

## Tech Tip Tuesday—April 4, 2023

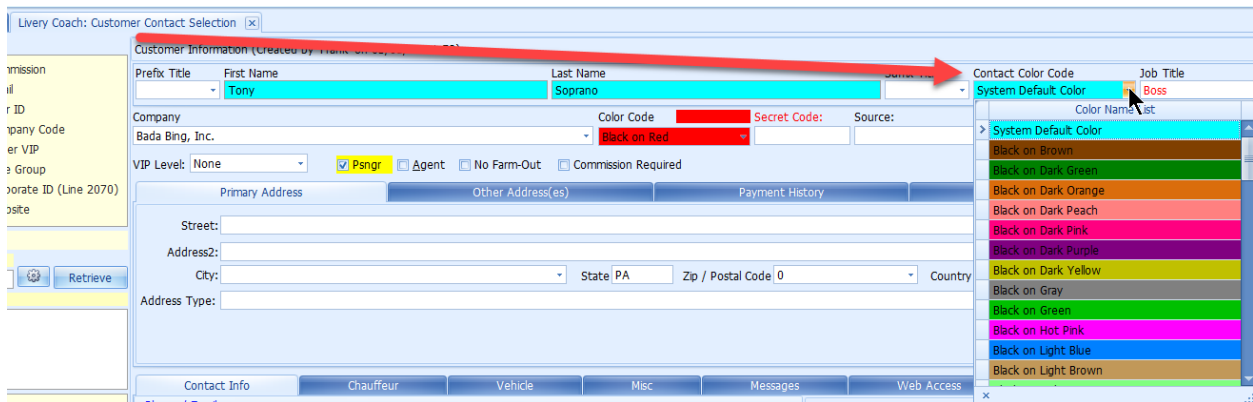
### Color-coding Contacts

Last week we discussed color-coding the *company* of a contact, so it stands out on the dispatch grid.

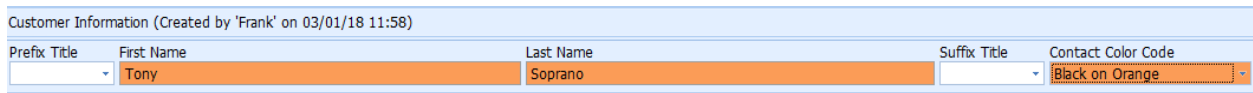
This week we will cover color-coding individual contacts. If you read all the way to the end, you will discover there is a condition you can set to make certain new contacts automatically have a color code!

The contact color-coding not only shows up in the Dispatch Grid (Customer Name and/or Passenger Name), it also highlights the name right in the contact record itself.

To select a color-code for the contact, click on the “Contact Color Code” button.



Once selected, the color will be highlighted in the contact record itself. In this example, I picked “Black on Orange”.

