

Tech Tip Tuesday—May 18, 2021

A Question about the CD/NLA show planned for this October

Even though it's only May, planning for the Fall has begun. We have seen the announcement about the CD/NLA show this fall, and are trying to determine what presence, if any, we need to have at the show. It would be quite helpful to us if you were to fill out this extremely short survey:

<https://www.surveymonkey.com/r/2KJHLCG>

Thanks! And now on to the tip...

Chauffeurs, Vehicles, and Status

Typically, when a trip is first entered into Livery Coach, the status of the trip is "Unassigned". Once the trip has both a chauffeur and a vehicle (or is farmed out), the system will automatically change the status to "Assigned".

If you are assigning chauffeurs and/or vehicles using the "Edit Grid" function of the Dispatch Grid (without opening up the trip), the system does the following:

- If you remove the chauffeur, the vehicle or both, the status will automatically revert to "Unassigned".
- If you change the status to "Unassigned", the system (after warning you) will remove the chauffeur and the vehicle assignments.

If you try to perform these same operations when the trip is open, however, there are settings to control what happens.

By default, when you open a trip and remove the chauffeur, the vehicle or both, when you attempt to save the trip, you will get a warning that you must change the status to Unassigned.

And if you open a trip and change the status to "Unassigned", when you save the trip it will automatically change the status back to "Assigned" if it still has both a chauffeur and a vehicle.

But this behavior can be changed.

Let's start by navigating to System Default Configuration... Dispatch/Scheduling Settings.

The top setting shown in the screen shot below is labeled "Change Trip Status To Unassigned If No Driver or Vehicle". If this box is checked, when you remove either a chauffeur or a vehicle in a trip, the system will automatically change the status back to Unassigned (so you don't have to change the status separately).

The 2nd box, labeled "When trip status is changed to UNASSIGNED, remove chauffeur and vehicle", essentially operates in reverse. When this setting is checked, if you change the status to Unassigned, the system will automatically remove the chauffeur and the vehicle (with no warning), so you don't have to do that separately.

Please note that this checkmark does NOT affect the chauffeur assignment when you drag the trip on the Trip Schedule screen from an assigned vehicle to the unassigned vehicle type—in this case, the system will NOT remove the chauffeur. If you want both vehicle AND chauffeur removed when using the Trip Schedule screen, then you must open the trip, change the status to Unassigned, and Save.

