

Tech Tip Tuesday—October 31, 2023

Orlando

It was great to see some of you in Orlando at last week's CD/NLA Show. If you missed it, Livery Coach will be exhibiting in Las Vegas at the next CD/NLA Show, scheduled for March 3-6, 2024, at the MGM Grand. We will also hold our annual User Meeting at that show (exact date and time to be announced closer to the show).

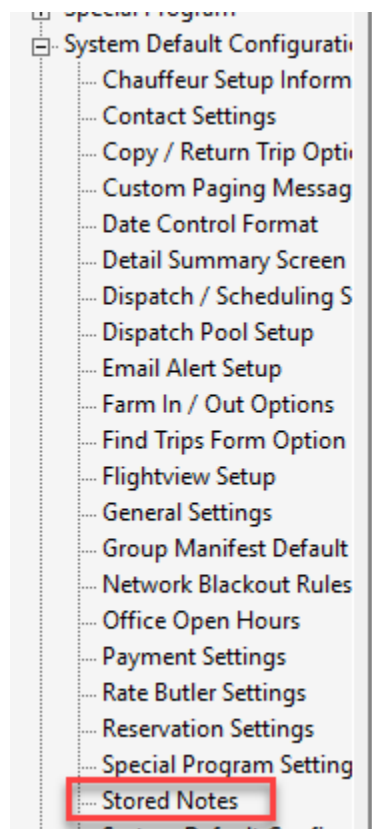
And, Happy Halloween for those who celebrate!

Stored Notes

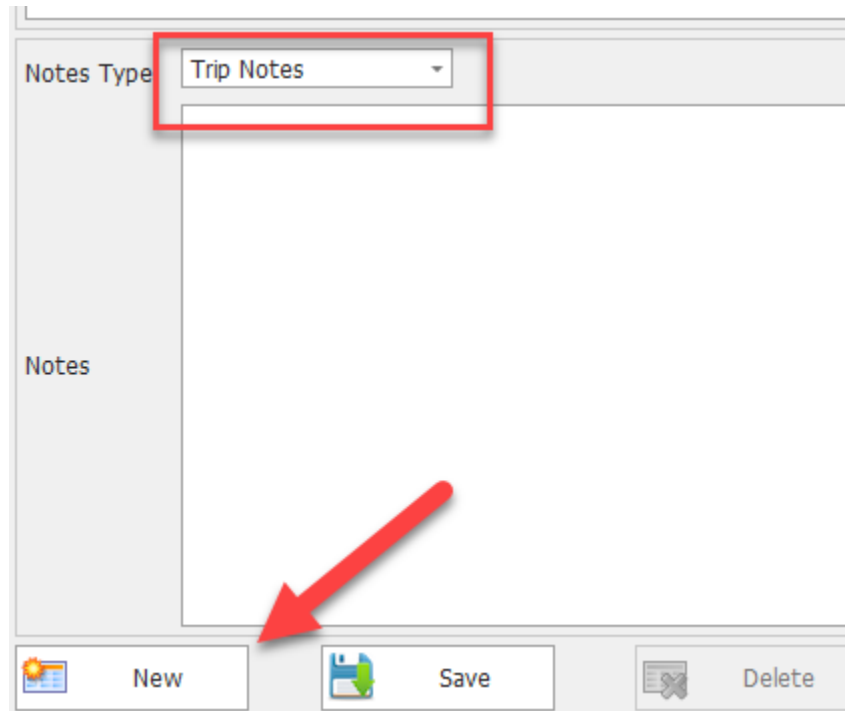
Livery Coach is designed to save a lot of repetitive typing, since that can lead to errors and inconsistency.

One way to do that is to have a library of stored or "canned" notes, so that instead of typing in the same thing over and over ("Chauffeur: be sure to verify credit card at start of trip"), you can just pick them from a list, so that they will always be worded the same, with no typos or spelling errors.

