

Tech Tip Tuesday—June 17, 2014

By David Hirsch

Changing appearance of Confirmations and Trip Sheets with CF Variables

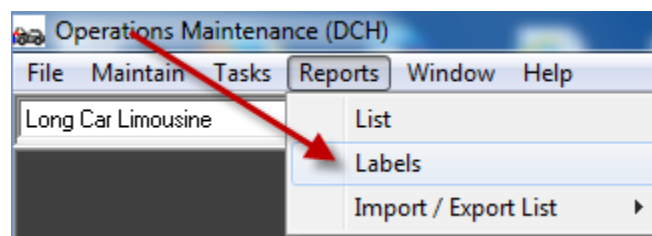
Should you ever decide to open your own software company, one of the things you'll need to consider is reporting capability. Businesses need reports, and while there are many "canned" reports that cover the majority of needs, sometimes customers require minor changes, such a wording, or omission or inclusion of other data points. One way to accomplish these customizations (aside from having customers write their own, which you can do) is to write custom versions for each client, but this has a very negative side effect—whenever you enhance the canned report, you must reproduce the changes in each of the custom reports, which would be incredibly time consuming as well as extremely difficult to track.

The other option, and in our opinion the better, more sustainable option, is to create settings within the reports, allowing the individual companies to choose, within limits, the desired output format.

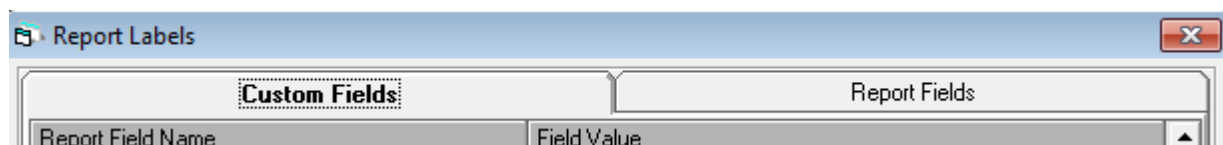
In Livery Coach this is accomplished with something we call CF variables. CF variables allow you, the users, to quickly and easily make changes without having any programming or report writing knowledge.

For example, you might want to change the default "Gratuity" on Chauffeur Trip Sheets to something different—say, "Recommended Tip". Or, you might not want to show the estimated drop-off time on your Customer Confirmation.

To access and change the CF variables built into the reports, launch Livery Coach Maintenance, and then select Reports...Labels.

