

## Tech Tip Tuesday—October 10, 2017

### GRiDD/GNet meeting at the CD Show in Orlando

As mentioned in previous Tech Tips, Livery Coach will be exhibiting at the Chauffeur Driven Show (Booth 50) in Orlando (October 22-25). We also wanted to invite you to an open GRiDD/GNet meeting on Wednesday, October 25<sup>th</sup> at 8:30am (meeting room: Naples 1 and 2). Representatives from GRiDD/GNet as well as all the major participating software vendors and many of their customers will be there. Those of you already using GNet can speak about your experiences, and those still wanting more information should be able to get their questions answered. Hope you can make it!

### Auto Close

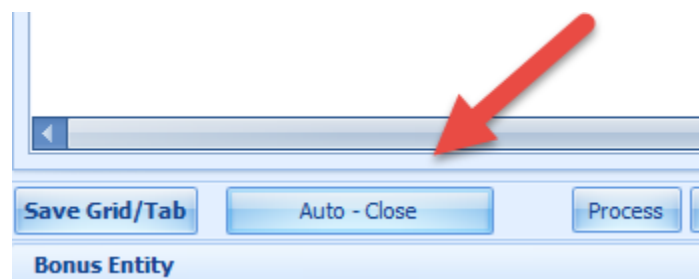
At most chauffeured transportation companies, the typical post-ride process involves looking at the trip after it's done, making any adjustments, maybe applying some chauffeur data, and then “processing” the trip to charge the credit card and send the receipt, or generate an invoice, etc. In Livery Coach, this process all happens in TripBook.

While many companies feel that this is an important part of an “audit” process to catch errors, some companies have refined their reservation and dispatch procedures so that, by the time a trip gets to TripBook, there are rarely, if ever, changes to trips—or at least to certain types of trips.

For those people, we have Auto Close.

Auto Close can perhaps best be thought of as a robot that automatically clicks the Process button for all trips that shouldn't need any editing. Depending on your business, Auto Close has the potential of closing many if not most of your trips, saving time and labor, increasing cash-flow, and giving your billing people (or person) more time to spend with the now-fewer number of trips that need closer attention. Auto Close is built into Trip Book, so it does require Livery Coach to be open (on a machine that has QuickBooks). Some of our clients just dedicate a machine to this, and create a user called AutoClose, so it's very easy to look later at an archived trip and see if it was closed by the robot.

While this tip is not intended to be the definitive guide in all the features and options of Auto Close, we did want to give you a tour. We can start our tour by opening TripBook and clicking the button in TripBook, just to the left of the Process button. Don't worry, this won't turn anything on yet.



What opens is a window with two tabs. On the General tab is where you turn it on and off, select which days of the week it should run, and during what time periods. While speed is dependent on a number of

factors, we have seen Auto-Close close as many as 505 trips in an hour, so it doesn't have to run all day to be effective.

Auto-Close Options

**General**

Auto-Close

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

# of Trips: 10

Reservation should be done after 120 min(s) from now.

Refresh interval: 2 Minutes.

**Exception List**

Auto Close-Out these listed trips only:

Separate by ;;; (3 semicolons)

Make these trips to auto close

Apply Close

On the Exception List tab, you can set up all the reasons that a trip is NOT eligible for Auto Close. In the example below, the system will not close out any Farm Out Trips, any Cash trips, or any trips with Wait Time charge. You can use the rules engine to build as many exceptions as you need...every time you add a rule, the system generates a space for the next rule.

