How to Add Contacts to Receive Invoices and Statements

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To add a bill to and/or cc a contact to receive invoices and statements, follow the steps below.

1. Locate the customer **CRM>Customers** and search for the customer.
2. Navigate to the **Contacts** tab.
3. Click **+ Add New Contact**.

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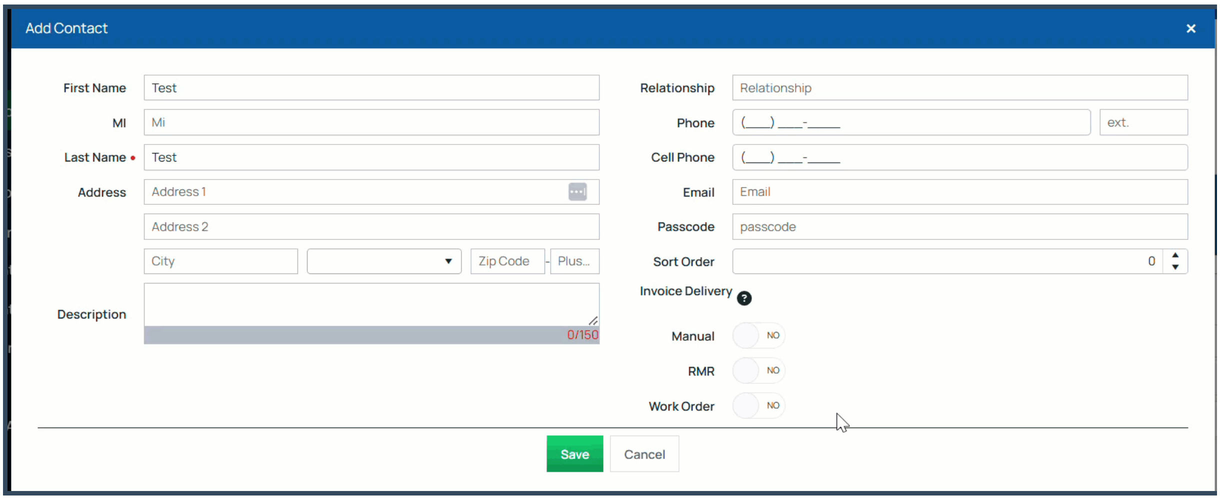
4. Complete the information for the contact.
5. Make sure to toggle to YES for the invoice type you wish the contact to receive.
6. Click Save.



After you create an invoice, you must go into the invoice and select Deliver Notification > Send Notification. This will send to any contact who has Invoice Delivery set as YES.