Tech Tip Tuesday—November 12, 2024

Billing Accounts

As you know, Livery Coach has a full integration with QuickBooks (either Desktop or Online) and as such, does not have its own Accounts Receivable module. As such, when you set the payment method in a trip to "Billing Account", the system will create an invoice in QuickBooks for that billed customer.

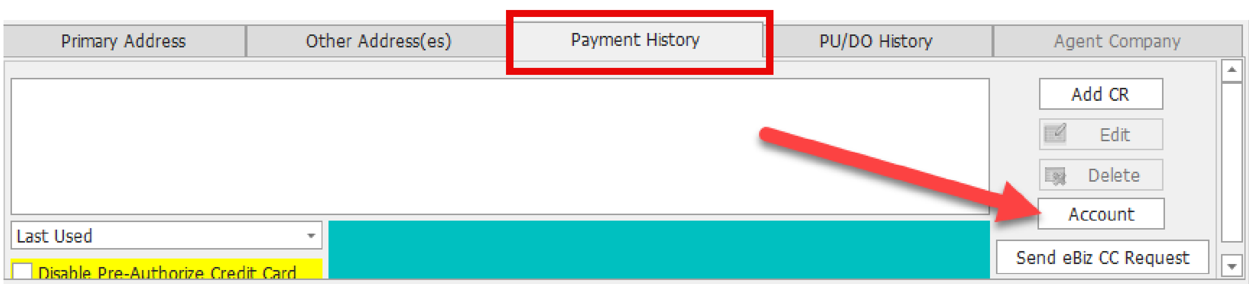
What that means, of course, is that you need to create the customer in QuickBooks first, and then perform an Accounting Update to refresh Livery Coach's list of potential billing accounts.

If you have any billing accounts at all, you already know this and might be questioning the point of this tip.

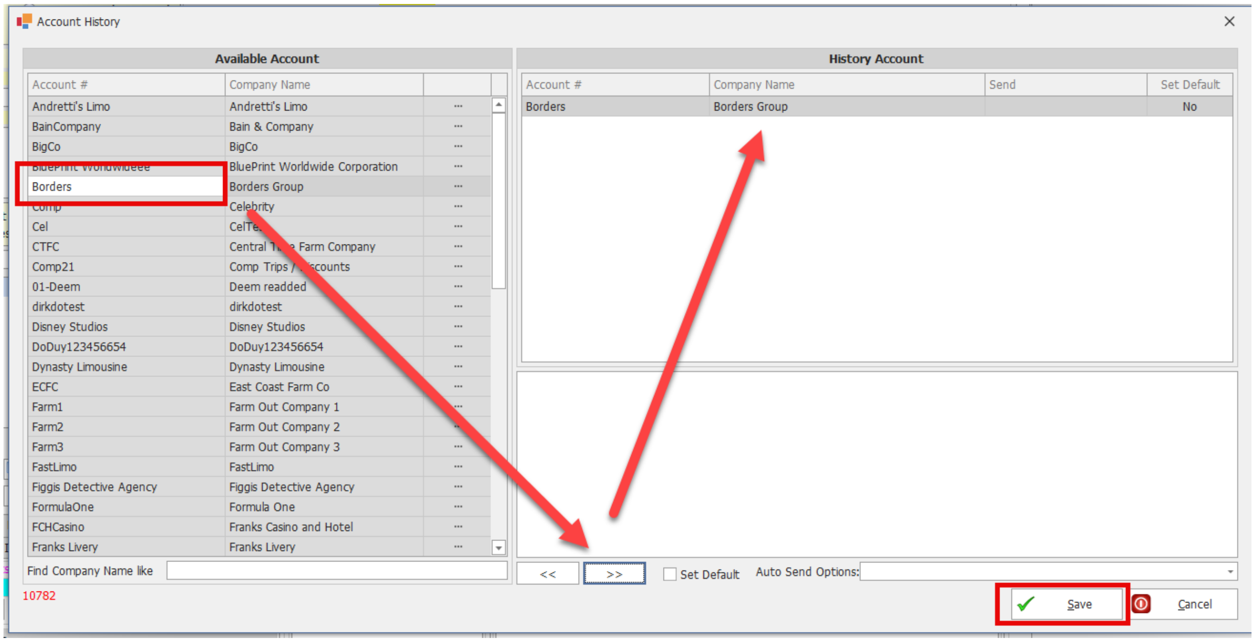
What hangs people up sometimes is how you actually use that billing account in a trip, especially the first time.

Just because the billing account (QuickBooks Customer) is now available in Livery Coach doesn't mean that it's instantly tied to a contact ….that process is automatic once you close a trip in TripBook, but how do you use it when you have never used it before? The answer is that there are several ways, and we will outline them two of them below.

