

## Tech Tip Tuesday—February 27, 2018

### Reminder: Livery Coach User Meeting in Las Vegas—and please RSVP!

As usual, our annual user meeting will be held before the LCT Show in Las Vegas. This year, the meeting will be on Sunday, March 11<sup>th</sup>, from 2pm to 4pm in Coral AB in the North Convention Center at Mandalay Bay. This meeting is open to all Livery Coach customers, and we encourage you to attend, but we really need a headcount. (If you have already RSVP'd, no need to let us know again...we have heard from quite a few of you.)

Please **RSVP** with the names of the attendees to [news@liverycoach.com](mailto:news@liverycoach.com).

Thanks!

### Farm-In Trips and Payment Method

Back in the “old” days, when you created a Farm-In agreement, you needed to set the payment method in the Farm-In agreement, and that’s what it used when a Farm-In/They Collect, regardless of the payment method in the trip. If you put a credit card in the trip, then the trip had to be marked as “We Collect”, even if the credit card was that of the affiliate and not the passenger.

Most of us find this a bit confusing, at best.

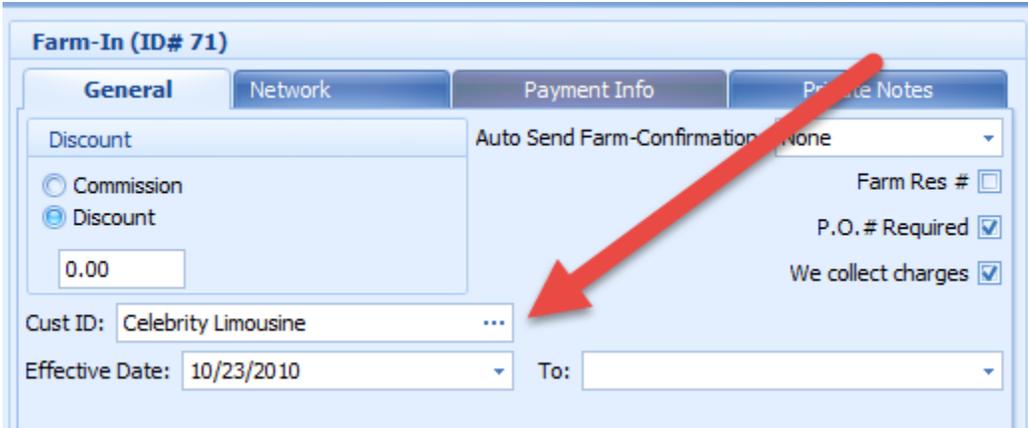
For a variety of technical reasons, it’s not a simple fix to make this more logical, but we are trying. Keep in mind that when the concept of Farm Agreements was first created, there were no electronic ways of transmitting trips between companies—the high-tech method of farming trips involved a fax machine!

So, here’s what we’ve done so far.

We have removed the requirement for setting Payment in the Farm Agreement, but now require the Farm In agreement to be tied to a Contact (or entity). That way if a trip comes in electronically (Livery to Livery, GNet, etc) it automatically picks that contact as a booker.

Or, if you are entering the trip manually, when you select the contact, it will automatically select the proper Farm In Agreement.

You select that contact in the General tab of the Farm-In agreement, by clicking the three dots and selecting the appropriate contact (which needs to have been set up first).



