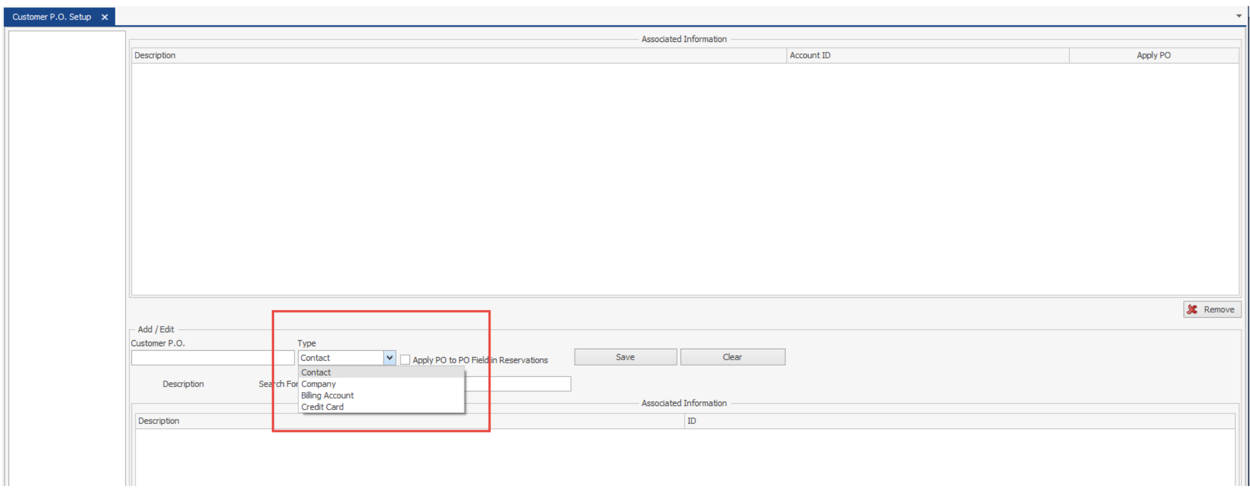
Tech Tip Tuesday—October 6, 2020

Automatic Customer PO

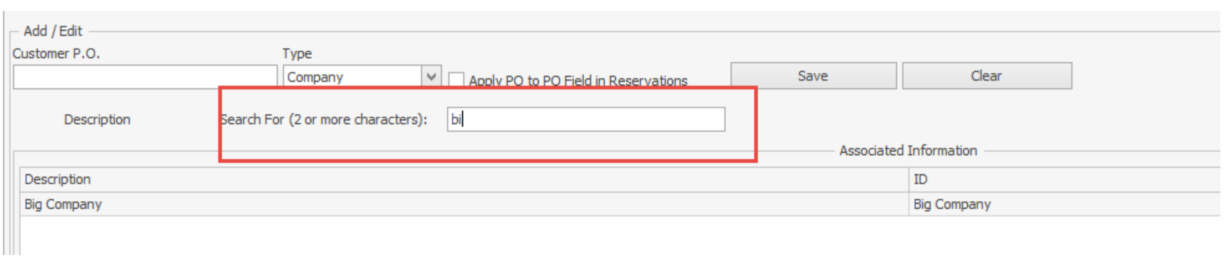
If you have a customer who gives you a blanket Purchase Order (PO) for multiple trips (say, for the year), and you want to automatically insert that PO number into a trip each time that customer books a trip, there is an easy way to set that up in Livery Coach.

Simply navigate to Setup->Maintain->Customer P.O. Setup.

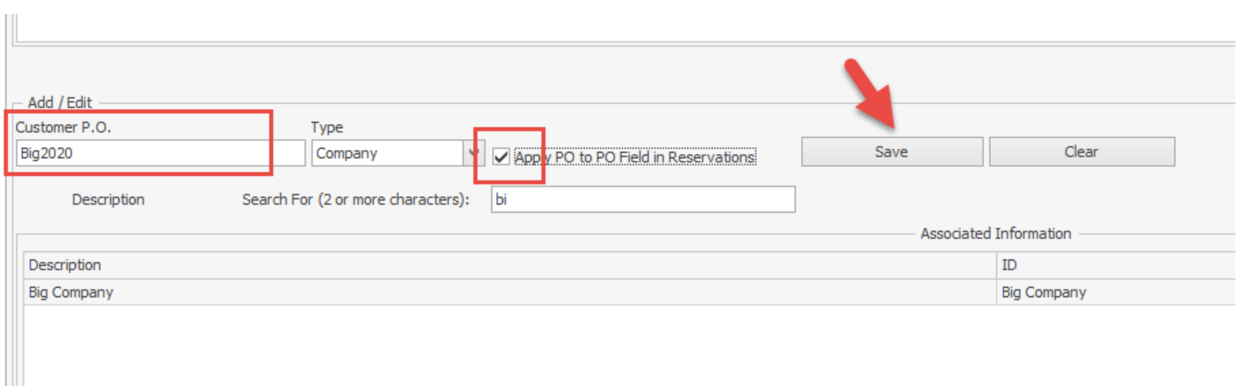
From this screen, in the bottom window, select whether you would like to tie the PO to a Contact, a Company, a Billing Account, or a Credit Card.



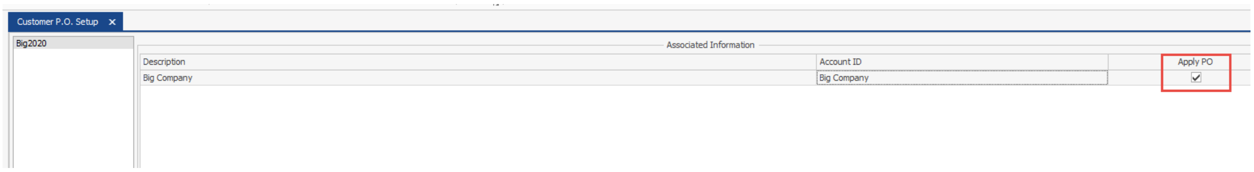
Then start typing in the Search box to find the desired selection, and select it.



Type in the Customer P.O. in the field, and then click on Save.



Now the Company will appear in the upper window, and the PO in the left window.



When you book a trip using a contact tied to this company (in our example), the system will automatically fill out the Customer P.O. field for you in the Payment window.

(Note that if you want to suspend this behavior, you simply need to uncheck the “Apply PO” box in the upper window.)