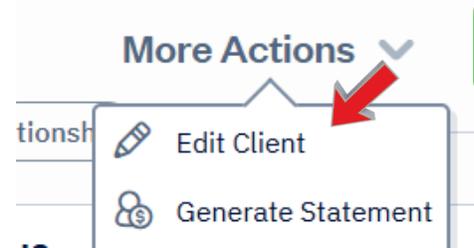


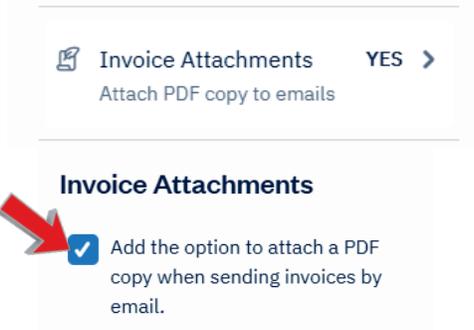
How to Send & Print Invoices from Freshbooks

First you will **login to your Freshbooks portal**

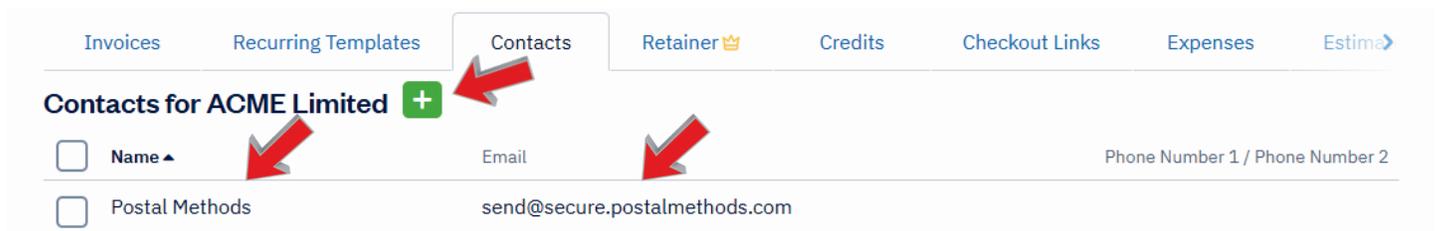
Now go to the customer whom you want to receive a paper invoice and **Click on Edit**



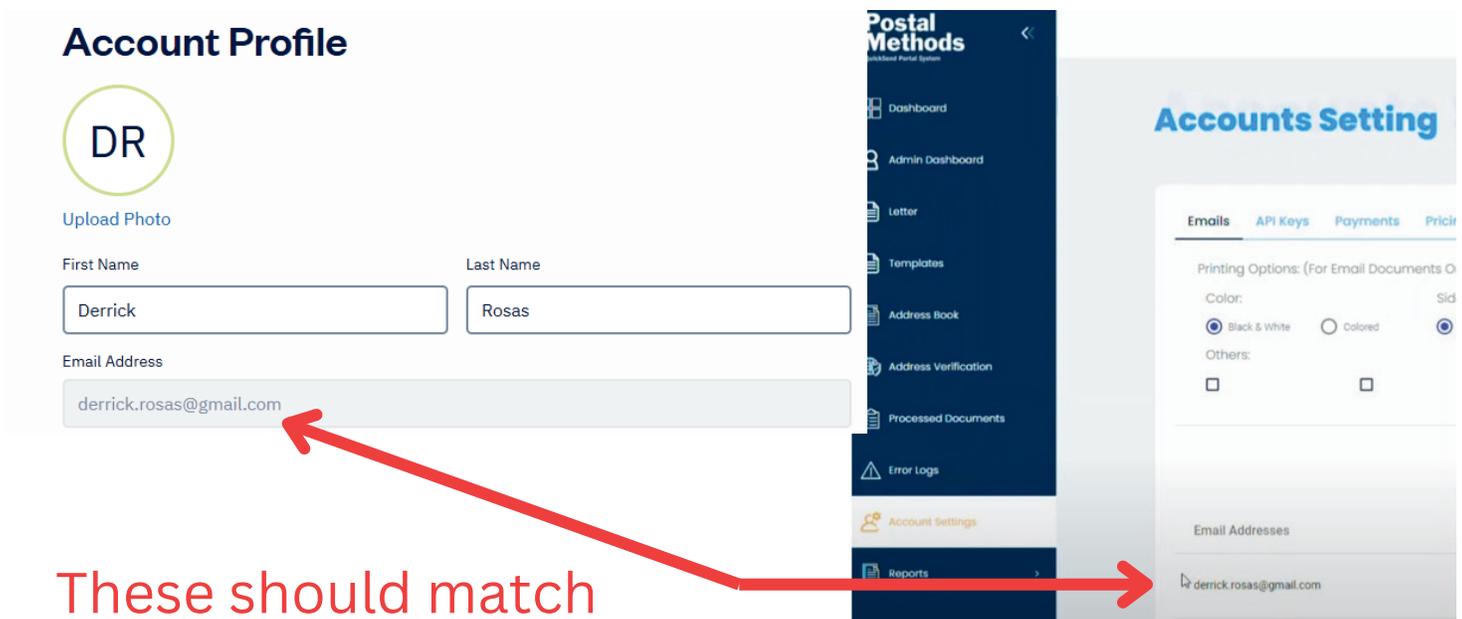
Now Click on Invoice Attachments and Checkmark the option to automatically Attach PDF copy to emails



