



Setting Up Polixen For Emailing Invoices

Step 1:

Fill out some information in your Service Scheme. To get to this page, go to the **Administration** menu, then select **Polixen Setup**, then select **Service Schemes**. Select your Service Scheme by clicking the blue Information button next to its name.

To successfully send out invoices as emails, you'll need to fill out the **Organisation Name** field and the **Contact Email** field.


Test MOW Service » Edit Service Scheme

Save Changes

Service Name: Test MOW Service	Organisation Name: Test MOW Service	Organisation ABN: Organisation ABN
MDS ID: Organisation ID	Contact Name: Jane Doe	Contact Email: janedoe@testmow.org

Step 2:

Fill out some information for the clients who will be emailed an invoice. To start with, they'll need an **Email Address**.

Contact Details	
Home Number: Home Number...	Mobile Number: Mobile Number...
Email Address: Email Address... 	Fax Number: Fax Number...



Then they'll need to have their **Payment Type** set to an Invoice payment type.

Payments & Invoices	
Payment Type:	Monthly Invoice
Preferred Payment Method:	Please Select
Invoice Address:	Mailing Address...

The **Invoice Delivery** will need to be set to Emailed. If the client already has an email address, and you'd like the invoices sent to a *different* email address, you can fill in the **Invoice Email Address** field.

Invoice Delivery:	Emailed
Starting Date:	dd/mm/yyyy
Invoice Email Address:	Email Address...

Step 3:

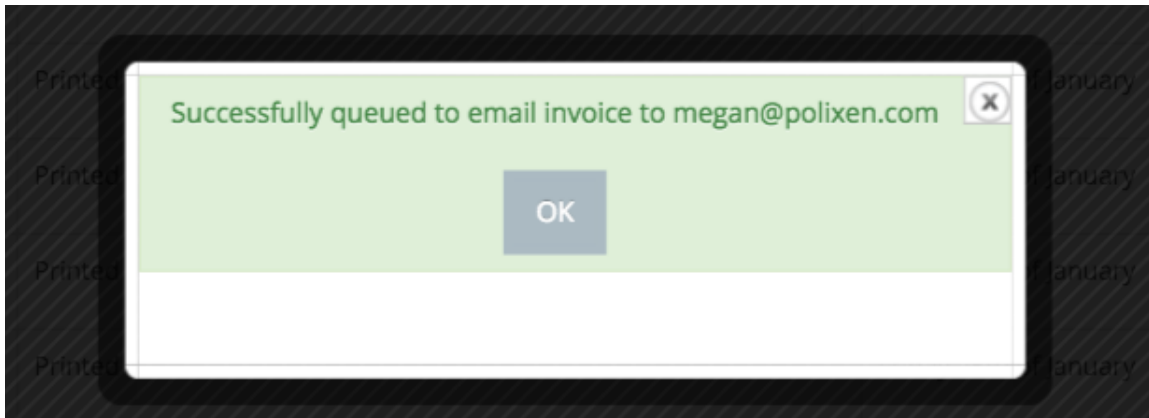
Once an invoice for the client has been generated, you'll be able to email it from the **Invoices** page, under the **Accounts** menu. Clients who have their **Invoice Type** set to Emailed will have an **Email** icon next to their names. To email the invoice, just click that Email icon.

[Accounts](#) » [List Invoices](#)

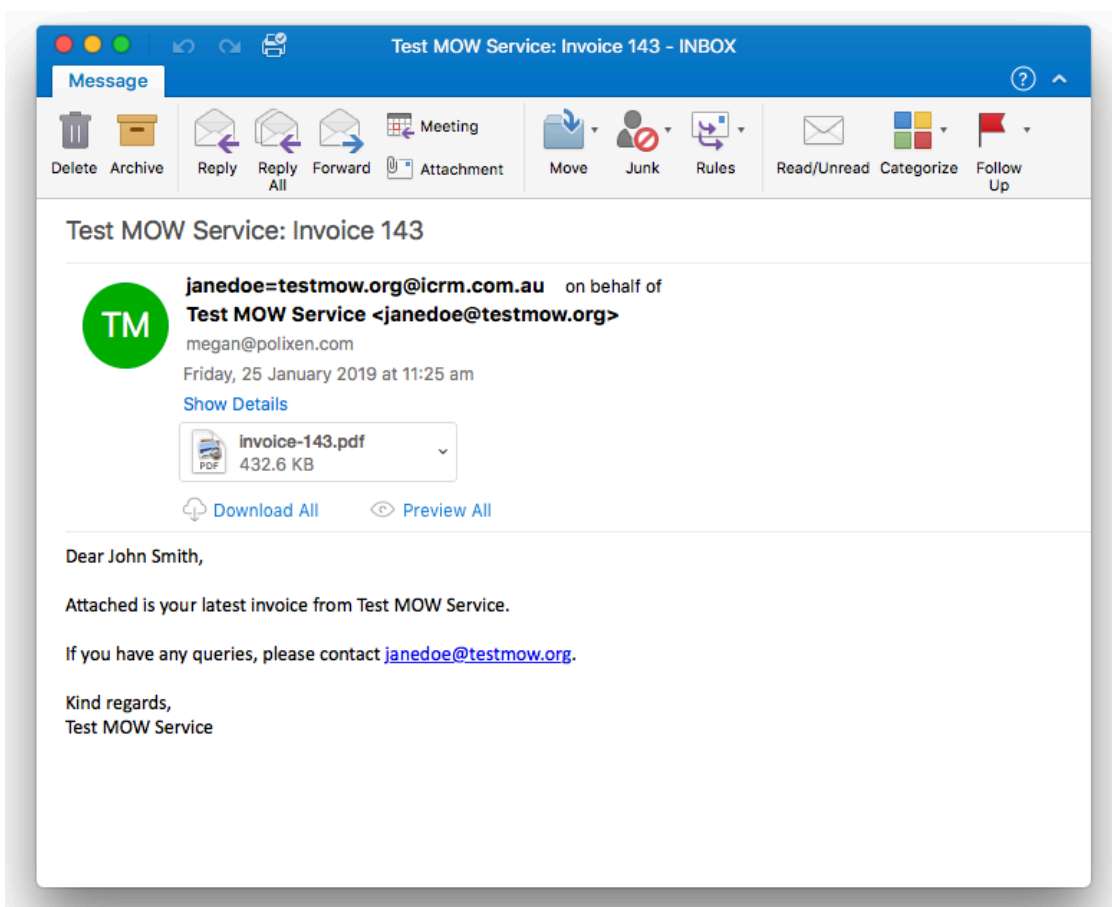
Start : 26/12/2018	End : 25/01/2019	Search	Search by Invoice ID :	Invoice ID	Search
Select All	Invoice ID	Client	Emailed At	Filter by Invoice Ty	Date Issued
<input type="checkbox"/>	143	Smith, John		Emailed	Friday 25th of January



Once you've clicked the button, you'll see a **popup** like this, with the client's email address.



The client will then receive an **email** that looks similar to this. Their invoice will be attached, and your information will be in the email so they can contact you if they have any questions.





If you also wish to receive these emailed invoices, please contact us to set up a BCC address for invoices.