

Tech Tip Tuesday—December 7, 2021

Charges/Fees—which fees generated how much? And maybe delete the old ones?

One big advantage of Livery Coach is that you can create an unlimited number of Charges/Fees, which can help in automating all sorts of situations. In some situations, such as when you have various Toll fees you add (based on vehicle type, pickup and dropoff, etc), you can get quite a long list.

Have you ever wondered how much money is actually generated by each fee?

Also, while you might be good at adding charges/fees as you need them, what about deleting the obsolete ones? If you don't use them anymore, it's probably a good idea to get rid of them, so the list is shorter and there's no chance of an agent manually picking a fee that you no longer use.

Livery Coach has a report to help with both these issues.

So how do we do that? There is a report that shows exactly that.

The default name in the system is "Additional Charges Revenue". Since we allow users to change the description of reports, it could be called something else in your system, but the Report File name is "addlchrga.rpt".

| Additional Charge Assignments by Contact | Additional Charges |
|---|-----------------------|
| Additional Charges Revenue | addlchrga.rpt |
| Additional Charges Revenue - Archive (Group Invoice Billing Only) | addlchrgaBillingGroup |

When you launch this report, the first window that pops up lets you enter the date range for the report—over what period do you want to see? If you are looking to delete unused charges, make sure this date range is large enough to capture fees that might only happen once a year.

Date Selection for report << Additional Charges Revenue >>

Begin Date

← January → ← 2020 →

| SU | MO | TU | WE | TH | FR | SA |
|----|----|----|----|----|----|----|
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |

Today

Begin Date **End Date**

01-01-20

12-06-21

Preview Print

Input Data

End Date

← December → ← 2021 →

| SU | MO | TU | WE | TH | FR | SA |
|----|----|----|----|----|----|----|
| 28 | 29 | 30 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |

Today

Once you have selected a date range, you then have a number of options, such as whether to include both Current and Archived Trips, etc.

The “Grouped By” selection defaults to “By Charge”, but you can pick other settings here—to see, for example, which company generates the most of certain charges, etc.

We do recommend making sure you select all the available Trip Statuses, and all the available Farm Statuses for an overall revenue or charge delete candidate report—but you can use these selections for other analysis.

| | |
|--|---|
| Current Archived or Both? | Current Archived or Both |
| <input type="text" value="Both Current & Archived Trips"/> | |
| Separate by Owner?: | SeparatebyOwner |
| <input type="text" value="No"/> | |
| Grouped By: | GroupedBy |
| <input type="text" value="By Charge"/> | |
| Add Page Break On Each Charge | AddPageBreakOnEachCharge |
| <input type="text" value="No"/> | |
| Enter Trip Status: | Trip Status |
| Available Values: Done Late Cancel No Show | Selected Values: Done Late Cancel No Show |
| <input type="button" value=">"/> | <input type="button" value="Remove"/> <input type="button" value="Remove All"/> |
| <input type="button" value=">>"/> | |
| Choose Farm Status | Farm Status |
| Available Values: In-House Farm-In Farm-Out Farm-Out a Farm-In | Selected Values: In-House Farm-In Farm-Out Farm-Out a Farm-In |
| <input type="button" value=">"/> | <input type="button" value="Remove"/> <input type="button" value="Remove All"/> |
| <input type="button" value=">>"/> | |
| <input type="button" value="OK"/> <input type="button" value="Cancel"/> | |

Once you click OK, you will get your report with a list of all the charges you have used over that period, including how many units were used, and the total amount of money collected.

If a charge is missing from this list, then it did not appear in a single trip over your selected date range—so might be a good candidate for deletion.

**ADDITIONAL CHARGES REVENUE**

01/01/2020 To 12/06/2021

| Additional Charge Description | Units/QTY | Total |
|--------------------------------------|------------------|--------------|
| *Airport Fee | 3.00 | \$30.00 |
| 04 Vehicle Type Conflict Sedan | 2.00 | \$66.00 |
| 15 % Hourly LC | 2.00 | \$190.50 |
| 2% Local Tax | 2.00 | \$39.74 |
| Administration Fee | 15.00 | \$15.00 |
| After Hours Fee | 10.00 | \$500.00 |
| Airport Fee per Unit | 8.00 | \$53.12 |
| ATL Toll | 3.00 | \$36.00 |
| Baggage Fee Test | 4.00 | \$120.00 |
| Baggage Meet | 1.00 | \$1.00 |
| Beverage/Food Products | 1.00 | \$2.50 |
| Booking Fee - CSR (\$3.00) | 3.00 | \$9.00 |
| Bottled Water | 26.00 | \$26.00 |
| Cellular Telephone | 7.00 | \$220.00 |
| Congestion Tax | 7.00 | \$33.14 |
| Credit | 1.00 | (\$1.00) |
| Credit Card Discount | 29.00 | (\$1,365.75) |
| Crime Scene Cleanup | 1.00 | \$300.00 |
| Discount | 73.00 | (\$149.50) |
| Discount - 10% | 12.00 | (\$5,609.36) |
| Discount - 20% | 15.00 | (\$1,050.55) |
| Discount - 50% | 10.00 | \$1,667.41 |