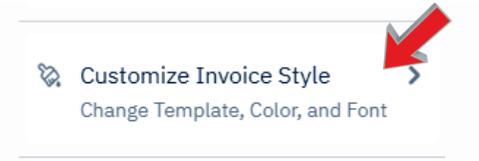
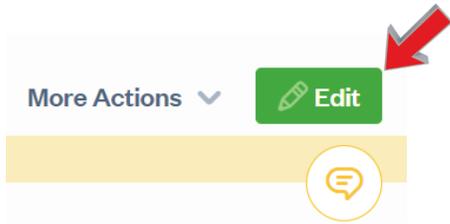
Now **Add a Contact Person** to your client with the First Name being Postal and Last Name being Methods. Then give this contact the following email address:
send@secure.postalmethods.com



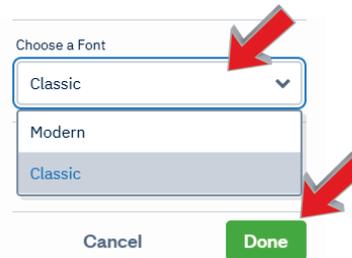
Make sure the email address that is used on your Freshbooks profile matches the email address that is used on your Postal Methods profile



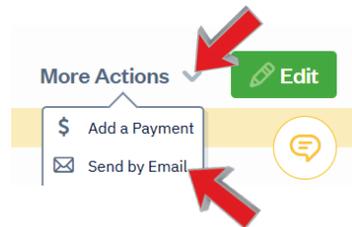
Now Click on the Invoice, if you do not have an invoice, then you will need to create an invoice. Now Click on Edit, then under Settings, Click on Customize Invoice Style



Now **Click on Classic** and then **Click on Done**, then **Click on Save** at the top of the screen



Now go back to Invoice, but now **Click on More Actions**, then **Click on Send by Email**



Now make sure that **both the Clients email address** is in place, as well as the **send@secure.postalmethods.com** email address. You should only have to add it in the To: box one time, and then that should be the default option moving forward.



After you have verified that the Attach a PDF copy of this invoice has a Checkmark, then Click on Send Invoice

 Personalize and automate emails to clients by creating email templates with dynamic fields. [Find out more](#) or [Upgrade Now](#)

Attach a PDF copy of this invoice

Or [share via link](#)

Cancel

Send Invoice

Processed Documents

Now that the invoice or invoices have been sent to Postal Methods, you can then **see them on the Processed Documents page, after you have refreshed your screen.**

The screenshot displays a software interface with two main panels: 'Jobs' on the left and 'Job Detail' on the right.

Jobs Panel:

- Job ID: LETTER - 1934785, Price: \$1.17
- Source: EMAIL
- Description: New payment request from Smart Co Choice - Invoice 1002
- Total: 1, Invalid: 0, Completed: 0
- Items per page: 10
- Navigation: 1 - 1 of 1, < > >|

Job Detail Panel:

- Summary Table:

No. of Pages	Total Documents	Valid Documents	Invalid Documents
1	1	1	0
- Preference: Black & White, Single Sided
- Submission Time: 10/11/2024 08:48
- Originals: [Document Icon]
- Buttons: Check All, Forcefully Send All, Forcefully Send Checked, Delete Checked
- Table:

Destination	Address Type	Id	Price
BILL TO			
Jane Tester	Local	4835259	\$1.17
700 W Loop 340			
Waco, TX 76712			

Annotations:

- A black arrow points from the 'Completed: 0' text in the Jobs panel to a trash can icon in the top right of the job card.
- A black arrow points from the 'Completed: 0' text to the 'Completed: 0' text.
- A green arrow points from the text 'Green checkmark indicates that the address is valid' to a green checkmark in the 'Destination' column of the table.

This will not show completed until after 4 a.m. Until then, you can cancel by clicking on Trash Can

Green checkmark indicates that the address is valid