

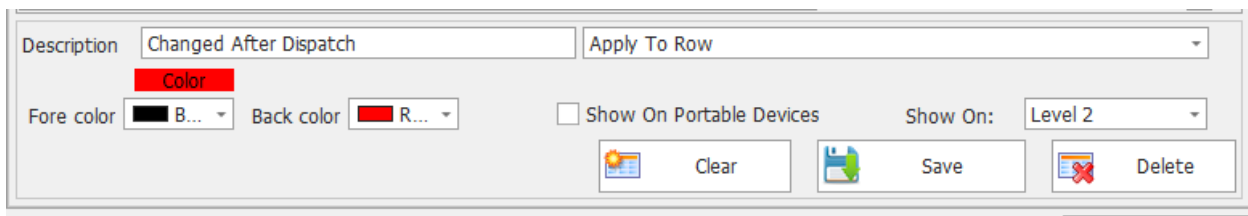
## Tech Tip Tuesday—November 5, 2024

### Status Levels—Automatically Assigning a Level 2-5 when a trip is changed

In last week’s Tech Tip we talked about how to create and use additional status levels (Status 2 through Status 5). One special use that you may find helpful is to automatically set an alternate status level if a trip has had any “major changes” after it has been dispatched—so you don’t blow a ride by forgetting to tell the chauffeur that things have changed.

If you want to enable this feature, you should start by creating a status level 2-5 (pick which status you want the system to set) and naming it “Changed after Dispatch” or something like that. We recommend making the status color “Apply to Row” rather than just to the column, so it becomes very clear on the dispatch grid that the status level has been set. Please note that you must also set this status to “Show On” a specific level (meaning it is available only for that status level)—it cannot be set to “All”. (If it were set to “All”, then the system wouldn’t know what status level to change.)

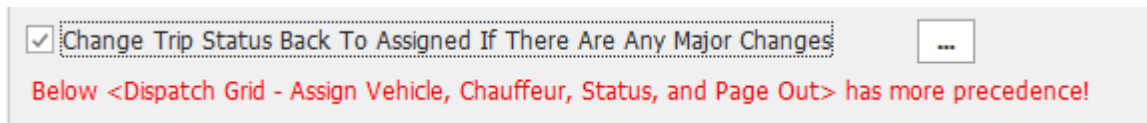
An example of the status after it has been set up is below. Note that we picked Status Level 2 for our indicator—you can pick anything from 2 through 5.



The screenshot shows a configuration window for a status level. The 'Description' field contains 'Changed After Dispatch' and the 'Apply To Row' dropdown is set to 'Apply To Row'. Under the 'Color' section, the 'Fore color' is set to 'Black B...' and the 'Back color' is set to 'Red R...'. The 'Show On Portable Devices' checkbox is unchecked, and the 'Show On:' dropdown is set to 'Level 2'. At the bottom, there are three buttons: 'Clear', 'Save', and 'Delete'.

Now, navigate to Setup->Maintain->System Default Configuration->Dispatch/Scheduling Setting.

Click on the box next to “Change Trip Status Back to Assigned If There Are Any Major Changes” (if not already clicked) “System Default Config” in Maintenance and select the Default 2 tab. Find the line that says “Change Trip Status Back To Assigned If There Are Any Major Changes” and check the box to the left of the statement.



The screenshot shows a list of configuration items. The first item is checked and has a dotted box around it:  Change Trip Status Back To Assigned If There Are Any Major Changes. To the right of this text is a button with three dots (...). Below this list item, there is a red warning message: Below <Dispatch Grid - Assign Vehicle, Chauffeur, Status, and Page Out> has more precedence!

This will make a box appear to the right of the statement (with three dots) as shown above. Clicking on that button will let you define exactly what constitutes a “Major Change”.

