

## Tech Tip Tuesday—February 11, 2020

### CD/NLA Show in Las Vegas is Fast Approaching

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!

### Tech Tip will be on Hiatus the next two weeks

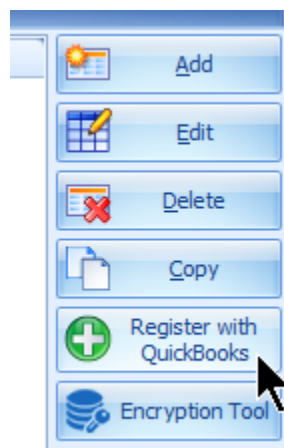
Next week is the LCT Show, and although Livery Coach will not be exhibiting this year, we know that some of you will be attending, and the last thing you need is a Tech Tip when you won't have time to read it.

And then the NLA/Chauffeur Driven Show is upon us. We plan to resume the regular weekly Tech Tip on Tuesday, March 3, 2020.

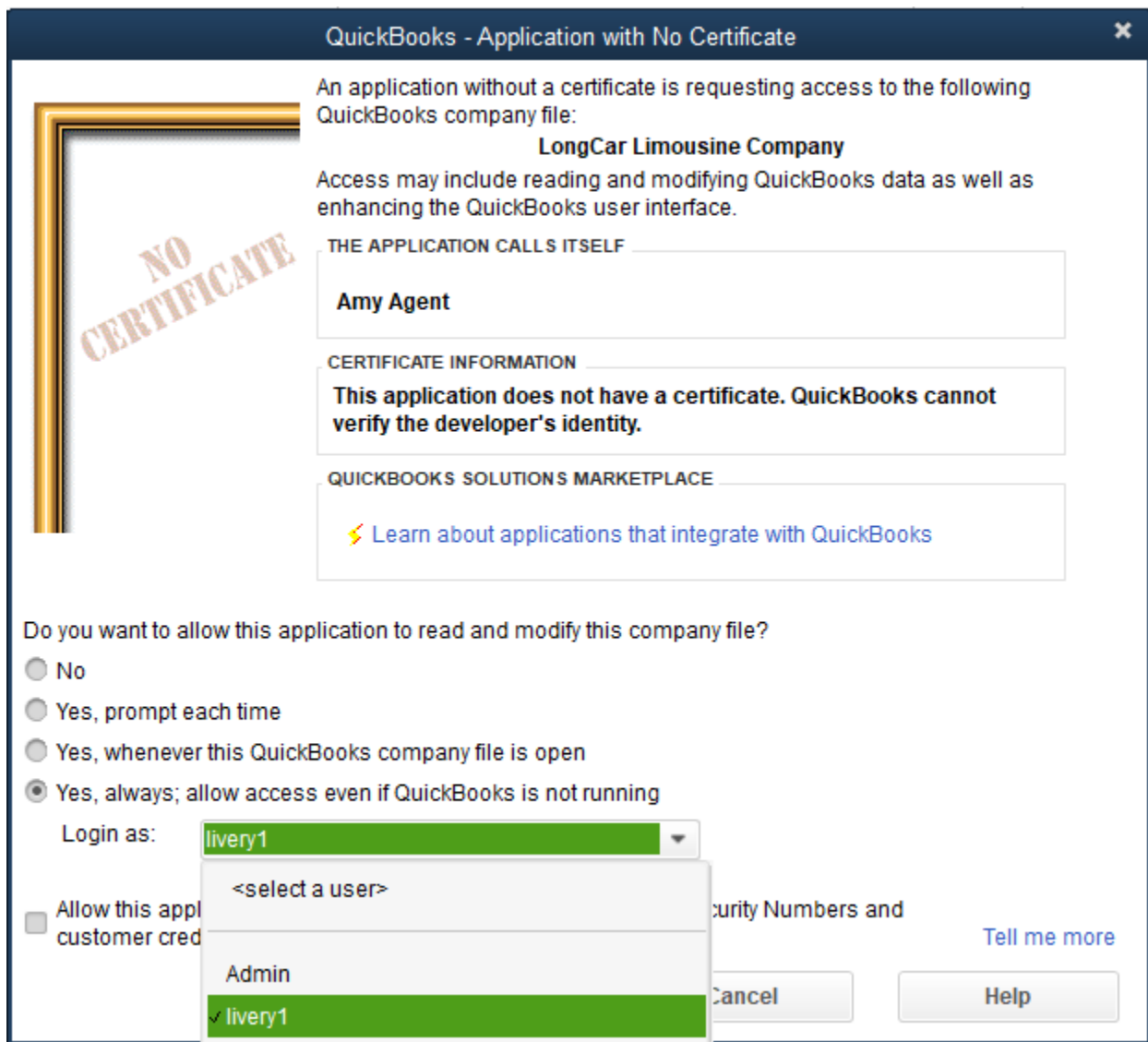
### Register With QuickBooks

In order for Livery Coach to interact with QuickBooks, the Livery Coach program has to be registered with QuickBooks.

