

## Tech Tip Tuesday—October 1, 2013

by David Hirsch

### **ALL ABOUT OCCASIONS—part 1** *(with apologies to our friends in Rhode Island)*

Last week we talked about how you can use Colors for Occasions to set them apart in the Dispatch Grid. Today we'll talk about some of the other things you can do with Occasions. Believe it or not, there is so much we're not going to be able to cover it all today. But here's the summary of what you can do with occasions:

- Have a separate cancellation policy at the bottom based on occasion
- Control what occasions show up on your website for booking
- Control whether occasion is required
- Control whether occasion is copied when you copy a trip
- Control whether occasion is copied when you make a return trip
- Set certain occasions to make chauffeur and vehicle info appear on confirmations
- Merge 2 occasions into one
- View the dispatch grid sorted by occasion
- Look up trips by occasion
- Run a report showing you trips by occasion

And (we'll cover the below in future tips):

- Automatically apply different hourly rates and gratuity based on occasion
- Restrict chauffeurs from driving trips marked with certain occasions
- Pay chauffeur differently based on occasion

First, a review. You are probably familiar with the spot in Livery Coach where you set the "Cancellation Policy"—the paragraph of text that appears at the bottom of a confirmation.

(If not, this can be seen by going to Livery Coach Maintenance...Maintain...Owner List...select the owner you want to edit the policy, click Edit, and then select the Policy tab.)

But the space in this field, and at the bottom of the confirmation, is limited. And, different occasions might require different policies. For example, your standard policy might talk about a 2 hour cancellation policy...but for, say, a wedding or bachelor party, you might want 24 or 48 hours.

Also, it can be uncomfortable for your corporate travelers booking trips to the airport to read a cancellation policy that mentions "biological emissions" or whatever euphemism you might use for the messes drunk party people might make.

Luckily, Livery Coach can handle this with ease. Simply click on Maintain...Occasions...and enter your text in the absurdly large white box (the policy can be up to 4000 characters...so you can put a whole wedding agreement or prom promise, complete with signature line, in there).

**Edit Occasion**

**Occasion Name**  
Bachelor/ette

Color Name: Black on Red

Use Colon(:) at the beginning of each Occasion Name to show Chauffeur Info in the Confirmation.

**Occasion Policy** (This text will override Company Policy)  Display in Website Occasion List

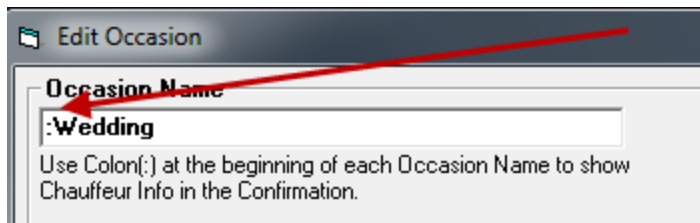
Cancellation made less than 48 hours before the scheduled pickup time will result in a forfeit of the deposit.  
If cancellation is made more than 48 hours prior to the scheduled pickup time, your deposit may be applied to any future reservation to be used within 6 months.

All Vehicles are NON-Smoking.

A Liability Deposit of \$200 Cash is required at time of pickup for Limousines, SUV or Vans or \$350 Cash for Buses, along with a signed Liability Agreement outlining fees that will be incurred if damages to the vehicle. This deposit will returned at the end of the evening if no vehicle damage(s) occurred. Please contact Long Car Limousine if you wish to view a copy of this agreement prior to the pickup.

