

Tech Tip Tuesday—March 30, 2021

Attributes (Part 3)

Over the last few weeks, we have covered how you [set up Attributes](#) and assign them to chauffeurs or vehicles, how you manually add them to a trip, and how you use the new Chauffeur Selection Screen and Vehicle Selection Screens to [use Attributes](#) to assign an appropriate chauffeur and/or vehicle.

In this Attribute wrap-up Tech Tip, we'll cover the areas where you can automate the assignment of Attributes to trips.

First of all, if you look at the Contact Record, you will notice that there is now an Attribute tab. Here you can add Attributes to a contact, which will carry over to any trip booked by that contact, or where that contact is a passenger.

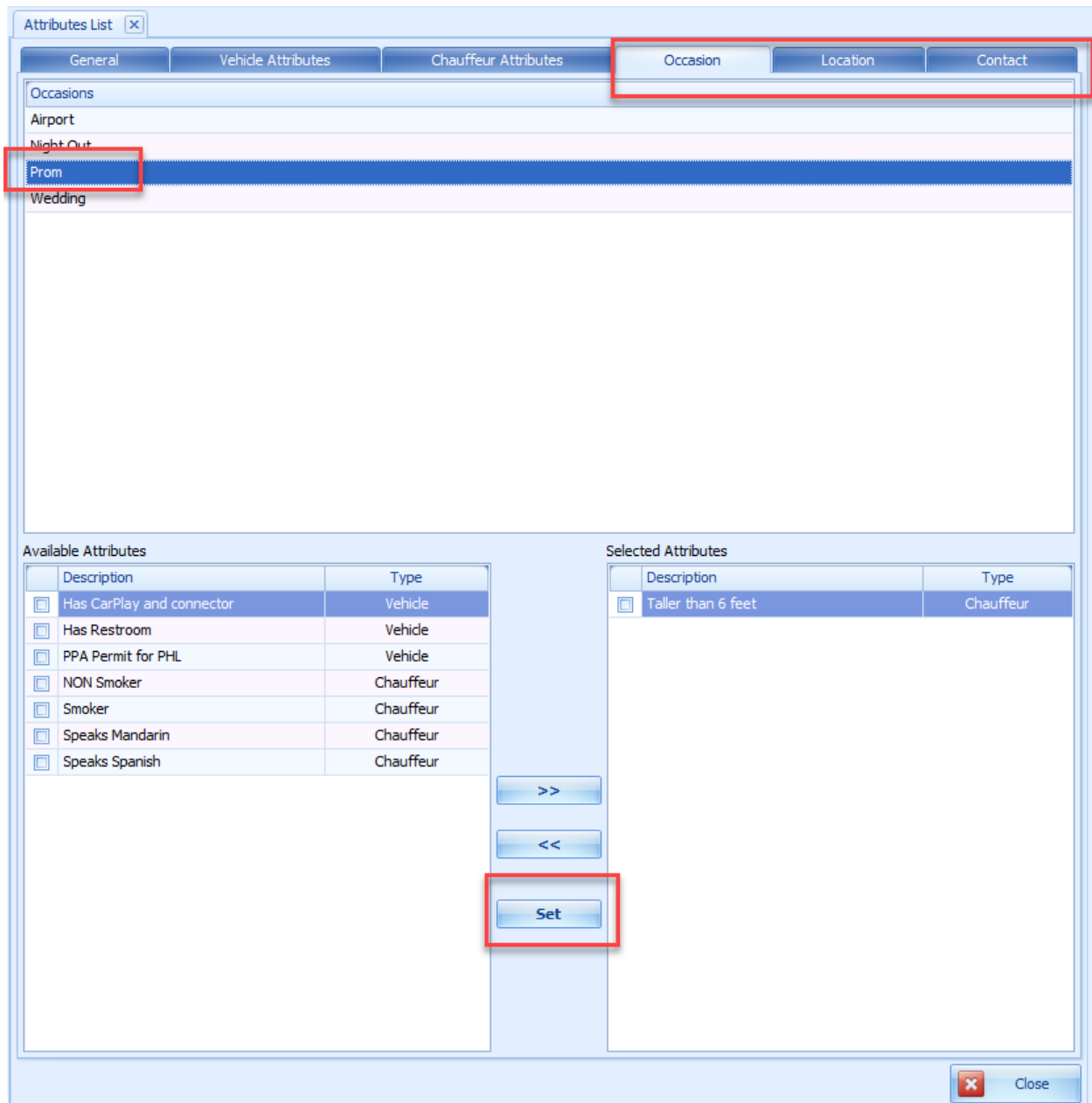
The screenshot shows the 'Customer Information' form for a contact named David Hirsch. The 'Attributes' tab is highlighted with a red box, and a red arrow points to it from the left. Below the main form, there are two tables for managing attributes.

