

Tech Tip Tuesday—January 21, 2025

Office Notes

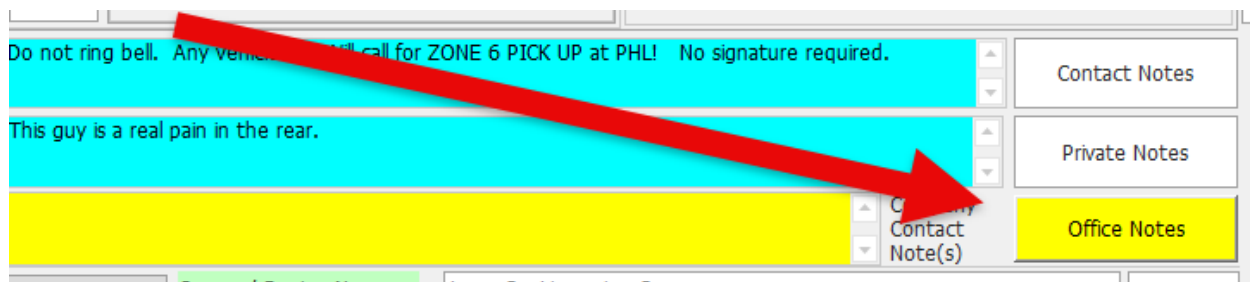
Livery Coach has a variety of different Notes fields that can be used for different purposes. One of these fields is called “Office Notes”.

Unlike some other notes fields, the notes in Office Notes do not automatically flow into a trip. Rather, they are designed to function as Notes Library for a particular client, so that you can then copy and paste a selected note from the library into the appropriate field in a trip.

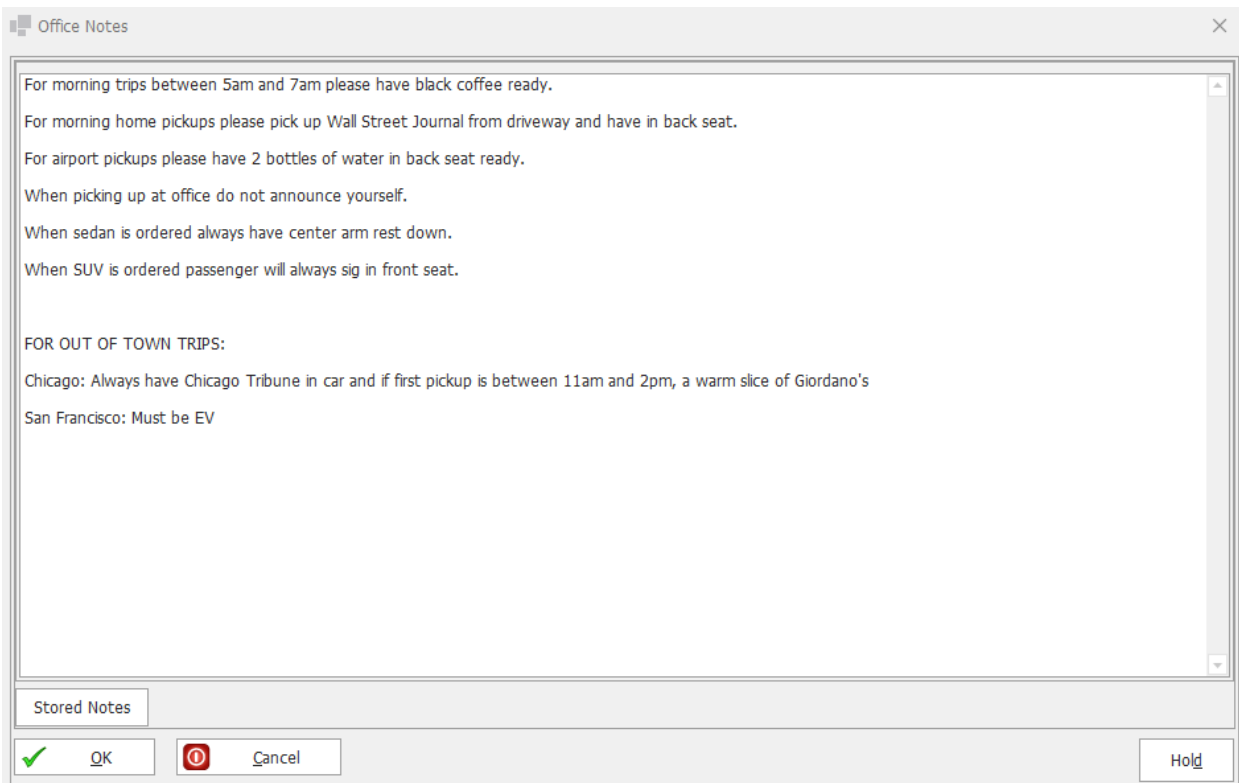
For example, you might have a very picky client who has very specific instructions depending on the type of trip, or perhaps who travels all around the world, and has very specific preferences in each market. So you could have a set of notes that say “When PU is in sedan center arm rest must be down” or “San Francisco: must be EV” or whatever you need.

You wouldn’t want all these notes to auto-populate in every trip, since there would be too many of them and most wouldn’t apply to any particular trip.

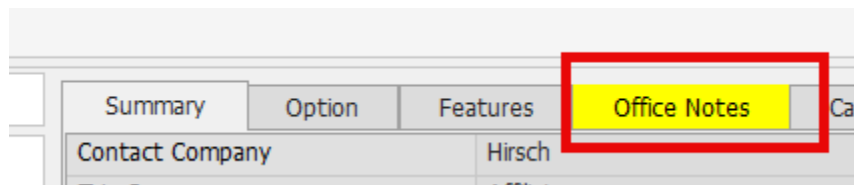
To create Offices notes for a client, simply navigate to that client’s Customer Contact Profile and click on the Office Notes button. (If there are already notes there, the button will be yellow to indicate that.)



Then, simply type in your notes as desired. We recommend having some line breaks between the notes so they are easy to distinguish for later copying.



Now when you go through the process of creating a reservations, there will be a yellow Office Notes tab on the trip summary, reminding you that there are available notes that can be used.



Selecting that tab will show you the available notes that can then be copied and pasted to the appropriate area.

Summary	Option	Features	Office Notes	Caller Info	Attribute	Communications
<p>For morning trips between 5am and 7am please have black coffee ready.</p> <p>For morning home pickups please pick up Wall Street Journal from driveway and have in back seat.</p> <p>For airport pickups please have 2 bottles of water in back seat ready.</p> <p>When picking up at office do not announce yourself.</p> <p>When sedan is ordered always have center arm rest down.</p> <p>When SUV is ordered passenger will always sig in front seat.</p> <p>FOR OUT OF TOWN TRIPS:</p> <p>Chicago: Always have Chicago Tribune in car and if first pickup is between 11am and 2pm, a warm slice of Giordano's</p> <p>San Francisco: Must be EV</p>						

Trip Notes

When sedan is ordered always have center arm rest down.