

Tech Tip Tuesday—June 2, 2015

by Chip Bowman

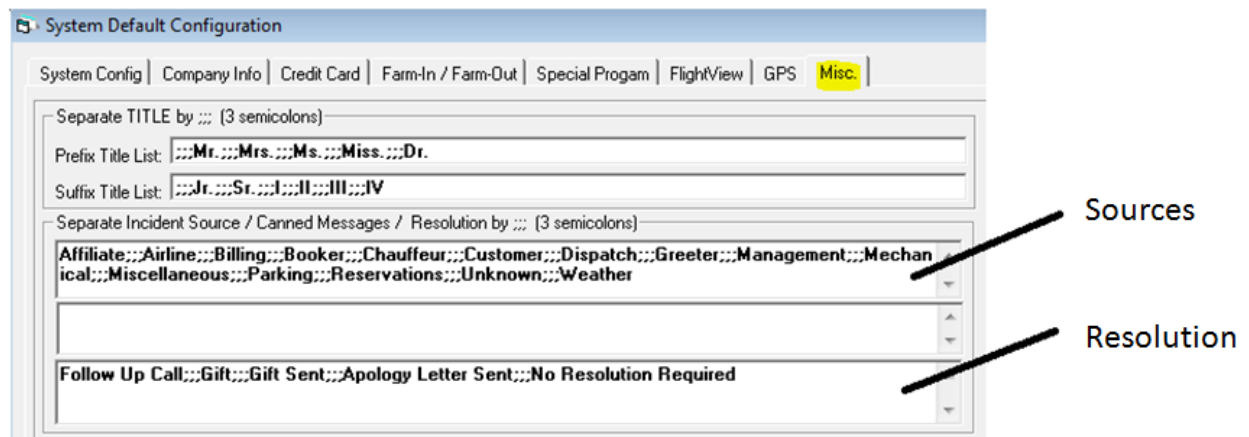
Incident Reporting – Part 1

An essential part of any quality assurance program is a system for tracking and reporting service errors. Of course all the information in the world won't help you improve your quality unless the information is communicated and used in a proper manner. With Livery Coach's Incident Reporting function you have all of these tools at your fingertips, so read on if you're ready to take your company to the next level.

When I think of incidents, my focus tends to be on the negative; something that caused the customer pain, or to get less than the desired service. But there are other types of incidents that, while no customer harm may have been done, that you still care about and want to document. In fact, tracking these types of incidents and correcting the behavior is a critical proactive step in quality management. So before you move on to setting up the system, meet with your team and decide what types of service issues, if not all, will be recorded as incidents.

Once you've decided which issues will be recorded, it's almost time to start using the system to keep track of them, but there are a few quick setup tasks that need to be reviewed—incident sources, and incident resolutions.

In Maintenance, open up system default configuration and select the MISC tab.



An incident "source" is the cause of the issue. Incidents could be caused by any number of things, including humans, machines or things that are out of your control, like the weather. Add/edit or delete sources from the menu, separating each source with three semicolons ;;;

"Resolutions" are what you did to make it better. Resolutions can be as simple as a call to the customer, or as complicated as ordering the chauffeur to mow their lawn in his wife's Sunday finest.

Note: The system will permit you to add more than one source and more than one resolution.

To create an incident related to a trip, simply open the trip, click on the booker (contact record) of that trip, and look for the incident button at the bottom of the screen.

Livery Coach: Customer Contact Selection

Retrieve By

Last Name Booker Only

First Name

Phone

Company

Customer ID

Created After

Enter Last Name

Bowman

Customer Contact Search

Display As Last, First Name

Display As Entity Desc

Bowman, Chip

Bowman, Chip

Merge To 752373

Customer Information (Created by 'sysadmin' on 08/02/10 11:20) Contact Color Code

Prefix Title First Name Last Name Suffix Title Job Title

Chip Bowman

Company Color Code: Secret Code: Source

LC Solutions

Psngr VIP Agent No Farm-Out Commission Required 08/02/2010 ...

