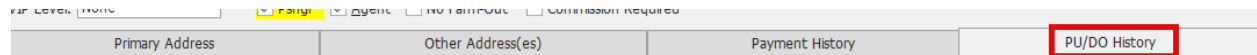


Tech Tip Tuesday—March 26, 2024

Clean Up Pickup/Dropoff (PU/DO) History in a contact record

When you close a trip in TripBook, Livery Coach automatically writes all the routing locations (Pickups, Stops and Dropoffs) to all the contact records involved in a trip (booker, passengers, etc.)

In a contact record, you can see the collection by navigating to the PU/DO History tab.

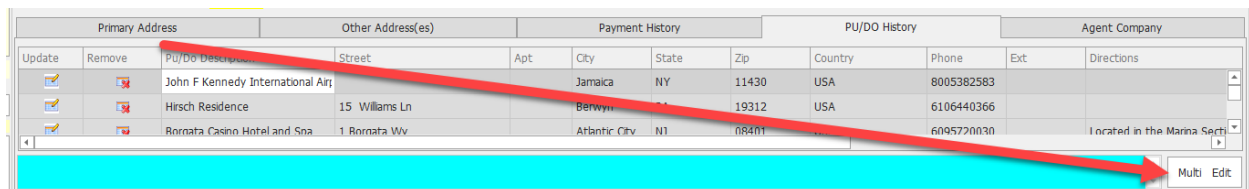


Over time, especially if your agents make minor modifications to the address in a trip (such as the Description), you can get lots of entries here that are similar (but not quite the same), and you might also end up with entries that are no longer relevant or desired (client former home, etc.).

While you can clean up these addresses from within a trip, it's often more convenient (and certainly faster and easier) to just clean them all up in the contact record,

When you navigate to that tab, you can click in any field to edit (remembering to click the Update button after), and you can also delete entries. For space reasons you can only see a few entries, so this can be tedious if you want to do a wholesale review.

Have no fear! Simply click on the Multi Edit button!



A screenshot of the PU/DO History table. The table has columns for Update, Remove, PU/DO Description, Street, Apt, City, State, Zip, Country, Phone, Ext, and Directions. There are three rows of data. A red arrow points from the 'Multi Edit' button at the bottom right to the 'Update' column of the first row.

Update	Remove	PU/DO Description	Street	Apt	City	State	Zip	Country	Phone	Ext	Directions
		John F Kennedy International Air			Jamaica	NY	11430	USA	8005382583		
		Hirsch Residence	15 Williams Ln		Berwyn	MA	19312	USA	6106440366		
		Rorntata Casino Hotel and Spa	1 Rorntata Ww		Atlantic City	NJ	08401	USA	6095720030		Located in the Marina Sect

That will open a much larger window to make it much easier to edit or delete these entries.

You can edit each line as needed, and when all done, click Save at the bottom. (You can also save as you go). To make it easier to see “nearly-duplicate” entries, you can double-click on the top of any column and it will sort all the entries by that column. A second double-click on the same column will reverse the sort. That way you can see if you have the same address referred to by different descriptions, for example, or the same address entered three different ways. (Notice the screen shot below, where the Livery Coach office appears three times, all slightly different.

Taking the time to clean up the history of your most frequent bookers can lead to faster reservation entry and reduce the chance of a mistake by picking an old or wrong address from the history.

Contact Address History Manage Address History

Save	Remove	Pu/Do Description	Street	Apt	City	State	Zip
		Office	1530 McDaniel Dr			PA	19380
		Office	1530 McDaniel Dr		West Chester	PA	19380
		Office	1530 McDaniel Drive		West Chester	PA	19380
		Vanos Pizza	1600 Pennsylvania Avenue		Washington	DC	20001
		Albertos Restaurant	191 S Newtown Street Rd		Newtown Square	PA	19073
		Livery Coach Solutions west coast office	19784 Mariposa Creek Way		Porter Ranch	Ca	91326
		Diane Vacation Home	214 2nd Street		Bethany Beach	DE	0
		Meyer Residence	239 Spring Rd		Malvern	PA	19355
		Residence	24 Cooper Run Dr		Cherry Hill	NJ	08003
		Livery Coach Software	2842 Belair Dr		Bowie	MD	20715
		Hirsch Test Residence	2842 Belair Dr		Bowie	MD	20715

Double-click here to edit address details.

New Delete Save David Hirsch Verify Close