CabVista: How can I send a customer an ad-hoc invoice ?

1) What is an ad-hoc (one-off) invoice ?:

There are two ways you can invoice a customer:

-Either-
1) in **Invoice Manager**, where once a week (or month) you invoice all your account customers for their jobs this week (or month).

-or-
2) you can create an "**ad-hoc**" invoice ... this is a special "one-off" invoice that you create for a customer / passenger "here and now". It is printed immediately and does not appear in Invoice Manager.

2) Creating an ad-hoc (one-off) invoice:

You can create an "ad-hoc" invoice, as follows:

How to do it:

When taking a booking, complete all the job details as usual (making sure you have entered the Account Customer and the Fare)
... then click on "**F7 Print / Email / Invoice Confirmation**" (or just press <F7>).

You are then shown a choice of documents you can print for the customer for this job. Click on "**Print an Ad-hoc Invoice**".

You can create an "ad-hoc" invoice for <u>either</u> an account job, <u>or</u> for a "cash" job, as follows:

Type of job:	What happens:
Account Job	Customer name and address details are added to the invoice ***automatically***
"Cash" Job	***You are asked*** for the Customer name and address. By default, these are the passenger name and the pick-up address, but you can edit them.

Notes:

1) Name & address details entered for an "ad-hoc" 'cash' invoice are <u>not</u> stored or remembered ... so if this customer is likely to be a regular customer, you are probably better-off storing him as an Account Customer, so you can retrieve his details quickly next time.

2) An ad-hoc invoice produced as above is saved in the <u>Invoice History</u>, so you can review it, print another copy, etc, in the usual way: "Invoicing → Invoice History".

3) An ad-hoc invoice is <u>not</u> exported to Sage or QuickBooks ... so if you need the invoice in Sage or QB, then you will need to keep a hard-copy of the invoice and enter it manually later.

3) Looking-up an existing Account Customer:

If you wish, you can create an Ad-hoc invoice for an existing Account Customer.

Start the Ad-hoc invoice in the usual way, but when asked for the address details, click on:

"Look-up details of an existing A/C Customer ...".

After selecting the Account Customer, their address details are copied into the invoice.

Note: this is different from marking this job as an Account Job on the Booking Screen, because such an Account Job will be invoiced later in Invoice Manager.

4) Displaying more than one job on an ad-hoc invoice:

You have the ability to create an "ad-hoc" invoice that includes *more than one job*.   This is useful if the customer wants a return-journey, or a multi-car job.

To bring the jobs together on the same invoice, simply give each job the same "Customer Ref" (ie: "Ref / Job#").

Then create the Ad-hoc invoice in the usual way (ie: while booking the final job, within the Booking Screen, click on "**F7 Print / Email / Invoice Confirmation**" - or just press <F7> - then select "**Print an Ad-hoc Invoice**").
Any earlier jobs with the same "Ref / Job#" will also appear on the invoice.
ie: any jobs that were booked for up to seven days either side of the invoice with the same Customer Ref.

5) Invoice footer, etc:

The **footer** is only shown for invoices created within "Invoice Manager" and not for "Ad-hoc Invoices".

Reason: many people use the footer for notes such as: "Our Terms are 28 days", which is not relevant to an Ad-hoc invoice.
The "Invoice Terms" are also omitted from an ad-hoc invoice, as they are typically cash jobs and so the terms are not relevant. "Total jobs" is also omitted, as there is usually only one job.

6) Emailing an ad-hoc invoice:

You could create an ad-hoc invoice and print it -- but as well as printing it, you can choose to also email it to the customer.
To do this, follow these steps:

a)   Create the ad-hoc invoice in the usual way.

b)   After previewing it on screen (and having the option to print it by clicking 'Print') when you close the Preview screen, you are also asked: "Do you wish to email the invoice to the customer ?".

c)   If you click "Yes" then an email is created with the invoice attached.
If the email address for this customer is known, it will be inserted in the "To" section of your email automatically. If the email address is not known, it will say "name@address" and you need to enter the email address yourself.