invoice Total: \$252.95
	Thank you for your business.
	Sincerely,
	i21 Source Company 800-433-5724
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	Invoice - SI-199.pdf

Relate Topics

- How to Add Email Template
- How to Setup SMTP Email Settings
- How to Setup Email Distribution
- How to Batch Email Reports

The **Email Invoice button** is used to send a copy of the invoice to the customer contacts. The email will use the format defined on the default Email Template of the customer (See also How to Add Email Template). Note that for this feature to work, make sure that the **Company Preferences | SMTP Email Settings** is properly configured and the contact has complete email distribution setup.

- 1. Open the Invoice record that will be emailed to the customer.
- 2. Click the Email | Email Invoice button. Sending of email may take a while.

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3. Click Yes on the confirmation message.



The Email Invoice button is used to send to the primary contact of customer a copy of the Invoice. The email will use the format defined on the default Email Template of the customer (See also How to Add Email Template). Note that for this feature to work, make sure that the **Company Preferences > SMTP Email Settings** is properly configured (refer to How to Set Up SMTP Email Settings).

1. Open the Invoice that you want to send to the customer.

2. Click the Email | Email Invoice button. Sending of Email may take a while.

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This is a sample Email Footer

