

Tech Tip Tuesday—October 25, 2022

Automatically Assign a Charge/Fee based on number of days before booking

We all know that last-minute booking of trips can be more difficult to manage, and we'd like customers to book early if possible.

If you offer a discount for people who book early, or charge a surcharge for people who book on short notice, or both, Livery Coach has a way to automate the application of these fees.

First, of course, you need to create the fee. In our example we will call it "Advance Booking Discount". Then, we want to apply it to all trips that are booked 7 or more days before pickup.

Once you create the fee in Charges/Fees and save it, click Assign, and scroll towards the bottom until you find "X Days or More Before PU Date". Then, enter the number of days before the PU date, click Add, and you are done.

The screenshot shows the 'Assign Charges and Fees' window. The 'Type' dropdown is set to 'X Days Or More Before PU Date'. The 'Trip booked' field is set to '7' and the unit is '1.00'. The 'Or More Before PU Date' radio button is selected. The 'Add' button is highlighted. Below, the 'Assigned' list shows the rule 'X Days Or More Before PU Date: 7 (Or More) (Auto)' with a unit of '1.00' and a quantity of '0'.

Search:	Charges and Fees - Assigned	Unit	Quantity
	X Days Or More Before PU Date: 7 (Or More) (Auto)	1.00	0

Note that even though the Type label says "Or More Before PU Date", this automation can also be used for fewer days—simply check the other box when assigning the rule.

So if you wanted to have a "short notice surcharge", you would put in how many days you wanted, but check the "Or Fewer Before PU Date" button instead.

Assign Charges and Fees

Type Late Booking Fee **Name**

Payment Method
 Profile: Zone <-> Zone
 Promotion Code
 Provider
 Rate Group
 Rate Type
 Same Day Charge
 Source
 Time Range each day
 Vehicle
 Vehicle Type
 VehicleType -> TaxArea <-> TaxArea
 VehicleType -> Toll Zone <-> Toll Zone
 VehicleType: CityStateZip <-> CityStateZip
X Days Or More Before PU Date
 Zone
 Zone Profile

Trip booked **1** calendar day(s) before Pickup Date
☐ Or More Before PU Date ☒ Or Fewer Before PU Date

Unit: **1.00**

☒ Auto Populate Reservation Charges

Assigned And

Search: Charges and Fees - Assigned

X Days Or More Before PU Date: 1 (Or Fewer) (Auto)	1.00	0
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Add
 Update
 And
 Remove

Note that the lowest number you can put in this field is 1. If you want a same-day booking surcharge, you need to use the "Same Day Charge" assignment.

Assign Charges and Fees

Type Late Book Surcharge **Name**

Holiday
 How Trip Booked
 International Pickup
 Location
 Meeting Procedure
 Occasion
 Owner
 Passenger
 Payment Method
 Profile: Zone <-> Zone
 Promotion Code
 Provider
 Rate Group
Rate Type
Same Day Charge
 Source
 Time Range each day
 Vehicle

All

Unit: **1.00**

☒ Auto Populate Reservation Charges

Assigned And

Search: Charges and Fees - Assigned

Same Day Charge (Auto)	1.00	0
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Add
 Update
 And
 Remove