Typically, you have to log in to QuickBooks as Admin, open Livery Coach, and select the user in Livery Coach Security. Then you click on the "Register with QuickBooks" button.



The system then interacts with QuickBooks and presents Livery Coach to QuickBooks as an application called whatever the name of the agent you are trying to register is. For example, if you are trying to register someone whose Livery Coach username is "Amy Agent", then that's what QuickBooks will show you when you register.

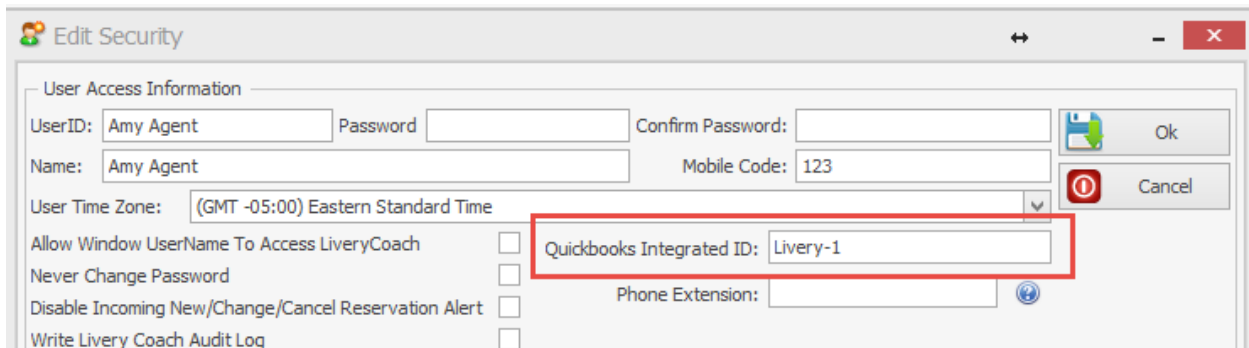


You then select the QuickBooks user that you want the integration to use (if QuickBooks isn't already open), and also select "Yes, always; allow access even if QuickBooks is not running"

