

## Tech Tip Tuesday—December 15, 2020

### Holiday hours, and Tech Tip Schedule

In light of the upcoming holidays, this will be the last Tech Tip of the year. The next scheduled Tech Tip will be on Tuesday, January 5, 2021. Let's hope that 2021 is a better, brighter year than the disaster we are just wrapping up.

The Livery Coach office will be closing at 3pm (eastern) on Thursday, December 24<sup>th</sup>, and will also be closed on Christmas Day, December 25<sup>th</sup>. We will reopen at 9am (eastern) on Monday, December 28<sup>th</sup>.

The Livery Coach office will be closing at 5pm on Thursday, December 31<sup>st</sup> and will also be closed on New Years Day, January 1. We will reopen on Monday, January 4<sup>th</sup>, at 9am eastern.

Happy Holidays!

### Charges and Fees—Exceptions to Auto Assign

Last week, we introduced the rules engine that allows you to automatically assign charges/fees based on various conditions. The sophisticated, powerful rules engine in Livery Coach also allows you to have multiple conditions, and exceptions.

In this Tech Tip, we'll cover the exceptions, and in a future Tech Tip we will explore the multiple conditions.

So let's suppose you have a common scenario where you want a charge/fee to be added to a trip most of the time, but there are exceptions.

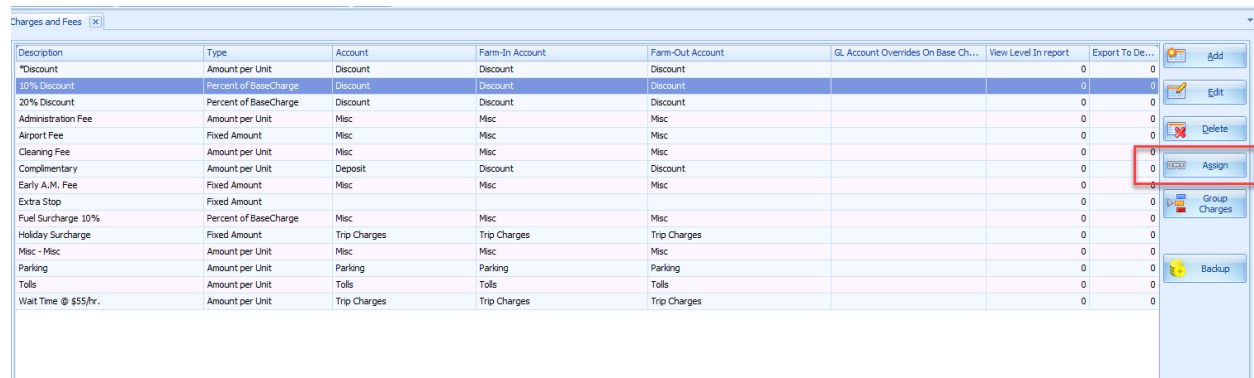
For example, maybe you have a particular client who gets a 10% discount, but not in buses, and not for weddings (two exceptions).

Livery Coach makes this easy, since you can easily add exceptions to the auto-assignment.

Let's illustrate with some screen shots.

