# Get Billing Records to Your Bookkeeper

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Your bookkeeper wants the invoices and Pipeline doesn't send invoices. What it sends is a monthly receipt, to every master admin, with no way to redirect it — so the answer is a download and one decision about access.

## Introduction

This question arrives in a dozen shapes and they all reduce to the same two facts.

The first: **Pipeline doesn't issue invoices.** What it has is your Billing History: a full record of every charge and the date you're paid through, downloadable whenever you want it. Accounting departments accept it in place of an invoice, and it's the fastest answer to most of these requests.

The second: **payment receipts are wired to master admins.** Every master admin on the account gets one each month, automatically. There's no toggle to turn it off for one person, no billing-contact field, and no billing-only role. That's not a setting we've hidden. It doesn't exist, and knowing that saves a long search.

Everything below follows from those two.

## When to Use This

- Your accountant or bookkeeper is asking for invoices and you can't find any to send.
- You need a record of last year's Pipeline charges for taxes.
- Receipts are still going to someone who left months ago.
- Accounts payable wants the monthly receipt sent straight to them.
- You need a receipt for a one-time charge like a merge or a data transfer.

## Why This Beats Making Your Bookkeeper a Master Admin

The obvious move, once you learn receipts only go to master admins, is to make the bookkeeper one. It works — and it's worth a moment's thought first, because master admin isn't a billing role. It's the top of the account: every Location, every transaction, every document, every commission figure, and the settings nobody else can touch. There's no way to grant the billing part on its own.

For a partner or an internal controller, that's usually fine. For an outside bookkeeper who needs a number once a month, it's a lot of access for a small job — and a forwarding rule on an inbox gets them exactly the same email with none of it. Decide which you're doing rather than defaulting.

## 1. Download Billing History

Your Billing History page is the record of every Pipeline charge — what you paid, when, and the date your account is paid through.

See Billing History

> If your accountant specifically asks for an invoice, send this and say Pipeline doesn't issue separate invoices. In our experience the download settles it — it carries the same information an invoice would.

## 2. Know Where the Monthly Receipt Goes

Each successful charge sends a Payment Receipt from help@paperlesspipeline.com with "Payment Receipt" in the subject line, and it goes to every master admin on the account.

Every part of that is fixed. It can't be switched off for an individual, it can't be pointed at a billing address instead, and there's no separate field anywhere for a finance contact. If somebody is getting these and shouldn't be, or isn't and should, the only lever is whether they're a master admin.

The master admin sits at the top of your account — full access to every location, every transaction, and the settings no one else can touch.

See Master Admin

> People sometimes solve this by creating a profile on the accounting address and making it a master admin. It does deliver the receipts — and it's still a full-access master admin, just one named after a department. If you go that way, do it knowingly.

## 3. Decide Whether Your Bookkeeper Needs Master Admin

If the person handling your books is internal and trusted with the whole business, adding them as a master admin is the clean answer — they get the receipts automatically and can pull Billing History themselves without asking anyone.

We'll need written authorization from a current master admin to add one. If there's no reachable master admin left at all, the company's owner has to establish ownership before we can act — which is exactly the situation worth avoiding by having more than one.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

## 4. Use a Forwarding Rule Where Full Access Isn't Right

For an outside bookkeeper, or anyone who needs the number and nothing else, this is the better shape. One rule on a master admin's inbox — anything from help@paperlesspipeline.com with "Payment Receipt" in the subject — forwards every month's receipt to accounts payable, permanently, and grants nobody anything.

It's also the answer when several people want to see the receipts. There's no way to add recipients inside Pipeline; a forwarding rule can point at as many addresses as you like.

## 5. Stop a Departed Admin's Receipts

Somebody left and the receipts follow them. Removing their master admin stops it — that's the only thing that does.

Two things to handle straight afterward. Removing master admin takes their ordinary permissions with it, so if they still work here in a different role, someone needs to set their access back up. And if they've left the company entirely, deactivate the profile rather than just demoting it.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

> Same story if it's the address that changed rather than the person. Receipts follow the email on their profile, so updating it there is what moves the receipts.

## 6. Ask Us for a Copy You're Missing

Receipts land in inboxes and inboxes lose things. We can re-send a specific month, and we can send a receipt for a one-time charge — a merge, a data transfer, a past backup order — that never went out as a monthly receipt at all.

The request has to come from a master admin, for the same reason the receipts only go to them. Name the month or the charge and we'll send it back through the ticket.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help