

Tech Tip Tuesday—May 15, 2018

Export Module Enhanced

Those of you who have the “ACT!/Export Module” already know that it allows the export of various reservation data into Microsoft Excel. (It also allows synchronization with the ACT! Contact Manager system, but we’re not going to talk about that today.)

What some of you may not know is that we have continued to improve and enhance this module to deliver more functionality.

For example, you can limit your exports to a particular Billing Account, or Account Group, or even a Group Name or Occasion.

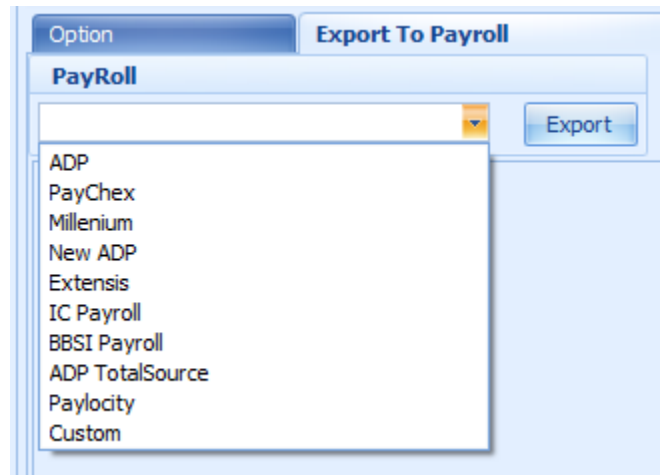
You can also export just trips farmed to a particular company.

If you use the Export Module to generate data for client billing systems, you can save the templates for easy use each month.

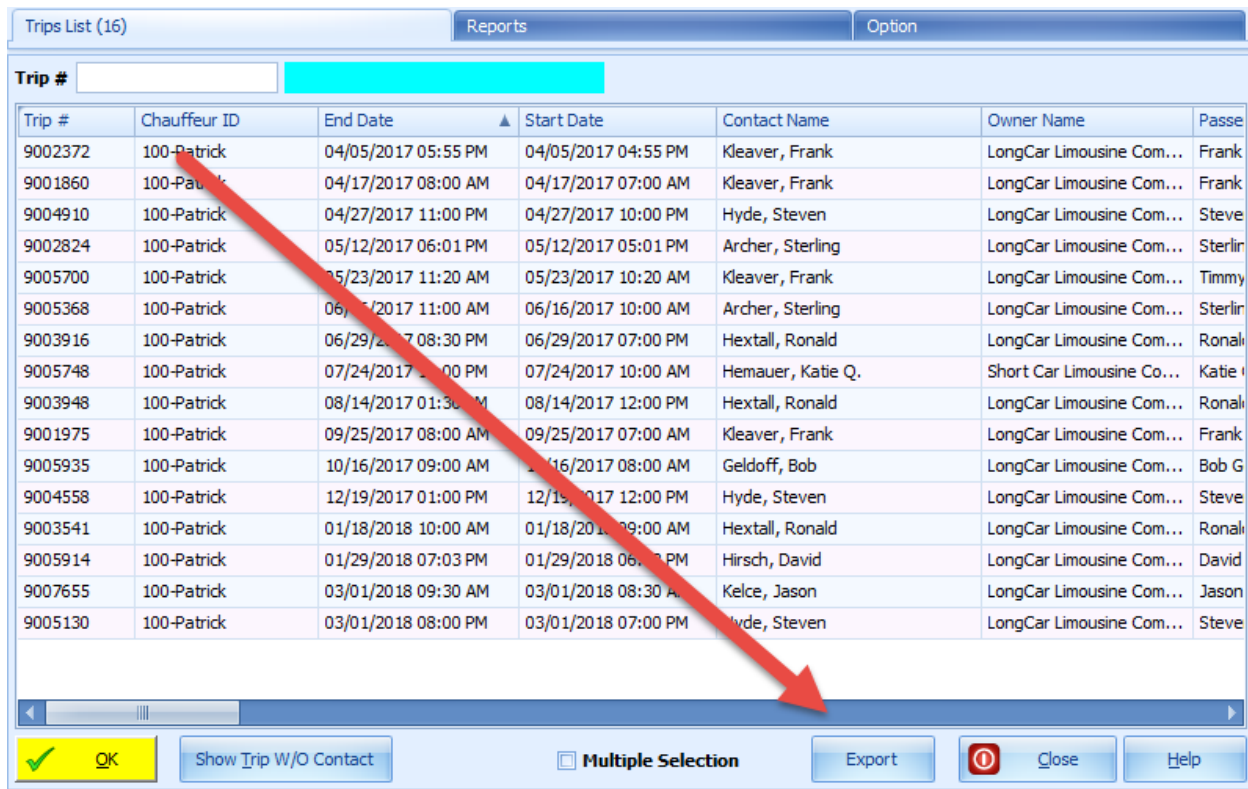
The screenshot shows the "Export Data" window with the following sections:

