

How to Send Invoices by Email from LEXZUR

Objectives

- Send Invoices by Email directly from LEXZUR

Steps

In LEXZUR you can now email your clients directly from the invoices section along with the corresponding invoice or other related documents.

To do so, go to the list of invoices from the Billing module, and open the invoice you want to send

1 - 20 of 137 Items

Invoices

All

View All Invoices

Add Invoice

View All Quotes

Add New Quote

View All Credit Notes

Save as

Invoice #	Client's Account	Client Account Number	Total	Collection	Balance Due	Currency	Status	Approval Stat...	Invoice Date	Due On	P.O#	Invoice Ref	Matter ID	Matter Name
INV0000111	Advanced Industries - SAR	CL172	1,851.85 SAR	1,851.81	0.04	SAR	overdue	approved	2023-12-06	2023-12-06				
INV0000110	Maria Smith - USD	CL144	2,900.00 USD	0.00	2,900.00	USD	draft	waiting approval	2023-12-06	2024-01-05	25633	1225665	M00000341	Legal Advice for Mar
INV0000109	Maria Smith - USD	CL144	800.00 USD	0.00	800.00	USD	draft	waiting approval	2023-12-06	2023-12-21	2568341	REF 1256358	M00000261	Commercial Consulto
INV0000108	John Marven - USD	CL51	500.00 USD	0.00	500.00	USD	overdue	approved	2023-11-30	2023-11-30				
INV0000107	Albert smith - USD	CL3	3,000.00 USD	0.00	3,000.00	USD	overdue	approved	2023-11-27	2023-11-27				
INV0000106	Albert smith - USD	CL3	1,500.00 USD	1,000.00	500.00	USD	partially paid	approved	2023-11-27	2023-12-27			M00000329	Albert Vs Branding C
INV0000105	Advanced Industries - USD	CL41	1,000.00 USD	500.00	500.00	USD	partially paid	approved	2023-11-14	2023-12-14			M00000319	legal advice for Adv
INV0000104	abc - USD	CL103	2,200.00 USD	2,200.00	0.00	USD	paid	approved	2023-11-06	2023-11-21			M00000323	ABC X Agency Grid
INV0000103	Alberto Scott - USD	CL134	300.00 USD	0.00	300.00	USD	draft	waiting approval	2023-11-06	2023-11-06			M00000194	Due Diligence-Alber

All emails related to invoices can now be sent and tracked under the Emails tab on the invoice page.

You can simply click on the email button from the actions on the top right of the General Info Page.

Dashboards

Clients

Invoices

Expenses

Time Entries

Suppliers

Partners

Reports

Advanced

app4legal - USD

Invoice Details

Collection

Attachments

Email

INV-0000023

bLP industry - USD

bLP industry

DRAFT

Date: 2022-11-10

Due On: 2022-12-10

Reference Number: (No Data)

Terms: 30 Days

P.O#: (No Data)

Description: (No Data)

Invoice Type

Transaction Type

Payment Method

Matters Linked

Summary

Sub Total: USD 450.00

Total Discount: USD 0.00

Sub Total After Discount: USD 450.00

Invoice Template: Proforma Template

Invoice Status: Draft

Approval Status: Approved

Customize Template

ALA Law Firm

Phone number:12334423

Registration number:1234

Tax Number: 1223232

COMPANY NAME

Company Slogan

INVOICE

Matter Name: Legal opinion for RLP

Client: bLP Industry

Tax Number: 1222

Invoice #: INV-0000023

Status: Draft

From: 2022-11-10

To: 2022-12-10

Terms: 30 Days


Table with 2 columns: Description, Amount

First, connect your personal email to LEXZUR. Choose either Gmail or Office 365, and sign in with your email address.

Email Integration

×


Connect your personal email to Lexzur, so you can send emails directly from within Lexzur



Google / Gmail

☐

Gmail Integration allows you to send emails directly from within Lexzur, and share threads between your inbox and Lexzur Modules



Office 365

☐

Office 365 Integration allows you to send emails directly from within Lexzur, and share threads between your inbox and Lexzur Modules

Click on **Compose** to start a new message.

Your client's email will be automatically retrieved if it is already included under the client's general information.

Choose the subject of your email and the message you wish to send, then click the attach button to attach this invoice as PDF, any other file from your computer, or any LEXZUR Documents.

New Message

✕

Choose a template

▼

+Add Template

bLP Industry <jimbatz@gmail.com> ✕

▼

Subject


Cc | Bcc


Dear Adam,


Kindly find attached the final invoice.









Best,

Normal



 Browse this computer


 Attach Invoice as PDF


 Lexzur Documents

Send





To attach the invoice, you have to select first the appropriate invoice template to display the invoice in the email, then click **Attach as PDF**. You can also preview the invoice before attaching it to the email.

Export/Preview

Invoice template*

Tax Invoice

View invoice templates

Preview

Attach as PDF

Cancel

Moreover, you can choose predefined email templates that can be used when sending emails to your clients. This approach will save you time and retrieve the desired information added in the template directly from the invoice.

New Message

Payments

+Add Template

bLP industry <jimbatz@gmail.com>

Caroline Mrawed <caroline.moraod@app4legal.com>

Settlements of PaymentBLP industry

Cc | Bcc

Dear Adam,

I trust this email finds you well.

As we approach the end of the agreed-upon payment period, we kindly request your attention to settle the outstanding balance on your account.

Invoice Details:

- Invoice Number: INV-0000023
- Invoice Date: 2022-11-10
- Due Date: 2022-12-10
- Total Amount Due: 450.00

Best regards,

Normal

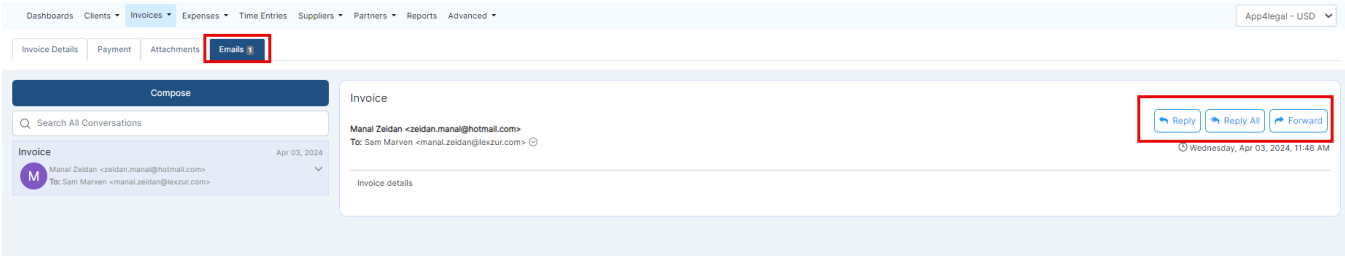
B I U

Send

Learn how to customize invoice email templates from [here](#).

All the related emails will be then tracked on the invoice page.

Additionally, you have the option to respond to the email directly within Lexzur, and also to forward it for further communications.



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

Thank you!