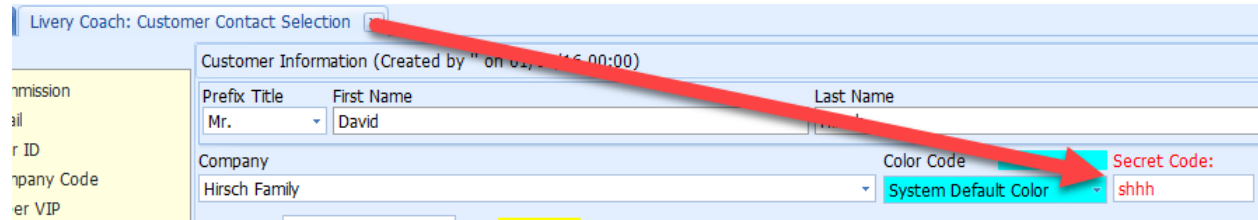


Tech Tip Tuesday—May 16, 2023

Secret Code—What is it?

When you look at the contact record, some of you may have noticed a field for “Secret Code”. What’s the point of that code, anyway?

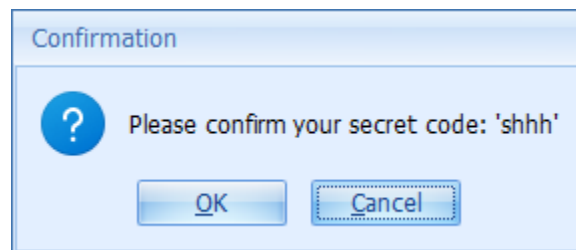


The screenshot shows a software interface for a customer contact record. The title bar reads "Livery Coach: Customer Contact Selection". Below it, the record is titled "Customer Information (Created by '...' on 04/27/2023 16:00:00)". The form contains several fields: "Prefix Title" (Mr.), "First Name" (David), "Last Name" (partially visible), "Company" (Hirsch Family), "Color Code" (System Default Color), and "Secret Code:" (shhh). A red arrow points from the top of the record to the "Secret Code:" field.

The purpose of the secret code is to allow a booker to put a “password” on his or her profile so that no one else can call in and pretend to be that person and book trips. I once heard of a real-world example where the son of a wealthy executive would call a transportation company and book trips, pretending to be his father. Attaching a secret code can stop this sort of activity.

The first step, of course, is to let the customer tell you he or she wants to “protect his account with a passcode” or whatever words might be used—so you can ask the customer for a key word or number that he wants to use, and you can put it in the field on the contact record.

Now, when that person makes a booking, just before the payment method pops up in the reservation wizard, a box will pop up prompting the agent to confirm the secret code:



The dialog box is titled "Confirmation" and contains a question mark icon, the text "Please confirm your secret code: 'shhh'", and two buttons: "OK" and "Cancel".

That’s it—simple as that. It is a rarely used feature, in our experience...but now you know...and should you have a client who wants to better “protect” his account, you’ve got an answer.