**Major Change Options**

As Directed Indicator

Car Seat Required Indicator

Chauffeur Meet Greeter Contact Type

Circling Routes Indicator

Current Passenger Count

Dispatch Note

Display Sign

Dwelling Time

Farm-Out Grid - Driver Info

Greeter Required Indicator

Greeter Selection

Group Name

Group Name Notes

iChauffeur Special Notes

Occasion

Owner

Passenger Selection - Passenger List

Payment Screen - Farm Res Number

Payment Screen - Paymethod

Pick Up Date/Time

Pick Up/Drop Off Locations

Primary Chauffeur

Reservation Notes

Second Chauffeur

**For In-House and Farm-In**

At Garage Time In Minutes

Collect Pay Info Indicator

Fixed Hours

Fixed Rate

Fixed Rate Indicator

Hourly Rate Indicator

Profile / Pick Up Zone / Drop Off Zone

Special Gratuity

Standard Gratuity

Trip Hourly Option (Door To Door, etc)

Up

Down

**For Farm-Out**

Vehicle Type Ordered

Up

Down

Up

Down

Ok

Cancel

Once you have “Major Change” defined, you will want to go to the bottom of the previous screen and click in the box next to “Using Alternate Trip Status...” as shown below.

If this line is missing on your screen, unclick the box next to “Change Trip Status Back...” as we described above, and then click the box again—it will make this box appear.

And if the box next to “Using Alternate Trip Status” is already checked, then uncheck that box and check it again.

Change Trip Status Back To Assigned If There Are Any Major Changes ...

Below <Dispatch Grid - Assign Vehicle, Chauffeur, Status, and Page Out> has more precedence!

If no City Code Found Use ZIP in Reservation on Trip Schedule

When Cancelling A Trip: Always remove Chauffeur and Vehicle

Apply This to Late Cancels

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**Dispatch Grid - Assign Vehicle, Chauffeur, Status, and Page Out**

With Chauffeur Selection

With Trip Status Default To: On The Way

Page Out As: Email TripSheet

Automatically send regardless of how status is set

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First Pickup Address Format: City, State, Zip / PostalCode

Last DropOff Address Format: City, State, Zip / PostalCode

Using Alternate Trip Status (Level 2-5, Click to select) (Changed After Dispatch (L2))

Clicking this box will make a selection window appear, where you can select what additional Trip Status you want set when a Major Change is made. Make your selection and click OK.

■ Dialog Caption ✕

- Canceled After Dispatch (L2)
- Changed After Dispatch (L2)
- Comp Ride (L2)
- Dispatched (L2)
- Farm Out - Assigned (L2)
- MAJOR CHANGE (L2)
- Met Client at Baggage (L2)
- Missed (L2)
- No Show (L2)
- Release Not Received (L5)
- Release Received (L5)
- Special Care (L2)
- Special Instructions (L4)
- Status Level 4 (L4)
- Status Level 4 New Label (L4)
- Status Level 5 (L5)
- Trip Sheet Sent (L2)

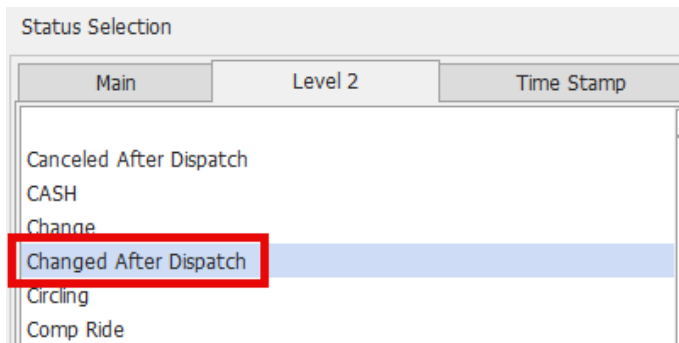
✓ OK

ⓘ Cancel

Once you pick the one you want and click ok, the screen will show you confirmation of what is set.



Now, when you make a change to a trip, the status level will automatically change when you save the trip, and be highlighted on the dispatch grid.



Status	P/U Time	Ga...	Chauffeur	Act. Flight Time	Trip # - Vip	Vehicle	PAX	Rate	Gratuity	TotalDue	D/O Time	PU Phone	VehicleType Ordered
Dispatched	11/01/2024 11...		111-Ben		20891	CON-002, Sedan	(3) Spence...	6.00 Hours @ 69.00	2	\$679.06	11/01/2024 17...		Sedan