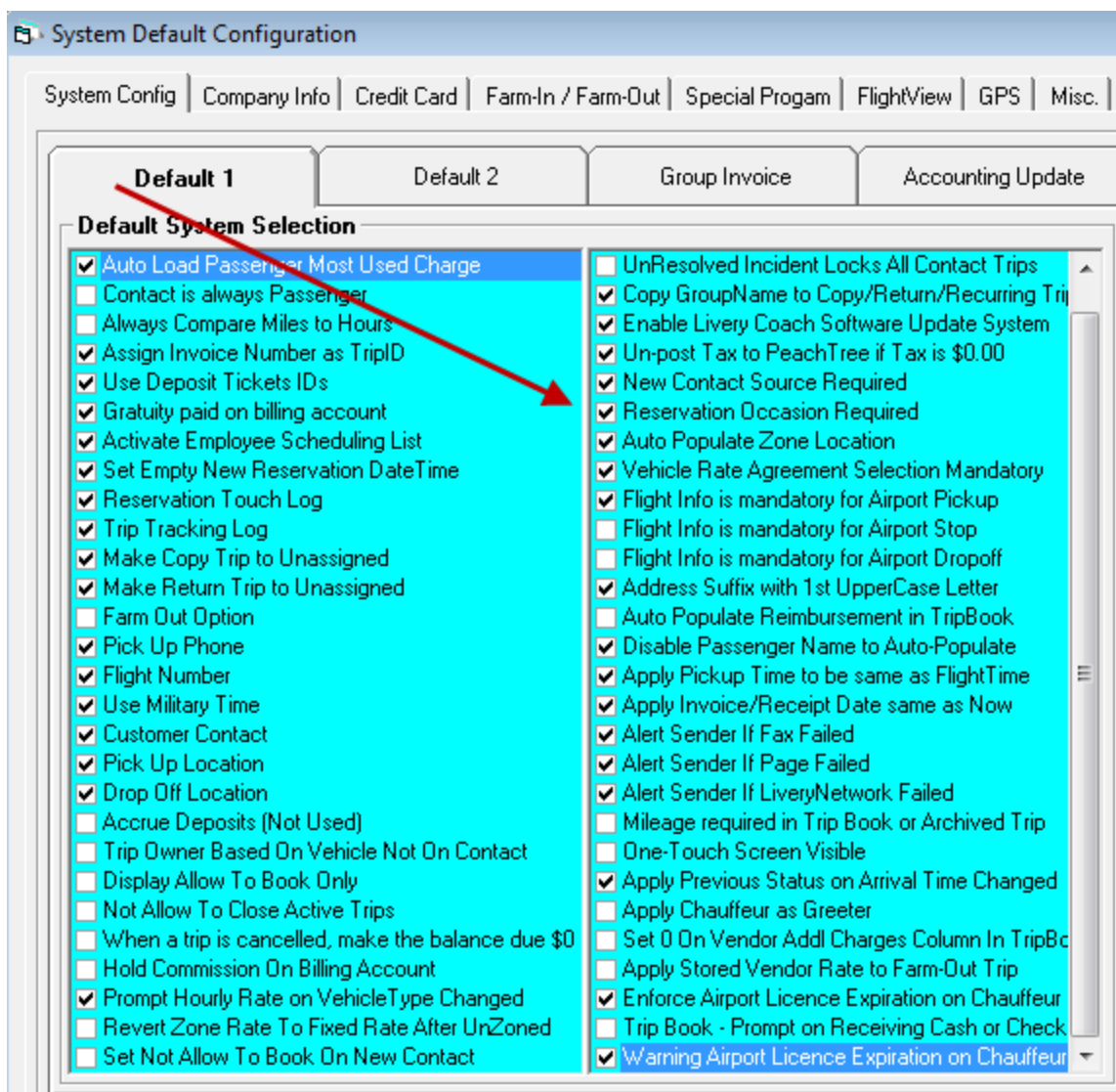
Ok Cancel

A few more points...if you begin the Occasion name with a colon (the : character), then the confirmation to the customer will show the Chauffeur Name, Chauffeur Cell, Vehicle Tag, and Vehicle information...this can be helpful if your customer is booking a specific vehicle and/or chauffeur (for a wedding, for example, or even a Road Show).

