

FAQ Invoice Inquiries

Description:


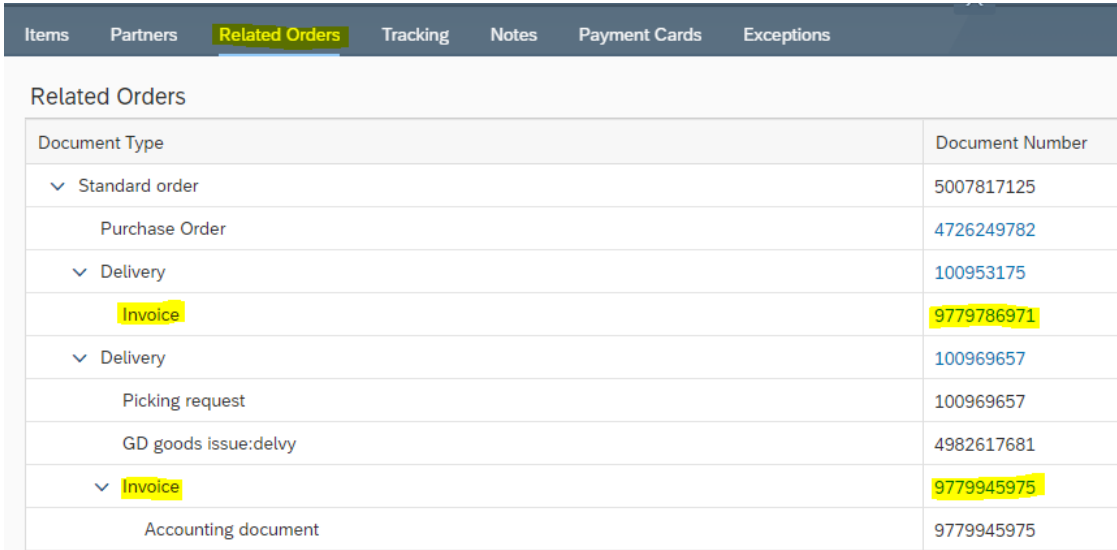
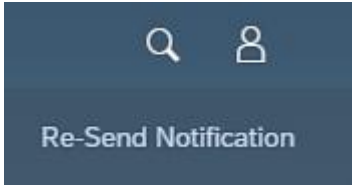
How to respond to the Forms Processing FAQ Invoice Inquiries

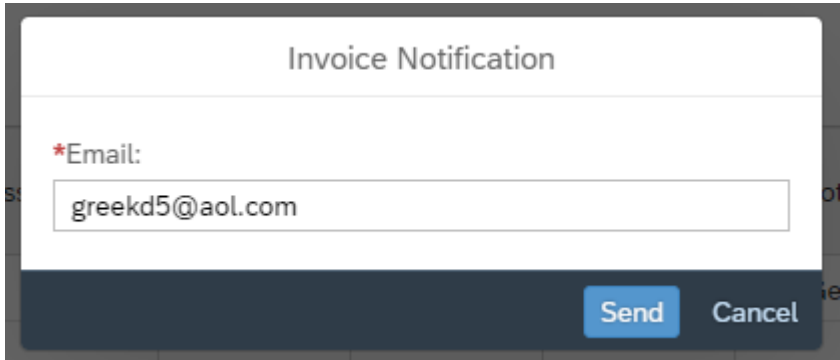
Guidelines:

There are some FSA orders that won't send the invoice. You may need to manually create one, especially if a customer asks for a PDF copy. If you have trouble finding the invoice needed, rely on the customer phone number or other contact information when running your search.

Process:

STEP	ACTION
1	<p>When an Invoice request comes in, it will look like this:</p> <p>First Name: (required) Vong</p> <p>Last Name: (required) Yang</p> <p>Your Email: (required) vooshroom@hotmail.com</p> <p>Your Phone: 4143798137</p> <p>Order Number:</p> <p>Request Type: Invoice Copy</p> <p>Comments Hello, I ordered a set of tires today through the phone. I was suppose to get a email of my invoice but it seems I never did. How can I get the invoice?</p> <p>Vong yang 3218 s landl In apt 211 Milwaukee wi 53227 414-379-8137</p>
Note:	<p>Not all requests will provide the order number, or it will be the wrong order number. Sometimes they will only have an invoice number too, so be sure to check for all possibilities including store-hybris orders, and/or Evolve and Execustar systems, depending on their purchase date.</p>
2	<p>If you cannot find their order anywhere with the information they provided in their request, feel free to respond and ask the customer for additional details. Here is the template I use:</p> <p><i>Hello,</i></p> <p><i>We are happy to assist you with this request, however we are having trouble finding the specific order this is in reference to with the information you've provided.</i></p>

