

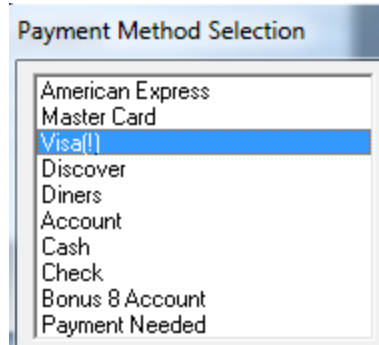
Tech Tip Tuesday—April 7, 2015

by David Hirsch

Payment Types

Livery Coach has the capability of accepting various payment types, such as American Express, Visa, Account (invoice), cash, check, etc.

These are all hard-coded in the system and you can see them in the payment method screen of a trip.



If there is history of that payment type in the booker or passenger profile, then (!) will appear after that payment type in a trip.

Some of the payment types may need further explanation:

Account—means that you will be sending the client an invoice and will get paid later.

Cash—means that the passenger will hand the chauffeur cash to pay for the trip

Check—means that the passenger will hand the chauffeur a check (or cheque for our Canadian customers) during the ride. Check does NOT mean that the ride will be paid for later—that's "Account".

Bonus & Account—if you have the optional Livery Coach Bonus/Frequent Flyer module, then bookers can be set up to accumulate credits in their Bonus account—and if they have enough for a ride, then this payment method could be selected.

Payment Needed—you don't yet know how you are going to get paid.

Depending on the type of clients you have, and your business practices, you may want to restrict some of these payment types. For example, maybe you will never accept a check in the car, or you don't have the Bonus module. It is easy to restrict some payment methods so your Customer Service Agents don't inadvertently select a method that you don't accept.

In Maintenance, navigate to Maintain...System Default Config...Credit Card tab. There, you can restrict whatever payment types you don't want to accept—and notice that there are separate settings for internal use, and for "external" use (i.e. booking on the web or the mobile app). For example, you may allow "Payment Needed" internally, but not on the web.

Payment Method Restriction (General / Web (BookingTool, iLivery))

<input type="checkbox"/> American Express	<input type="checkbox"/> American Express
<input type="checkbox"/> Master Card	<input type="checkbox"/> Master Card
<input type="checkbox"/> Visa	<input type="checkbox"/> Visa
<input type="checkbox"/> Billing Account	<input type="checkbox"/> Billing Account
<input type="checkbox"/> Cash	<input type="checkbox"/> Cash
<input type="checkbox"/> Discover	<input type="checkbox"/> Discover
<input checked="" type="checkbox"/> Check	<input checked="" type="checkbox"/> Check
<input checked="" type="checkbox"/> Bonus	<input checked="" type="checkbox"/> Bonus
<input type="checkbox"/> Diners	<input type="checkbox"/> Diners
<input checked="" type="checkbox"/> Payment Needed	<input checked="" type="checkbox"/> Payment Needed

If we check some of these payment methods, the next time Livery Coach (Reservations and Dispatch) is launched, those payment methods will not be able to be selected.

A screenshot of a payment method selection list. The list includes the following items: American Express, Master Card, Visa, Discover, Diners, Account, Cash, Check (Not Accepted), Bonus & Account (Not Accepted), and Payment Needed (Not Accepted). A red circle is drawn around the last three items: Check (Not Accepted), Bonus & Account (Not Accepted), and Payment Needed (Not Accepted).