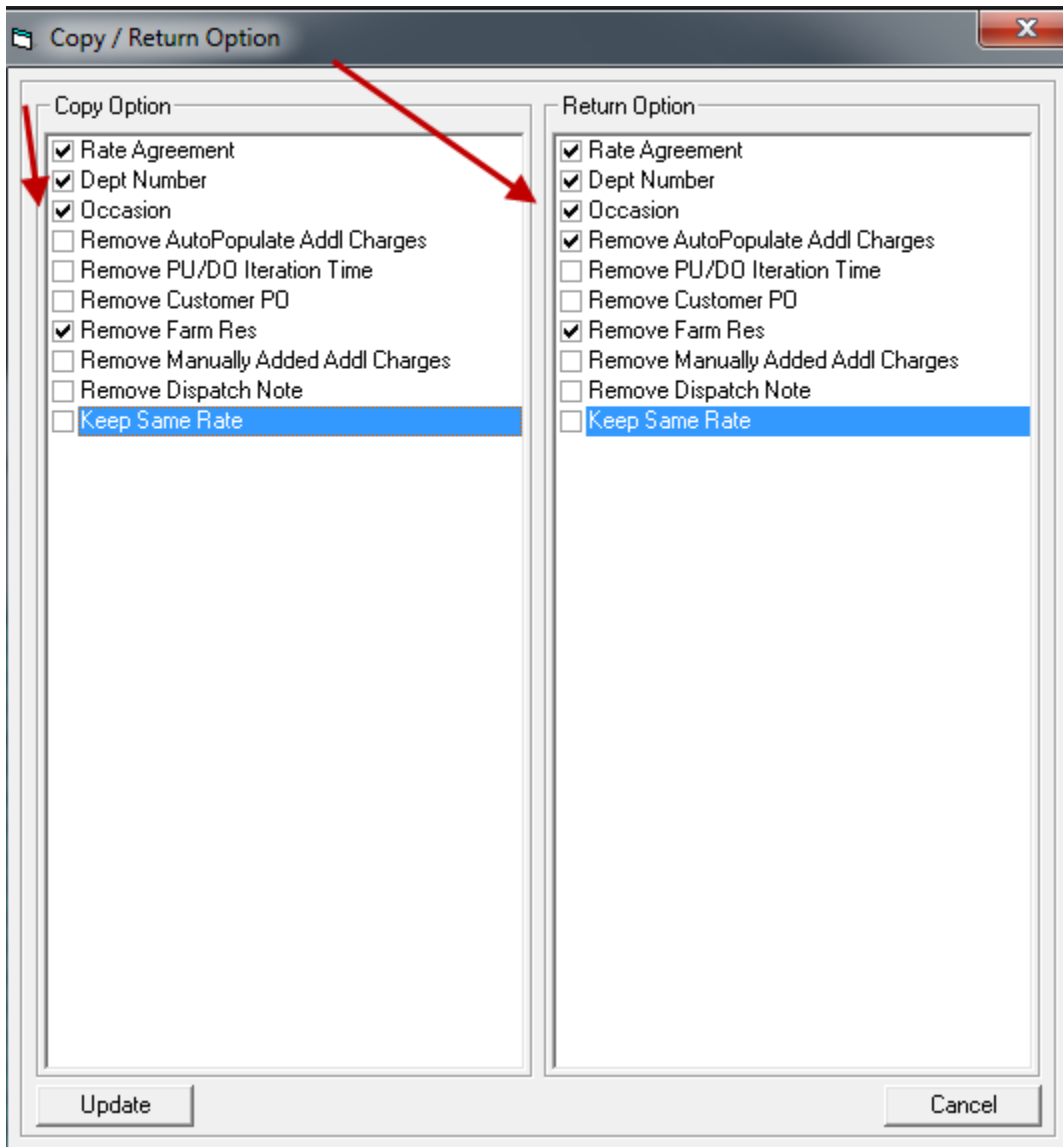
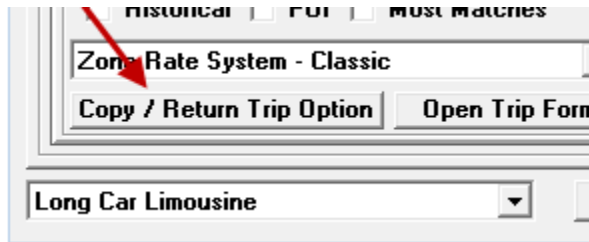


You can also pick which Occasions appear in your website Occasion list (that your customers can see), and which ones are “private” and can only be booked in the office. Note the checkmark in the screen shot above.