Primary Address: Other Address(es) Payment History PU/DO History Agent Company

Street Apt

1112 Vermont Ln Verified

Address 2 City State Postal Code Country

Downingtown Pe 19335

Address Type: Home

Contact Info Chauffeur Vehicle Misc Messages! Web Access UDF

Phone / Email

Home Home Phone and Extension Auto Send:

Work x Confirm Email

Mobile Receipt Email

Fax Cancel Confirmation

E-Mail Default

TollFree

Mr. Bowman is an EXTREMELY difficult customer and likely to complain about everything.

Owner / Region Name:

Long Car Limousine

Contact Status Active InActive

Customer History

Contact Sale-To-Date	Incident Report(s)
2014 2218.40 (13)	lc - 04/15/2013 10:49:08 - Customer
2013 4766.56 (27)	c - 03/29/2012 15:07:12 - Dispatch, Miscellaneous
2012 4907.76 (23)	
2011 1732.32 (10)	
2010 1014.10 (8)	

05/21/14 18:05
443670 - \$ 139.72

Commission Event Log Charges Option

General Add Info Hotel Tab Order

Bonus To Credit Balance

0.00 0 %

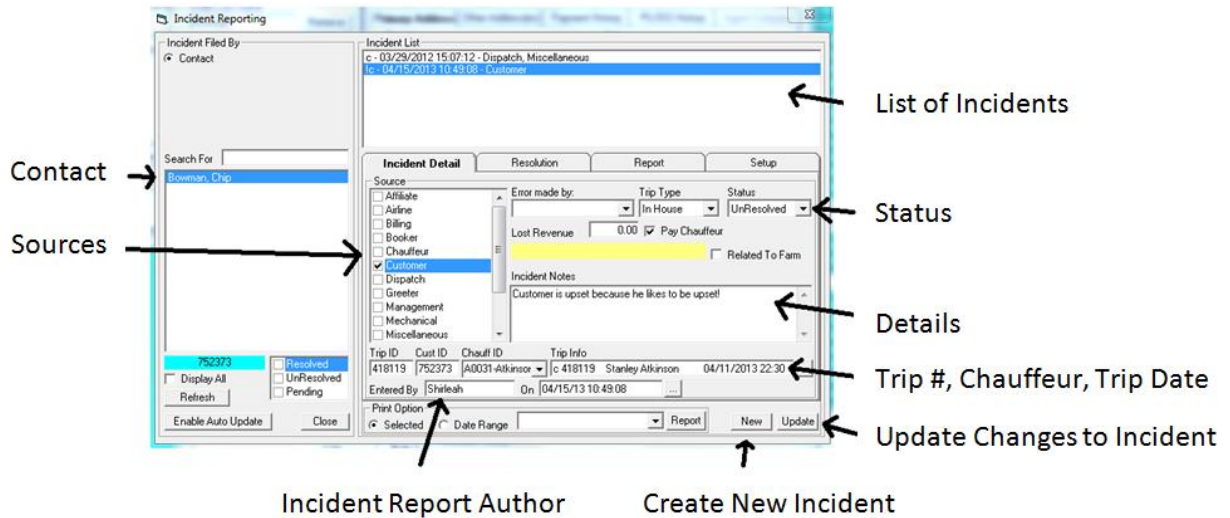
Enable

Frequent Flyer Mileage

Member # 0

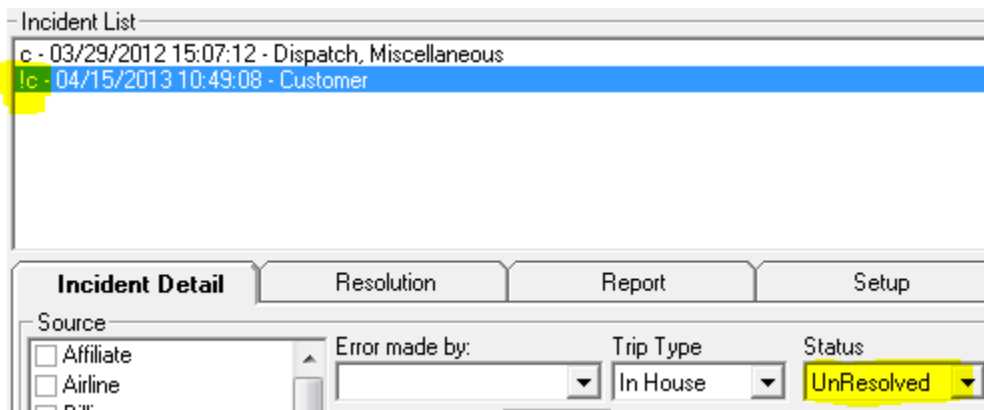
Tax-Exempt / TaxID Tax Override 0

Click the Add/Edit IR button.



The incident reporting window has several sections. On the left hand side we see the selected contact, in the uppermost right window we see a list of incidents, and the lower right quadrant list various details about the selected incident.

Moving back to the incident list, if you look carefully you'll notice that the selected incident has an exclamation point at the beginning. This indicates that the incident is currently open/unresolved. While the indicator makes it easy to see unresolved incidents, you can also filter the list to show only unresolved incidents by selecting the "unresolved" option in the lower left corner of the screen.



Note: If an incident is unresolved and associated with a trip you will not be able to close the trip until the incident status is set to resolved.

We're getting a little ahead of ourselves, so let's step back and start by creating a new incident..