	Can you please send us the purchase date and/or any other name, phone number or email it would be placed under? These accurate details would better help us find the requested invoice.
3	Once you can locate the invoice their asking for, send them a copy to the email provided in their request. This will be done differently depending on which system the invoice comes from
4	<p>If the order is found in FSA, check the email address on the order and verify it matches the email in their request. If it does match, click Send Notification from the top of the order details. This will send them the final invoice</p> 
5	<p>If their email address is different, we can send the invoice to the requested email by clicking on Related Orders, then clicking on the invoice #. The order may have multiple invoices, and invoice numbers will usually begin with "977". Be sure to check all invoices to ensure we are sending the one with the product information they need. If necessary, you can send all of them separately</p> 
6	<p>When you open the invoice, click Re-Send Notification from the top right corner</p> 

7	<p>The invoice notification box will popup, allowing you to change the email address as needed before clicking Send</p> 		
8	Once it's been sent, you'll get a confirmation. Click OK		
9	If the order is found in Evolve or Execustar, view the invoice to ensure it is the right one, and click Send Invoice		
10	Both systems will ask you to confirm and/or change the email address before sending it. Be sure to verify the email address, or change it according to their request and click OK		
Note:	If you need to manually create an invoice, pull up the order and send yourself a copy of the invoice. When you receive the email, copy all text from the order number down to the total, and paste it into a blank word document.		
11	Highlight all the text and change the font to Arial size 10		
12	Open the "INVOICE TEMPLATE copy" word document found in M:\Support Team\Best Practice's 2023		
13	Copy each section of information from the "blank doc" and paste onto the official template accordingly. Some of the information, such as the totals may need to be typed instead of copied/pasted		
Note:	<p>There are tables imbedded in the format so be careful as the pasted info may change the spacing. Also the email address may paste in bold, but you can un-bold it.</p> <table border="0" style="width: 100%;"> <tr> <td style="vertical-align: top; width: 50%;"> Billing Information: Brian Merson 240 Gold Leaf Ln Carson City, NV 89706-0733 916-662-9092 Brianmerson@yahoo.com </td><td style="vertical-align: top; width: 50%;"> Shipping Information: Brian Merson 240 Gold Leaf Ln Carson City, NV 89706-0733 916-662-9092 Brianmerson@yahoo.com </td></tr> </table>	Billing Information: Brian Merson 240 Gold Leaf Ln Carson City, NV 89706-0733 916-662-9092 Brianmerson@yahoo.com	Shipping Information: Brian Merson 240 Gold Leaf Ln Carson City, NV 89706-0733 916-662-9092 Brianmerson@yahoo.com
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	<div><div><div><div>Payment Information:</div><div><div><div><div><div><div></div></div></div><div>Paypal</div></div><div>#####0058 exp 12/9999</div><div>Card Total - \$544</div></div></div><div><div>Product Information:</div><div><div><div><div><div></div></div></div><div>205 /55 R16 91H SL BSW COP COOPER CS5 ULTRA TOURING Item# 000000000000019856 ★★★★★ 4.7</div></div></div><div><table><tr><td>Unit Price</td><td>Order Quantity</td><td>Line Item Price</td></tr><tr><td>\$136.00 /ea</td><td>Qty: 4</td><td>Price: \$544.00</td></tr></table></div></div></div><div><div>Vehicle Information:</div><div>2012 Hyundai Sonata</div></div></div><div>Lastly, don't forget to double check all info including the tax & totals to ensure they're correctly updated for the current customer / invoice</div></div>	Unit Price	Order Quantity	Line Item Price	\$136.00 /ea	Qty: 4	Price: \$544.00
Unit Price	Order Quantity	Line Item Price					
\$136.00 /ea	Qty: 4	Price: \$544.00					
14	Click File > Save as and save it as a PDF file titled with the customer's name in an easily accessible folder						
15	<div>Reply to the invoice request with the following message and attach the PDF invoice you just saved before clicking send</div> <div><div>Hello,</div><div>Thank you for taking the time to reach out to us regarding your invoice.</div><div>Attached is a PDF copy of your invoice as requested.</div></div>						
16	For other additional and helpful response templates for various scenarios, view the "Forms Processing- Invoice Request responses" word doc from the following file path. M:\Support Team\Best Practice's 2023						

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