

## **Tech Tip Tuesday—June 27, 2017**

### **Note: Tech Tip going on Summer Break**

The Tech Tip will be on Summer Break during the months of July and August. So now you can take your vacation without worrying about what important Livery Coach tip you might be missing!

The Tech Tip will return after Labor Day. Have a great summer!

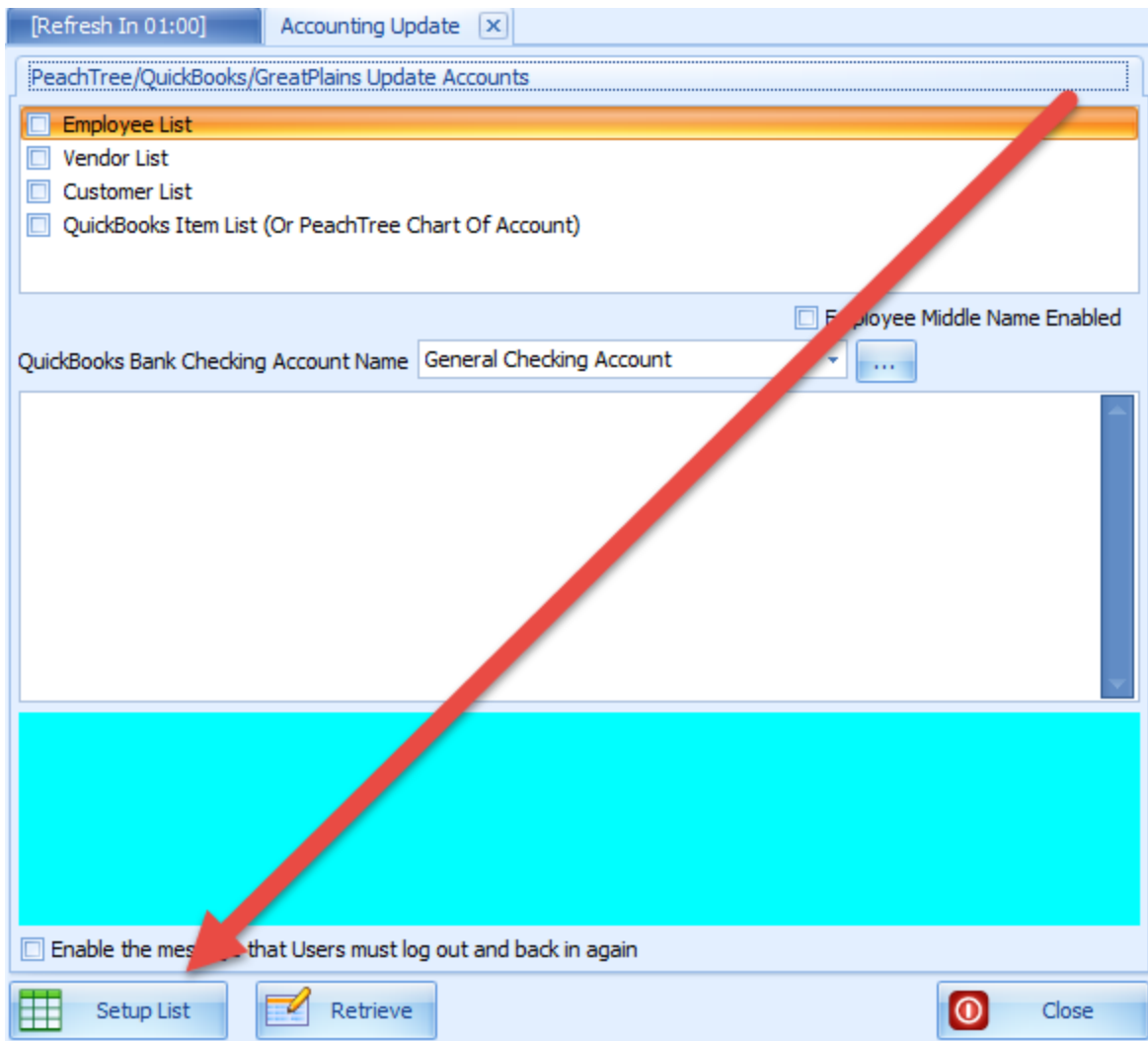
### **Add Chauffeurs directly into Livery (without QuickBooks step)**

Ever since Livery Coach was in diapers, it has been a requirement that Chauffeurs need to be entered in the accounting package (Peachtree, and later QuickBooks) and pulled over with an Accounting Update in order to have your chauffeurs appear in Livery Coach.

As many of you use payroll services and don't have any other use for chauffeurs in QuickBooks, we finally figured out that we should eliminate this requirement.

Before we go further, an IMPORTANT warning: once you switch the system to not read your chauffeurs from QuickBooks, this should be a *permanent* setting. The system will remember all the chauffeurs you have in the system when you make the switch, but if you then add some chauffeurs in Livery Coach, and then switch the system back to reading from QuickBooks (even though we are telling you not to), an Accounting Update will wipe out those new chauffeurs. If you call tech support after you have done this, we can't get them back. So consider yourself warned.

To turn off the update, simply navigate in Setup to Accounting Update...and click on the Setup List.



Once there, put a check-mark in the box at the bottom of the window labeled "Use Only This Employees List (Disable Accounting Update For Employees List)".

Accounting Information

Accounts Vendors Items **Employees** Credit Card Accounts (Quick Books)

Entity ID	Entity Name	Type	Address
155-McKay	B.J. McKay	Chauff	
140-BDuke	Bo Duke	Chauff	
909-Smith	Carl Smith	Chauff	
202-Seavers	Colt Seavers	Chauff	
666-CTD	Crash Test Dummy	Chauff	
100-Patrick	Danica Patrick	Chauff	
121-Blues	Elwood Blues	Chauff	
444-Frank	Frank Kleaver	Chauff	
OFF1-FK	Freddy Krueger	Office	
888-Greet	Greet McGreetface	Greeter	
143-Colburn	Luke Colburn	Chauff	
400-Jim	Jim Hemauer	Chauff	
999-Joe Driver	Joe Driver	Chauff	
141-LDuke	Luke Duke	Chauff	
101-PerTripGree	per Trip Greeter	Greeter	
273-Grant	Pete Grant	Chauff	
100	Salary Greeter	Greeter	

Use Only This Employees List. (Disable Accounting Update For Employees List)

Show History Add Edit Delete

\* After you made the changes, please have your office personnel log out/in on all Livery Applications.

Change Employee EntityID From  To 155-McKay Update

Close

Once you have made the selection, simply click on Close. The selection now disappears from the Update List.

[Refresh In 01:00] Accounting Update [X]

PeachTree/QuickBooks/GreatPlains Update Accounts

- Vendor List
- Customer List
- QuickBooks Item List (Or PeachTree Chart Of Account)

Employee Middle Name Enabled

In order to update or add a chauffeur from now own, simply navigate back to Setup List, Employees Tab, and select the chauffeur you want to edit, and click Edit. Or, click the Add button to add a new Chauffeur.

**IMPORTANT NOTE:** When adding a Chauffeur, be sure to create a unique "Entity ID" (this becomes your driver ID), and also be sure to select "Chauff" from the drop-down for the Type field.

