

Tech Tip Tuesday—February 2, 2021

Charges and Fees—Auto Assign

As we have discussed in previous Tech Tips, Livery Coach has a very sophisticated, powerful rules engine that can automatically add various Charges and Fees based on certain conditions when a trip is booked.

In previous tips, we have discussed how to create an additional charge/fee (Dec 1, 2020) auto-assign a charge based on a condition (December 8, 2020), and how to make exceptions to the auto-assignment (December 15, 2020).

In this tip, we'll round out the series by covering the situation where you want to automatically add a charge/fee when there are TWO conditions in the trip that need to be met.

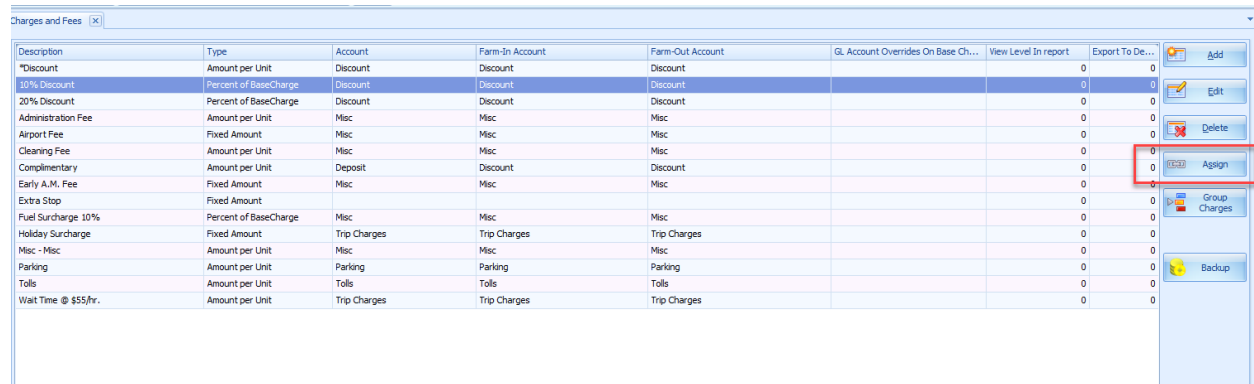
For example, maybe you have a particular client who gets a 10% discount, but only airport runs. Or a Cleaning Fee, but only for Bachelor/ette parties and only on the Limo Bus. Etc.

While some of these scenarios could be handled by just creating the rule and having lots of exceptions, often it's easier just to set up a compound rule.

Livery Coach makes this easy, since you can auto-assign charges based on Condition A **AND** Condition B.

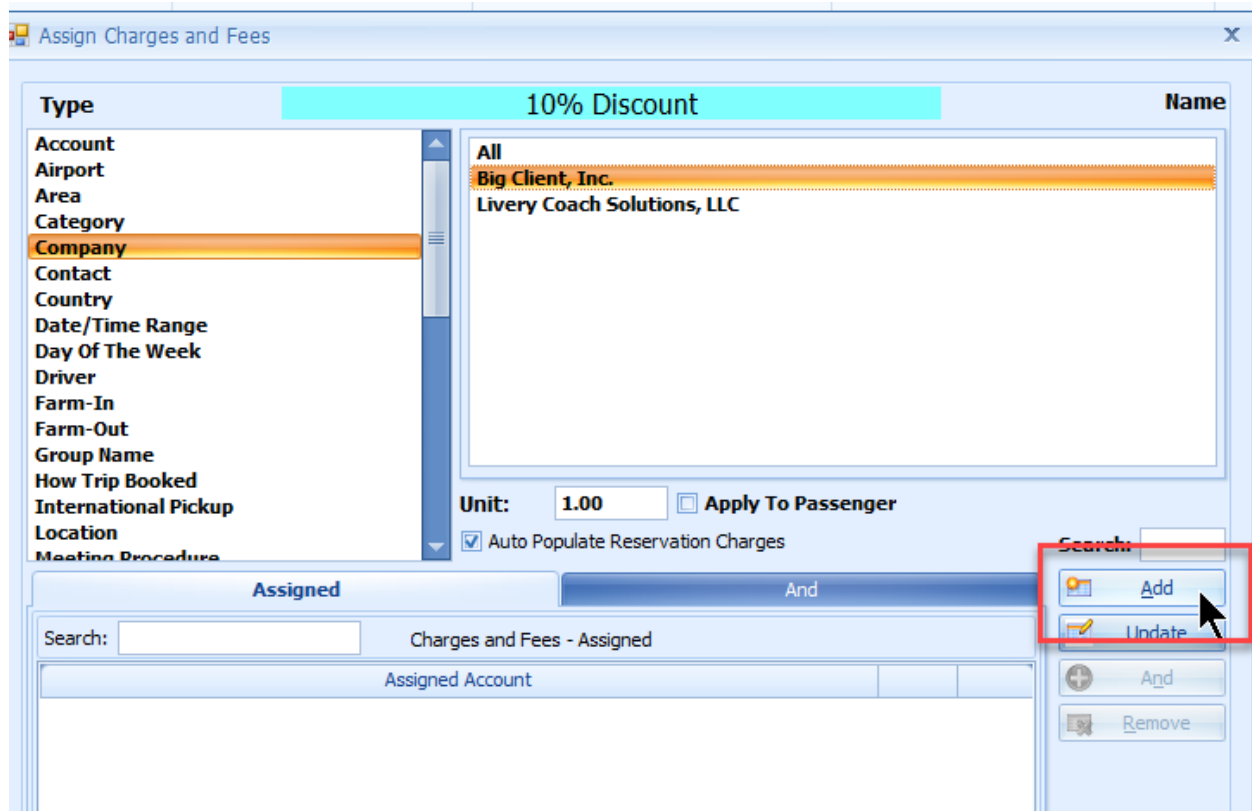
So let's take the first example and illustrate with some screen shots.