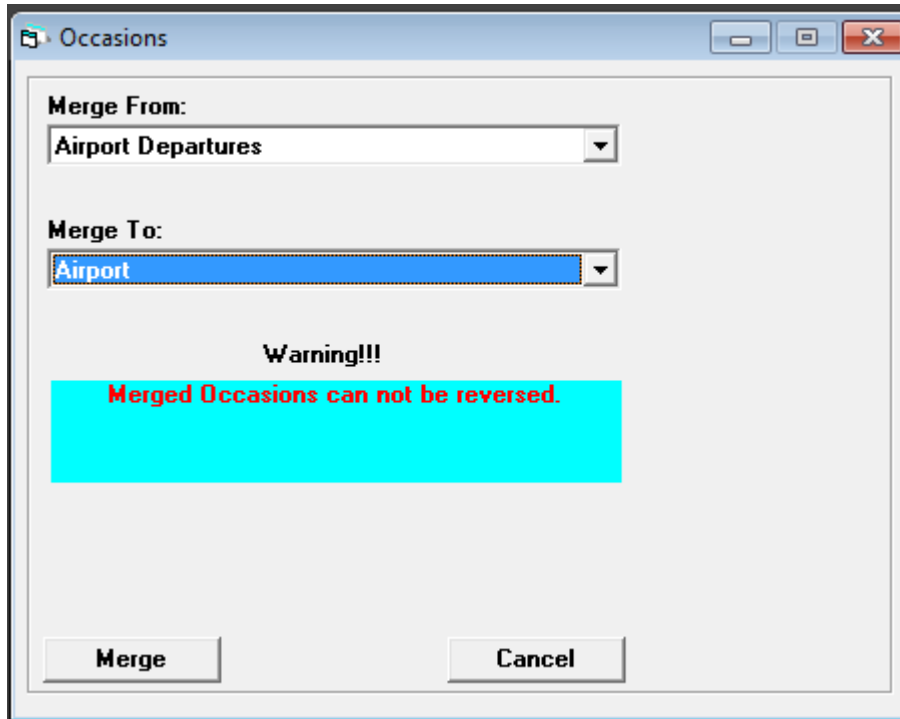
Occasion can be a required field, if you like. This is set in Livery Coach Maintenance...System Default Configuration...Default 1 tab.



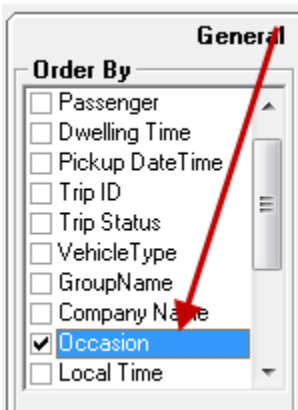
If you don't want the occasion to automatically populate when you copy a trip and/or book a return trip, this can also be controlled...System Default Config, Default 2 tab...Copy/Return Trip Option (at the bottom). The options for copying a trip and generating a return trip are set separately.



If you want to merge two occasions (say, for example, you used to have “Airport Departure” and “Airport Arrival”, and decided “Airport Transfer” was more appropriate), this is easy. Simply select the “Merge To” button in Maintain...Occasions, and click. You will a screen where you can select the “From” and the “To”, and then you can click the Merge button at the bottom. Note that if you are merging, say, Airport Departures and Airport Arrivals to Airport, you will need to create the Airport Occasion first, before the merge.



If you like, you can sort your dispatch grid by occasion...simply click on the big Set button at the bottom of the grid, then un-check Pickup Date/Time, and check Occasion. Your grid will now be sorted (remember to change it back when you are done if you prefer Pickup Date/Time).



You can also use Open Trip to find trips by Occasion...just select it and Click to Search (you don't enter a specific Occasion...it will find them all)

The image shows a software interface titled "Open Trip". Under the "Search Criteria" section, there are two dropdown menus. The first is labeled "View All:" and is currently set to "Occasion". The second is labeled "With Status:" and is currently set to "All". Below these dropdowns, there are three labels: "Type:", "Trip Date:", and "Start Date:", each followed by a small grey rectangular box, likely representing input fields for these search parameters.

Finally, if you want to run a report on your trips by Occasion, there are two: Occasion Statistics – Archived (for trips that have already been closed out), and Occasion Statistics – Pending (for current trips). When running this report, you can set the start and end date, and also group the trips within each occasion by vehicle type, if desired. It will also show you the total runs for each occasion, the total hours (measured by trip hours), the average hours, the total revenue and average revenue, and the % of your gross (for the period for which you ran the report). So you can see how much revenue those weddings bring in compared to the airport runs.