



Travel Manager Help Sheet

How to Send Travel Manager Invoices by Email

Introduction

Travel Manager has a facility to save an invoice to a file. While you could attach such files to emails this is not recommended. The files created are text files which may not appear in the correct format on the recipient's computer and also these files can be amended by the recipient. The most common file format for sending documents and invoices is PDF files which are guaranteed to be received in the original format and cannot be amended by the recipient. In order to open a PDF file the recipient needs to have Adobe Reader software installed – this is free and is installed on most new computers by default; otherwise it is available as a free download from <http://get.adobe.com/reader/>

What you need to do first

- Make sure you are using the latest version of Travel Manager – check the Customer Support page to confirm the latest version number
- In Travel Manager, login as ADMINISTRATOR and go to *Utilities – Booking Options*. Make sure the option for “**Format reports for spreadsheet export**” is set to **Y**.
- Then go to *Utilities – Printers* and make sure that the option for “**Print Name & Address on Invoices**” is set to **Y**.
- Your computer will need to have a PDF print driver installed. If your computer does not already have one then you will need to purchase one, for example **PDFComplete** available from www.pdfcomplete.com or **SmartPDF Creator** available from www.smartpdfcreator.com. You need to have this software installed on each computer from which you want to create PDF files and you need to become familiar with how the software works.
- You need to be able to attach files to an email.
- Mercury Software does not provide support for PDF software or Email programs so you will need to become familiar with these products before using them to convert invoices to PDF files. However, we can provide an on-site training service to fully demonstrate how the process works.

Saving the invoice to a PDF file

A Confirmation Invoice is printed in Customer Transactions screen, either when saving a booking or when you press F6 and select “Confirmation Invoice”.

When you request to print a Confirmation Invoice you will be given three options – **Screen or File** – select **Screen**.

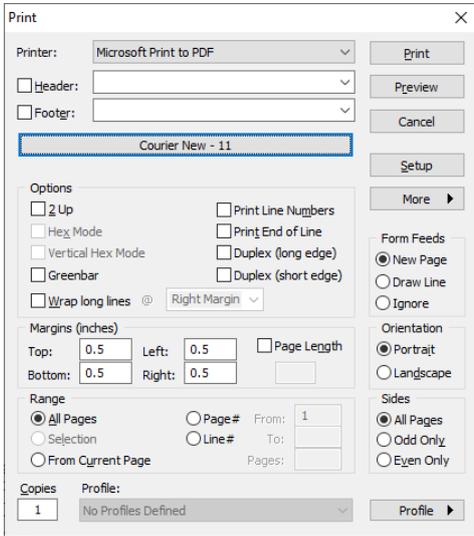
The invoice will then be displayed using V File Viewer which is an add-on program for viewing and printing reports.

To save the invoice as a PDF file, using any of the following options to Print the invoice:

- Click on **File, Print**
- Click on the Printer Toolbar icon

- Press Ctrl-P
- Right-click and select **Print**

Whichever option you use, you will be presented with the following screen:



Change the “Printer” to a PDF Printer Driver and then click “Print”.

The invoice will then be sent to your PDF Printer Driver which will allow you to save it as a PDF file. Enter a name which will identify the invoice e.g. the Customers name, Travel date, etc. Note the location and name of the PDF file.

Once the PDF file has been created you can then attach it to an email and send it to your customer.