

Tech Tip Tuesday—May 21, 2024

Livery Coach office closed next Monday for Memorial Day

The Livery Coach office will be closed next Monday, May 27, 2024, for Memorial Day. We will reopen on Tuesday, May 28th, at 9am Eastern time. As always, emergency support will be available, but we please ask that off-hours calls be limited to true emergencies so that our staff may enjoy the holiday.

GroundXchange Update

Our team is continuing to work on the GroundXchange integration, with plans to release it to production by the end of June. Once this is released, Livery Coach users will be able to electronically send and receive trips to Santa Cruz users through this network, with full functionality (GPS, etc.). We will provide more guidance and setup instructions with the release.

Tech Tip on hiatus

As is tradition, the Tech Tip takes the summer off (between Memorial Day and Labor Day), so this will be the last Tech Tip until it returns on Tuesday, September 10, 2024.

That said, in the event of any big news or other important communications, we still might send a special Tech Tip or other Special Announcement now and then over the summer.

And rest assured that although the Tech Tip takes the summer off, the rest of the team will be hard at work adding features and making other improvements, as well as working on our operational integration with the Ground Widgets team.

Have a great summer!

Account Groups and Credit Card Groups

As most of you are well aware, when an individual trip is closed in TripBook, it runs the credit card (if a credit card trip) and then creates an individual Sales Receipt or (for billed trips) an Invoice in QuickBooks.

If you want to have multiple trips on one invoice, there are a few extra steps. You need to navigate to Setup->Maintain->Accounts->Billing Account Groups. There you click Add, select a master billing account in the top window (which is your Customer list in QuickBooks), and then give your Account Group a name.

The screenshot shows the 'Add Account Group' dialog box with the 'General' tab selected. A list of account groups is displayed, with 'Disney Studios' highlighted. Below the list, the 'Account Group' field is set to 'Monthly' and the 'Custom Invoice' checkbox is checked. A red box highlights the 'Account Group' field and the 'Custom Invoice' checkbox. Below this, there are fields for 'Secret Code', 'PO #', 'Billing Format Type', 'QuickBooks To-Be-Printed or To-Be-Emailed', and 'Credit Card Name'. The 'Ok' and 'Cancel' buttons are at the bottom right.

Many of you already are quite familiar with this process. If not, please reach out to our support team (and if there are enough of you, we will devote a future Tech Trip just to Account Groups).

But what if you don't want to invoice your customers, but want to charge their credit card—just not each trip individually?

In that case, the setup is exactly the same, except that you will also want to select the "Credit Card" tab and enter the credit card associated with this billing group.

Add Account Group

General | **Additional Info** | **Credit Card**

CustomerID: Disney Studios *

Customer Name: Disney Studios *

Credit Card Name: Michael Mouse *

Credit Card Number: 4111XXX1111 *

Credit Card Type: Visa *

Exp Date: 12/2024 ... * Prompt for CVV

Street: 1180 Seven Seas Drive

Zip / Postal Code: 32830

Set As Primary

Note(s): * - Required For Saving

Once you have one (or more) credit cards tied to the Account Group, you can then set this Account Group to use a particular credit card, or none (conventional invoicing) by selecting the appropriate credit card on the General Tab, or the blank line above all the credit card choices if you do not want to use a credit card for the group.

Disney Studios

Account Group: Monthly Custom Invoice
* Account Group Limited to 25 characters

Secret Code: Inactive

PO # Required

Billing Format Type: Default

QuickBooks To-Be-Printed or To-Be-Emailed: Default

Credit Card Name: (dropdown menu open)

- Walt Disney
- Michael Mouse

You set the payment method as Billing Account-Account Group as usual, the same way you would if it was really a Billing Account (with no credit card). And the trip closes out the same in TripBook—to the Groups button.

But, when you are ready to process the group, you can see that there is a credit card attached, and when you click on Process, it will try to run the credit card for the total before sending the Sales Receipt with all the trips to QuickBooks.

Invoice #: 10500 Select

Process Close

Show All Owners Long Car Limousine Company

Preview

Send

Monthly ➔

Select Trip To be Invoiced **Credit Card On File [Michael Mouse - 4111XXX1111]**

PickUp	DropOff	TripID	Vehicle Type	Customer
01/11/2021 06:07	01/11/2021 06:57	9015699	SUV	Bird, Early