

Tech Tip Tuesday—January 28, 2025

Follow Up

Have you ever had a situation where you had a reservation that you wanted to follow up on later? Maybe a new client that you want to check in with after the trip to see how everything went? Or maybe even an old client but you sent him a new car, or maybe used a new chauffeur?

Rather than trying to note down the trip number for later, and then remembering where you put the note, Livery Coach has an easier way.

In the Option tab of a trip summary, there is a box labeled “Reservation Follow Up” that can be checked.

The screenshot displays the 'Option' tab of a trip summary in the Livery Coach software. The interface includes several tabs: Summary, Option, Features, Office Notes, Caller Info, Attribute, and Communications. The 'Option' tab is active, showing various fields for trip configuration. A red arrow points to the 'Reservation Follow Up' checkbox, which is highlighted in green. Other visible fields include 'Owner / Region' (Long Car Limousine Company), 'Tax Exempt / TaxID' (0), 'Facility', 'Call-In Time for Driver', 'How Trip Booked' (Phone), 'Sales Rep', 'Status Level' (Level 3, 4, 5), and 'Chauffeur Notes' (Max of 500 characters). The 'Reservation Follow Up' checkbox is currently unchecked.

Now, how to find all those trips?

Simply navigate to Find Trips, where you can just search for them directly, and see which ones are (and aren't) marked for follow-up. As with any other search, you can look for current trips, archived trips, or both.

Find Trips x

Primary Search
View All
Follow Up Reservations

(Use a comma to search for more than one term
Ex. Cat, Dog will show results that match Cat or Dog)

Secondary Search
View All
All

Type
In-House, Farm-In, Farm-Out

With Status
All

Trip Date:
Pickup Date Between 10/18/2024 01/28/2025

Use Dates

Search Data In
 Current
 Archived
 Both

Exclude
 Done
 Canceled
 DownTime
 Quotes

Search Results (2)
Follow Up Reservations

No
Yes

Trips List (6)

Trip #	Trip Total	Chauffeur ID	Contact Name	Start Date	End Date
9009964	1,268.50	Frank	Unionville-Chadds Ford Sch...	05/15/2019 10:30	05/15/20
9015359	335.75		Hemauer Jr., James	01/06/2020 17:06	01/06/20
13180	311.85		Test , David	11/04/2021 10:55	11/04/20
15804	124.00		Freeman , Freddie	02/10/2023 13:47	02/10/20
18451	255.90	420-Snoop	Hirsch , David	08/16/2023 16:15	08/16/20
20330	290.58		Hirsch , David	03/01/2025 10:00	03/01/20

Once you have followed up, simply open the trip and un-check the box. On an archived trip, the checkbox is at the bottom of the Pick Up/Drop Off tab.

- 18451 (Orig Trip #18450, Copy Trip)

Additional Trip Info

Pick Up / Drop Off **Payment** **Driver**

Pick Up **Drop Off** **Hourly Price**

Time / Time: 08/16/2023 16:15 08/16/2023 19:15

Reason: FUNERAL

Notes:
 01 P - Hourly garage to garage without block or dwell, 1 Liberty Bo
 02 D - Office, 1530 McDaniel Dr , West Chester, PA

Change Picku

Mileage In / Out: 0 / 0

Garage Time (Leave / Return):

Reservation Follow Up

