

## Tech Tip Tuesday—January 28, 2020

### User Meeting at CD/NLA Show in Las Vegas

As announced previously, Livery Coach will be exhibiting at the CD/NLA Show in Las Vegas on February 23-26. In conjunction with the show, we will be having our user meeting on Sunday (February 23) at **3:30pm in Oceanside F**. This meeting is open to all Livery Coach clients, and we encourage you to attend, but we need a headcount.

For those of you who have already let us know that you are coming, thanks! If you haven't let us know yet, please RSVP with the names of attendees to [news@liverycoach.com](mailto:news@liverycoach.com). Thanks!

### Rate Group

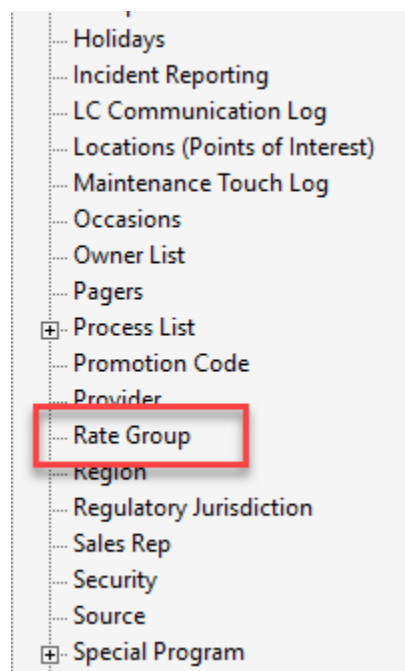
Livery Coach has a very powerful rules engine for Charges and Fees, and in a future tech tip (or series of tech tips) we will explore this further. But one use is to auto-assign, say, a discount.

Let's suppose you have a client that gets a 10% discount from your regular rates—let's call that your "Corporate" discount. The traditional way was to go into Charges/Fees and auto-assign that discount to your corporate client. Then, if you got another client for whom you wanted to offer that discount, you would go into Charges/Fees and auto-assign the same discount to the 2<sup>nd</sup> client. And so forth.

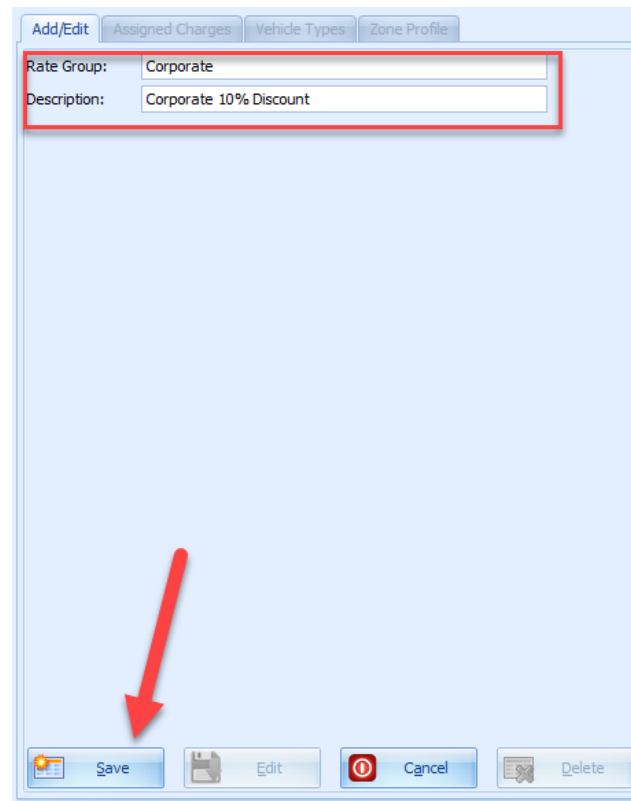
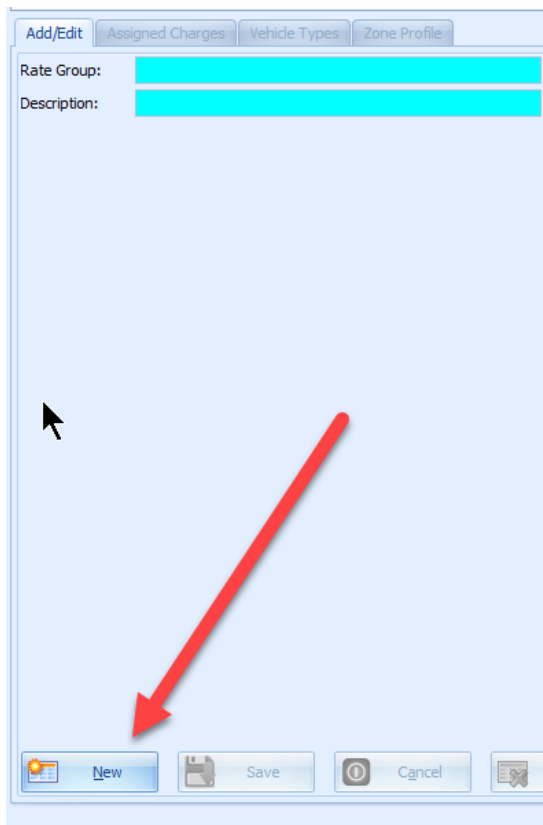
If you have 30 clients who get the same discount, that would mean 30 assignments in Charges/Fees for that discount. And if your corporate rate also has (for example) a different fuel surcharge, then it's a whole 2<sup>nd</sup> set of assignments.