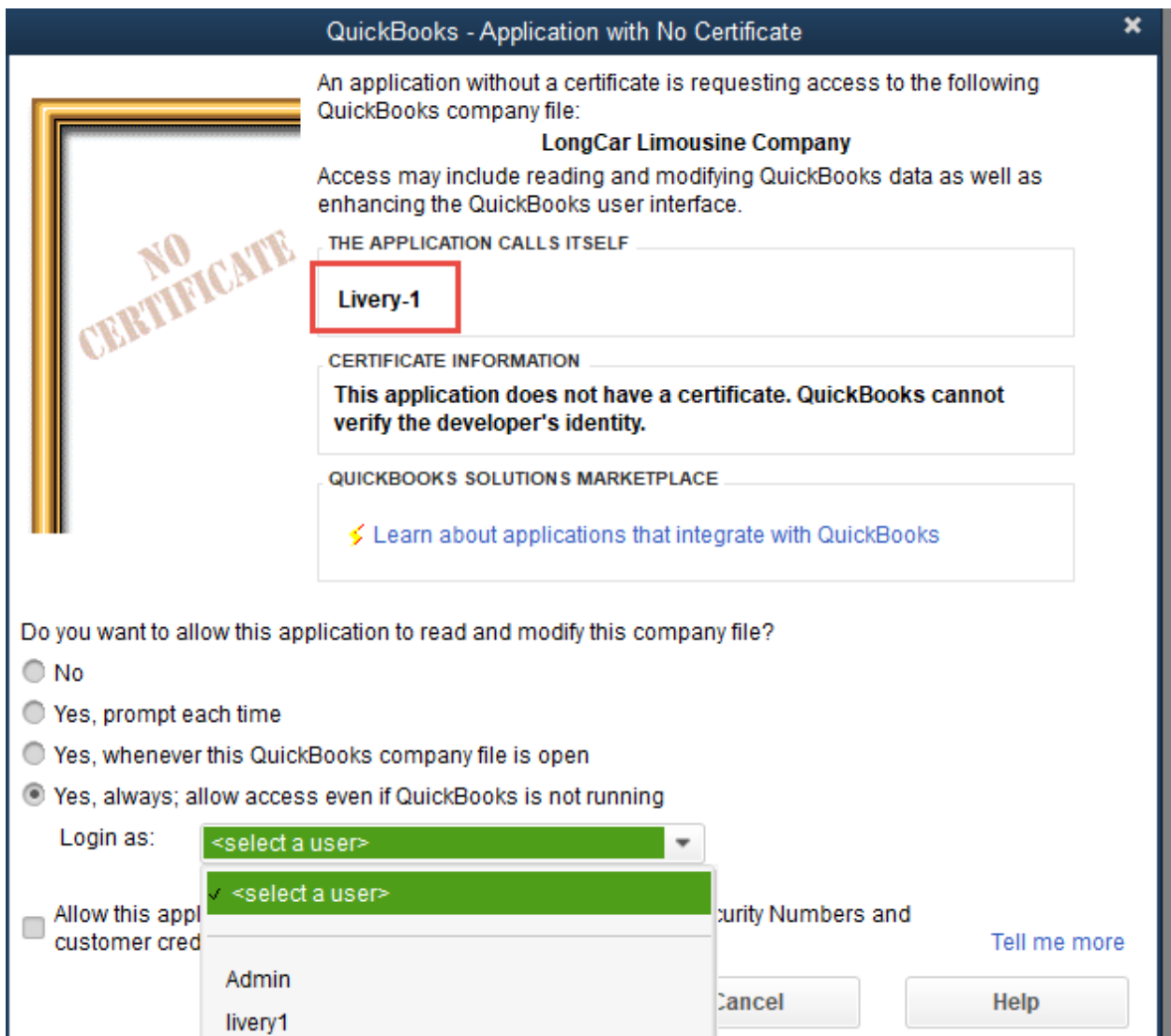
That way, if you have an agent who needs to close trips in TripBook, he or she does not have to actually launch QuickBooks (although it does need to be installed on the machine), so you don't have to train that user in QuickBooks, nor worry that the user has the ability to poke around QuickBooks and either see things or do things that you might not want seen/done.

All that said, with this method, every time you have a new user who needs to be able to close trips, you have to go through this, which can be inconvenient. But there is a better way.

In Security, for each user there is an optional field labeled "QuickBooks Integrated ID:".



As we have seen, when this field is blank, it uses the User ID (“Amy Agent” in this example). But, if you put something in the QuickBooks Integrated ID field, then it will use that value instead.



So why is this so helpful?

The big advantage to this is that you can use this function so you never have to go through the somewhat tedious process of registering a TripBook user again!

Simply pick a few “phantom” user names (such as “Livery-1”, “Livery-2”, etc., or whatever you want them to be), put them in a user’s security (either different users, or the same user, one after another), and then register each.

Now, if you want to give someone the ability to process trips in TripBook (and interact with QuickBooks), you no longer have to register that user—just put one of your “pre-registered” names in the QuickBooks Integrated ID field.

And, if you want to revoke access, all you have to do is remove the name in Livery Coach security.

If you have two users that both close trips in TripBook at different times (say, a weekday person and a weekend person), they can even share the same QuickBooks Integrated ID. The only restriction is that two people who share the same ID can’t be in TripBook at the same time, since QuickBooks won’t allow the same user to be logged in twice.

Any questions? As always, just give us a call or drop us an email to [support@liverycoach.com](mailto:support@liverycoach.com).

See you in Las Vegas.