

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**.

The screenshot shows the 'Add Contact' form with the following fields and values:

- First Name: Test
- MI: Mi
- Last Name: Test
- Address: Address 1, Address 2
- City: [empty]
- Zip Code: [empty]
- Description: [empty] (0/150)
- Relationship: Relationship
- Phone: () - -
- Cell Phone: () - -
- Email: Email
- Passcode: passcode
- Sort Order: 0
- Invoice Delivery: Manual (NO), RMR (NO), Work Order (NO)

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.