

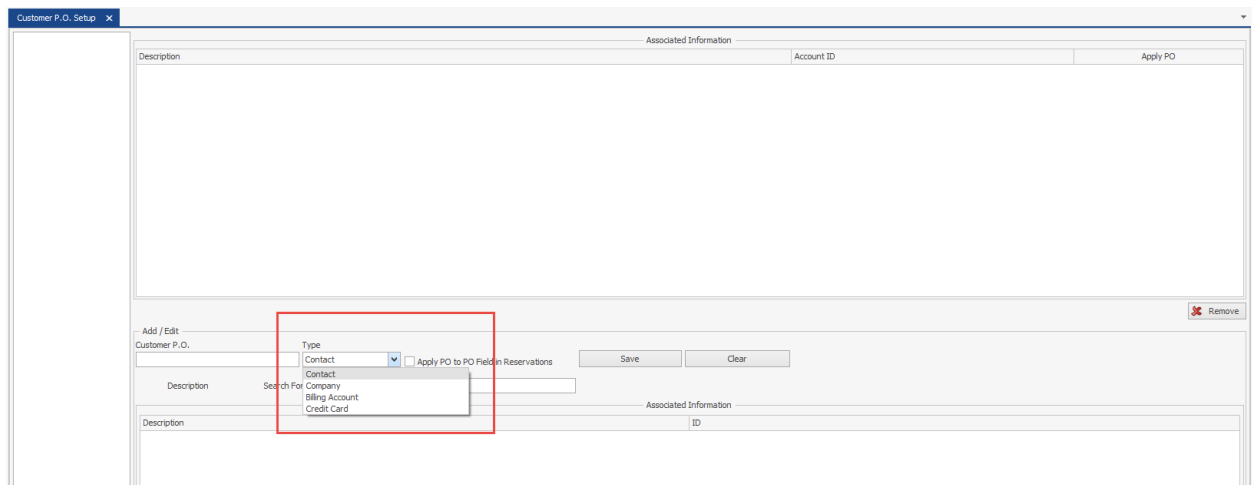
## Tech Tip Tuesday—October 6, 2020

### 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.

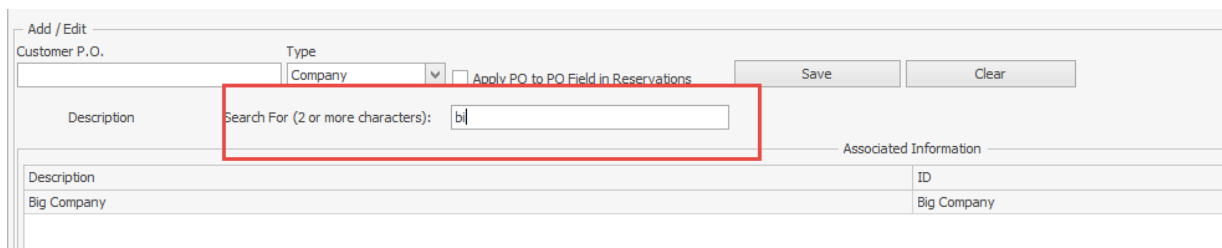
Simply navigate to Setup->Maintain->Customer P.O. Setup.

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.



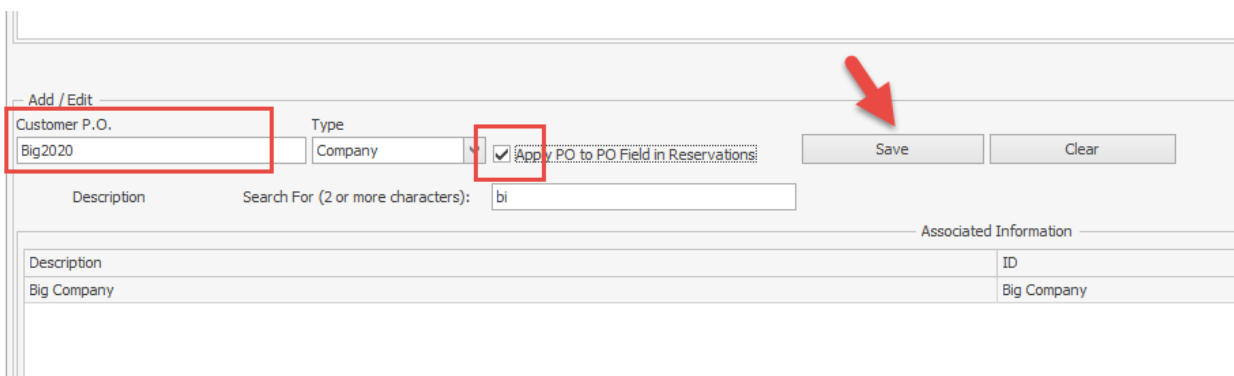
The screenshot shows the 'Customer P.O. Setup' window. At the top, there is a table with columns for 'Description', 'Associated Information', 'Account ID', and 'Apply PO'. Below this is the 'Add / Edit' form for a 'Customer P.O.'. The form includes a 'Type' dropdown menu set to 'Company', a checkbox for 'Apply PO to PO Field in Reservations', and 'Save' and 'Clear' buttons. A search box labeled 'Search For Company' is visible, and a dropdown menu is open below it, listing 'Contact', 'Billing Account', and 'Credit Card'. A red box highlights the 'Type' dropdown and the search box.

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



This screenshot shows the 'Add / Edit' form with the search box containing 'bi'. A dropdown menu is open below the search box, showing 'Big Company'. The 'Type' dropdown is still set to 'Company'. A red box highlights the search box and the dropdown menu.

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



This screenshot shows the 'Add / Edit' form with the 'Customer P.O.' field filled with 'Big2020'. The 'Type' dropdown is still set to 'Company', and the 'Apply PO to PO Field in Reservations' checkbox is checked. A red arrow points to the 'Save' button. A red box highlights the 'Customer P.O.' field and the 'Apply PO to PO Field in Reservations' checkbox.

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

Customer P.O. Setup		Associated Information	
Big2020	Description Big Company	Account ID Big Company	Apply PO <input checked="" type="checkbox"/>

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.)

Payment Method Selection(13656 millicsec)

- American Express
- MasterCard(!)
- Visa
- Discover
- Diners
- JCB
- Account(!)
- Cash
- Check
- Bonus Account
- Multi-Pay
- Payment Needed

**Show Payment History By**

Passenger
  Contact
  Company

Acct Name	Account	Default	
Big Company	BigCo	No	...

**Rate Breakdown**

Hourly Rate:

Fixed Rate:

Hour Limit:

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Name:

Acct #:

CW2 /CVC2:

Exp:

Billing Address:

Zip/Postal:

Okd By:

Save As:

Auth. Amt:

PN Ref:

Auth. Code:

Auth Exp:

Disable auto pre-auth

Account Group:

PO/FI #:

FO #:

Dept #:

PO 1

PO 2

PO 3

PO 4

PO 5