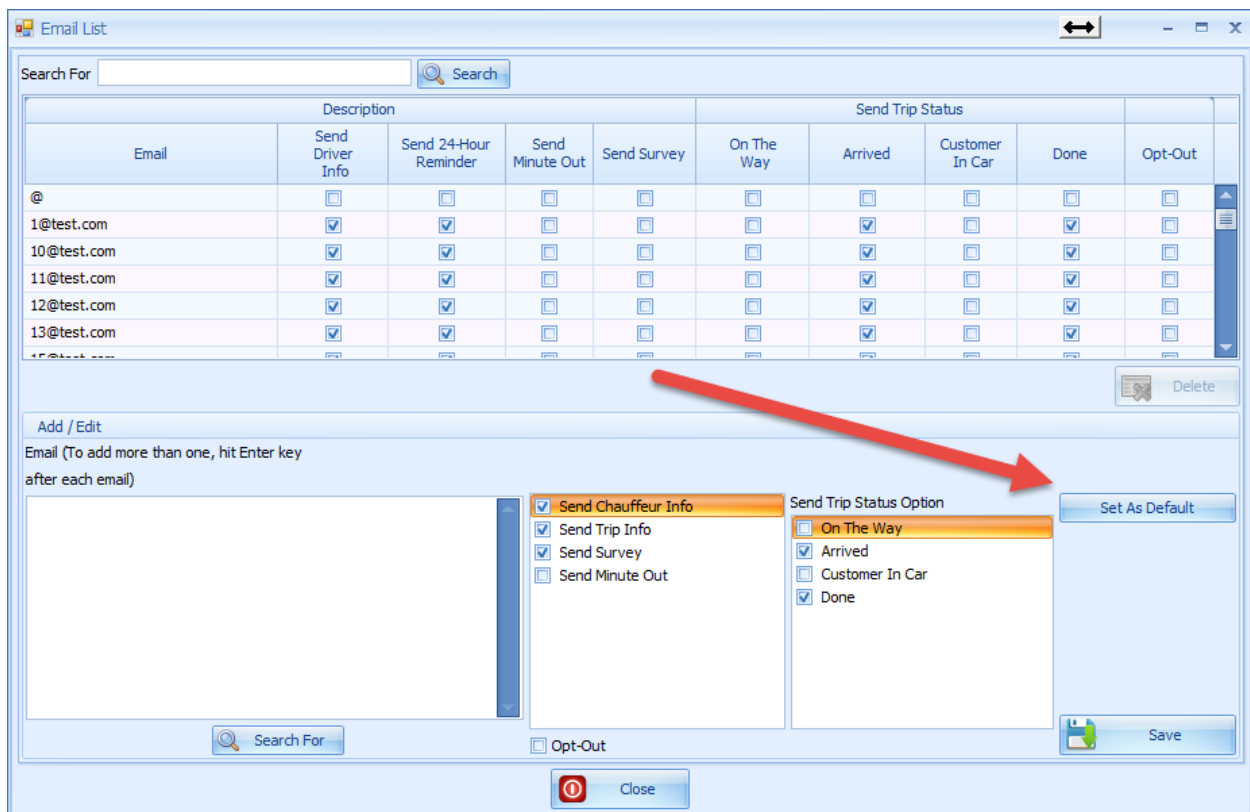## Tech Tip Tuesday—September 25, 2018

Chauffeur Direct Default Settings

Chauffeur Direct is our name for a family of alerts that go out to bookers and passengers at scheduled times with key information such as chauffeur name and phone number, etc.

While you can customize each booker's settings so he/she gets the exact notifications that he/she wants, you can also set up default settings, by navigating to Setup…Maintain…Chauffeur Direct Program and then clicking on either "Email List" or "Mobile List" at the bottom of the screen.
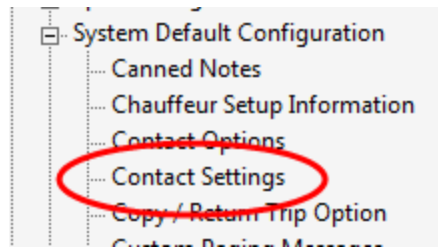

You can set the defaults separately for email and text (mobile). An example of the screen is shown below (example for email). You can locate existing email addresses here (rather than having to find the contact) and change the settings, and you can also set the default for new contacts by clicking "Set As Default" once you have the settings the way you want them.

Once you have the defaults set, there is still one more step if you want these defaults to apply to new contacts –you have to turn them on!

Navigate to Maintain…System Default Configuration…Contact Settings.

Make sure there is a check-mark in "Add Chauffeur direct defaults to new Contact Profile…". Note that if a new contact is created without an email or mobile number, then the defaults (for email or mobile, respectively) will not be set.

In addition, if you want to apply these defaults to "transient passengers", or one-time passengers for which you have not created a contact record, then you need to check the box just below the red circle above that says "Auto Apply Chauffeur Direct Defaults to Transient Passengers".

Finally, if you ever want to know whether Chauffeur Direct was sent on a trip, simply open the trip and look at the Communications tab (note that there are separate sub-tabs for Minutes Out, Chauffeur

Direct, and Trip Status). In the screen shot below, you can see that the Chauffeur Direct was sent out to two recipients (in this case, an email address and a mobile number, although that is masked for privacy in this example.)