Available Attributes		Selected Attributes	
Description	Type	Description	Type
<input checked="" type="checkbox"/> Has CarPlay and connector	Vehicle	<input checked="" type="checkbox"/> NON Smoker	Chauffeur
<input type="checkbox"/> Has Restroom	Vehicle		
<input type="checkbox"/> PPA Permit for PHL	Vehicle		
<input type="checkbox"/> Smoker	Chauffeur		
<input type="checkbox"/> Speaks Mandarin	Chauffeur		
<input type="checkbox"/> Speaks Spanish	Chauffeur		
<input type="checkbox"/> Taller than 6 feet	Chauffeur		

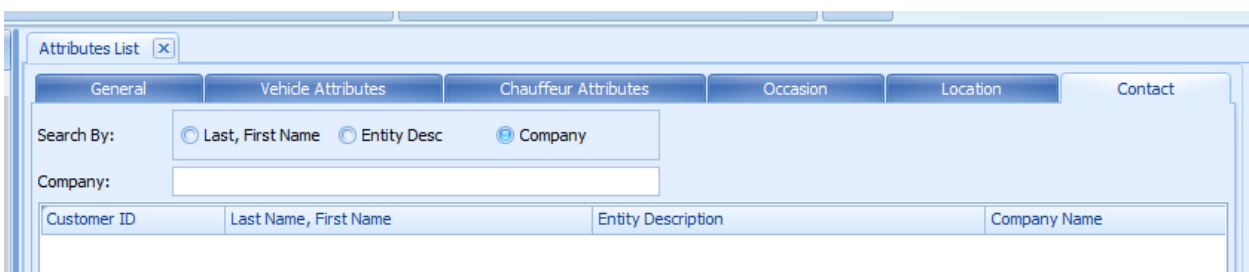
You can also automatically assign an Attribute based on Occasion or Location.

To manage these assignments, simply navigate to Setup->Maintain->Attributes, select the desired tab, and add the Attributes based on the criteria.

Note: You MUST click on the SET button after moving the desired Attributes from the left column to the right column. If you forget, your settings will not be saved.



Note that under the Contact tab, you can add Attributes by Contact or by Entity Description (which are the same as adding them in the individual contact records—the ability is duplicated here for convenience), and by clicking on Company, you can find all the Contacts associated with a particular Company. In a future release, we will be adding the ability to auto-assign Attributes by Company.



Please note that because the system will combine the Attributes for the Booker, all the Passengers (if they have contact records) and other criteria (Occasion, Location) , it is conceivable for a trip to have conflicting Attributes. For example, if you have a Booker who prefers a smoking chauffeur, and a passenger who prefers a NON-smoking chauffeur, both Smoker and NON-Smoker Attributes will get added to the trip, but they will both be highlighted Red, and the Trip will show you which Attribute got added based on what criteria. If the Attribute was manually added in the trip, the "From" column will be blank for that attribute.

	Description	Type	Auto	From
<input checked="" type="checkbox"/>	NON Smoker	Chauffeur	Yes	Passenger
<input checked="" type="checkbox"/>	Smoker	Chauffeur	Yes	Contact
<input type="checkbox"/>	Speaks Spanish	Chauffeur	No	
<input type="checkbox"/>	Taller than 6 feet	Chauffeur	Yes	Occasion