

Tech Tip Tuesday—June 9, 2015

by David Hirsch

Do you have a great tech tip?

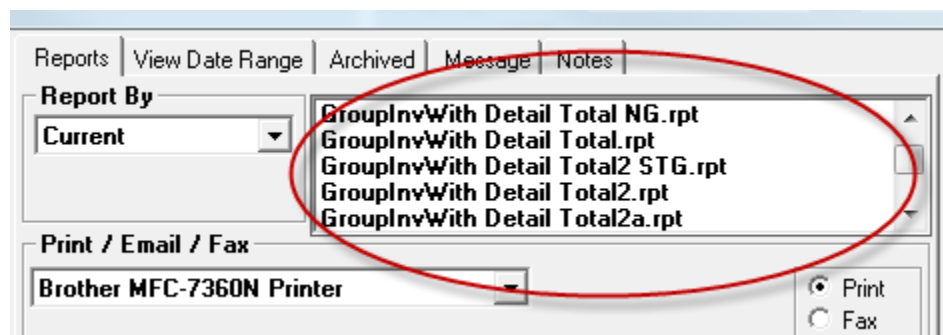
Have you been reading these tips each week and thinking “these are great, but why don’t they mention xxx?” Maybe you’ve got a great tip that you think would be good to share with the Livery Coach community? Well...now you can! Simply submit your tip (complete with screen shots if applicable) to news@liverycoach.com. If the tip is “ready to publish” and we haven’t used it before, then not only will you get credit, but we’ll pay you \$100! Reward the Livery Coach community and yourself at the same time. Before you write the tip, we recommend you check with us (at news@liverycoach.com) to make sure it hasn’t been used, or hasn’t already been written. If we like your idea, we’ll “reserve it” for you so you can write and submit your tip without worrying that someone will beat you to it.

Custom Group Invoices

As most of you know, the default billing option for invoiced trips is that each trip, when closed in TripBook, generates a separate invoice in QuickBooks. Since many of you have high-volume clients that don’t want a separate invoice for each trip, we have a “Group Invoice” system that allows you to create multiple trips on a single invoice and then send them to QuickBooks.

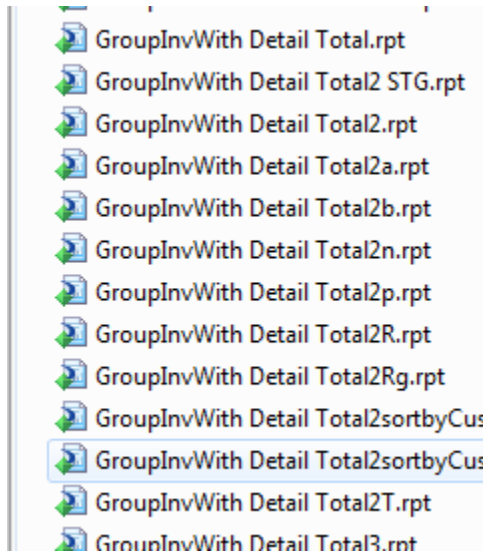
One issue with this method is that the invoices created in QuickBooks are...well, pretty ugly. Because there are limits to the way the QuickBooks integration works, there’s not a whole lot we can do about that. So, we have created a number of “custom” group invoices so that you can send a much more attractive invoice to your customer (right from Livery Coach) and then use the QuickBooks invoice just for the accounting.

Because everyone has a different opinion of what they want the custom invoice to look like, we have a lot of them—which is nice when you are looking through and picking which one you like the best, but not so nice once you have picked the one you like.



Luckily, it’s quite easy to get rid of all the ones you don’t use.

Simply navigate to the Reports directory in your shared Livery Coach folder (typically <\\liverysoftware\Livery\Reports>) Sort the directory by name, and go down to the section where all the file names begin with “GroupInv” (your list might look slightly different).



Then, just delete all the files that begin with GroupInv that you don't use. (If you are cautious, move them to a different directory in case you change your mind). Once they are deleted from the reports directory, they will no longer appear in TripBook as choices.

