

Tech Tip Tuesday— June 23, 2015

by David Hirsch

Globally Changing Company Name

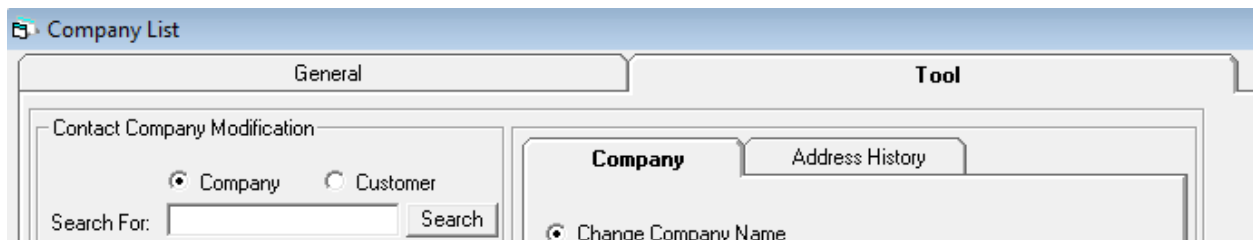
As you know, Livery Coach doesn't have a separate entry form to set up Company names. When you create the first contact for a company, if the company name doesn't exist on the drop-down, you can just type in a new company name and it will appear on the dropdown for the next time.

However, sometimes there are situations that arise where you end up with the company name being entered two different ways, and you want to fix it. Or, a company changes its name.

The "manual" way is, of course, to just go to every contact with the old or wrong name and change it (using the dropdown) to the correct name. That's fine if there are only a few...but this can be tedious if you have a lot of contacts to change.

Fortunately, there is an easier way.

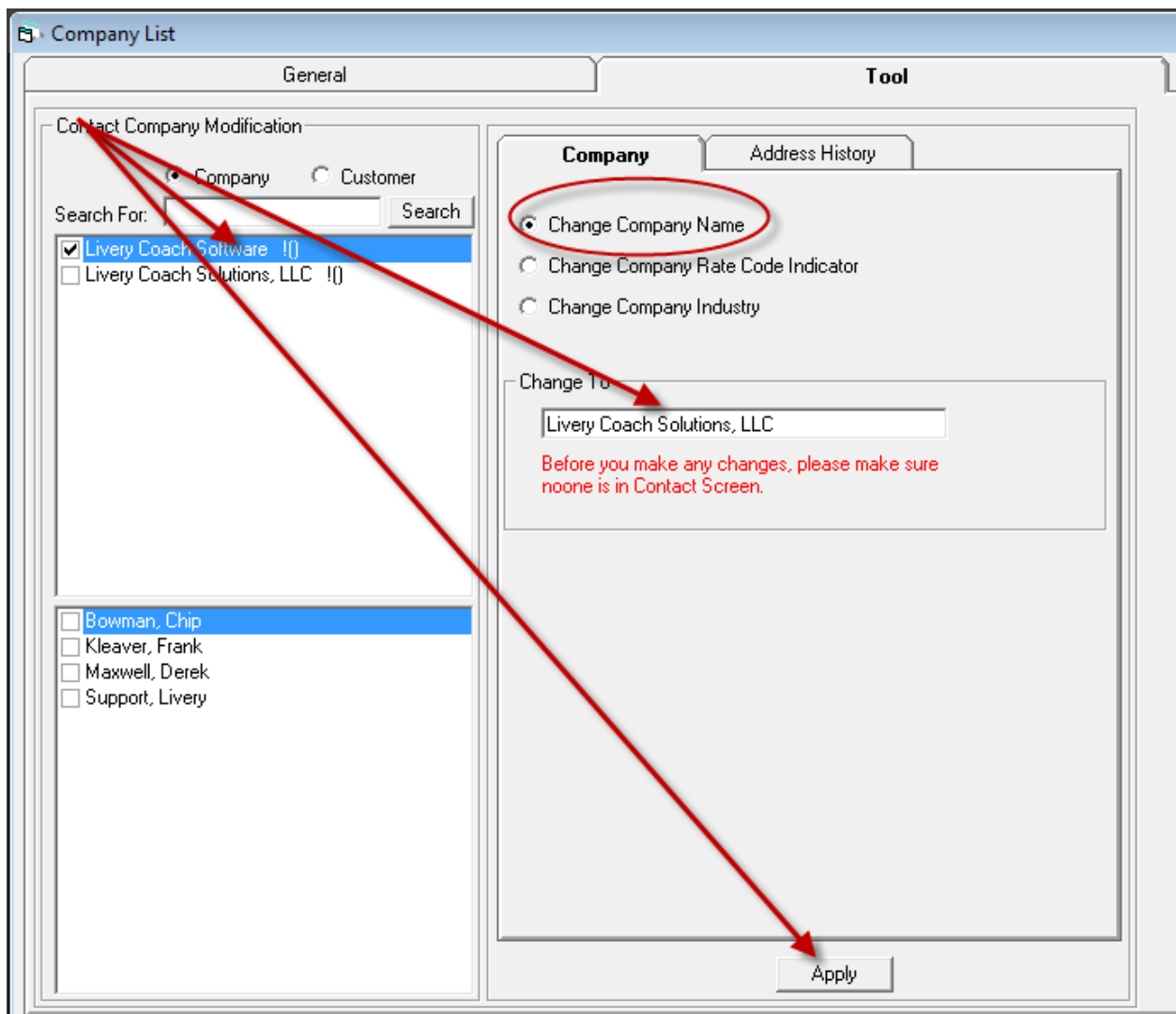
In Livery Coach Maintenance, navigate to Maintain...Company List...and then select the Tool tab.



Then, on the left side, find the company for which you want to change the name, and click on it. Type in the name you want to change it to, and then click Apply. Note that you can change the name to an existing name, which has the effect of merging the company names.

CAUTION: THERE IS NO UN-DO—SO BE CAREFUL!

Also, once the name is changed, if you have any auto-assigned discounts or other charges/fees, or if you have any Rate Agreements, these will need to be updated to reflect the new company name.



The special instructions then appear in the Holiday Message tab of the Date/Time window of a trip.