

Tech Tip Tuesday—December 8, 2020

Charges and Fees—Auto Assign

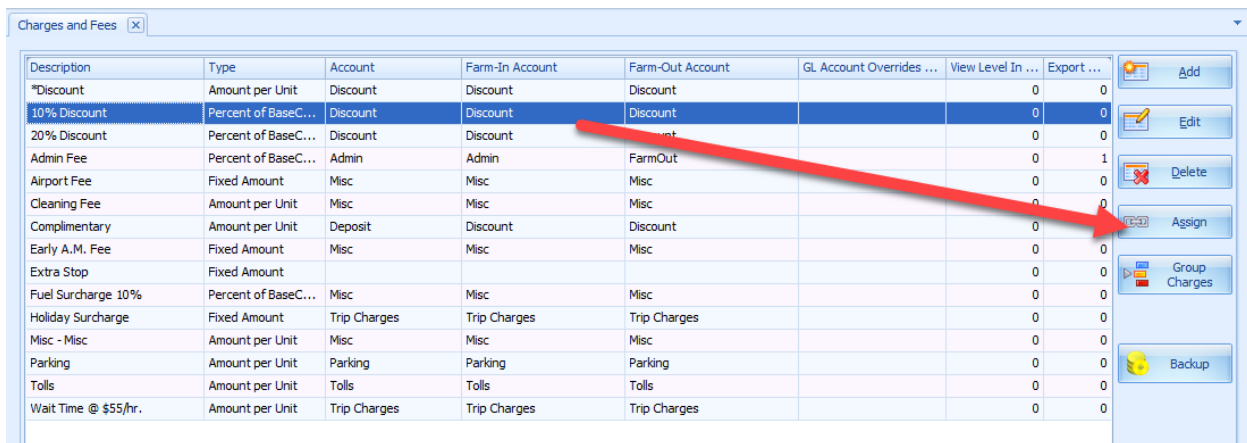
In the last Tech Tip, we reviewed how to set up a Charge/Fee in Livery Coach. While this is certainly a start, you certainly don't want to have to remember what charges/fees to add to what trips and do that manually. Much better to let the system do this for you.

In this Tech Tip, we'll review how to make that automatic application, and also how to add exceptions to the rule. In a future tech tip, we'll cover compound rules (where more than one condition must apply), but let's cover the basics first.

Let's suppose you have a client for whom you want to give a 10% discount.

The first thing to consider is how will you identify that client? Normally, we suggest using the Company name, since that would apply to all bookers with contact profiles tied to that Company. (If you use Account, then the auto-assignment only applies when the selected billing account is used, meaning it would not apply for credit card trips).

