

Tech Tip Tuesday—February 13, 2024

Livery Coach Annual User Meeting at the CD/NLA Show in Las Vegas

March is rapidly approaching, and so is the next CD/NLA show. In addition to staffing a booth (#59 near the NLA Lounge), we will also be having our annual user meeting at 4:30pm on Sunday, March 3. If you are planning on attending, please send the names of the attendees, so we can plan accordingly. You can just drop a note to news@liverycoach.com. Thanks! See you in a few weeks!!

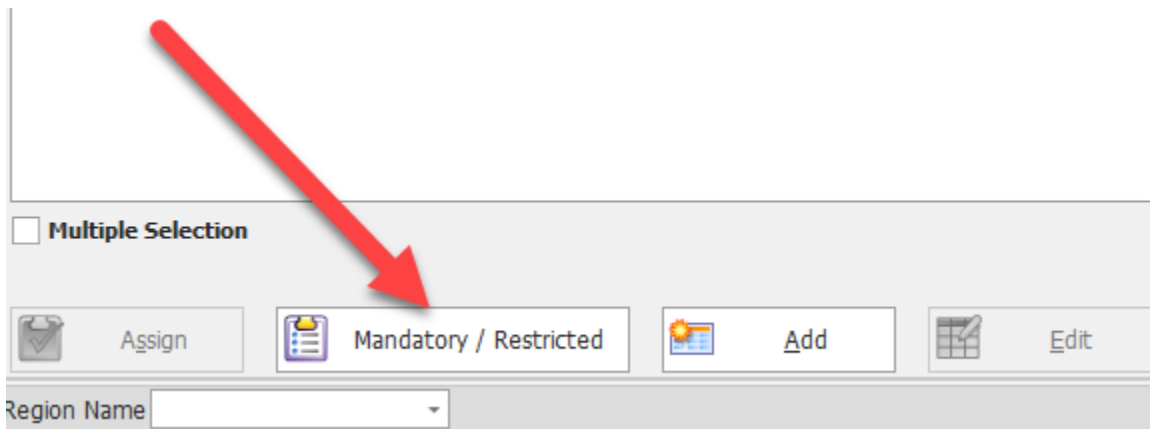
Group Invoices, assignments, and making it mandatory

As we all know, the default scenario when the payment method in a trip is set to “Account” is to create a separate invoice in QuickBooks for each trip. In order to put multiple trips on one invoice, you have to use the “Group Billing” feature. (If you are not familiar with how to set up and use the Group Billing feature, please contact support@liverycoach.com to set up a brief tutorial.)

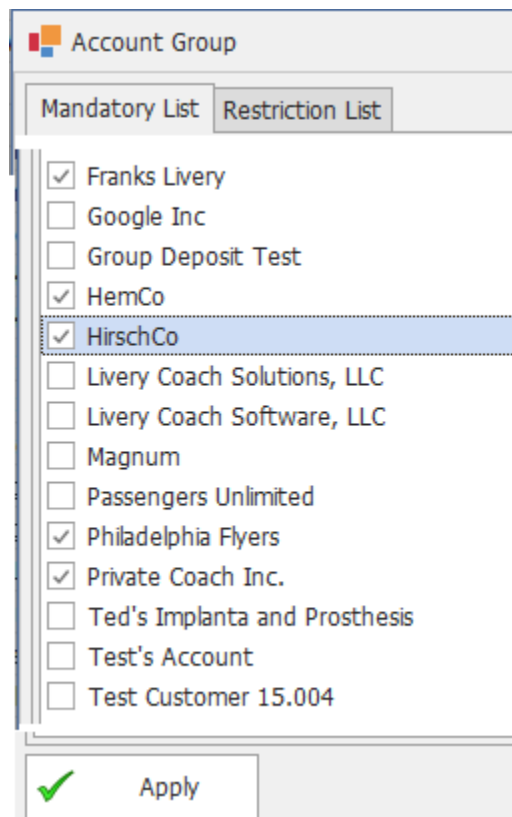
In order to have a trip billed to a billing group, you have to make sure that billing group is selected in the payment method of each trip. If not, the trip will stand alone and go directly to QuickBooks when it is closed.

Fortunately there is an easy way to make sure that reservation agents don’t forget.

