

What chauffeur booking software should handle, from first enquiry to paid invoice.

Use a familiar job. Mark what you have checked, note the gaps and agree the next step with your team.

1. Capture the request wherever it arrives.

- ☐ Send it a messy real email and see what it extracts.
- ☐ Check that missing details are visible, not blank or guessed.
- ☐ Confirm repeat enquiries from one person land on one client record.

2. Quote, get acceptance and confirm.

- ☐ Price a job from your own rates, then change one detail.
- ☐ Open the customer's side of the quote as the customer would.
- ☐ Find out what happens to an accepted quote that nobody has booked.

3. Assign a driver and vehicle you can trust.

- ☐ Assign a job to a vehicle with too few seats and see the response.
- ☐ Reassign a job and check what the old and new driver are told.
- ☐ Follow a partner job to the point a driver is named.

4. Check the driver's view on a phone.

- ☐ Read a job on a phone without zooming or scrolling sideways.
- ☐ Change a job after assignment and see what reaches the driver.
- ☐ Ask how a driver proves the job was done.

5. Turn the finished job into an invoice and a payment.

- ☐ Create an invoice from a finished booking and compare the figures.
- ☐ Record a part payment and check the remaining balance.
- ☐ Issue a credit note and see how the balance changes.

6. Give clients access and read the results.

- ☐ Log in as a client and see only that client's records.
- ☐ Ask for the margin on one job and see where each figure comes from.
- ☐ Find the unpaid invoices report and check it against one client.

Our next step / owner / date

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