

Tech Tip Tuesday—April 29, 2025

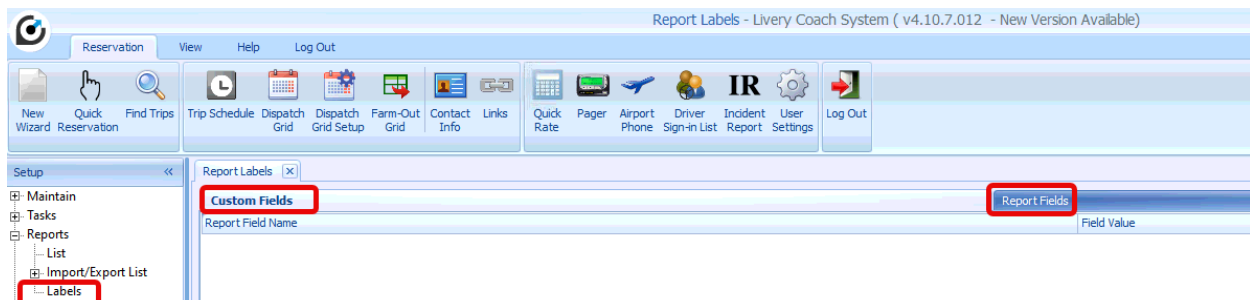
Changing labels and options on Confirmations

While Livery Coach has a standard format and standard wording for Trip Confirmations, this standard doesn't work for everyone, because everyone's business can be different.

While it is certainly possible to use a completely custom-written Trip Confirmation report, that can be costly to create, and then there can be an ongoing cost to keep it updated as the system changes over time.

To provide flexibility in wording and appearance without getting into a custom form, Livery Coach also gives you the ability to change many elements of your Trip Confirmation yourself, using a feature we call CF (Custom Field) Labels.

If you navigate to Setup->Reports->Labels, you will get a list of the reports in your system, and there will be two tabs at the top—Custom Fields and Report Fields. If you have yet to create any Custom Fields, there will be nothing on that tab, but more on that later.



Selecting the Report Fields tab will list all the reports in your system. Navigate to the Confirmation report (which in the system is called “Transportation \ Cancellation Confirmation” and located under “T”), and select it.

When you do, the lower window will populate with all the changeable fields that are built into that report. The “Field Name” column shows the internal CF name, and the “Field Data” shows the default data that's built into the report.

Report Labels [x]

Custom Fields | Report Fields

Sort By: Report Name File Name Show All Report Files From The Report Directory

Report Name	File Name
Sales Detail by Company - Pending	Sales_compl.rpt
Sales Detail By Contact/Company Monthly - Archive	SaleDetailByConComMonthly_A_FT.rpt
Sales Summary by Contact - Archived	delivery.rpt
Sales Summary by Day & Date Range - Archived	CompareDateRangeSalesOnly.rpt
Sales Summary Compare by Date Range & Year - Archived	CompareDateRangeYearSales.rpt
Sales Summary Compare by Day & Year - Archived	CompareDailySales.rpt
Transportation \ Cancellation Confirmation	Confirm.rpt
Transportation Receipt - Cash - Credit Card - Check (Batch Print by Date ...	Tripreceipt.rpt
Vehicle Completed Maintenance - Archived	veh_maint.rpt
Vehicle Mileage and Fuel Statistics	vehtrkmile.rpt
Vehicle Operational Status	Vehicle.rpt
Vehicle Revenue Detail - Archived	veh_rev.rpt
Vehicle Revenue Summary - Archived	Veh_stat.rpt
Vehicle Revenue Summary - Pending	Ut_vehd.rpt
Vehicle Type Revenue Archive - IH and FT	Ut_vehdtype_Archive_ib_f.rpt

Field Name	Field Data
{@CFCancelledPolicyTitle}	Cancellation Policy
{@CFCompanyLogoConfirm}	
{@CFShowDepositList}	
{@CFShowVehicleTypeOrdered}	0
{@CFTaxLabel}	Tax
{@CFGratuityLabel}	Gratuity
{@CFShowPUDODirections}	
{@CFConfirmShowDropOffPhoneToo}	0
{@CFSystemDeposit}	Deposit

If you now select a specific field, say {@CFGratuityLabel}, the system will populate the bottom windows with the Report Field Name and the default Field value that's built into the report.

Field Name	Field Data
{@CFCancelledPolicyTitle}	Cancellation Policy
{@CFCompanyLogoConfirm}	
{@CFShowDepositList}	
{@CFShowVehicleTypeOrdered}	0
{@CFTaxLabel}	Tax
{@CFGratuityLabel}	Gratuity
{@CFShowPUDODirections}	
{@CFConfirmShowDropOffPhoneToo}	0
{@CFSystemDeposit}	Deposit

Report Field Name: {@ CFGratuityLabel }

Field Value: Gratuity

Buttons: Add, Update, Delete

So we can see in this example that the default word for Gratuity is, well, Gratuity. But what if you want it to say something else? Like, for example, "Recommended Tip"?

In that case, simply edit the Field Value to say Recommended Tip and then click on Add. The boxes will then go blank, but have no fear. If you navigate to the "Custom Fields" tab you will now see your "override" label for Gratuity.

Report Field Name	Field Value
{@CFGratuityLabel}	Recommended Tip

And now, if you preview (or send) a confirmation, instead of saying "Gratuity", it will say "Recommended Tip". Below is the before and after.

Hourly Rate	0.00 hr(s) x \$0.00 per hr = \$0.00	Hourly Rate	0.00 hr(s) x \$0.00 per hr = \$0.00
+ Fixed Rate	1.00 hr(s) fixed for \$65.00	+ Fixed Rate	1.00 hr(s) fixed for \$65.00
Base Trip Charges	\$65.00	Base Trip Charges	\$65.00
Gratuity	20% → \$13.00	Recommended Tip	20% → \$13.00
Additional Charges	Fuel Surcharge 10% \$6.50	Additional Charges	Fuel Surcharge 10% \$6.50
	Tolls \$1.00		Tolls \$1.00
Trip Total	\$85.50	Trip Total	\$85.50
Deposit	\$0.00	Deposit	\$0.00
Total Due	\$85.50	Total Due	\$85.50

We used the Gratuity as a simple example, but there are many other settings and overrides available, and not just in Confirmations (settings and overrides vary by report). Some of the CF Names, rather than just allowing you to change text, allow some fields to appear or not appear on reports (such as do you show the vehicle type ordered, etc.). If you have your logo in an appropriate size, you can even use the CF Name to make your logo appear at the top of a Confirmation.

Keep in mind that these settings are all Global—they affect the report for every user. If you have any questions about a specific setting and can't figure it out, please email our support team at support@liverycoach.com and we can help.