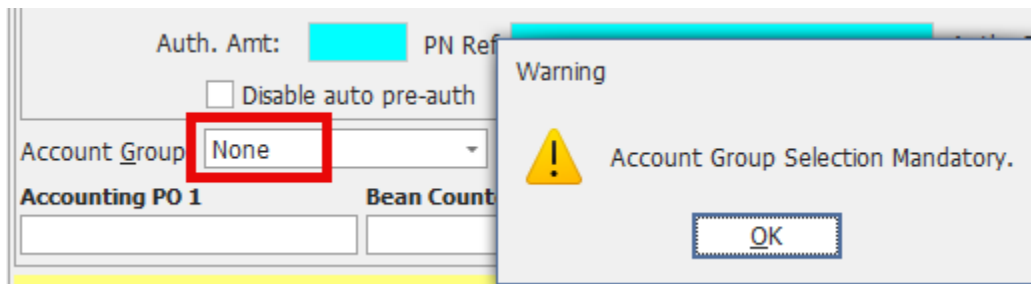
Simply navigate to Setup->Maintain->Accounts...->Billing Account Groups. Then click on the “Mandatory/Restricted” button at the bottom.



From there, you can select the billing accounts for which an account group is mandatory, and then check Apply.



Now, if an agent forgets, they will get a reminder message in the trip.



If you have a customer who only uses one (or a few) billing groups, you can automatically assign them so that the billing group will automatically be entered (if there is only one) or at least limit the choice (more than one).

To set that up, back in the Billing Account Groups setup page, just select the Account Group and click on Assign at the bottom.

Billing Account Groups ×

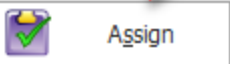
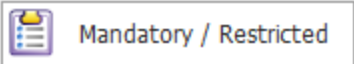
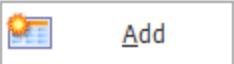

Search For

Customer Account:

Account Group:

| Account ID | Account Name | Account Group |
|--------------------|-----------------------------|-------------------------|
| Franks Livery | Franks Livery | Franks Livery duh |
| Franks Livery | Franks Livery | Franks Livery Duh2 |
| Franks Livery | Franks Livery | Test |
| Franks Livery | Franks Livery | Test CC |
| Franks Livery | Franks Livery | Testc2a |
| Google Inc | Google Inc | Google-Acct-Addre |
| Google Inc | Google Inc | Google-LiveryAcctGrp-Ac |
| Group Deposit Test | Group Deposit Test | 13015 |
| HemCo | HemCo | Group 1 |
| HemCo | HemCo | Super Bowl |
| HirschCo | HirschCo | CCBilling |
| LIV0404 | Livery Coach Solutions, LLC | Chips Slush Fund |

Multiple Selection

 **Assign**  **Mandatory / Restricted**  **Add** 

From there, you can search for the contact or contacts for which you want to assign this Account Group, and once selected, click Add, which will add them to the Assignment box.

Assign Account Groups

HemCo:Super Bowl


| Name | Company | Street, City |
|--------------------|------------|--------------|
| , Test Entity | | , |
| Test, Company | | , |
| Test, CompanySpace | | , |
| Test, Contact | | , |
| Test, David | | , |
| test, david1 | test david | , |
| Test, iLivery | | , |
| Test, Jim | | , |
| Test, Phone | | , |
| test, test | | , |
| Test, Test | | , |
| test, test | | , |
| test, tester | | test, |
| Test, Tokenization | | , |


Account Group Assignments


Contact : Test, Joe -

Contact Company

Enter Name
test

 Add

 Remove

 Close

Now when you select that billing account for that contact, the Account Group will automatically populate (if there is only one). Even if more than one, your drop-down selection list in the trip will be limited to the assigned Account Groups, which can make picking one much easier, faster, and less subject to error.

Payment Method Selection

American Express
MasterCard
Visa
Discover
Diners
JCB
Billing Account(!)
Cash
Bonus

Show Payment History
 Passenger Cont
Acct Name
HemCo

This was automatically populated

Card Used

Name: HemCo Acct
Billing Address: 111 HemCo Blvd
Auth. Amt: PN Ref:
 Disable auto e-auth

Account Group: Super Bowl PO/FI #: