How to Customize Invoice Email Template

Objectives:

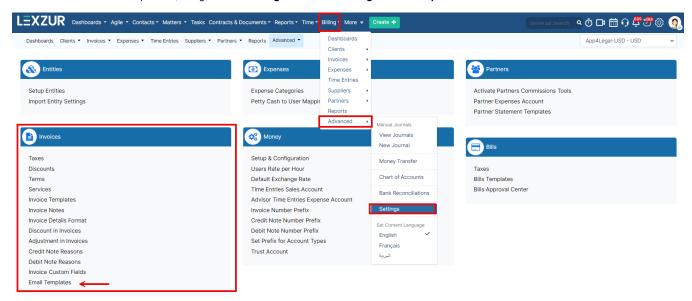
• Create Invoice Email templates, predefine the Subject, Message, etc....

Steps:

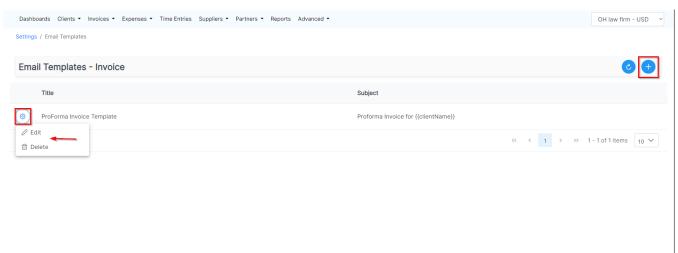
Users can now customize the email templates for sending emails in Invoices, Matters, Cases, and Contracts.

You can create multiple variations, personalize subjects and messages, and add custom fields and recipient information according to your preferences.

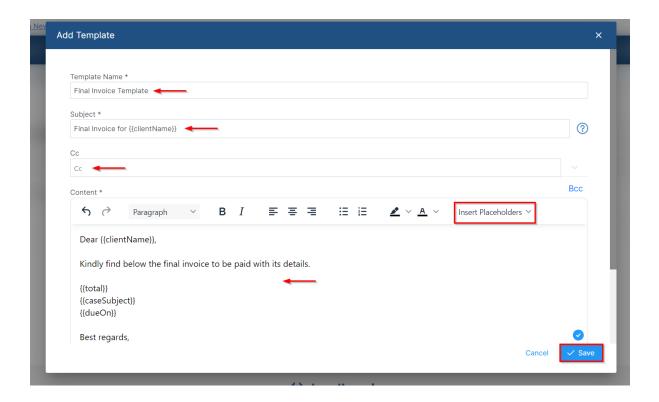
To initiate this customization process, navigate to the Billing Advanced Settings Email Templates in the Invoices section.



Here, you can efficiently manage your invoice email templates and create new ones.

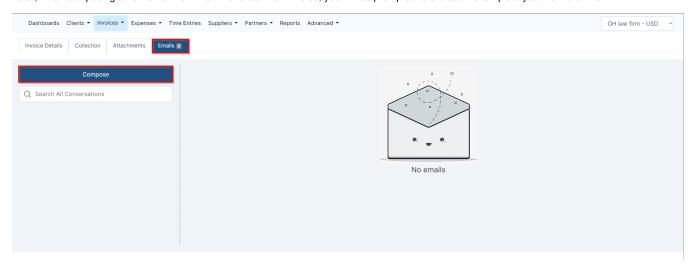


To create a new template, simply provide the template with a distinctive name, specify the subject and message for your email, and identify the CC recipients.



Additionally, you have the flexibility to insert any invoice field and custom fields directly into the message content using placeholders.

Later, when composing a new email from the Emails tab in an invoice, you will be prompted to choose the template you wish to utilize.

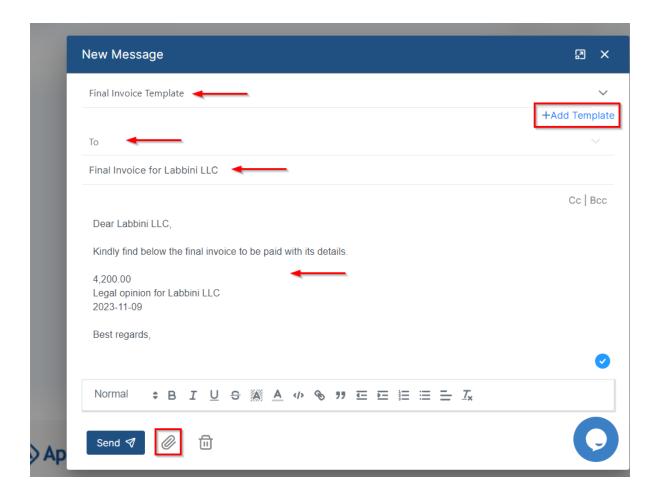


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The first time you click on compose, you will be asked to integrate with either Gmail or Office 365 and login to your account.

This streamlined approach ensures that all necessary information is automatically filled in with minimal effort on your part.

You can then add the recipient of the email, modify your message, and attach any files if needed.



For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!