

Tech Tip Tuesday—October 22, 2019

Was great to see so many of you in Boston last week!

It was very nice to see so many of you at the Chauffeur Driven/NLA show in Boston last week, both on the show floor, at the Tech Panel (where we were a participant), and at our user meeting on Tuesday afternoon.

While we will not be exhibiting at the LCT East show in Atlantic City, we will be participating in the Tech Panel at the show on Tuesday, November 5th at 9am.

In Las Vegas, we will be exhibiting at the Chauffeur Driven/NLA show at the Mandalay Bay that starts on Sunday, February 23, 2020. We do not plan on having a booth at the LCT show (which is earlier in February).

Multi Owner and Contacts

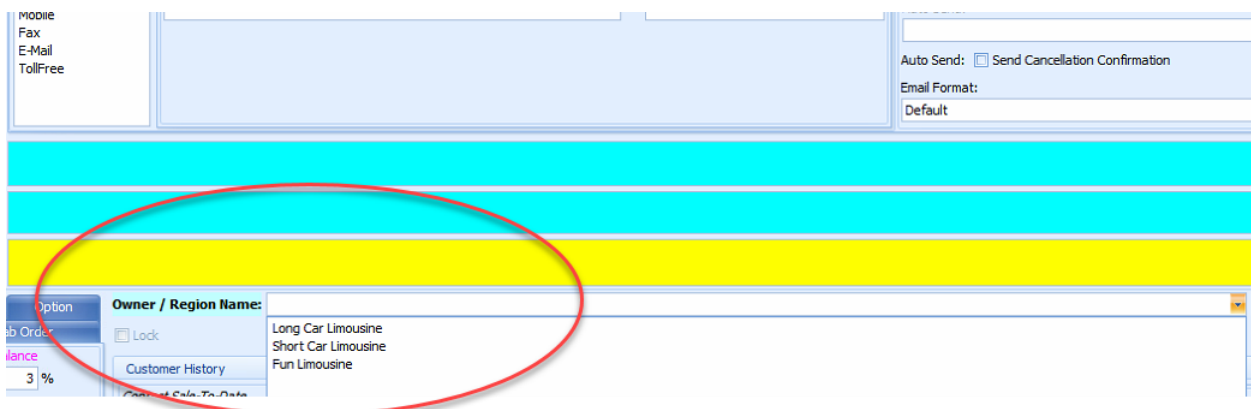
One feature of Livery Coach enables you to run the system as “multi-owner”, meaning that you have more than one company set up, and different trips can be fulfilled by different companies.

There are two common reasons to do this. One is that some of our customers have set up a separate legal entity that owns larger vehicles (e.g. buses) so that they can maintain separate insurance policies and not be required to have bus-sized liability insurance for their smaller vehicles (which saves money).

The other common reason is marketing—to have multiple brands in a marketplace, either because they focus on different market segments (retail vs corporate, for example) or because one company purchased another and wants to benefit from the brand equity.

Note that if you are or will be in either situation, and need some help setting up multiple owners, please contact our support team.

In the multiple-brand situation, what controls which company fulfills a given job is determined by the “owner” of the job, which is typically determined by the “owner” of the contact. Each customer profile has an owner field, which, if you have more than one owner, is a selectable drop-down.



The default setting is that, when creating a new contact, the new contact defaults to the primary (first) owner that you set up in your system. For many of our customers, this works well.

However, if all of your brands are currently active (accepting new customers), you might not want this—instead, you might want your agent to specifically pick the owner of the new contact.

This is set in System Default Config—Contact Settings. You can pick which owner you want as a default, or you can make the agent pick at time of creation.

