

Sharing invoice to clients via email directly from the dashboard.

You can share the invoice in PDF form directly to your clients via email.

(For accessing this feature, you have to update the primary contact details of client.

Dashboard ⇒ Client ⇒ Select Client ⇒ Click on 'Contacts' tab ⇒ Click on Add Contacts Button ⇒ Fill necessary details and submit.

A client portal will also be created by setting password for your client, then that particular client will be able to log in to the their company's dashboard and review the working related to it.)

Click on the Action button as shown in the above figure. Select "Email Invoice to Client" from the various options as displayed.

Following screen shall be displayed. Select the primary contact and fill rest of the information and click on send button.

You may also update the text of mail content according to your own language.

