

Courtesy Notice & Invoice Numbering System with Notes

Courtesy Notices, Cover Letters, Invoices and your **Notes** need to have some unique reference numbers on all related documents that are linked together. Here is the system that I use to do that.

Courtesy Notice

Each document Reference number begins with two or more letters designating the type of document.

CN "Courtesy Notice"
CNCL "Courtesy Notice Cover Letter"
IV "Invoice"
IVCL "Invoice Cover Letter"
NO "Notes" (Personal note document with events related to a reference number)

Next comes the year, date, & sequence#, i.e.

2013-0613-1-

The last 'set' of letters designate the initials of the person receiving the notice. If two people on the same day have the same initials simply include their middle initial to provide uniqueness, i.e.

MM = "Mickey Mantle" with the IRS
AEN = "Alfred E. Neuman"
JC = "Jonny Cash"
etc.

Thus: **CN-2013-0613-1-MM** designates the (first sequence # 1) Courtesy Notice sent on June 13, 2013 to Mickey Mantle.

Thus: **CNCL-2013-0613-1-MM** designates the (sequence # 1) Cover Letter sent on June 13, 2013 to Mickey Mantle along with the Courtesy Notice with the same corresponding middle date and sequence numbers.

Invoices:

Invoices for the above Courtesy Notice will then have the following Reference number format.

Invoices numbers will start with "**IV**" and carry the same Reference number as the corresponding Courtesy Notice and their Cover Letters with the persons unique initials at the end. The sequence (last) number changes only to denote the consecutive numbers assigned to each successive Invoice should that need arise due to further action on the part of the Respondent.

1 = First Invoice, **2** = Second Invoice, **3** = Third Invoice, etc.

IV-2013-0613-1-MM, **IV-2013-0613-2-MM** (follow up), **IV-2013-0613-3-MM** (follow up), etc.

Thus the above numbers represents the first, second and third Invoices sent because of a response or action on the part of Mickey Mantle, **CN-2013-0613-1-MM**.

IVCL-2013-0613-2-MM designates the **Invoice Cover Letter** for the second (follow up) **Invoice**.

Final Notes:

Using the above letter and number system assures that all **CN's** or **CL's** or **IV's** have the same reference number and correctly correlate to the original Courtesy Notice. Only the sequence number changes for consecutive "Invoices."

It also allows for the same "date" and "sequence" number to be assigned to multiple **CN's** on the same day because each persons initials at the end of the number will be different and unique. Make sure to include the **CN** Reference number on page 2 of the "Courtesy Notice" and at the top of page 3. It is also a good idea to include any Reference number at the top of any Cover Letter to link them together.