

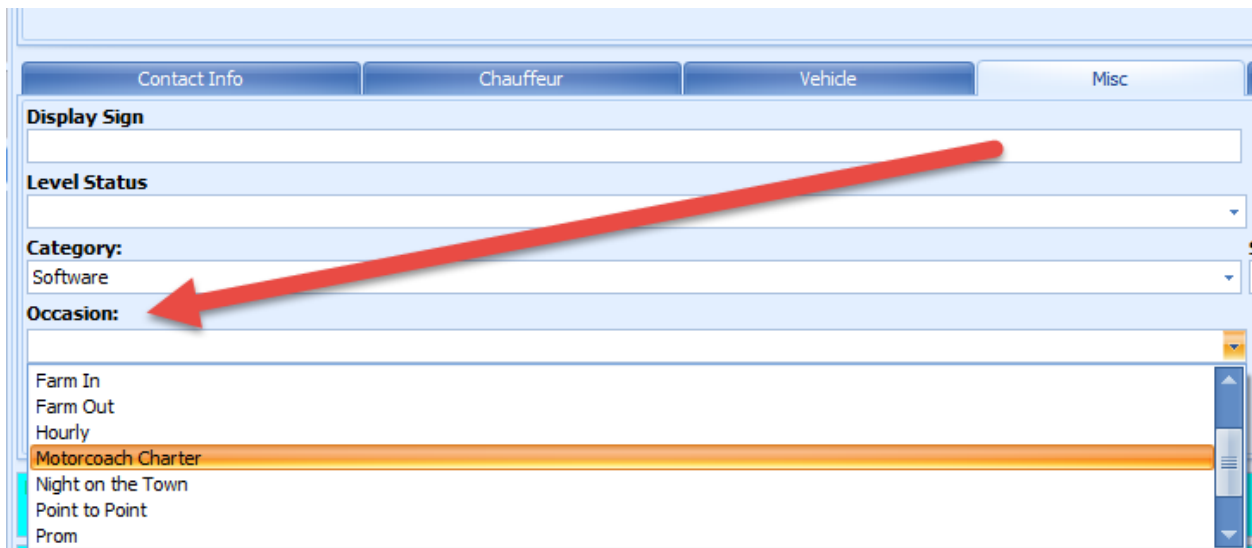
Tech Tip Tuesday—March 27, 2018

Automatically Assigning Occasion based on Contact

Do you have certain bookers who always book trips for the same Occasion? Or maybe you have decided to use Occasion as a customer category.

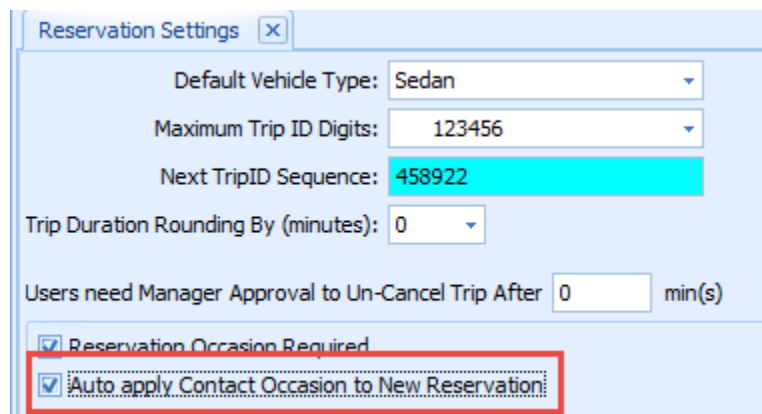
Regardless, Livery Coach can help.

In the Contact Record, there is a field where you can set the Occasion of a contact. Simply navigate to the Misc tab, and there it is.



The screenshot shows the 'Misc' tab of a 'Contact Record' in Livery Coach. The 'Occasion:' field is highlighted with a red arrow. The dropdown menu is open, showing a list of occasions: Farm In, Farm Out, Hourly, Motorcoach Charter (highlighted in orange), Night on the Town, Point to Point, and Prom.

Now, navigate to System Default Configuration, Reservation Settings, and turn the automation on:



The screenshot shows the 'Reservation Settings' window. The 'Auto apply Contact Occasion to New Reservation' checkbox is checked and highlighted with a red box. Other settings visible include Default Vehicle Type: Sedan, Maximum Trip ID Digits: 123456, Next TripID Sequence: 458922, Trip Duration Rounding By (minutes): 0, and Users need Manager Approval to Un-Cancel Trip After: 0 min(s).

From now on, when a contact with a pre-set occasion books, that occasion will automatically be selected in the PU/DO screen. Note that you can always change it for a given reservation, if appropriate.

Phone:	Ext:
<input type="text"/>	<input type="text"/>
Source:	
<input type="text"/>	
Profile: (0 - Search Chars)	Pick Up Zone:
<input type="text"/>	<input type="text"/>
Drop Off Zone:	
<input type="text"/>	

Occasion:

Motorcoach Charter