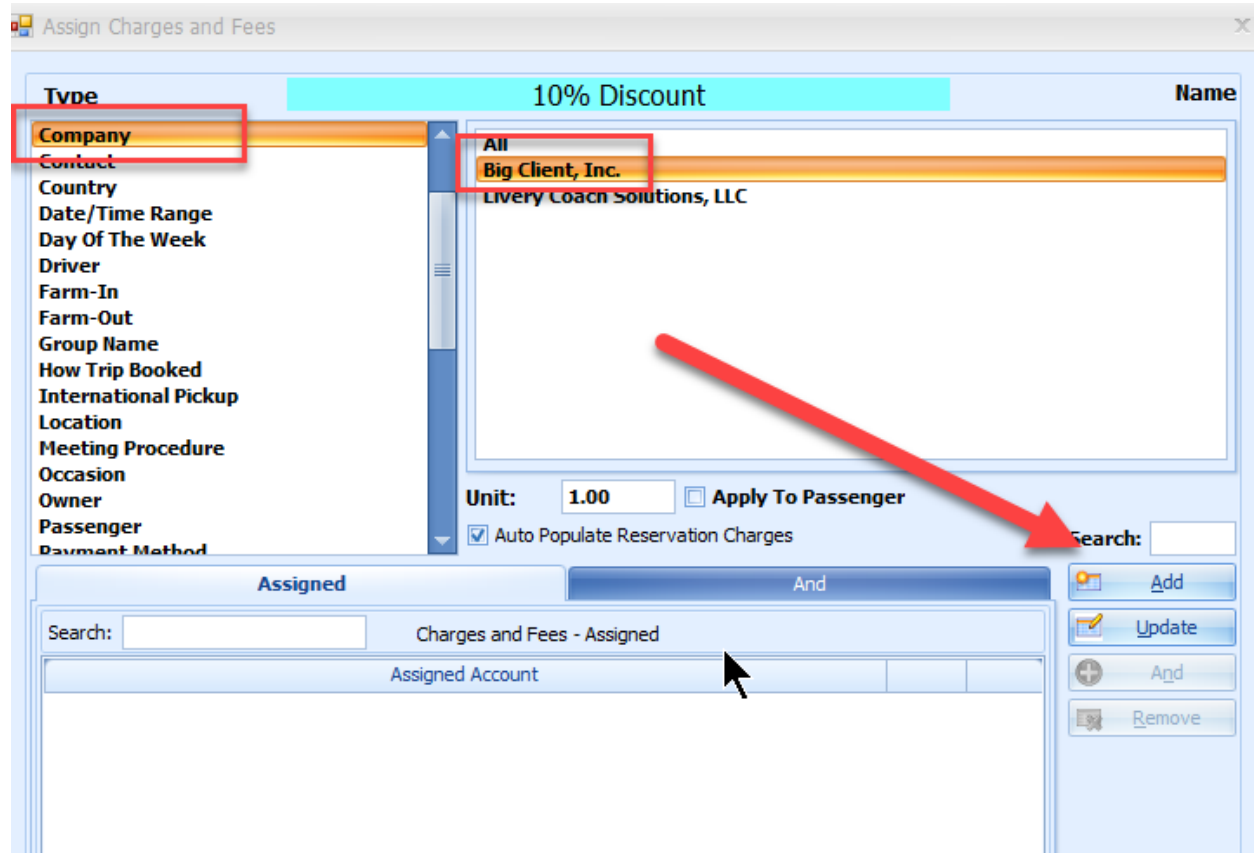
So select the charge (10% Discount in our example), and click on the Assign button.