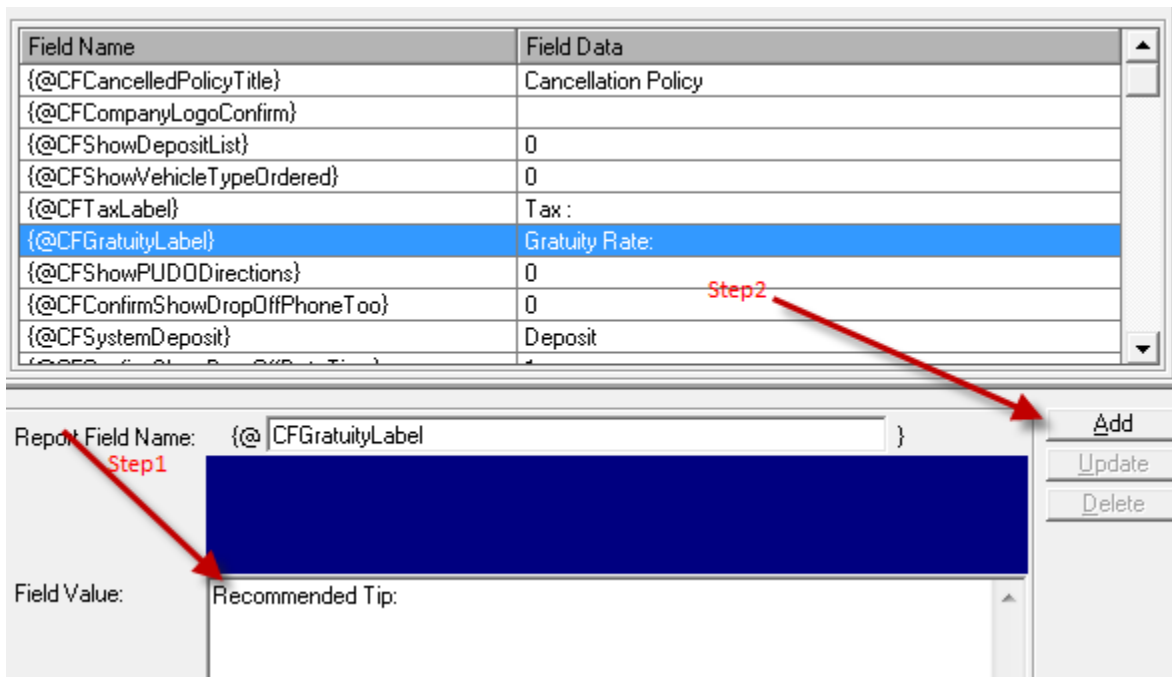


Once there, you will notice that there are two tabs at the top..."Custom Fields" and "Report Fields"



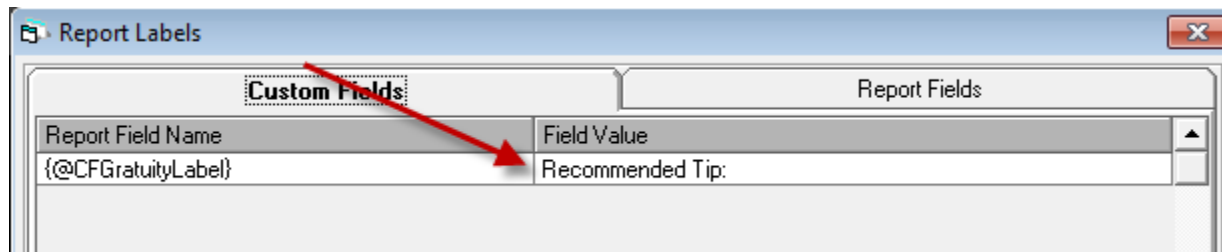
The "Custom Fields" tab shows you all the report labels (CF variables) that you have specifically selected and entered values (even if the values are the same as default); the "Report Fields" tab shows you every report, and when you select the report, will show you all the CF variables in that report and what the default values are.

For example, in the screen shot below, I have selected the confirmation report. Once selected, it may take a few seconds for the "Field Name" and "Field Data" fields to populate—so be patient.

