TRAMS BACK OFFICE
Tip of the month

Efficiency rules! Trams Back Office is rich with functionality to assist with making every work hour a productive hour. Perhaps there are more features that you may not yet be aware of that can improve efficiencies? Tip of the month is a series designed to open new doors that could just make that work hour even more productive!

Problem:

Our agency allows customers to make multiple payments on the trips they book (some might refer to it as a type of lay-away plan). We only want to create one invoice and work from that as the payments are being made. We use the split booking method where we deduct the new payment amount from the initial booking total fare field and then create a new booking in the same invoice for the amount we're receiving. It works, but we feel there must be an easier way to get to the same end result.

Solution:

And there is! It's the Split Booking function.

1. Query the invoice
2. Highlight the particular booking the payment is being applied to
3. Right click on the booking and select Split Payment from the menu
4. Enter the amount equal to the amount the customer is paying (in this example $500.00 - see screen snap #1)
5. Click OK. Notice, the new booking for 500.00 was added and the original $10,500.00 booking was reduced by $500.00 with just a few clicks (see screen snap #2)

6. Now apply the $500.00 payment to the new $500 booking and you're done!

Screen snap #1

Screen snap #2

Tips:

1. A split booking can only be created if the initial booking (for the full amount) is left open.
2. You can continue to add split bookings using the same steps above and the initial amount will keep reducing based on the split booking amount.
3. Split bookings are allowed even if the invoice has been posted to the general ledger via an end of period.

So easy, so efficient.