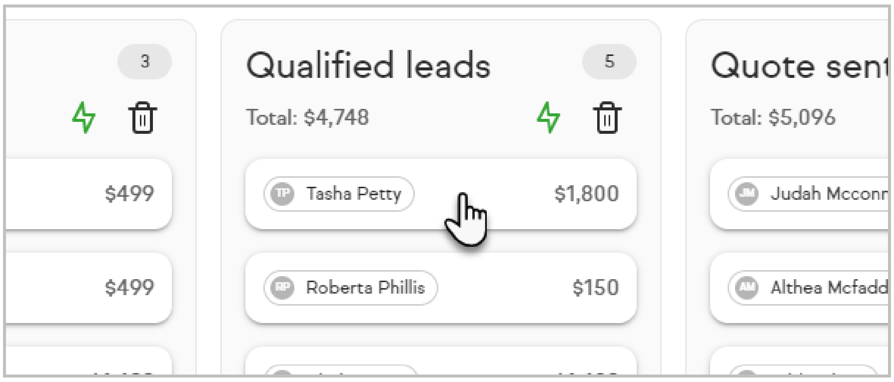
Send invoice or quote from a pipeline deal

This article applies to:

Pro-Tips!

- The activity feed in the deal card will update based on the invoice or quote being created and sent.
- The quote or invoice will be assigned to the primary contact on the deal by default. You can change the assigned contact within the quote or in the invoice.

1. Navigate to your sales pipeline
2. Click on a deal



3. Note the option to create a quote or invoice