

Tech Tip Tuesday—April 3, 2018

Extra PO fields

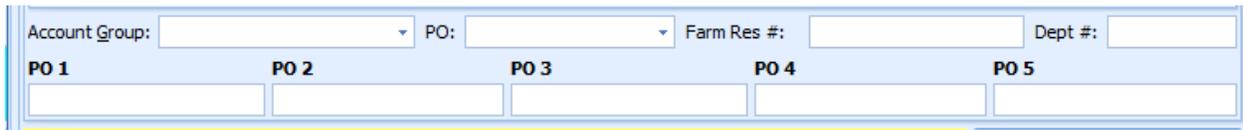
While Livery Coach has always had a Purchase Order (PO) field, sometimes that isn't enough.

For example, you might have a law firm as a client, and they might have specific requirements such as:

1. Every Booker has an employee number, which has to appear on every trip (and receipt/invoice).
2. There has to be a Client ID on every trip (provided at booking).
3. There has to be a Matter number on every trip (also provided at booking).

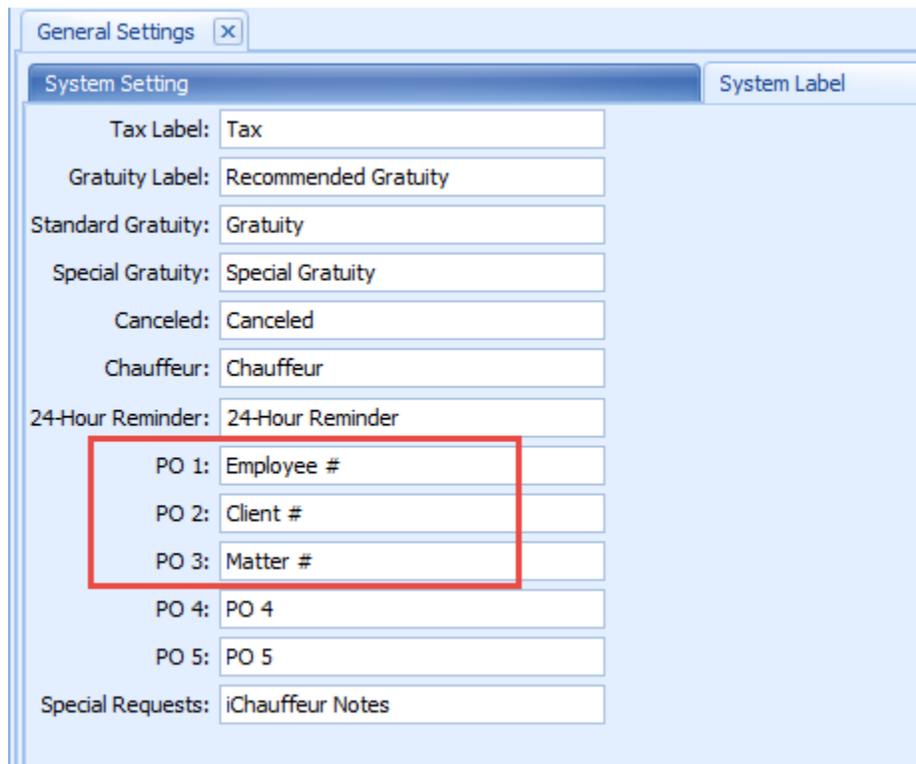
Fortunately, Livery Coach can handle this with ease.

As some of you may have noticed, there are already 5 additional PO fields in the Payment Method screen, which are by default labeled PO1 through PO5.



The screenshot shows a form with the following fields: Account Group (dropdown), PO (dropdown), Farm Res # (text), and Dept # (text). Below these are five PO fields labeled PO 1, PO 2, PO 3, PO 4, and PO 5, each with a corresponding text input box.

So you remember what you are using these extra fields for, they can be relabeled in System Default Config...General Settings...System Label tab. Type in what you want to call them (note that these are global labels):

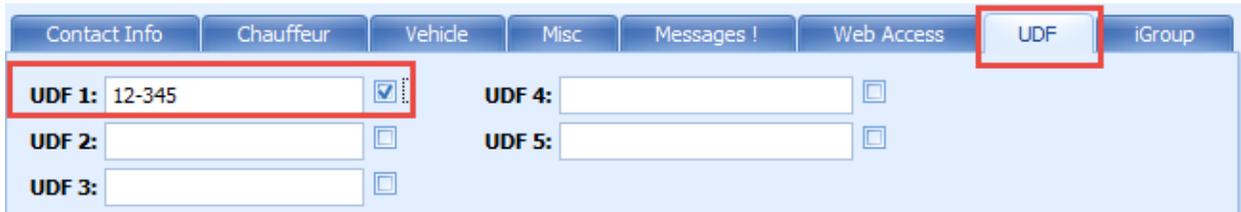


The screenshot shows the 'System Label' tab in the 'General Settings' window. The following fields are visible:

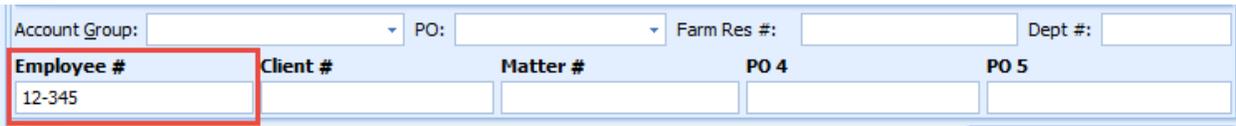
Tax Label:	Tax
Gratuity Label:	Recommended Gratuity
Standard Gratuity:	Gratuity
Special Gratuity:	Special Gratuity
Canceled:	Canceled
Chauffeur:	Chauffeur
24-Hour Reminder:	24-Hour Reminder
PO 1:	Employee #
PO 2:	Client #
PO 3:	Matter #
PO 4:	PO 4
PO 5:	PO 5
Special Requests:	iChauffeur Notes

The PO 1, PO 2, and PO 3 fields are highlighted with a red box.

Now, to enable the auto-fill, open the contact record and navigate to the UDF (User Defined Fields) tab. In the example below, I filled out UDF 1, and I checked the box next to the field. The check-box means that UDF 1 will auto-fill the PO 1 field in a reservation.



Now, when you enter a new reservation, your re-labeled PO field will automatically be filled out.



You can add the Client # and Matter # as needed.

This data will flow over to QuickBooks when the trip is closed. If you want the information on the confirmations and receipts as well, simply turn on the CF variables (Maintain...Reports..Labels) and they will appear! (For a review of report labels, visit liverycoach.tech and reference the two-part tech tip in June 2014.)

required.

Billing

Reference: 12-345 LCS 0001

Routing Information :
Pickup At : Phila. Intl Airport - PHL AA1824, 8000 Essington Ave # Philade
Dropoff At : Livery Coach Office 1530 McDaniel Drive # West Chester PA
Reference : 12-345 LCS 0001