The first thing you need to have the Charge/Fee set up. Then, you 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/hr.	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 supposed we want this discount to only apply when the Occasion is Airport? To make that work, click on the charge you just added, then select a new Type and a selection from the results window.

In our example, select Occasion and then Airport.

Then, click on the And button.

Assign Charges and Fees

Type: 10% Discount

Group Name: Occasion List

How Trip Booked: Airport

International Pickup: Night Out

Location: Quote

Meeting Procedure: Wedding

Occasion: Occasion

Owner: Occasion

Passenger: Occasion

Payment Method: Occasion

Profile: Zone <-> Zone: Occasion

Promotion Code: Occasion

Provider: Occasion

Rate Group: Occasion

Rate Type: Occasion

Same Day Charge: Occasion

Source: Occasion

Time Range each day: Occasion

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)

Buttons: Add, Update, And, Remove

Now notice how your original rule went from a 0 to a 1 in the last column. That tells you there is an “And” rule.

Search: Charges and Fees - Assigned

Assigned Account		
Company: Big Client, Inc. (Auto)	1.00	1

While your original rule is still highlighted, if you click on the And tab, you will see the second part of your rule.

Assigned And

Search: Charges and Fees - Assigned

Assigned Account		
Occasion: Airport		

Buttons: Add, Update, And, Remove

Note that it is possible to have multiple “Ands” to your main rule—when this is done, the “And” part functions as an “Or”. If you just said “Huh?”, please read on and we will explain this in more detail.

For example, suppose we want the discount to apply when Big Client books AND it's an Airport, OR when Big Client books AND it's a Train Station.

We've already got the Big Client/Airport combo covered, so now we add the Train Station.

So we click on the main charge assignment again (Company: Big Client, Inc. (Auto)) and navigate to the 2nd condition we want (Occasion: Train Station). Then click on And.

Assign Charges and Fees

Type: **10% Discount** Name:

Country
Date/Time Range
Day Of The Week
Driver
Farm-In
Farm-Out
Group Name
How Trip Booked
International Pickup
Location
Meeting Procedure
Occasion
Owner
Passenger
Payment Method
Profile: Zone <-> Zone
Promotion Code

Occasion List
Airport
Night Out
Quote
Train Station
Wedding

Unit: **1.00**
 Auto Populate Reservation Charges

Assigned And

Search: Charges and Fees - Assigned

Company: Big Client, Inc. (Auto)	1.00	1
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Multi-Selection (For removal only)

Search: Charges and Fees - Exceptions

Add Update And Remove

Add Remove List All Close

Now, if we click on the Company:Big Client, Inc (Auto) assignment, and then click on the And tab, we will see both conditions. Remember that both of the additional (And) conditions don't apply at the same time (they can't in this case—a trip only has one occasion at a time). It's the main condition and EITHER of the secondary conditions.

Assigned **And**

Search: Charges and Fees - Assigned

Company: Big Client, Inc. (Auto)	1.00	1
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Add
Update
And
Remove

Assigned **And**

Charges and Fees - Assigned

Occasion: Airport

Occasion: Train Station