

Tech Tip Tuesday—

by David Hirsch

Stored Notes (save some typing)

We all know that Trip Notes are the place to put important notes about a trip.

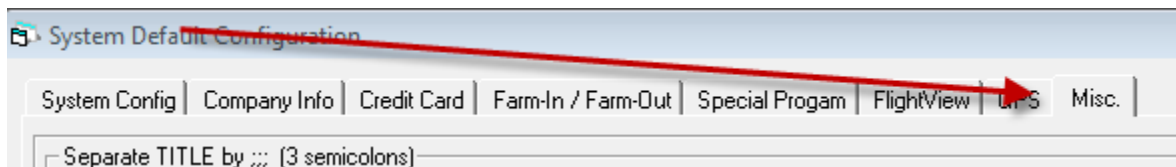
These notes will appear in the trip itself, on the Chauffeur Trip Sheet, in iChauffeur, and on the confirmation you send to the customer.

While many of these notes can be automatically inserted from the notes on the booker or passenger profile, there are often times when you need to manually add notes to the trip, such as “Get credit card imprint” or some other such verbiage.

While you could certainly manually type these phrases when relevant, that can take a lot of extra time and runs the risk of typos and inconsistent wording.

What we recommend is that you store these notes in Livery Coach’s “note library” of stored notes.

You enter these notes in Maintenance...under Maintain...System Default Configuration...Misc tab.



Click the Stored Notes button.

System Default Configuration

System Config | Company Info | Credit Card | Farm-In / Farm-Out

Separate TITLE by ::: (3 semicolons)

Prefix Title List:

Suffix Title List:

Separate Incident Source / Canned Messages / Resolution by

Separate Paging Custom Message by ::: (3 semicolons)

Then enter the text you want, make sure the "Type" dropdown is set to Trip Notes, and then click Add.

Type:

Trip Notes

Attn Chauffeur: Please get Credit Card Imprint and Signature, along with email address as office can provide receipt via email.

Stored Notes

Notes

Trip Farm-In

Ok

Cancel

Help