

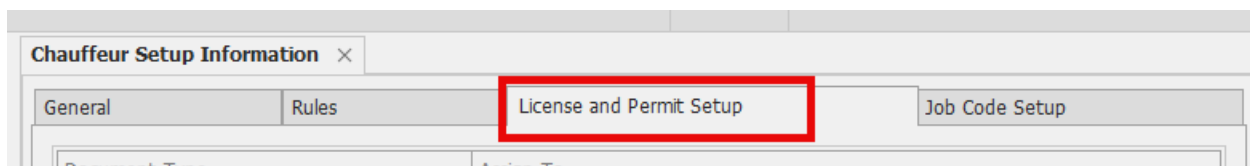
## Tech Tip Tuesday—January 30, 2024

### Managing License and Permit expirations (for Chauffeurs)

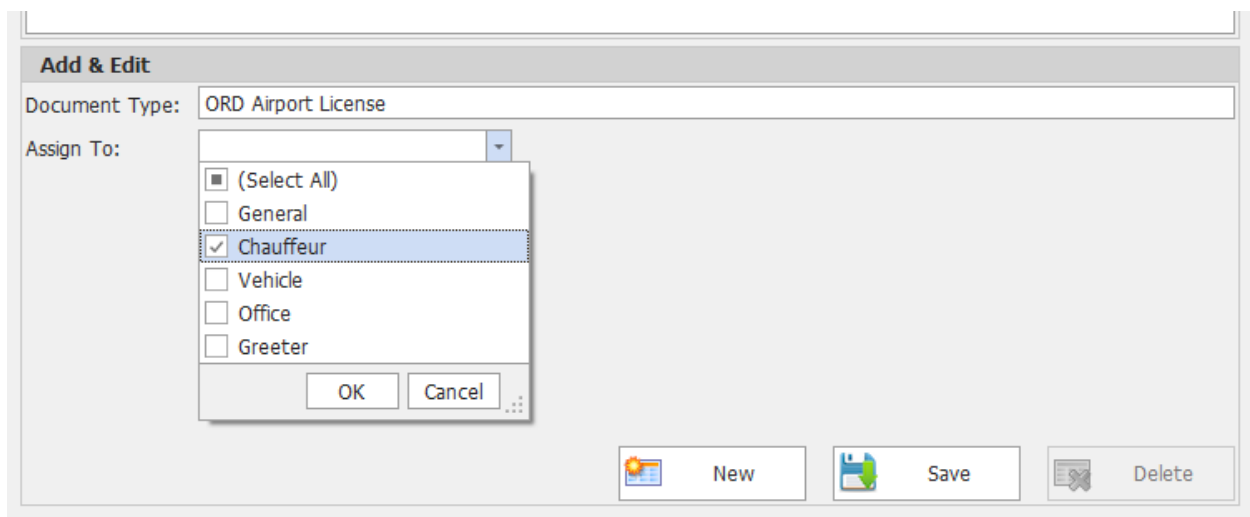
With the great variety of different licenses and permits that a chauffeur might need to hold, managing who has what and when they expire can be challenging.

Livery Coach has some tools to manage all this, for vehicles as well as chauffeurs. We will cover vehicle expirations in a future tip—this tip will focus on chauffeur licenses and permits.

To set up your list of all potential licenses and permits, first navigate to Setup->Maintain->System Default Configuration->Chauffeur Setup Information, and select the License and Permit Setup tab.



Then, at the bottom, you can add as many licenses and permits as you might need. Simply type in a short description in the “Document Type” and then select Chauffeur under the Assign To drop-down, and then click Save.

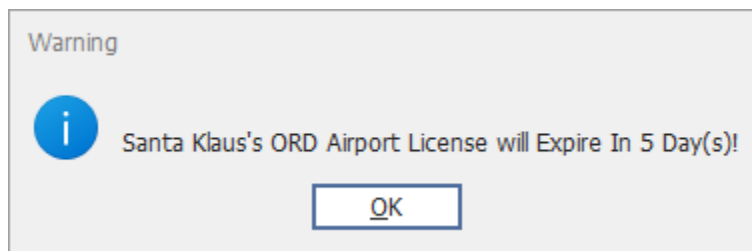


Once you have created your list, then you just need to assign them to chauffeurs as needed. Simply navigate to Reservation->View->Employee List. Select the desired chauffeur, click Edit, and then select the Licenses tab near the bottom of the screen. From there you can select the Document Type, then enter a Description and expiration date. If you want to inhibit this chauffeur from being assigned to ANY trip once this document expires, click “Enforced”. If you leave this block unchecked, then your dispatcher will get a warning but still be able to assign the chauffeur to a trip. Be sure to click “Save”, and the document will be added to the list for that chauffeur.

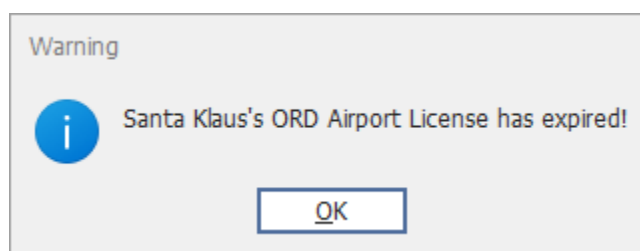
Address	Personal	Licenses	Paging	Option	Restriction	Incident	Doc
Description		Expires On		Enforced			
Add / Edit Description		Entity <b>Santa Klaus [624-Santa]</b>					
Document Type	Expires On		01/26/2024				
Description	<ul style="list-style-type: none"> <li>CCP</li> <li>Driver License</li> <li style="background-color: #e0e0e0;">ORD Airport License</li> <li>Passport</li> <li>Physical Exam</li> <li>Sensitivity Training</li> <li>State License</li> </ul>						
<input checked="" type="checkbox"/> Active							

Address	Personal	Licenses	Paging	Option	Restriction	Incident	Docs	Attributes	EmployeeUDF
Description		Expires On		Enforced		Document Type			
renews every 2 years		01/31/2024		No		ORD Airport License			

When the expiration date is within 30 days, the chauffeur will appear yellow in the selection screen, and when you select the chauffeur, you will get the warning:



If the document is already expired, the chauffeur appears in red in the selection screen, and when you select the chauffeur, it will tell you the document has expired.



If you have not checked “Enforced”, then you can still select the chauffeur. If you have checked “Enforced”, then you are not able to assign the chauffeur to the trip.