Clicking the new button at the bottom of the screen clears the form, then loads the current trip.

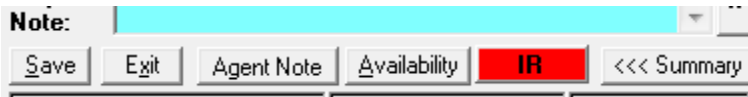
The screenshot shows the 'Incident Reporting' application window. On the left, there's a sidebar with 'Incident Filed By' set to 'Contact' and a search for 'Bowman, Chip'. The main area is divided into 'Incident List' and 'Incident Detail'. The 'Incident List' shows two entries: 'c - 03/29/2012 15:07:12 - Dispatch, Miscellaneous' and 'lc - 04/15/2013 10:49:08 - Customer'. The 'Incident Detail' form is active, showing a 'Source' list with 'Customer' selected. The 'Error made by' field is empty, 'Trip Type' is 'In House', and 'Status' is 'UnResolved'. 'Lost Revenue' is 0.00. The 'Trip Info' section shows 'Trip ID' 443909, 'Cust ID' 752373, and 'Chauf ID' [blank]. The 'Entered By' is 'DCH' and 'On' is '05/31/2015 18:13:27'. The 'Print Option' is set to 'Selected'.

As you can see from the highlighted section, the trip number and customer ID filled in automatically. Now select the incident source, add your comments, and click add.

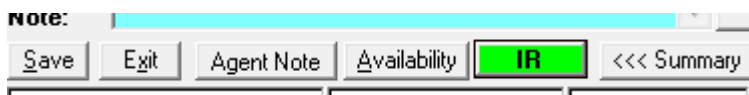
This screenshot shows the 'Incident Reporting' application window after a new incident has been added. The 'Incident List' now includes a third entry: 'lc - 05/31/2015 18:13:27 - Chauffeur', which is highlighted in yellow. The rest of the interface remains the same as in the previous screenshot.

Congratulations, you've just created your first incident. Observe that it now appears in the incident list. Now close the window and look at the trip summary.

Observe that there is now a deep red IR button visible.



Click on the IR button to go back into the incident, mark it resolved, click update and return to the trip summary.



Note that the IR button is still present, but colored green.

In a future tech tip we'll discuss how to run reports on incidents. If you're already a user of incident reporting, please feel free to share your ideas in our Facebook group.