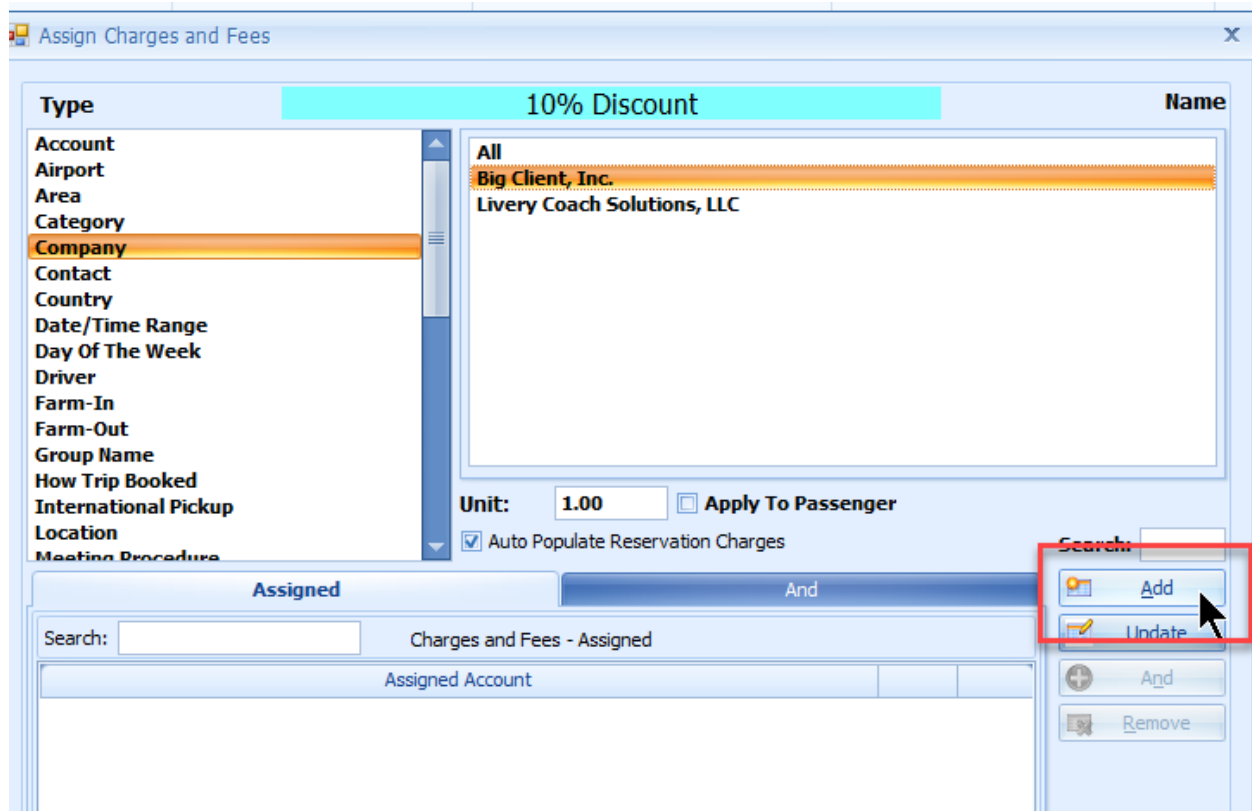
The first thing you need to have the Charge/Fee set up.

We have covered this thoroughly in a previous Tech Tip, but a quick review: select the desired charge, and select Assign.



Description	Type	Account	Farm-In Account	Farm-Out Account	GL Account Overrides On Base Ch...	View Level In report	Export To De...	
*Discount	Amount per Unit	Discount	Discount	Discount		0	0	Add
10% Discount	Percent of BaseCharge	Discount	Discount	Discount		0	0	Edit
20% Discount	Percent of BaseCharge	Discount	Discount	Discount		0	0	Delete
Administration Fee	Amount per Unit	Misc	Misc	Misc		0	0	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 BaseCharge	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/yr.	Amount per Unit	Trip Charges	Trip Charges	Trip Charges		0	0	

