

## Tech Tip Tuesday—January 14, 2025

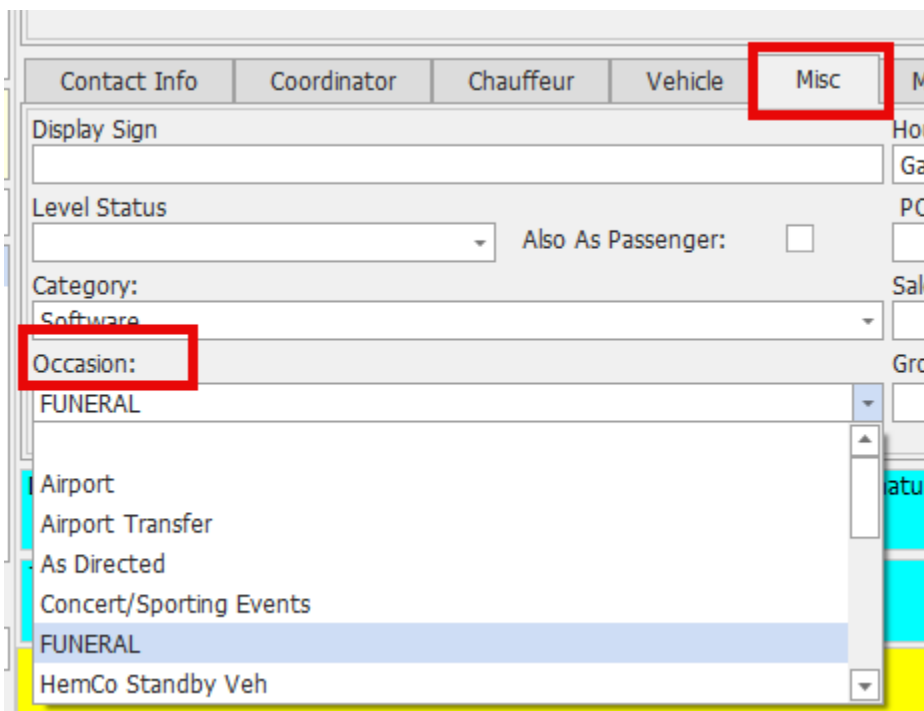
### Automatically Assign Occasion for some Contacts

Livery Coach has an Occasion field designed to designate what kind of ride is being booked, and it can also be color-coded and have special Terms and Conditions on the Trip Confirmation. It can be made a required field if desired (a system setting).

While typically your reservation agent will pick this during the process of entering a new trip, you might have certain contacts who always (or almost always) book the same type of ride. For example, a wedding planner might book just “Wedding”, or an investment bank booker might always book a “Road Show”, or a school might always book “School Trip”.

To save your agents the step of needing to assign an occasion every time, you can add that occasion to the booker contact, and then the system will auto-populate the occasion field on every ride. If you need to change the occasion for a particular ride, you can—this just saves you the step of picking most of the time.

On the contact record screen, navigate to the “Misc” tab, and then just pick the appropriate occasion from the drop-down menu, and then save your changes. Now, when you enter a trip booked by that contact, the Occasion field (in the routing screen) will auto-populate (and you can change it right then and there if needed).



The screenshot displays the 'Misc' tab in the Livery Coach software interface. The 'Misc' tab is highlighted with a red box. Below the tab, the 'Occasion:' field is also highlighted with a red box. The dropdown menu is open, showing a list of occasions: FUNERAL, Airport, Airport Transfer, As Directed, Concert/Sporting Events, FUNERAL, and HemCo Standby Veh. The 'Occasion:' field is currently set to 'FUNERAL'. The 'Also As Passenger:' checkbox is unchecked. The 'Category:' dropdown is set to 'Software'. The 'Display Sign' field is empty. The 'Level Status' dropdown is empty. The 'HemCo Standby Veh' option is highlighted in blue.

Occasion:	
▼	FUNERAL ▼
Drop Off Zone:	