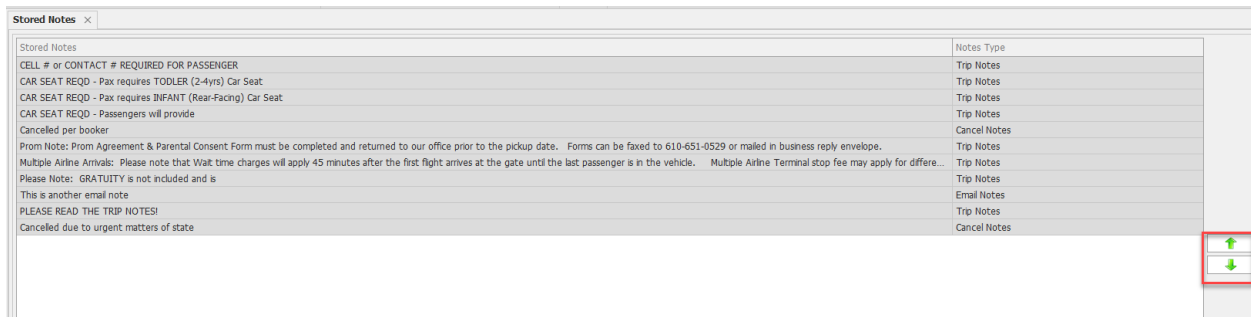
To access the list of Stored Notes, simply navigate to Setup->Maintain->System Default Configuration->Stored Notes.



