

Trip Tracker – Finance

Reference guide for creating and printing invoices

To view a single invoice when you know the date the trip was taken:

- 1) Click on Calendar
- 2) On the calendar on the left side of the screen, determine the month in which the trip occurred by clicking on the arrow to the left or right of the month and year on the calendar at the top left corner of the screen.
- 3) Click the day the trip occurred.
- 4) Locate the trip in question and double click on that trip in the calendar
- 5) Click on **“Invoicing”** on the top row. This is the invoice for the trip

To print your invoice:

- 1) Click on **“Printable Copy”**
- 2) Click on the printer icon located in the upper left corner of the screen.

To view multiple invoices within a period of time:

- 1) Go to **“Reports”** in the upper right corner of the screen, but do not click
- 2) Slide down to **“Accounting Reports”**
- 3) Slide over to **“Invoice”**
- 4) In the search query:
 - a) Field Name = Account Name
 - b) Operator = Is Equal to
 - c) Value = The account you are requesting invoices
 - d) Click **“Add”**
 - e) The information you entered will now be below the empty fields in blue and the fields you entered information in will now be blank.
 - f) If you are interested in receiving information on more than one account, click on the first field on the left and click on **“Or”**
 - g) Repeat steps a-d above
 - h) Click on the first field on the left and click **“and”**
 - i) Field Name = Trip Date
 - j) Operator = Is greater than

- k) Value = On the calendar, click on the day before you are interested in receiving an invoice.
- l) Click “add”
- m) Click on the first field on the left and click “and”
- n) Field Name = Trip Date
- o) Operator = is less than
- p) Value = On the calendar, click on the day after you are interested in receiving an invoice

To print your invoices:

- 1) Click on the printer Icon located in the upper right corner of the screen. The printer Icon with a “1” in a black circle will print the visible Invoice. The printer Icon without the “1” will print all the invoices.