

Tech Tip Tuesday—May 3, 2022

New Contacts

We've talked about Contact Searching before, but there is an option in Contact Search that is often overlooked—"Created After".

When you select the "Created After" search criteria and enter a date in the search field (using the format MM/DD/YYYY or MM/DD/YY).

Retrieve By

<input type="radio"/> Last Name	<input type="radio"/> Commission
<input type="radio"/> First Name	<input type="radio"/> Email
<input type="radio"/> Phone	<input type="radio"/> User ID
<input type="radio"/> Company	<input type="radio"/> Company Code
<input type="radio"/> Customer ID	<input type="radio"/> Super VIP
<input checked="" type="radio"/> Created After	<input type="radio"/> Rate Group
<input type="radio"/> Billing Account	<input type="radio"/> Corporate ID (Line 2070)
<input type="radio"/> Sales Rep	<input type="radio"/> Website

☐ Booker Only

Enter Created After

09/01/2021

Retrieve

Customer Contact Search

When you click on Retrieve, the system will return all the contacts that were created on or after the entered date.

Keep in mind that, when you look at a contact, when that contact record was created appears at the very top of the contact record screen.

Customer Information (Created by 'Jim' on 12/22/21 09:58)

Prefix Title	First Name	Last Name
	Bob	Booker

Note: the system started tracking contact creation date way back in 2001, and who created them in 2002. So for those of you who have been running Livery Coach a very, very long time, you might come across a contact that is missing the creator, the create date, or both. That just means that the contact has been in your system for nearly 20 years or longer!

If you navigate to Reports and select the report that's probably called "Contact List", you can also run a report with the same info.

Contact Labels	ContactPromoteLabel2.rpt
Contact List	contacts.rpt
Contact Profile	contactprofile.rpt

This report actually lets you select both a starting and ending date range, and how you want the results sorted.

Enter Parameter Values

Enter FROM Date for Earliest Contact Creation:

From Date

3/1/2022

Enter TO Date for Oldest Contact Creation:

To Date

5/31/2022

Sort By

...

Company

Last Name

Source

Owner

OK

Cancel

Contacts Created between 3/1/2022 and 5/31/2022																
Customer ID	First Name	Last Name	Company Name	Address	Source	Create Date	Creator	Email	Work Phone	Mobile	VIP	Tax Exempt	Category	Owner	Trips as Booker	Last Trip as Booker
18344	test	test				4/22/2022	WebService			2022005000		No		Long Car Limousine	0	
18345	Tom	Test				4/22/2022	WebService			3022875580		No		Long Car Limousine	0	

A Note about Caralyn

Most of you are familiar with and have worked with our office administrator/accounts receivable person, Caralyn Meier Barr. We just wanted to let you know that Caralyn has received an opportunity she couldn't turn down...so she didn't. That said, Caralyn has agreed to continue working for us part time and remote, so the only thing that will change in your interactions is that it might take a bit longer for Caralyn to get back to you, and emails are preferred to phone calls. If there is any situation that needs immediate attention and you can't wait, please reach out to our support team and they will help if they can, or track down someone who can if they can't. Thanks for understanding.