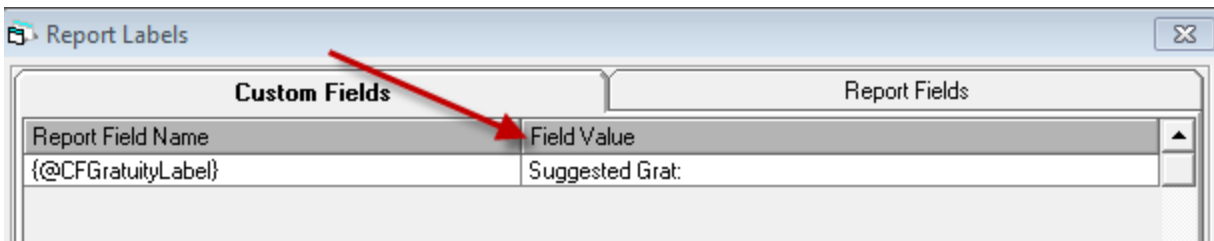
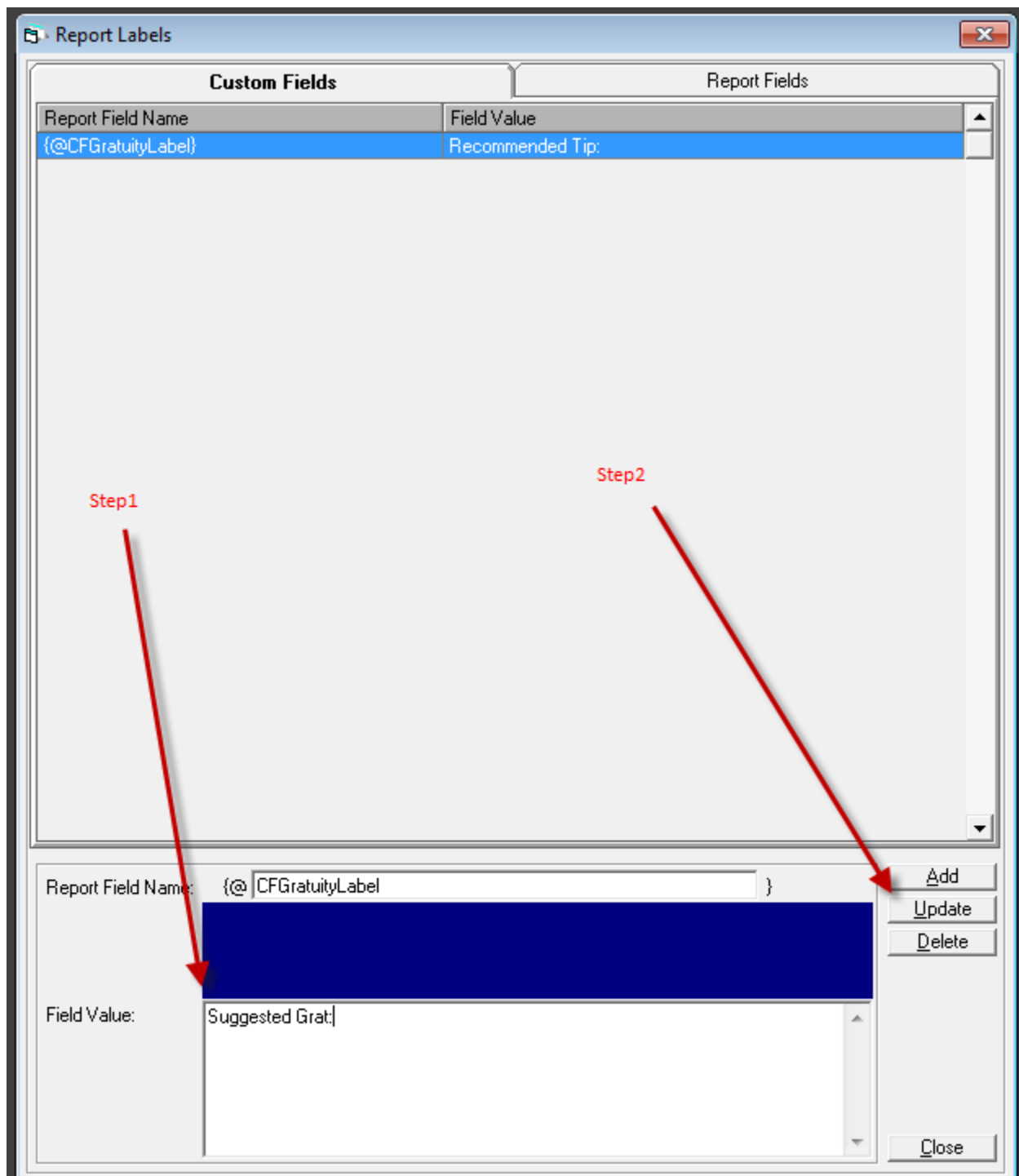


Now, if you highlight the label again on the Report Fields tab, you will notice that it is still the default—that's because the Report Fields tab ALWAYS shows the default settings—what is built in to the report.

But, if you select the "Custom Fields" tab, you will see the field you just added.



If you want to make further changes to this variable, there is no need to go back and find it on the Report Fields tab...just select it here, make the changes below, and click "Update".



Next week we will show some examples of other elements you can change using CF Variables.