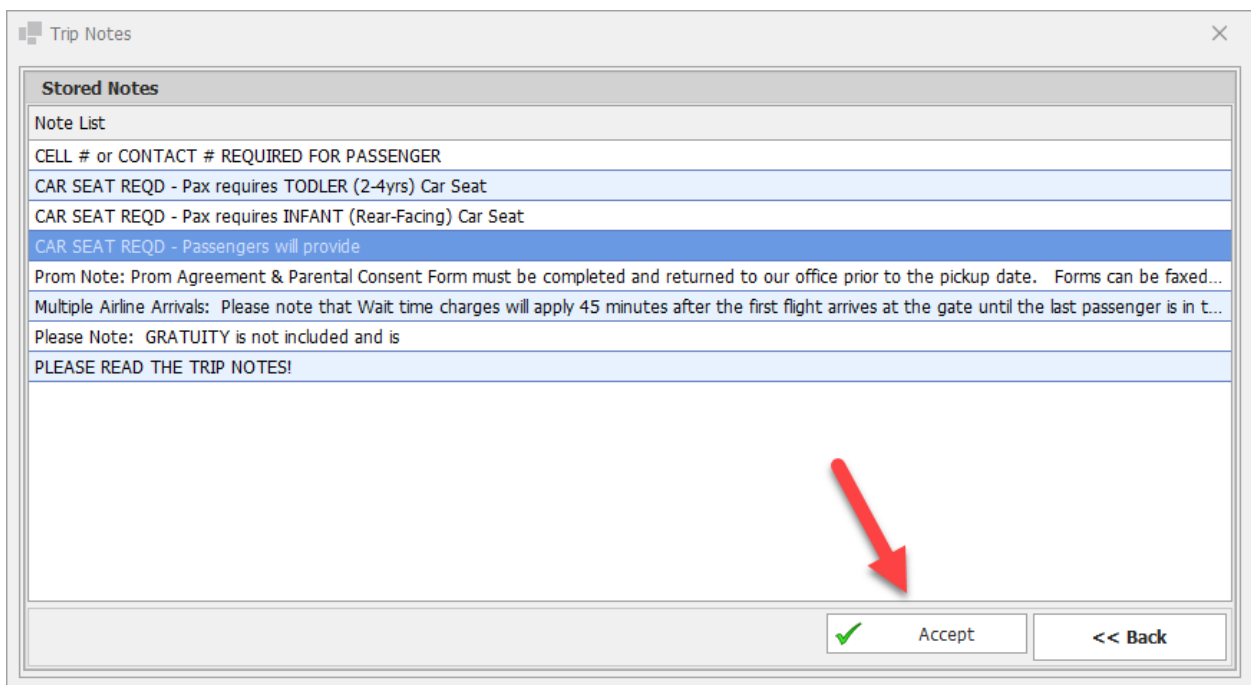
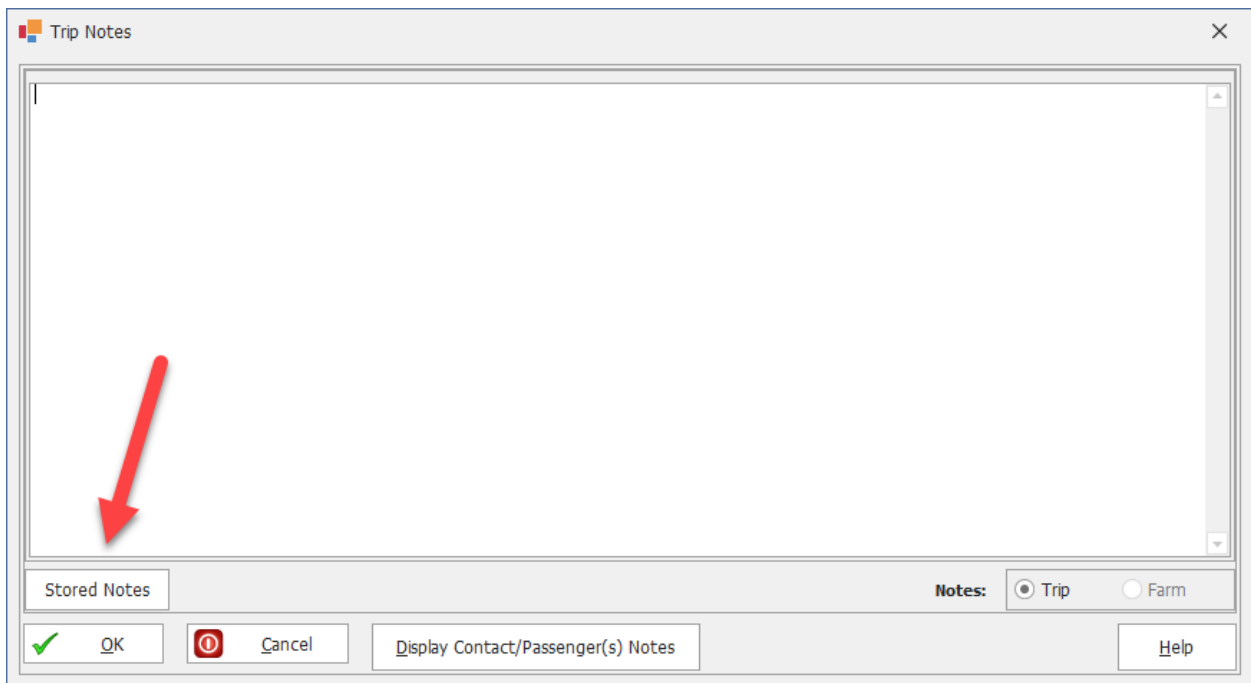
From there, you can create stored Trip Notes, Cancel Notes, and Email notes, which are then available when you are in the appropriate sections of the system. For a new note, just click on “New” at the bottom of the screen, pick the note type, and then type in the note you want to store.



Once saved, you will see the list at the top, and can also sort them (with the up/down arrows to the right of the screen) so that the most-used notes are at the top. Note that you can put partial notes and then just fill out the rest of it in the trip after you select it.



If you are in a trip and want to pick a Stored Note, simply click on the Stored Note button, and the selection will come up. Pick the note you want and click Accept.



For a cancelled trip, the button is currently labeled “Canned Notes” although that will be changed to “Stored Notes” in a future update. But the process is similar—click the button, pick the note, and in this case click OK, and your cancellation reason will be populated.



Trip Confirmations - TripID # 9015360

Confirm Nbr	Confirm Date	Type:	Confirmed by:
		Canceled	De...

Notes:

Canned Notes

Trip #: 9015360

 ADD  Save

Canned Notes

- Canned Notes
- Cancelled per booker
- Cancelled due to urgent matters of state