Tech Tip Tuesday—March 1, 2022

Will you be at our User's Meeting in Las Vegas?

As previously announced, Livery Coach will be exhibiting at the CD/NLA Show in Las Vegas on March 27-30. In conjunction with the show, we will be having our user meeting on Sunday (March 27th) at 4**:15pm in Versailles 3/4.** This meeting is open to all Livery Coach clients, and we encourage you to attend, but we need a headcount.

Please RSVP with the names of attendees to news@liverycoach.com. Thanks!

ZipWhip replacement

As you know, ZipWhip is discontinuing service near the end of this year. We have been researching alternatives, and have tentatively selected a replacement service. We hope to be able to announce more details by the show, and will let you know more soon. Thank you for your patience.

Mobile Phone required for new contact

With the near-universal use of mobile phones and texting, it can be extremely helpful to make sure that your agents ask for and enter a mobile phone number for every new contact.

If you navigate to Setup->Maintain->System Default Configuration->Contact settings, there is a checkmark at the bottom, called "Mobile phone required for new contact". If you check that, then your agents will be prompted if they forget.
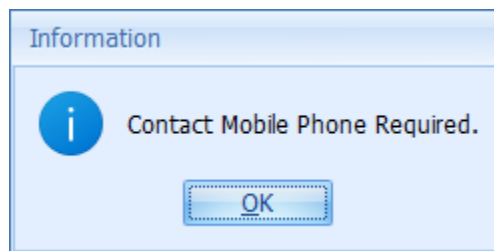
Contact Settings ⊠

☐ Display Allow to Book Only

☑ Duplicate contact warning when system finds match on:

    ☐ Home Phone   ☑ Mobile Phone   ☐ Email

    Allow duplicate to be created   ☐ Yes   ☑ No

☐ Disable Contact Changes

☑ Set Default for Auto Confirmation in Contact Profile   [Confirm Email ▾]

☐ Set Default for Auto Confirmation - W/O Rate Checked

☑ Set Default for Auto Receipt in Contact Profile   [Receipt Email ▾]

☐ Set Default for Auto Cancel Confirmation in Contact Profile

☐ Do not store payment info as contact for new contact profile

☐ Do not store Payment Info as Passenger for new Contact Profile

☐ Set not Allow to book on new contact

☑ Contact Commission Date based on the 1st Costed Trip Pickup Date

☐ New Contact Category Required

☐ Set Checked For Show Private Notes In Trip Notes

☑ Set Checked For Auto Insert Into Dispatch Note

☑ Show prompt message on changing occasion in contact profile

☑ Enforce selection from this list (Only Contact Profile Manager to bypass)

☐ Require Psngr or Agent box checked on all new Contact Profile

☑ Do not require address type in Contact Profile

☐ Enforce at least 1 phone number for Contact Profile

☑ Enforce Unique Line 2070 ID in Contact Profile

☐ Occasion required for new Contact Profile

☑ Add chauffeur direct defaults to new Contact Profile only with email or mobile

☐ New Contact Source Required

☐ Require Company Name on Contact Record

☐ Turn on Company Code

☑ Mobile phone required for new contact