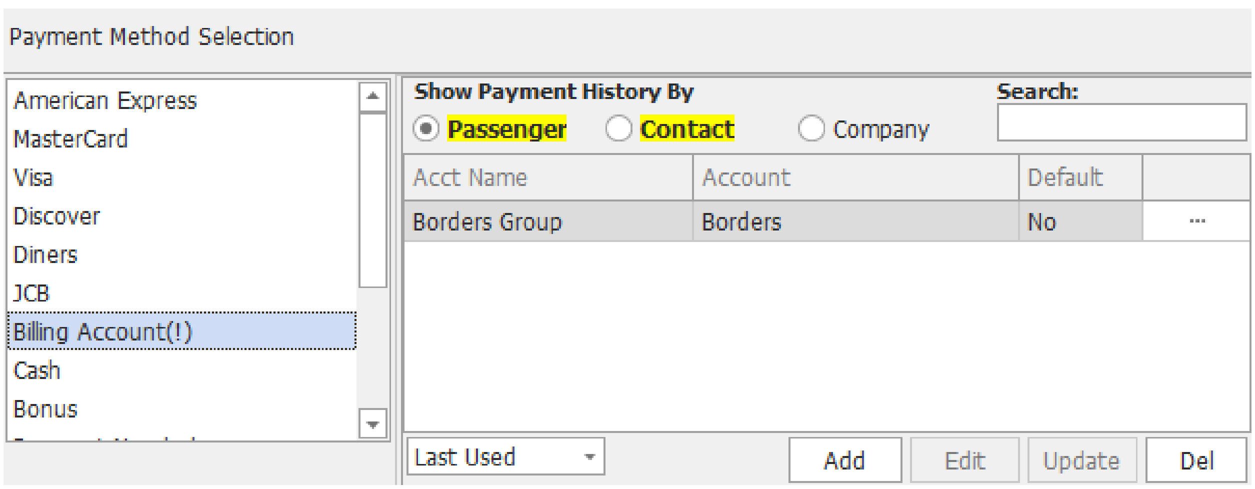
The first way is that you manually add it to a contact, by selecting the "Payment History" tab in the contact, clicking the "Account" button.



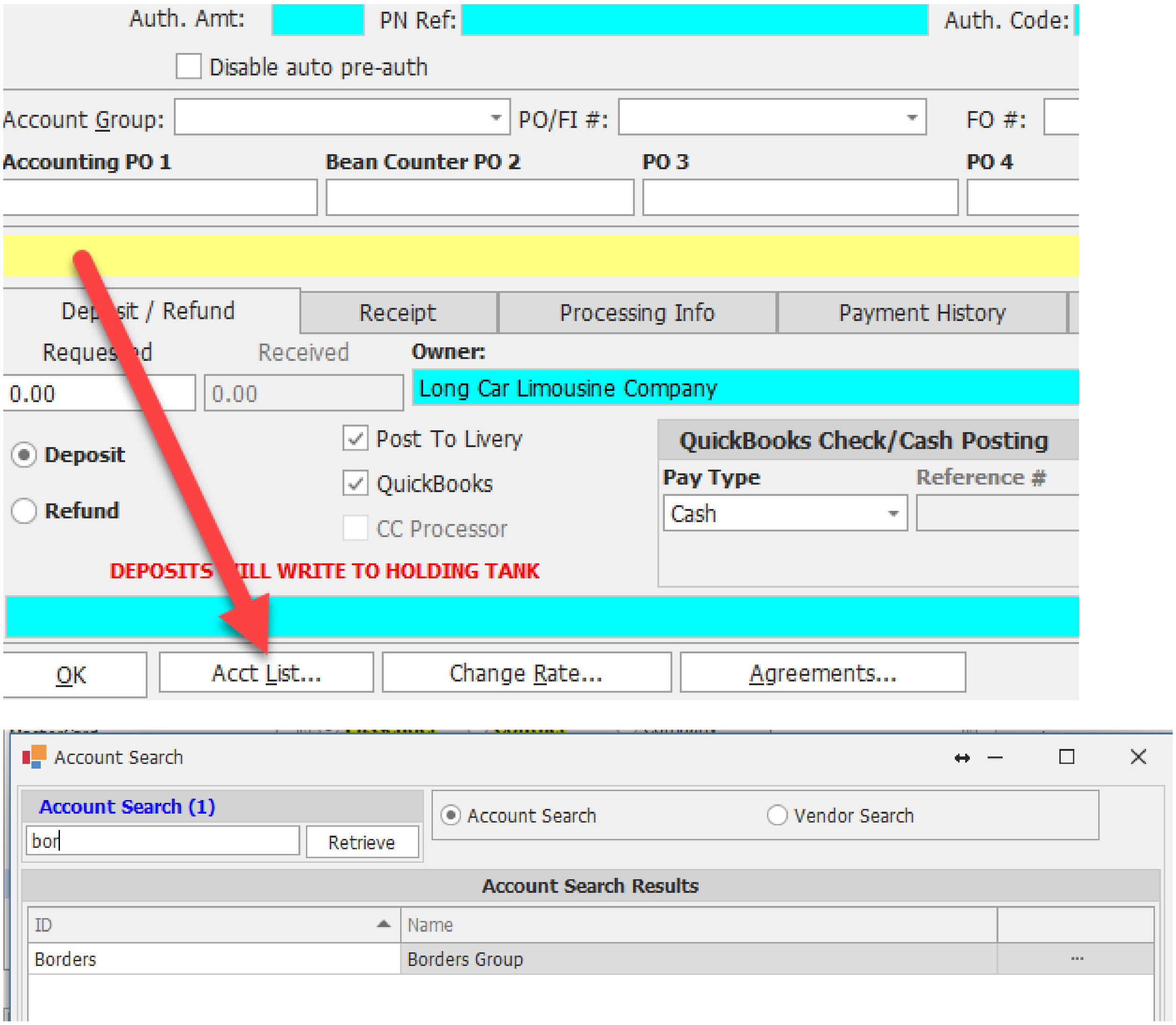
This brings up a screen with all the possible billable accounts, where you can select the desired one, copy it from the left (the whole list) to the right (History of payment accounts for that contact) and then click Save.



This will cause that billing account to immediately appear in the Payment History of that contact, instead of having to wait for TripBook to do its thing.



If you already got to the payment screen and forgot to add it to the contact, you can still click on the “Acct List” button (if your Livery Coach security permissions are set to allow you to do so) and then search and select that billing account from the list.



Just be aware that if you pick this billing account for an individual trip, it will still not appear in the Billing Account(!) list of a trip until after you have closed at least one trip with this billing method.

In a future Tech Tip we will discuss how you can make this billing account (or even a credit card) instantly available to all bookers from the same company, without having to add them to each contact individually.