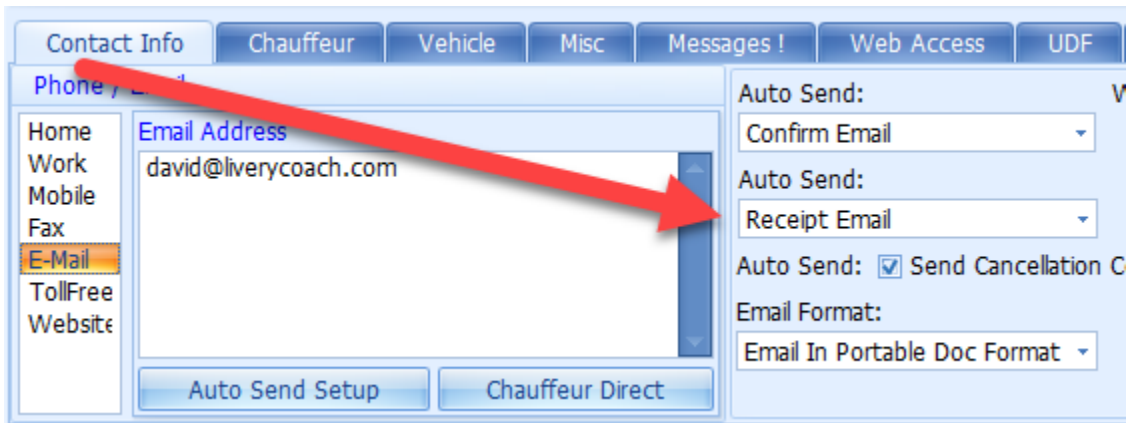


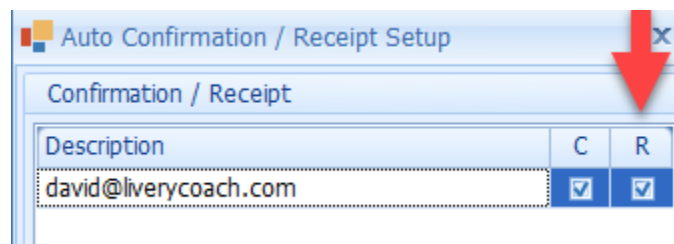
Tech Tip Tuesday—March 21, 2023

Leveraging Auto Receipt to send an Invoice (or an “Information”)

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 'Contact Info' tab with the 'E-Mail' sub-tab selected. The 'Email Address' field contains 'david@liverycoach.com'. Below this, there are two buttons: 'Auto Send Setup' and 'Chauffeur Direct'. To the right, the 'Auto Send' section is visible, with the first dropdown set to 'Confirm Email' and the second dropdown set to 'Receipt Email'. There is also a checkbox for 'Send Cancellation C' and an 'Email Format' dropdown set to 'Email In Portable Doc Format'.



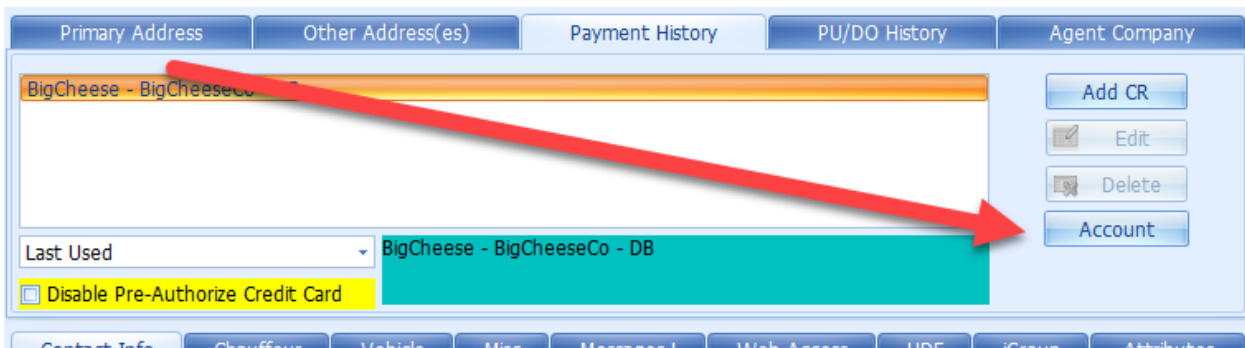
The screenshot shows a dialog box titled 'Auto Confirmation / Receipt Setup'. Inside, there is a table with the following data:

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

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.

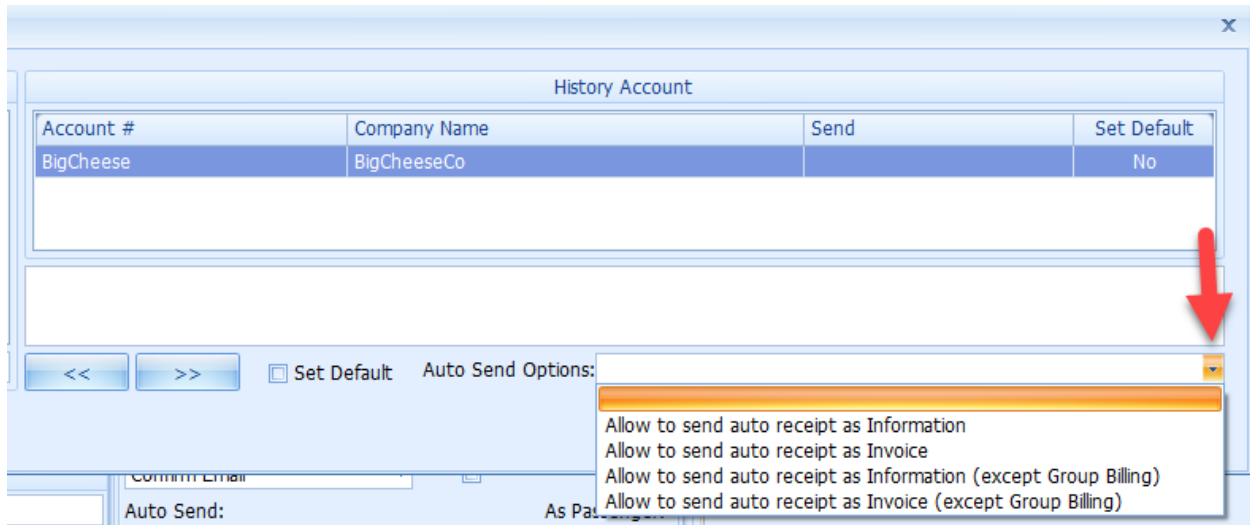
In order to get this to work, select the “Payment History” tab from the contact and click the Account button.



The screenshot shows the 'Payment History' tab with a list of entries. The entry 'BigCheese - BigCheeseCo - DB' is highlighted in green. To the right of the list are buttons for 'Add CR', 'Edit', 'Delete', and 'Account'. A red arrow points from the highlighted entry to 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. Note that you can exclude the billing account from auto-send if the trip is billed as part of a Group Invoice (Account Group), so that only individually billed trips would send.

Once you have made your selection, click “Save”.



Now, when you close a trip in TripBook, the “Auto Information” or “Auto Invoice” will be automatically sent.

