

## Tech Tip Tuesday—March 19, 2024

### Find Trips

When Livery Coach overhauls a feature or function, often we leave the old function in place, so that you aren't immediately forced to switch to a new look or way of doing things. Some people like to change more slowly than others.

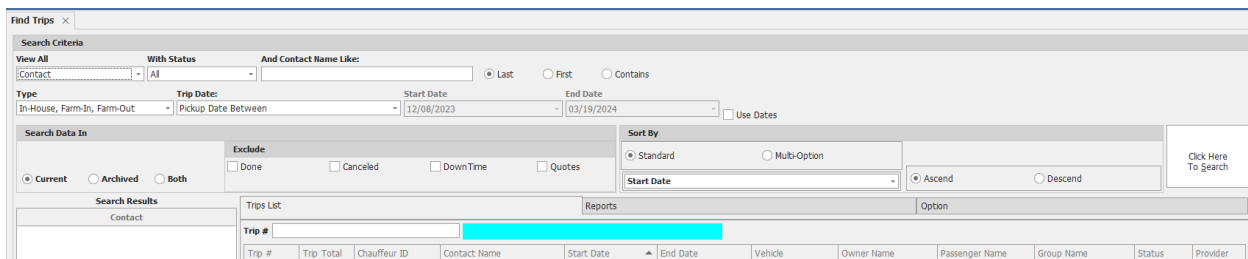
That said, sometimes people read the announcement about something new and then forget about it.

We have noticed that this appears to be true with "Find Trips", where many of you are still using the old, legacy Find Trips instead of the new one we introduced a few years ago.

How can you tell which one you are using?

### Legacy Find Trips

If your Find Trips screen looks like the below screen shot, you are on the Legacy (old) version.

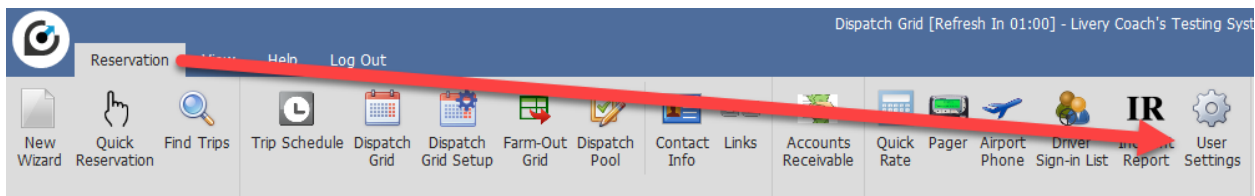


The screenshot shows the Legacy Find Trips interface. It features a search criteria section with fields for 'View All', 'With Status', and 'And Contact Name Like:'. Below this are fields for 'Type', 'Trip Date', 'Start Date', and 'End Date'. There are also sections for 'Search Data In' (Current, Archived, Both) and 'Exclude' (Done, Canceled, Down Time, Quotes). A 'Sort By' section is visible with options for 'Standard', 'Multi-Option', and 'Start Date'. The interface includes a 'Trips List' table with columns for Trip #, Trip Total, Chauffeur ID, Contact Name, Start Date, End Date, Vehicle, Owner Name, Passenger Name, Group Name, Status, and Provider. A red arrow points to the 'User Settings' icon in the navigation bar of the screenshot below.

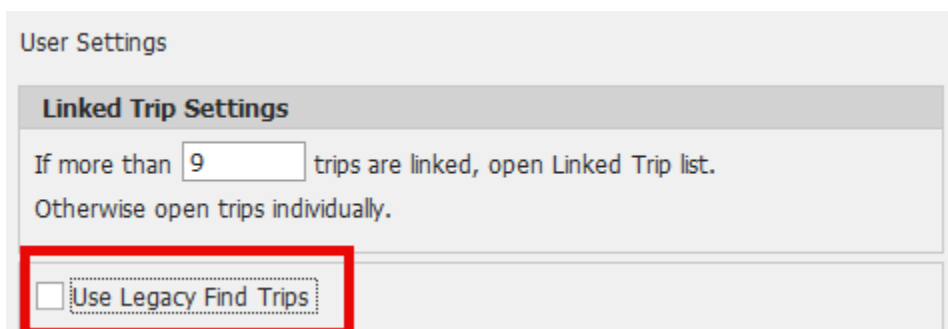
While you might be happy with that, have you tried the new and improved version?

The choice is made user by user, and it's simple to switch. If you don't like the new one, it's also simple to switch back (although we'd like feedback on why you don't like the newer one).

To switch, simply navigate to the "User Settings" icon on the Reservations window.



Then, simply un-check the box next to "Use Legacy Find Trips" and then click OK.



The screenshot shows the 'User Settings' dialog box. It has a section titled 'Linked Trip Settings' with the text: 'If more than 9 trips are linked, open Linked Trip list. Otherwise open trips individually.' Below this is a checkbox labeled 'Use Legacy Find Trips' which is currently unchecked. A red box highlights the checkbox.

If you already had the Find Trips window open, close it and open it again. Now your Find Trips will look like this:

The screenshot shows the 'Find Trips' window with the following sections:

- Primary Search:** Includes a dropdown menu set to 'Contact', a text input field for 'And Contact Name Like:', and radio buttons for 'Last', 'First', and 'Contains'.
- Secondary Search:** A checkbox labeled 'Secondary Search' is unchecked, with a dropdown menu set to 'All'.
- Type:** A dropdown menu set to 'In-House, Farm-In, Farm-Out'.
- With Status:** A dropdown menu set to 'All'.
- Trip Date:** Includes a 'Pickup Date Between' dropdown, a 'Start Date' field with '12/08/2023', and an 'End Date' field with '03/19/2024'. There is also a 'Use Dates' checkbox.
- Search Data In:** Radio buttons for 'Current', 'Archived', and 'Both'.
- Exclude:** Checkboxes for 'Done', 'Canceled', 'Down Time', and 'Quotes'.
- Sort By:** Radio buttons for 'Standard' and 'Multi-Option', and a 'Start Date' dropdown menu with 'Ascend' and 'Descend' options.
- Search Results:** A table with the header 'Contact'.
- Trips List:** A table with columns: Trip #, Trip Total, Chauffeur ID, Contact Name, Start Date, End Date, Vehicle, Owner Name, and P.
- Reports:** A section with a 'Begin Search' button.

This version of Find Trips allows you to search using 2 different criteria (by clicking on “Secondary Search” and picking the 2<sup>nd</sup> criteria), and then also using the column headers to filter your results (so almost like a third criteria). And soon, we will be enhancing this Find Trips so that you will be able to search for more than one of the same criteria (like a search for either of two contacts, for example).

So if you aren’t using the new Find Trips, we suggest that you try it!