- Document List Type:** A list of exportable data types including "Reservation Excel - Archive / Current", "Customer - Act 6.0", "DriverPay - Excel", "Farm-Out List - Excel", "Commission - Excel", "Advance Commission - Excel", "USB Format", "Livery Data", and "Driver Sign In/Out".
- Reservation Option:** Includes "From Date" (02/01/2018), "To Date" (03/31/2018), and radio buttons for "Pickup Date" (selected) and "Res Taken Date".
- Filters:** Tabs for "Account", "Occasion / Group Name", "Company", "Farm", and "Farm Status". Under "Farm", options include "In - House", "Farm - In", and "Farm - Out".
- Excel Option:** Includes "CI Format" and "Split Airport / Airline Info" (set to "Archive").
- Select the following field(s):** A list of fields to export, with "Pickup Date/Time" selected. Other fields include Pickup Date, Pickup Time, Meeting Procedure, Reservation Number (TripID), How Trip Booked, Dropoff Date/Time, Dropoff Date, Dropoff Time, Trip Duration, DwellTime, Dwell Date/Time, BlockTime, Contact Name, Contact First Name, Contact Last Name, Contact ID, Contact Notes, Company Name, Company Notes, and Contact Email.
- Buttons:** "Up", "Down", "Select All", and "De-Select All".
- Save this template as:** A table with columns "Name", "Created...", "Last Run Time St...", and "Public". It lists "Minthly TTL" and "Carey DP Re...".
- Export Type:** A radio button for "Excel 2000 or Higher".
- Options:** Checkboxes for "Show all additional passengers for each trip", "Zero out trip pricing for additional passengers", "Charges/Fees export based on Common Group instead of description", and "Include Cancelled Trips".
- Footer:** "Export", "Stop", and "Close" buttons. A red message states: "The application must be installed on this computer".

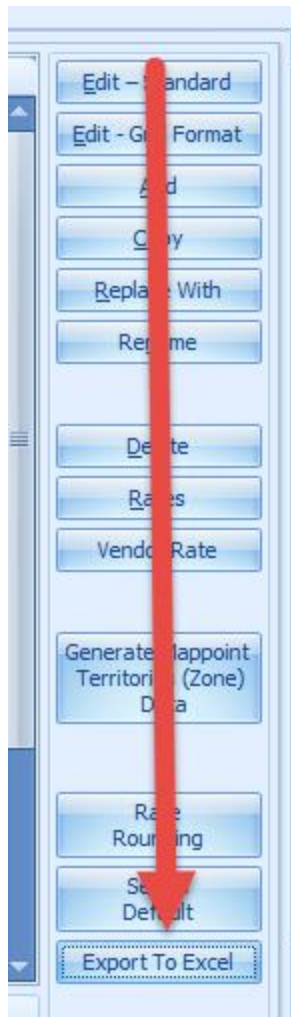
If you have a lot of chauffeurs and use an outside payroll company, you can export your payroll records for easy upload into your payroll system—we support quite a wide variety of formats, and if you have the module and your format isn't listed, we can add it (requires specs from the payroll company).



As if this weren't enough to show the value of the module, we have just added even more features. Now, with the module, you can export the results of Find Trips right into Excel!



And finally, we've added the Export feature to Zone rates.



If you already have the Export Module, please enjoy these new features!

If you don't already have the module, for a limited time we are offering a special deal! While the module normally sells for \$2,795 plus support, we are offering it through the end of June 2018 at \$800 off, bringing the next price to only \$1,995 plus standard support \$559/year). Act now before this offer expires! Simply send a note to info@liverycoach.com that says that you want it, and we'll take it from there.