Auto-Close Options

**General**

**Exception List**

F/O Trips = Farm Out

Wait Time > 0.00

PayMethod = Cash

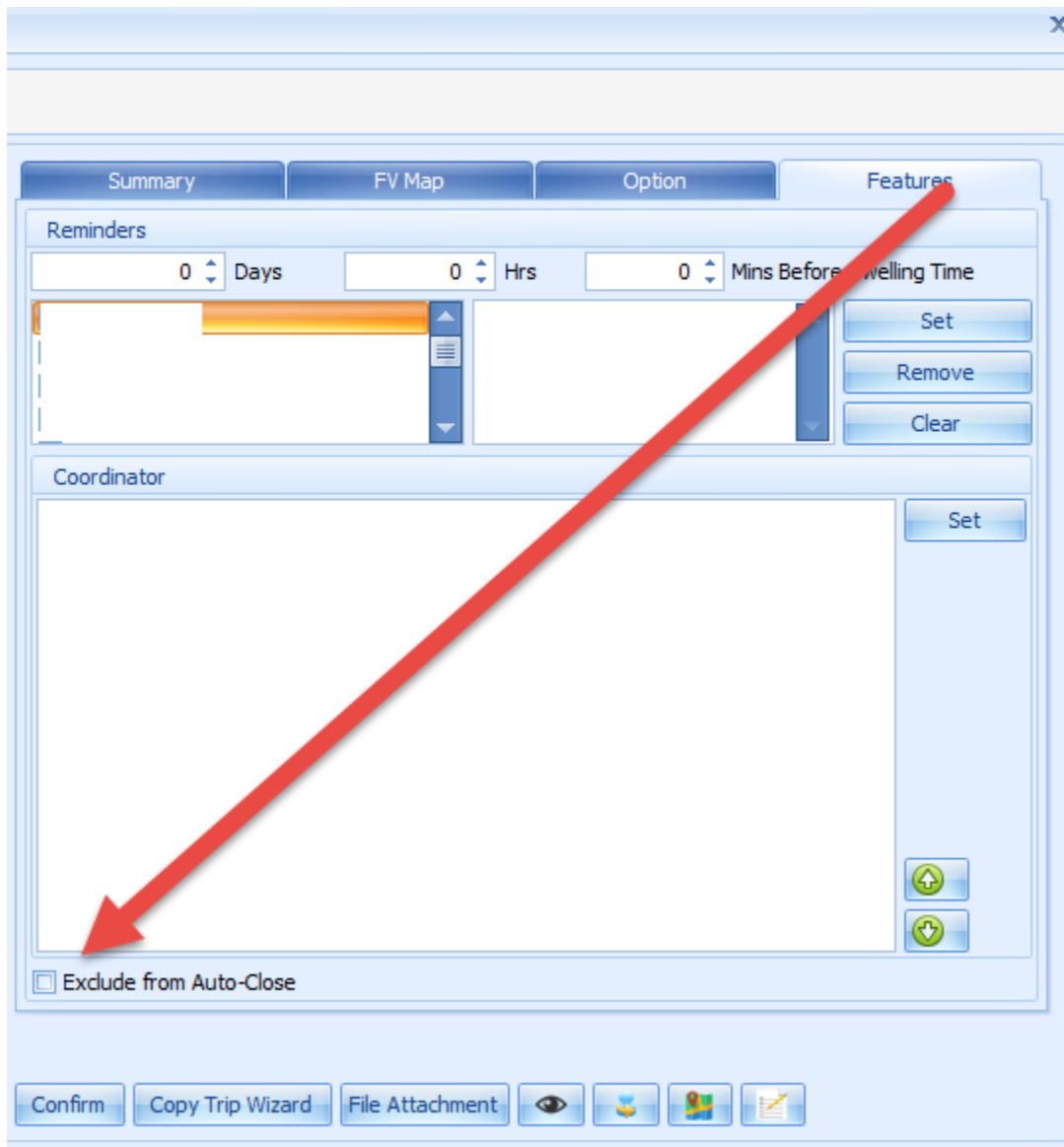
Save Clear

Apply Close

Once you are complete, click Save, and Apply to close the window.

The rules you can set yourself with the above tool are somewhat limited, and we understand that many of you might have more complex rules that can't be accommodated this way. Not to fear—just let us know what all the rules are, and we will work with you to set up the system “behind the scenes” so that only the trips you want to be auto-closed are.

It is also possible to mark a specific trip to be excluded from Auto Close, by navigating to the Features tab in the trip.



When you get started, we can help you set the system up initially to be in “preview” mode. In this mode, the system won't actually auto close any trips, but it will indicate which trips would be eligible—there is an Auto Close column that tells you the status...whether it has been accepted, rejected, evaluated, or manually excluded from Auto Close.

Trip Date	Auto Close	Trip ID
10/01/17 00:30	Manually	610008
10/04/17 11:37	Pending	612985
10/05/17 12:37	No	597455
10/05/17 14:00	No	610992
10/05/17 16:00	No	609320
10/05/17 17:29	Pending	613900
10/06/17 07:00	No	602416
10/06/17 07:47	Yes	613864

When the system is in operation, any trips that are rejected by the Auto Close system will appear in the Rejection List at the bottom of TripBook, where you will see why the trip was rejected.

