

Managely – How to setup Managely to send all invoices tied to a specific account to multiple recipients

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Managely gives its users the ability to automatically have all invoices delivered to multiple recipients.

Managely allows the users to set up an account to automatically send all invoices to multiple recipients by using the **Contacts** feature.

To set up multiple recipients to receive all invoices, access the customer's account and then the Contacts tab below.

Click "Add New Contact":

The screenshot shows the 'My Test Account' interface. At the top, it displays 'Customer #3702' with status 'Active' and 'Normal'. Below this, there's a summary section with 'Total Balance Due: \$22,530.60' and 'Total RMR: \$150.00'. A 'Customer Aging' bar chart is shown. The 'Contacts' tab is selected in the bottom navigation bar, and the 'Add New Contact' button is highlighted with a red box.

Fill out the fields, and toggle on all three options:

The screenshot shows the 'Edit Contact' form. It includes fields for 'First Name' (Test), 'Last Name' (Customer), 'Address' (Address 1, Address 2, City, Zip Code), 'Phone' ((999) 999-9999), 'Email' (test_email@testingexample.com), and 'Password' (password). The 'Invoice Delivery' section has three toggle switches: 'Manual', 'RMR', and 'Work Order', all of which are turned on. The 'Save' button is highlighted with a red box.

Click "Save".

Next time an invoice gets created/generated, the email specified under Contacts will receive an emailed copy.