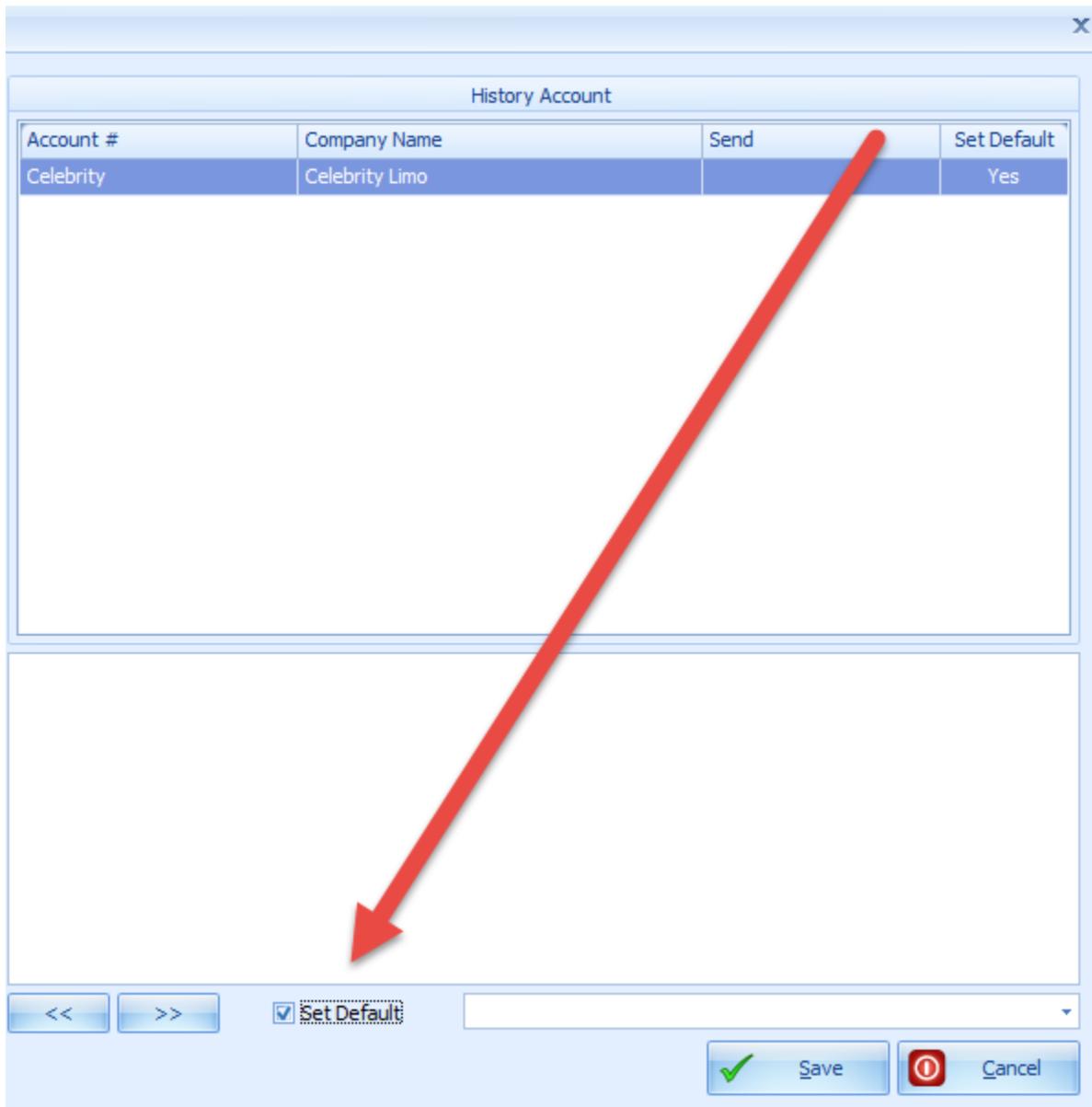
The screenshot shows a software interface for a "Farm-In (ID# 71)" agreement. The "General" tab is active, displaying a "Discount" section with radio buttons for "Commission" and "Discount" (selected), and a text box containing "0.00". Below this is a "Cust ID" dropdown menu currently showing "Celebrity Limousine" with a three-dot menu icon to its right. A red arrow points to this three-dot icon. Other fields include "Effective Date" set to "10/23/2010" and a "To:" dropdown. On the right side, there are checkboxes for "Auto Send Farm-Confirmation" (set to "None"), "Farm Res #", "P.O. # Required" (checked), and "We collect charges" (checked).

Because there is always a defined single contact for the Farm In trip, and a contact could have multiple payment methods in the Payment History tab, one of them needs to be set as a Default payment method so that when trips come in electronically, the system knows what payment method to use.

Go to that contact and select the Payment History tab. If your default Payment Method is a credit card, then select the credit card and click Edit. Put a check-mark in the "Set Default" box at the bottom and Save.

The screenshot shows a software window titled "Edit Credit Card History". It contains several input fields and a list of options. A red arrow points from the top right towards the "Set Default" checkbox at the bottom left. The fields include: "Account #:" (empty), "Card Type:" (American Express), "Account Name:" (empty), "Save As:" (Corporate), "Exp Date:" (12/31/21), "Street:" (2521 Yellow Springs Rd), and "Zip/Postal Code:" (1935). Below these is a section titled "Apply the following to all current trips that use this credit card" with four unchecked checkboxes: "Expiration Date", "Card Type", "Street and Zip/Postal Code", and "Name On Card". At the bottom, the "Set Default" checkbox is checked. There are "Save" and "Cancel" buttons, and the number "4693" is displayed in the center.

If you normally invoice that affiliate and they pay later, then click on the Account button, select the desired billing account, and put a checkmark in Set Default.



We are still looking into ways to eliminate the whole “They Collect/We Collect” confusion, but the easiest way to remember it for now: If you are getting paid on a credit card when the trip is complete, it’s “We Collect”, regardless of whose card it is. If you are invoicing the affiliate and getting paid later, then it’s “They Collect”, since you have to wait to get the money from them after they collect it from the customer.

Hope that helps at least a bit.