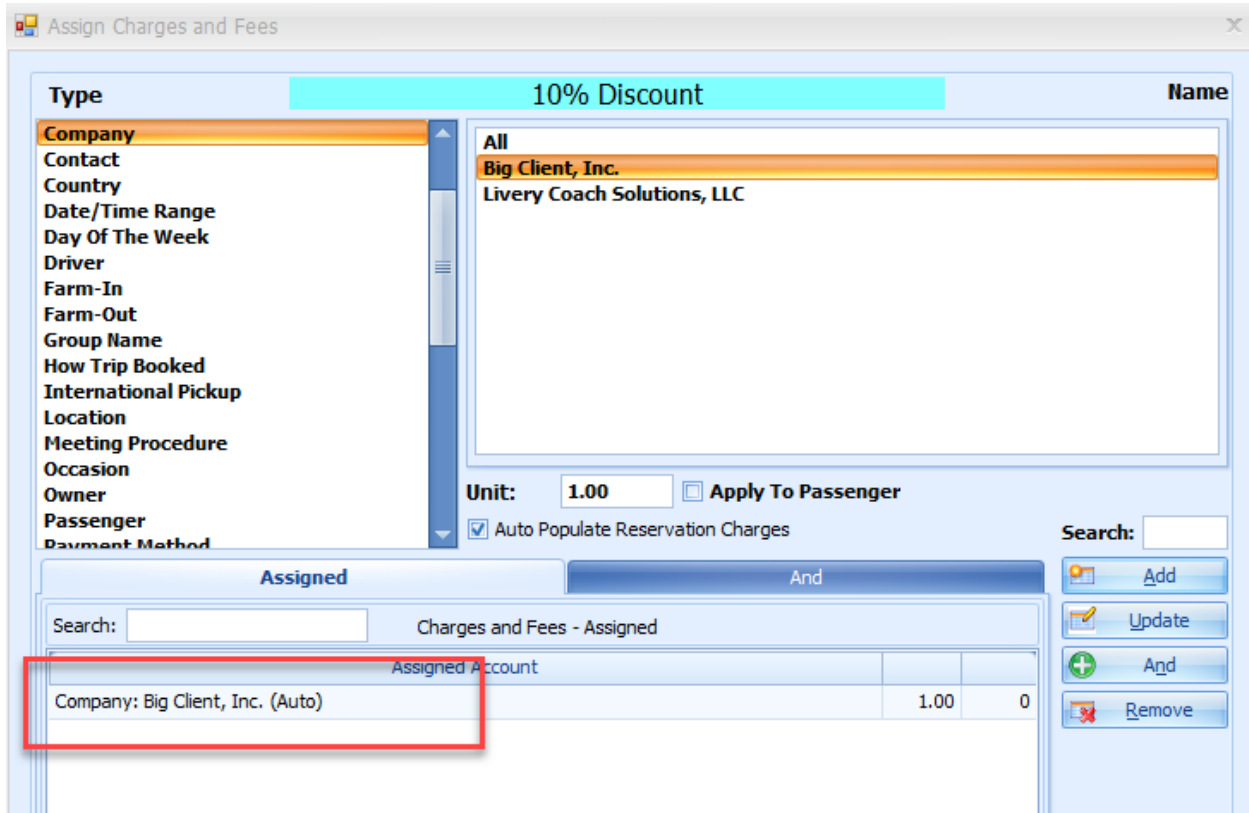
Description	Type	Account	Farm-In Account	Farm-Out Account	GL Account Overrides ...	View Level In ...	Export ...	
*Discount	Amount per Unit	Discount	Discount	Discount		0	0	Add
10% Discount	Percent of BaseC...	Discount	Discount	Discount		0	0	Edit
20% Discount	Percent of BaseC...	Discount	Discount	Discount		0	0	Delete
Admin Fee	Percent of BaseC...	Admin	Admin	FarmOut		0	1	Assign
Airport Fee	Fixed Amount	Misc	Misc	Misc		0	0	Group Charges
Cleaning Fee	Amount per Unit	Misc	Misc	Misc		0	0	Backup
Complimentary	Amount per Unit	Deposit	Discount	Discount		0	0	
Early A.M. Fee	Fixed Amount	Misc	Misc	Misc		0	0	
Extra Stop	Fixed Amount					0	0	
Fuel Surcharge 10%	Percent of BaseC...	Misc	Misc	Misc		0	0	
Holiday Surcharge	Fixed Amount	Trip Charges	Trip Charges	Trip Charges		0	0	
Misc - Misc	Amount per Unit	Misc	Misc	Misc		0	0	
Parking	Amount per Unit	Parking	Parking	Parking		0	0	
Tolls	Amount per Unit	Tolls	Tolls	Tolls		0	0	
Wait Time @ \$55/hr.	Amount per Unit	Trip Charges	Trip Charges	Trip Charges		0	0	

A box will open up that allows you to make all the auto-assignments you like. For example, you can automatically assign charges based on billing account, an Airport, Date/Time Range (good for automatic Holiday surcharges), Day of Week (maybe you have a discount on Tuesdays), Occasion, Payment Method (cash discount?), Time of Day (good for early am fees), and many other choices (feel free to scroll through the choices at your leisure).

In our example, we will select Company from the Type column, which will then give you a choice of all the Companies in your system. In our example, we will select Big Client, Inc, and then click Add.



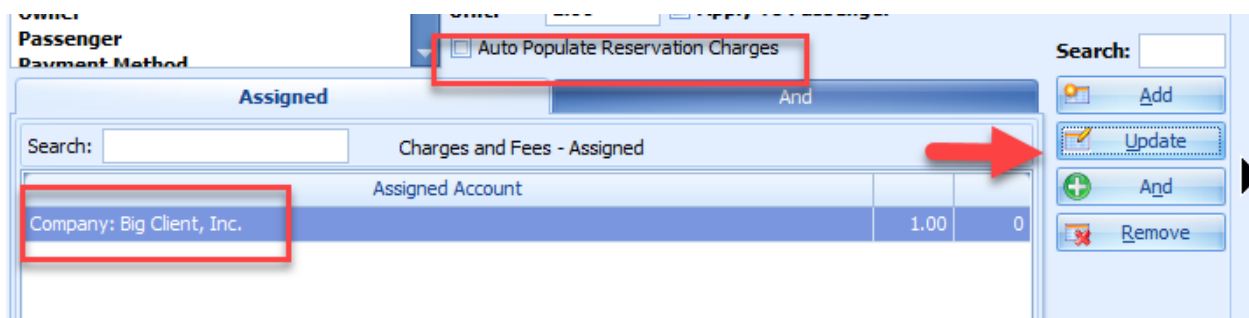
Assuming you didn't make any changes to the other fields (explained shortly), you will now see the Assignment in the lower box, including the word (Auto).



