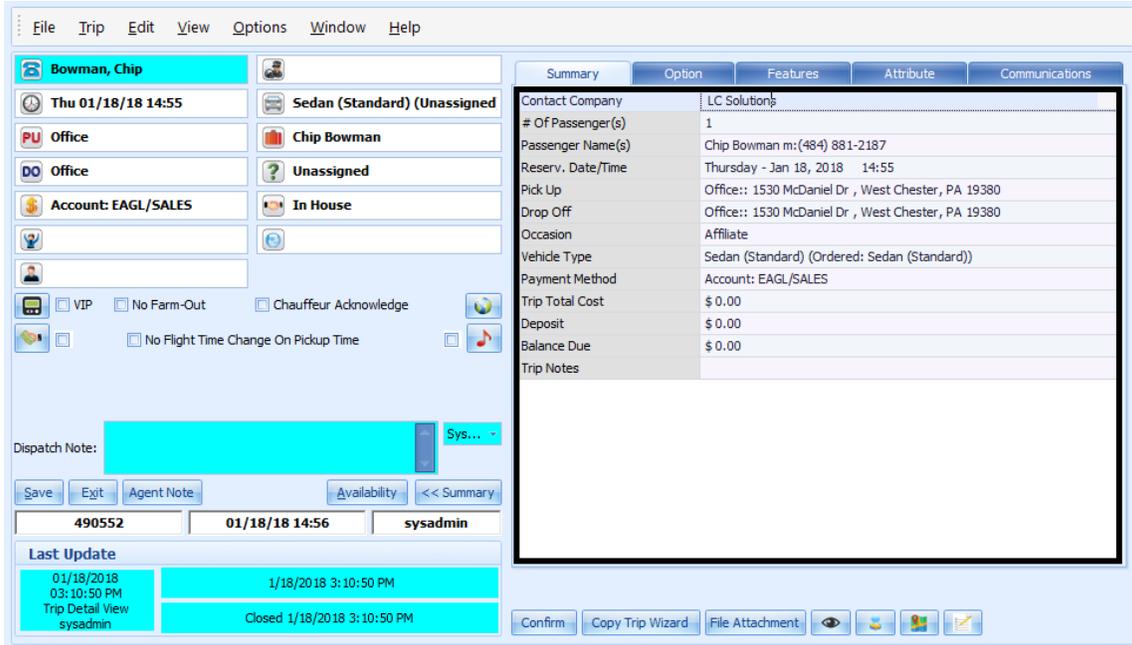


## Tech Tip Tuesday - February 13th, 2018

### Five little things

While we generally try to make sure the weekly tech tips are of substance and covering a feature from top to bottom, sometimes it's the little things that can make a big difference. Here are five little enhancements that will make your lives easier:

#### 1) Trip Summary is Copyable



The screenshot shows a software interface for trip management. On the right side, there is a 'Summary' tab with a table of trip details. The table is highlighted with a black border, indicating it is selected for copying. The table contains the following information:

Contact Company	LC Solutions
# Of Passenger(s)	1
Passenger Name(s)	Chip Bowman m:(484) 881-2187
Reserv. Date/Time	Thursday - Jan 18, 2018 14:55
Pick Up	Office:: 1530 McDaniel Dr , West Chester, PA 19380
Drop Off	Office:: 1530 McDaniel Dr , West Chester, PA 19380
Occasion	Affiliate
Vehicle Type	Sedan (Standard) (Ordered: Sedan (Standard))
Payment Method	Account: EAGL/SALES
Trip Total Cost	\$ 0.00
Deposit	\$ 0.00
Balance Due	\$ 0.00
Trip Notes	

At the bottom of the interface, there are buttons for 'Confirm', 'Copy Trip Wizard', 'File Attachment', and several social media icons.

Click on the first row of text, hold down the shift key, then click on the last row, right click and choose copy.

#### 2) Request vendor charges right from tripbook

**We Collect**

**Vendor Invoice #**

**QuickBooks Credit Charge Account**

**0.00**

**0.00** **0.00**

**Charges**  
**\$120.25 Total**  
**\$120.25 Balance**

On the charges tab, simply click on the "Charge request" button to send an email to the vendor requesting they submit their charges.

3) Edit status levels 2-5 directly from the dispatch grid.

meter #1	Motorcoach57	MiniCo	
2nd Level Status	3rd Level Status	4th Level Status	5th Level Status
<input type="button" value="▼"/>			
<div style="border: 1px solid black; padding: 5px;">           Change Made            Shuttle Run         </div>			

For those of you that aren't familiar with the dispatch grid's edit mode, when turned on users can edit/change select fields without having to open the trip. This functionality has now been expanded to include trip status levels 2 - 5.

4) Auto assign group names to all orders by a specific company

Add & Edit	Paymethod History	Private Notes	Pickup / Dropoff History	Contact Notes
Company Name	<input type="text"/>	Rate Group:	<input type="text"/>	<input type="checkbox"/> PO Required
Company Code	<input type="text"/>	Display Sign	<input type="text"/>	<input type="checkbox"/> PO Match Req
Parent Company	<input type="text"/>	Industry	<input type="text"/>	<input type="checkbox"/> Tax Exempt
Chauffeur Airport Sign Logo	<input type="text"/>			<input type="checkbox"/> Auto Insert Contact Note
Confirmation Logo	<input type="text"/>			<input type="checkbox"/> Auto-Email based on profile only with no override
Receipt Override	<input type="text"/>			<input type="checkbox"/> Web res editable
Rate Agreement Name:	<input type="text"/>			<input type="checkbox"/> Show Trip Total Only
Sales Rep	<input type="text"/>	Region Name	<input type="text"/>	<input type="checkbox"/> Verify Employee PO Number
Gratuity	<input type="text" value="-1"/> (Use -1 on Gratuity as Default)	Hourly Pay Option	<input type="text" value="System Default"/>	<input type="checkbox"/> iChauffeur: Disable Passenger View
Web res alert email	<input type="text"/>			<input type="checkbox"/> Dept Number Required
Other Vendor Names Or Codes (Each Name or Code follows with a comma (,))	<input type="text"/>			
Show Rate On Confirmation	<input type="text" value="Default"/>			
Always assign this group name when agents for this company book	<input type="text" value=""/>			

From the setup menu, select maintain>company list. Select the desired company, select the group name, then click save. This feature is particularly useful when combined with the iGroup application.

#### 5) Filter by payment method in Trip Book

Dispatch Grid [Refresh In 00:30]	Find Trips	Trip Book	Group Name	Company List
<b>Select By</b> This Year <input type="text"/> Payment Method <input type="text"/>				<input type="checkbox"/> Exclude <input type="checkbox"/> Only Show Declined Credit Card <input type="checkbox"/> Exclude Qualified Auto-Closeout Trips
				<b>AMEX:</b> <b>M/C:</b> <b>VISA:</b> <b>Account:</b> <b>CASH</b>

In Trip Book it is now possible to filter results by payment method. From the second dropdown select "payment method" then choose from the list of payment methods.