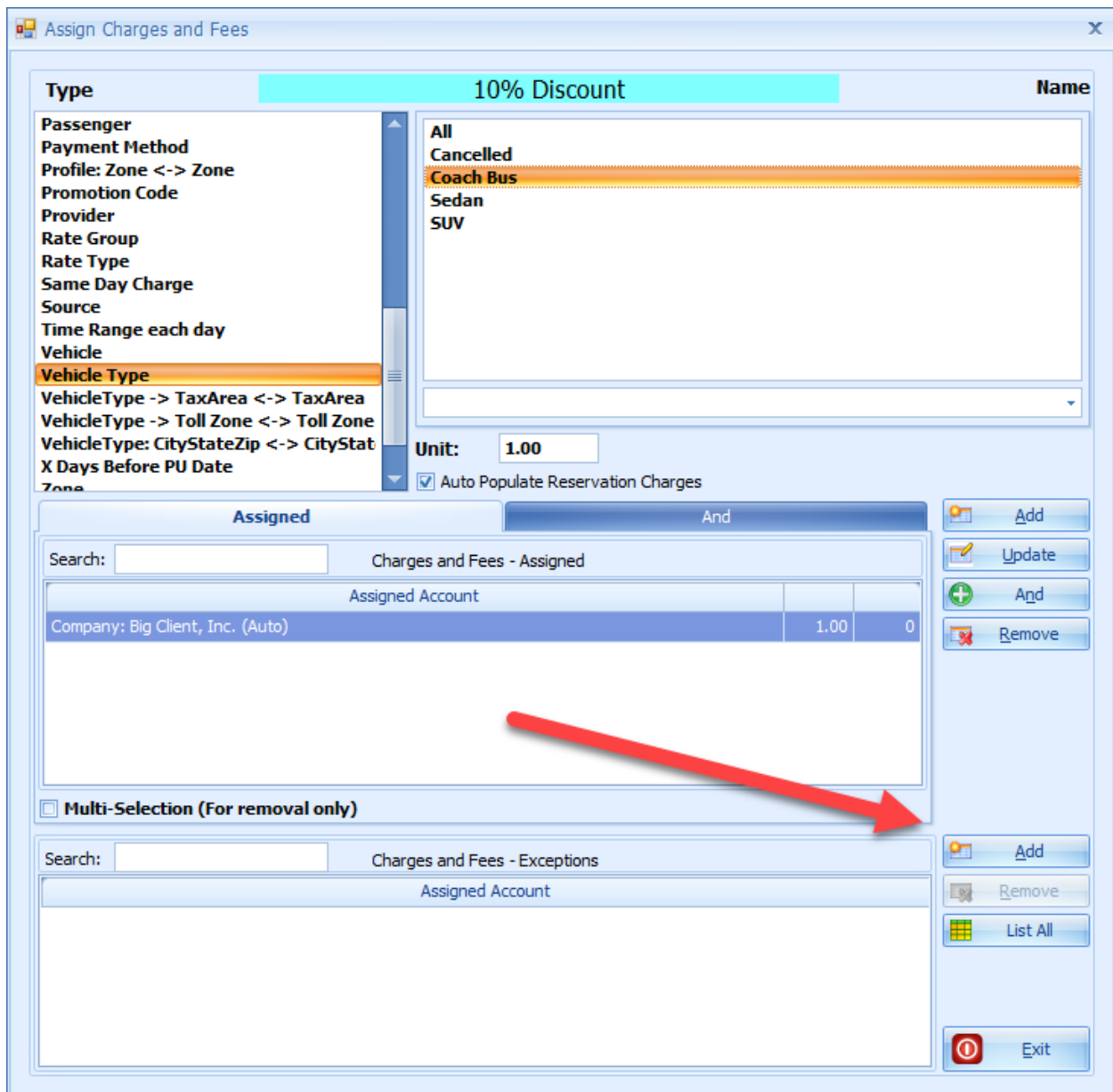
Then, you select the primary assignment criteria (in this case the desired company) and click on Add.



You will then see the charge in the list below. The Auto in parentheses tells you it is an auto-populated charge. If you have no other conditions to this charge (Big Client, Inc. always gets 10% discount on all trips) then your work is done—from now on, all new trips booked by a contact associated with Big Client, Inc. will get the 10% discount.

But now we need to add the exceptions. In our example we need to exclude all bus trips, and also weddings.

So now we need to use the upper windows to select the first exception. In our example, we will select Vehicle Type and Coach Bus. Then, while making sure that the rule for which you want to have the exception is selected (in our example. Company: Big Client), click on the LOWER Add button as shown in the screen shot below.



Once you click on the Add, the exception will appear in the lower Exception window.

Assign Charges and Fees

Type: 10% Discount Name

Passenger  
 Payment Method  
 Profile: Zone <-> Zone  
 Promotion Code  
 Provider  
 Rate Group  
 Rate Type  
 Same Day Charge  
 Source  
 Time Range each day  
 Vehicle  
**Vehicle Type**  
 VehicleType -> TaxArea <-> TaxArea  
 VehicleType -> Toll Zone <-> Toll Zone  
 VehicleType: CityStateZip <-> CityStat  
 X Days Before PU Date  
 Zone