There is a simpler way. It's called Rate Group.

The first step is to navigate to Setup...Maintain...Rate Group.

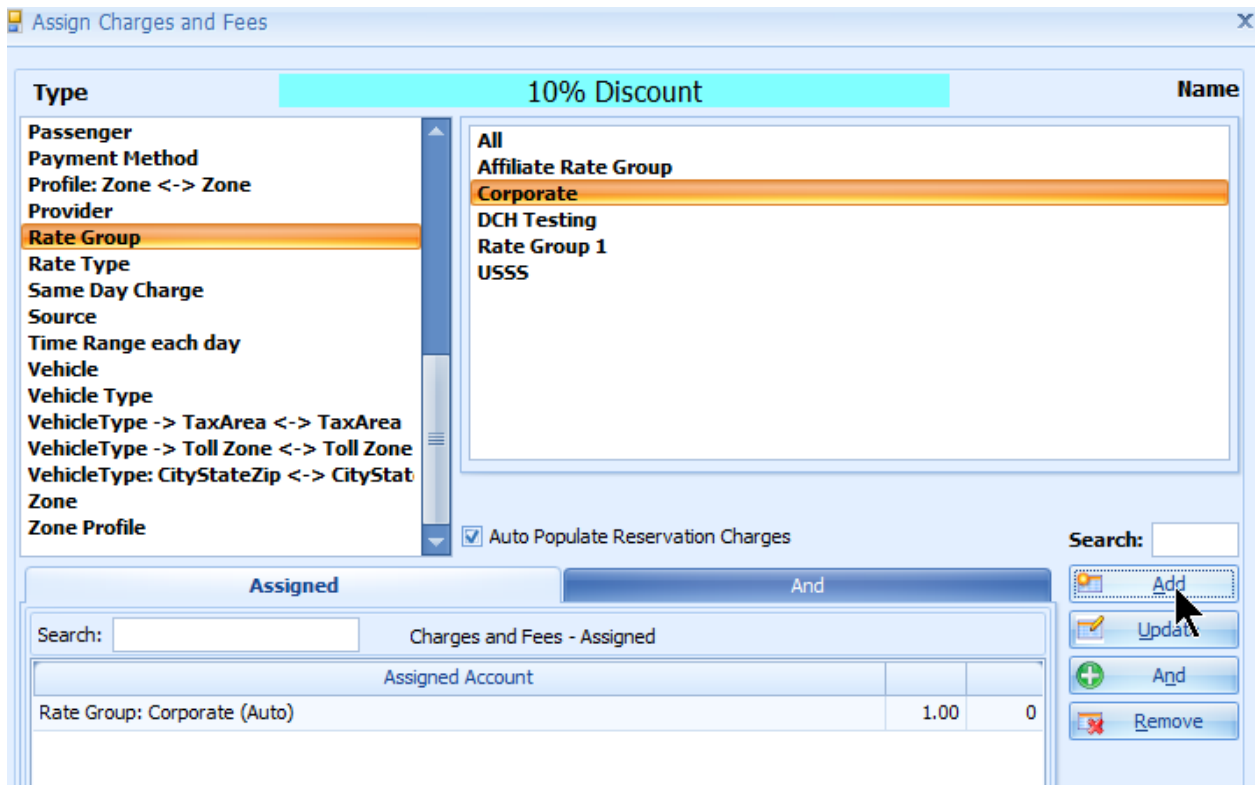


Then, click on the “New” button at the bottom, type in the name of your Rate Group and a description, and click on Save.