So some tips: first of all, the (Auto) tells you (and the system) that this is an auto-populated charge, so when Big Client, Inc. books a trip, this charge (10% Discount) will automatically apply.

If you wanted to suspend this behavior, say temporarily, you could turn off the automatic feature but still leave the charge assigned—that would make it dormant (so it wouldn't have any effect), but it makes it easier to turn back on.

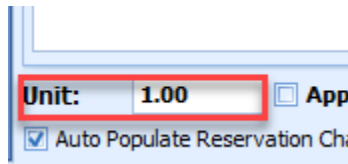
To do that, highlight the charge, uncheck the "Auto Populate Reservation Charges", and click Update. The (Auto) is now removed, and the charge will not auto apply. To make it automatic again, simply reverse the process. Here's what it looks like dormant.



When you added this charge, by default the Unit field stays at "1.00", which means that the system will automatically apply 1 unit of 10% Discount (which means, 10% Discount). With some types of charges, it might be appropriate to change the Unit to something else. For example, if your charge is set up as

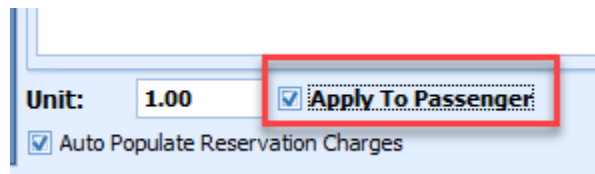
Parking and you set up the charge as \$1.00, if you change the unit to 5.00 when you add the rule, then that rule would apply \$5.00 in parking.

The Unit is good when you only want to have one Charge, but automatically apply different amounts for different situations. We will explore this functionality more thoroughly in a future tech tip.

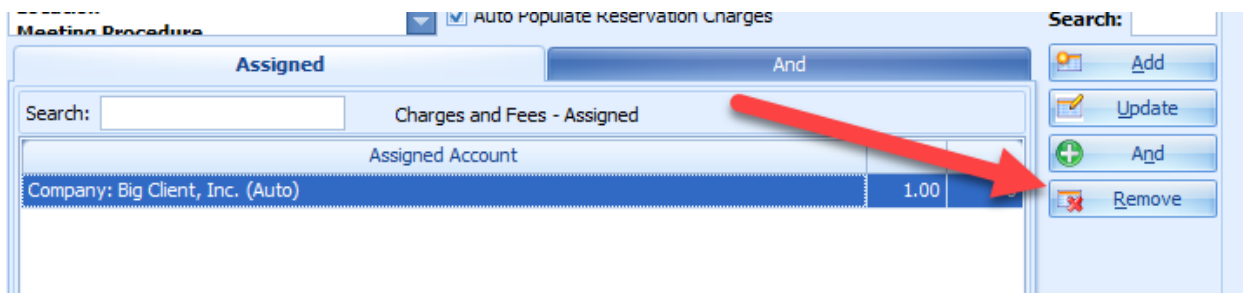


Finally, note that this assignment is for the Company “Big Client, Inc.” which means that the BOOKER must be tied to that company for the charge to auto-populate. This works well most of the time, but if you have a travel agent from a different company booking, then maybe not so much.

If you check the “Apply to Passenger” button when automating this charge, then the charge will auto-apply when the booker AND/OR ANY passenger profile has the company Big Client, Inc.



If you want to remove the assignment completely, simply select the Assignment you want to remove, and then click the Remove button.



Some important final notes: the automatic charge/fee assignment works when entering a NEW reservation. In most circumstances, making changes to an existing reservation will not cause the auto-assignment rule engine to run again (because this would be frustrating if you had manually removed charges, only to keep having them reapply).

Also, if you want to manually remove any auto-assigned charges from a trip, you MUST save the trip before the removal. When you initially save a new trip, the rules engine runs one more time to make sure nothing was missed—so if you already took an auto-assigned charge out, the system will put it back. Once you save the trip, remove it and it will stay removed.

In a future Tech Tip (or two), we will explore even more advanced applications of auto population, including exceptions and compound conditions.

As always, if you need assistance, please contact our talented support team, and they will be happy to help.