

## Tech Tip Tuesday—April 1, 2014

by David Hirsch

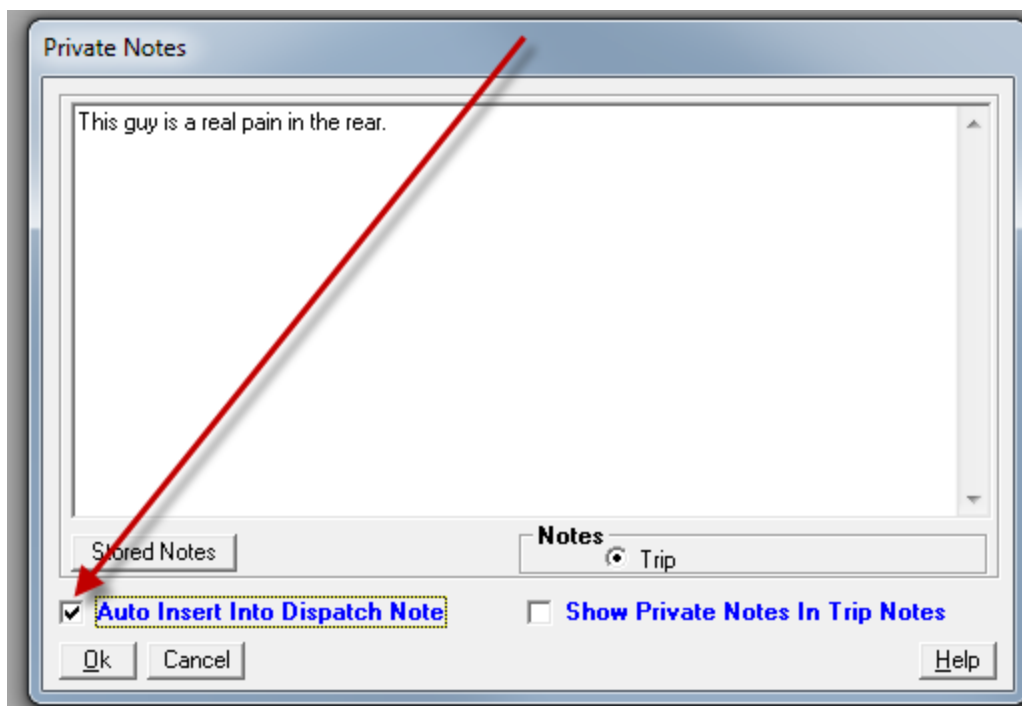
### Private Notes

Private notes are notes you can put in a contact that do NOT appear on the Confirmation to the customer, and do NOT appear on the trip sheet for the chauffeur.

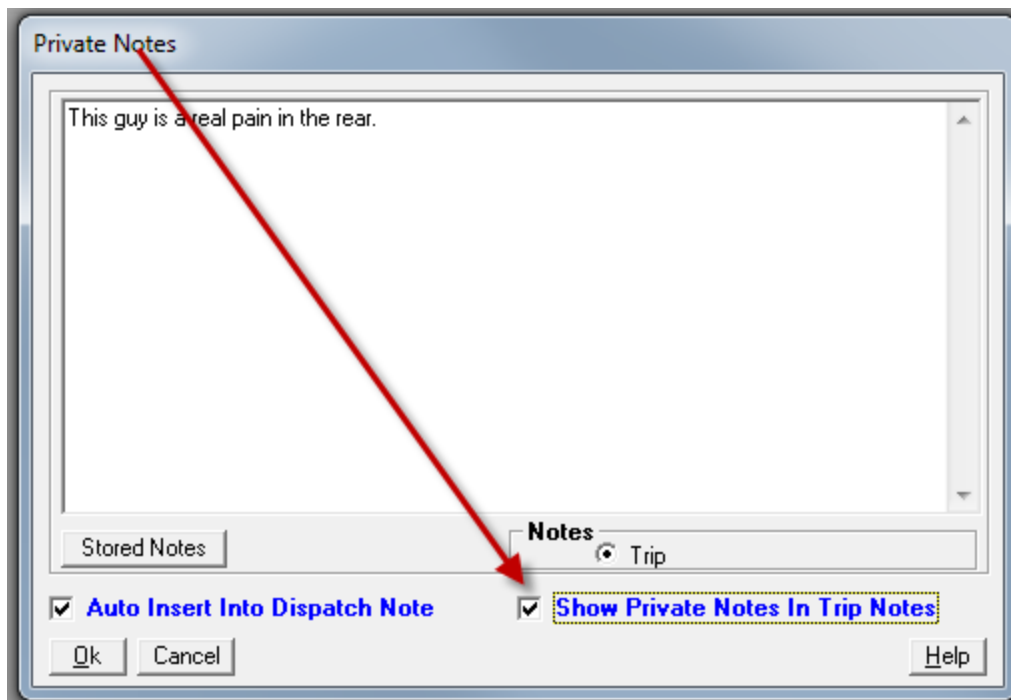
However, sometimes it would be convenient to see them from within a trip more easily than just remembering to look back at the contact.

There are several options that can help accomplish this.

First of all, when editing a private note in a contact record, you can check the box that says “Auto Insert Into Dispatch Note”. Then, when booking a new trip, this will automatically insert the private note into the dispatch note. CAUTION: The dispatch note field is smaller than the Private Note field...so if your Private note is lengthy (greater than 50 characters) and you try to save the trip with that long note, you may get a huge scary error on your screen—just shorten the dispatch note and save again.



The second checkbox, when checked, will show the Private Notes in a reservation whenever you look at the Trip Notes. Note that they still won't appear in the Trip Notes (and therefore won't appear on the Confirmation or Trip Sheet), but it is a handy way of seeing both notes at the same time.



Then, when you look at a trip, you will see both notes.

Trip Notes

Do not ring bell. Any vehicle ok. Will call for ZONE 6 PICK UP at PHL! No signature required.]

Stored Notes

Notes

Trip

Contact Private Notes

This guy is a real pain in the rear.

Ok

Help