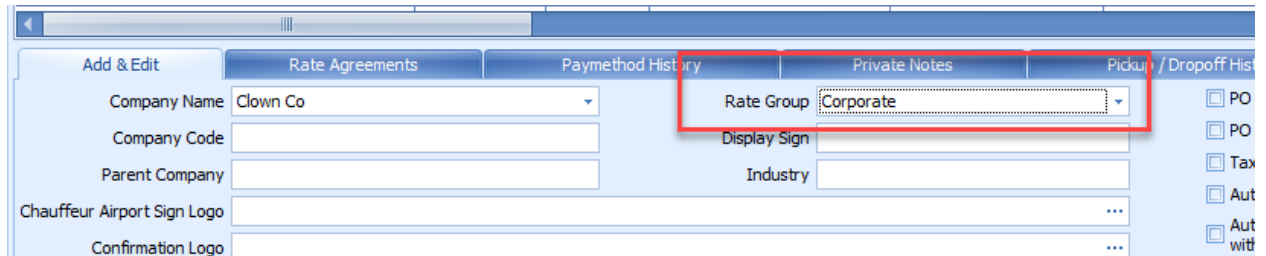
Now that you have the Rate Group set up, what do you do with it?

First of all, you go to Charges and Fees and auto-assign the appropriate charge/discount to the Rate Group. In our example, we are assigning the 10% Discount to the Corporate Rate Group.

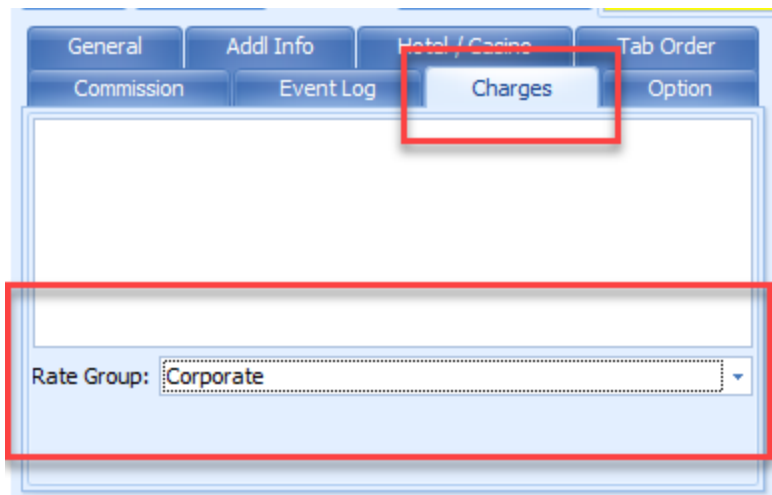


Now that the Rate Group is all set up with the auto-assigned discount, how can it be used?

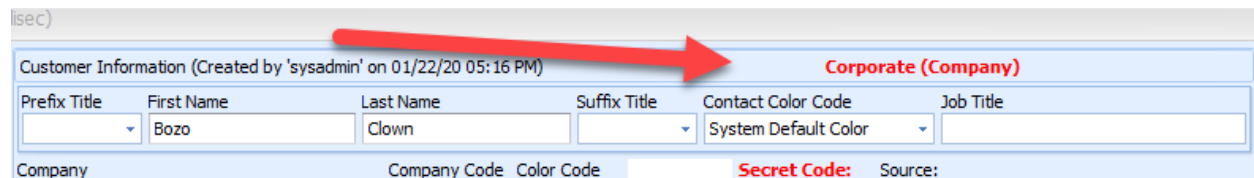
If you want to assign the Rate Group to a Company, you can do so in Company List.



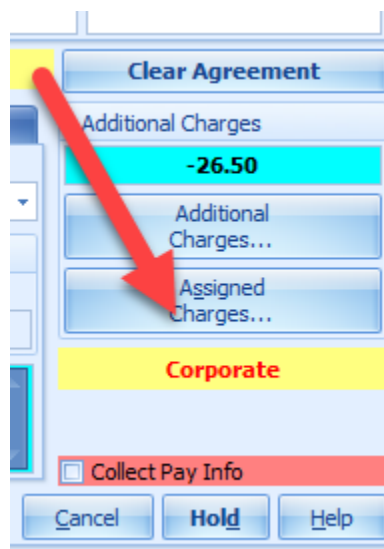
If you want to assign the Rate Group to an individual contact, you can do that by navigating to the Charges tab in the contact profile.



Once your assignment is made, when you look at the contact, or make a reservation, there are a few spots where the system shows you the rate group, and whether it was assigned to the individual contact or the company. Here's an example in the Contact Profile where it was assigned by Company:



It's also shown in the Payment Method Selection screen, towards the bottom.



In summary, Rate Group is a nice feature that allows you to simplify all the assignments of auto-assigned charges/fees, and makes it a lot easier to move a client from one set of fees to another. Look for more uses of Rate Group in the future as we continue to build out it's capabilities!