

# How to Send & Print Invoices from QuickBooks

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

Now decide if you'll be sending All of your customers a printed copy of their invoice, or only certain individuals. If you are going **to send a paper invoice to ALL of your customers**, then you need to do the following: (skip to Create default rule to Attach PDF)

**Click on the Settings gear** at the top right of the screen



**Select Account and settings**



**Click on Sales, then Go to Messages, Click on pencil to edit**

**Enter into the Blind Copy (Bcc) field:**



Then **Click on the green SAVE** button.

## Create default rule to Attach PDF

**Click on Settings gear** at the top right of the screen



**Select Account and settings**



**Click on Sales, then Go to Online delivery, Click on pencil to edit**

Put a **Check Mark by PDF Attached**

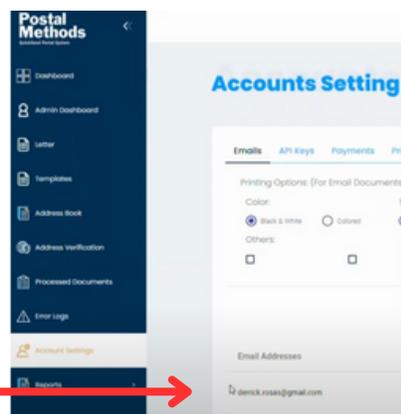
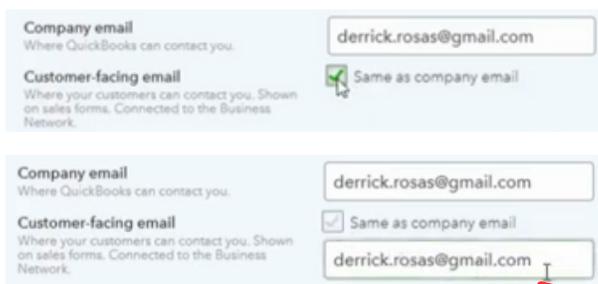


Then **Click on the green SAVE** button

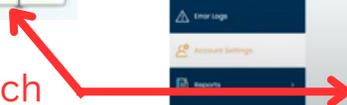
## Link QuickBooks to your Postal Methods by entering email address

**Click on Company, then Go to Contact Info, Click on pencil to edit**

**Uncheck Same as company email box**, and enter **same address that you have in Postal Methods**

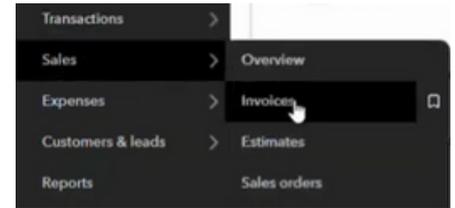


These should match



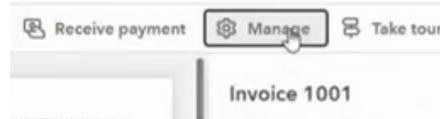
## Format Invoice template to allow Address Fields to Align in Envelope

Go to **Main page** and **Hover over Sales** and then **Click on Invoices**



Pick an **Invoice** and **Click on Edit**

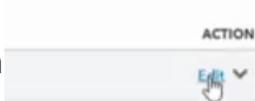
Look for **Manage gear** and **Click**



Now go down & **Click on Design**, then **Click on Remove Default** next to **Modern Template & Save**

Now Select **Standard template**, **Save** and then **Click on Add/Edit**

**Click on Edit again**



Now **Click on Edit print settings**

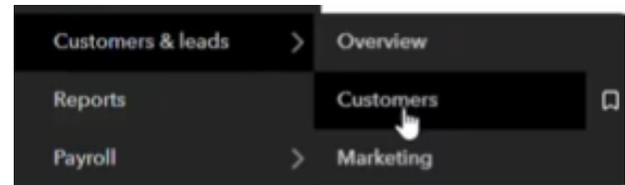


Now put a **Check mark** in the **Fit to window envelope** box

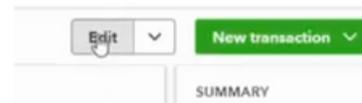


## Make Adjustment to Customers Profiles

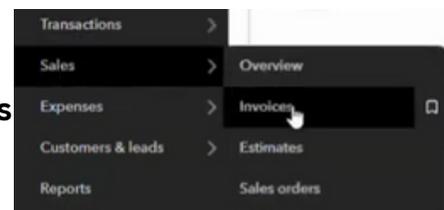
Go to **Main page** and **Hover over Customers & leads** and then **Click on Customers**



After selecting one of your customers **Click on Edit** and make sure you have their **email address entered**.

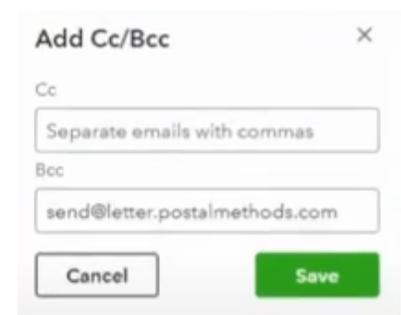


Go to **Main page** and **Hover over Sales** and then **Click on Invoices**



Pick an **Invoice** and **Click on Edit**

Now **Click on Cc/Bcc** and **enter into the Bcc field: send@secure.postalmethods.com** and **Save**.



## Set up Invoice page for email

If you have 4 lines of text in your Bill to box, **remove either the Customer Name or the Company Name**, so that you only have 3 lines of text, so that it will fit in envelope window. To Edit this, **DO NOT click on Edit customer**, instead, **Click your mouse inside the box, and delete one line manually and then Save**.

Bill to

Jane Tester  
Acme Ltd  
700 W Loop 340  
Waco, TX 76712

Edit customer



Bill to

Jane Tester  
700 W Loop 340  
Waco, TX 76712

Edit customer



Now that this has all been done, you can **Click on Review and Send**

**INVOICE**

Acme Ltd

jdtester46@gmail.com

Cc/1 Bcc

Bill to

Jane Tester  
700 W Loop 340  
Waco, TX 76712

Edit customer

Invoice no. 1004

Terms Net 30

Invoice date 10/22/2024

Due date 11/21/2024

Tags (hidden):

Start typing to add a tag

Product or service

#	Product/service	Description	Qty	Rate	Amount
1	Services		1	100.00	\$100.00

Add product or service

Customer payment options Edit

Subtotal \$100.00

Print and download More actions

Save Review and Send



## 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.**

Jobs Refresh as Needed

**LETTER - 1934785** \$1.17

Source: **EMAIL**

Description: **New payment request from Smart Co Choice - invoice 1002**

Total: **1** Invalid: **0** Completed: **0**

Items per page: **10** 1 - 1 of

Job Detail

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:

**Check All** **Forcefully Send All** **Forcefully Send Checked**

**Delete Checked**

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

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