All  
 Cancelled  
**Coach Bus**  
 Sedan  
 SUV

Unit: 1.00

Auto Populate Reservation Charges

Assigned And

Search: Charges and Fees - Assigned

Assigned Account		
Company: Big Client, Inc. (Auto)	1.00	0

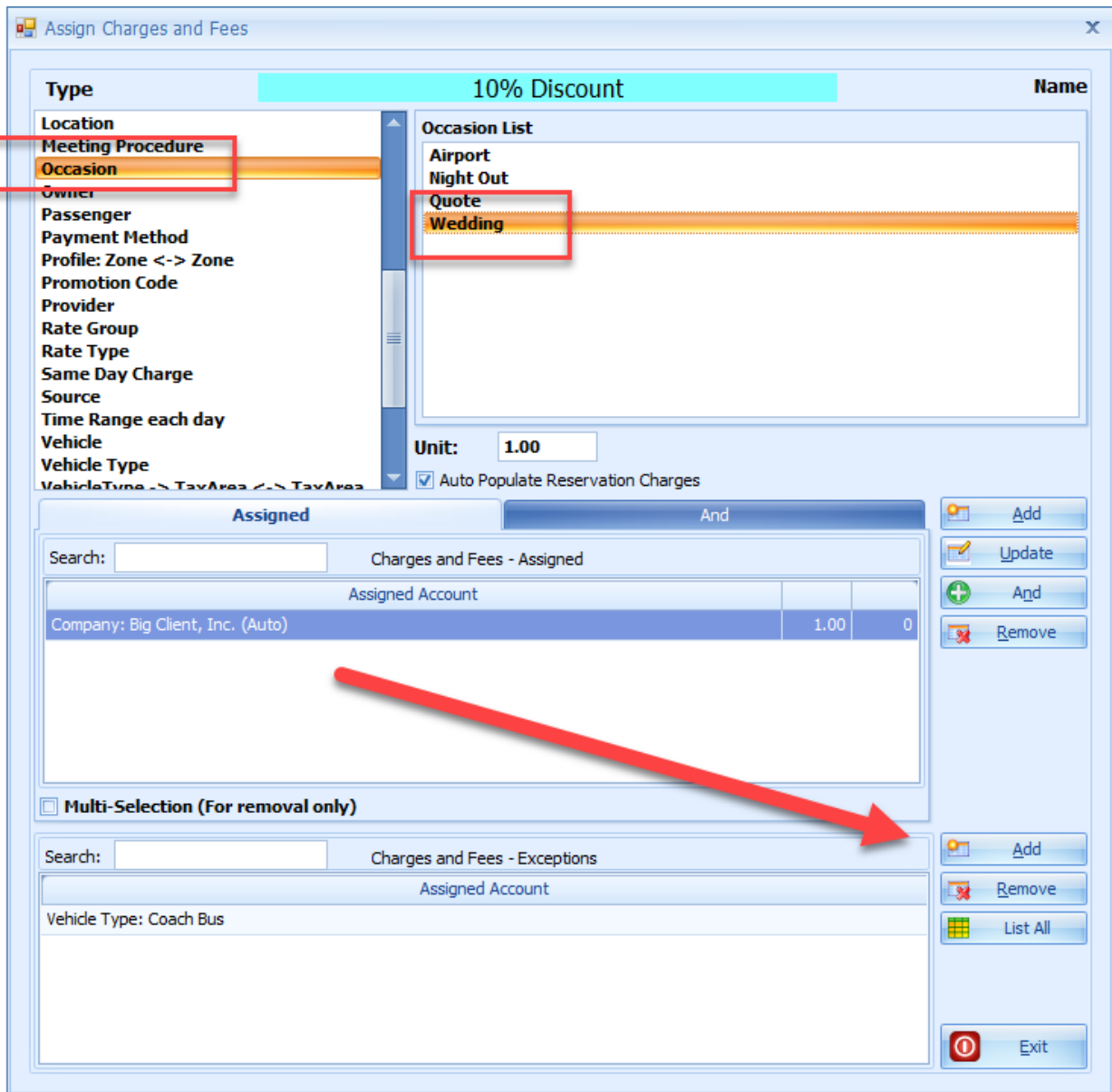
Multi-Selection (For removal only)

Search: Charges and Fees - Exceptions

Assigned Account		
Vehicle Type: Coach Bus		

Add  
 Update  
 And  
 Remove  
 Add  
 Remove  
 List All  
 Exit

Follow the same procedure to add the second exception (in our case, Weddings).



When you are done, now your assignment rule has 2 exceptions.

**Assigned** And

Search:  Charges and Fees - Assigned

Assigned Account		
Company: Big Client, Inc. (Auto)	1.00	0

**Multi-Selection (For removal only)**

Search:  Charges and Fees - Exceptions

Assigned Account	
Vehicle Type: Coach Bus	
Occasion: Wedding	

**Buttons:** Add, Update, And, Remove, Add, Remove, List All, Exit

By using the automatic assignments with exceptions, it's now easy to fine-tune your charges/fees so you don't forget to add them and leave money on the table, but also don't add them when not appropriate (and annoy your customers).

In a future Tech Tip, we'll talk about how to add compound conditions (two conditions to activate the auto-assignment). Thanks for reading all the way to the end!