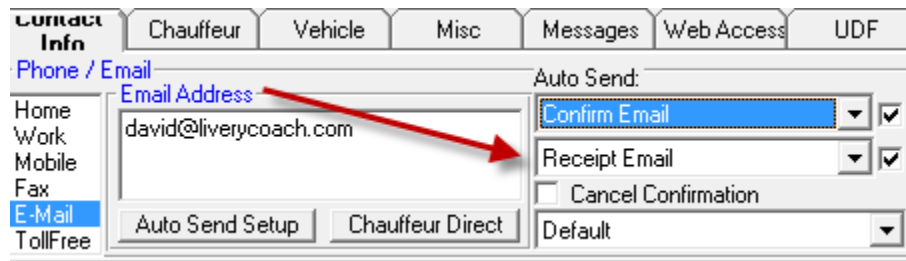


Tech Tip Tuesday—May 20, 2014

by David Hirsch

Auto Receipt—when it's not a receipt

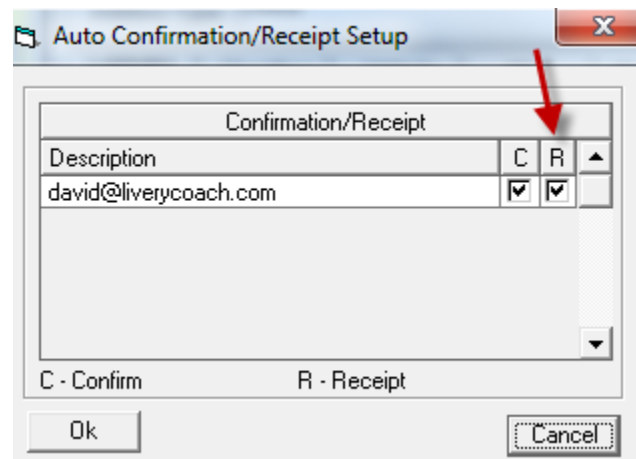
As most of you know, Livery Coach has the ability to automatically email a receipt when the trip is closed in TripBook. This is, of course, set up in the contact profile.



The screenshot shows the 'Auto Send' configuration for a contact. The 'Email Address' field is set to 'david@liverycoach.com'. The 'Auto Send' section has the following options:

Option	Checked
Confirm Email	<input checked="" type="checkbox"/>
Receipt Email	<input checked="" type="checkbox"/>
Cancel Confirmation	<input type="checkbox"/>

Buttons: Auto Send Setup, Chauffeur Direct, Default.



The dialog box 'Auto Confirmation/Receipt Setup' contains a table for configuring auto-send settings:

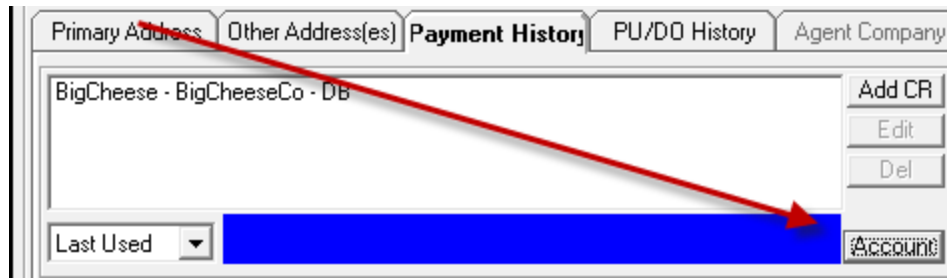
Confirmation/Receipt		
Description	C	R
david@liverycoach.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Legend: C - Confirm, R - Receipt. Buttons: Ok, Cancel.

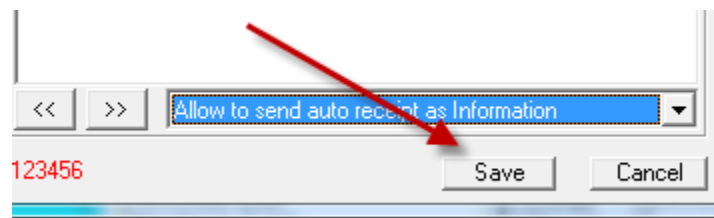
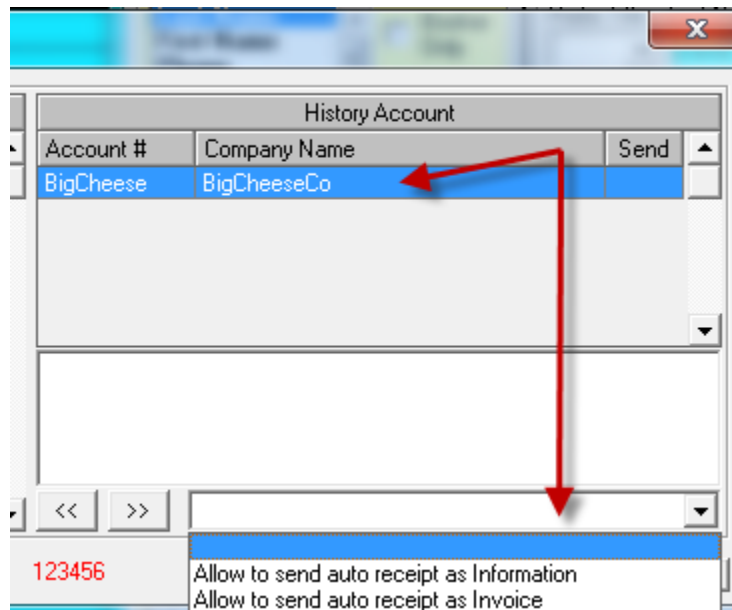
However, keep in mind that the word “Receipt” means “Paid”. Therefore, even if you have auto-receipt turned on, the system will NOT send a receipt if the trip is billed to an account.

That said, the system can send something in lieu of a receipt for a billed job—and what it sends will look very much like a receipt, but instead will say “Transportation Information” or “Transportation Invoice” at the top. This is set separately for each contact and billing account, in the contact profile.

In order to get this to work, select the “Payment History” tab from the contact and click the Account button.



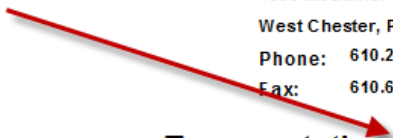
Once the screen opens, select the account from the history side (BigCheeseCo in our sample), and then select whether you want “Information” or “Invoice” from the drop-down. Then click “Save”.



Now, when you close the trip in TripBook, the “auto information” will automatically be sent.

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Transportation Information