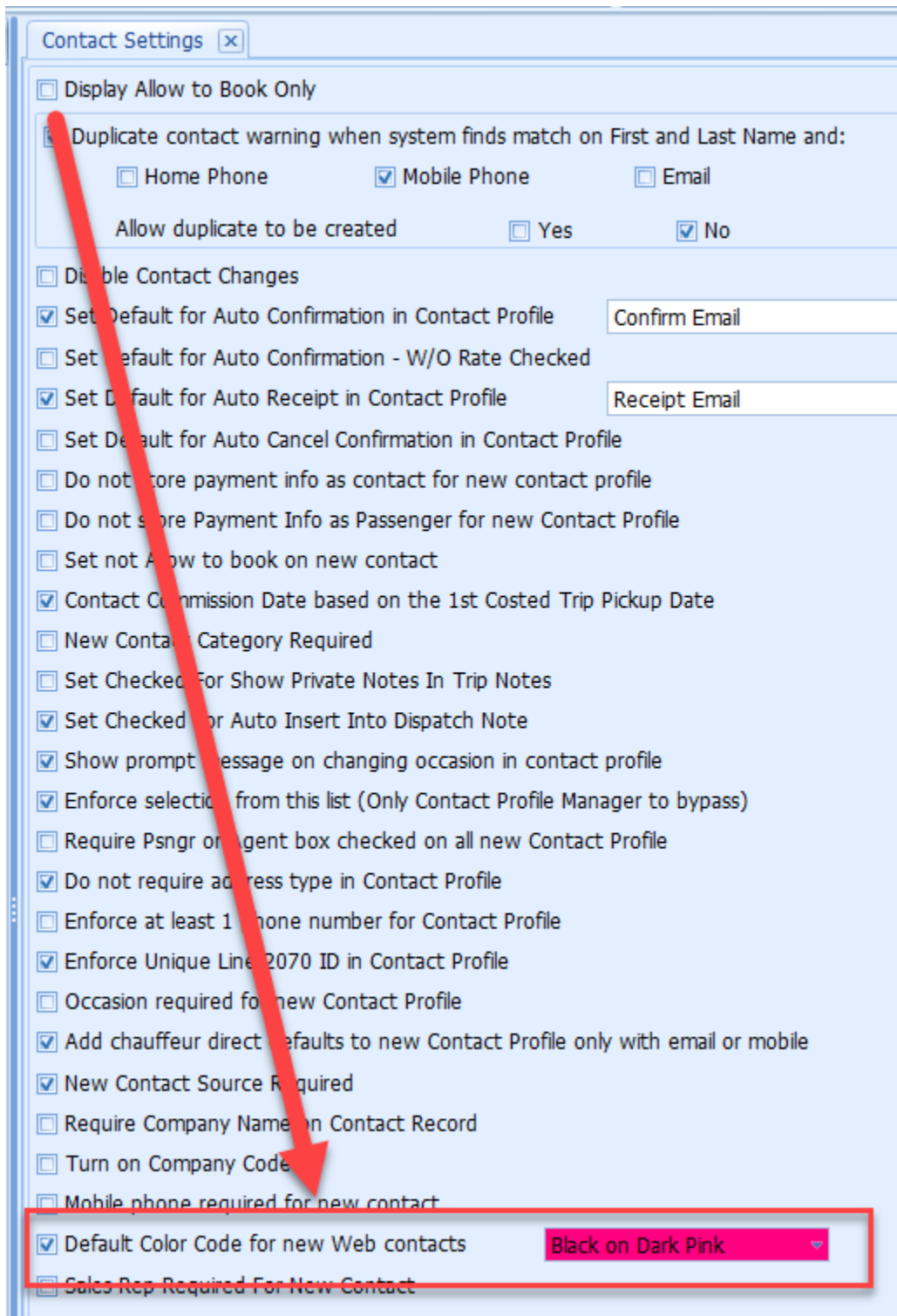


Color-coding can be used to tag super VIPs, or people you never turn down, or people you always turn down, or for any other purpose you see fit. And, of course, any reservations with this contact as booker and/or passenger will be appropriately color-coded on the dispatch grid.

Contact Name	PAX
Schwarber, Kyle	(1) Kyle Schwarber
Daisy, Miss	(1) Miss Daisy
Freeman, Freddie	(1) Freddie Freeman(!)
Soprano, Tony	(1) Tony Soprano
East Coast Farm Co...	(1) Affiliate Passenger

Finally, if you want to automatically color-code all new Web contacts (where the user created his/her own profile on the web), you can do that by navigating to Setup->Maintain->Contact Settings.

Towards the bottom you can turn this feature on, and pick your color.



The screenshot shows the 'Contact Settings' window with a red arrow pointing to the 'Default Color Code for new Web contacts' option. This option is checked and set to 'Black on Dark Pink'. A red box highlights this option and its dropdown menu.

Contact Settings [x]

- Display Allow to Book Only
- Duplicate contact warning when system finds match on First and Last Name and:
  - Home Phone
  - Mobile Phone
  - Email
- Allow duplicate to be created  Yes  No
- Disable Contact Changes
- Set Default for Auto Confirmation in Contact Profile
- Set Default for Auto Confirmation - W/O Rate Checked
- Set Default for Auto Receipt in Contact Profile
- 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
- Default Color Code for new Web contacts
- Sales Rep Required For New Contact