How to Add or Edit a Reservation

SUMMARY

When creating a reservation, all the pertinent information for an established customer is drawn from the customer's profile. Once a reservation is saved, an invoice is automatically prepared for future printing. Based on the reservation information entered, invoices and statements are created by a few simple clicks.

- ❖ Reservation trip sheets can be e-mailed or faxed to many different sources.
- ❖ Customized Confirmation letters can be e-mailed or faxed.
- ❖ Complete Credit Card information is drawn from the customer's profile.
- ❖ A special routing area provides an itinerary for the driver.
- ❖ Fields are also available to record airline flight information, points of interest, home address, and business address, to name a few.
- ❖ Customized liability statements are available for each customer account or run type.
- ❖ The price of a job is calculated based on pre-set hourly or flat rates or a special rate selection.
- ❖ Additional expense charges: wait time, stops, parking, tolls and telephone can also be recorded.
- ❖ All information is saved for future recall by several different key fields.
- ❖ A reservation number is automatically assigned.
- ❖ Reservations may be printed individually or grouped together for batch printing.
- ❖ Specific fields record the individual who ordered the run and the date it was ordered.
- ❖ Manifest provides daily schedules by time and can be sorted by various categories in detail or summary.
- ❖ A link is available with Driver/Employee Earning, Pay and Scheduling feature, for automatic calculation of the Driver's pay.
- ❖ Complete vehicle starting and ending miles and total number of hours and earnings are recorded.
- ❖ Vehicle mileage and earnings are incorporated with the Vehicle Rates, Income, and Maintenance feature for maintenance prompts while scheduling the vehicle and for running earnings reports.

RECOMMENDATION

Throughout the reservation table there are many drop-down lists that are designed to insure accuracy and consistency. The drop-down lists are a valuable managerial tool, as they allow for more streamlined reports. It is recommended that some thought be given to items as they are added to the drop-down lists.

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For a general description of how to add, edit or delete an item from the field's drop-down list refer to "How to Add or Edit the Drop-down Lists".

For more in depth instructions on some of the tables or if a drop-down list is not available on the menu, please refer to "How to Set Up Lookups".

HOW TO ADD A RESERVATION
1. Click on **Reservation** on the upper menu or side icon toolbar and click on **Reservation**. A Reservation Table Form will appear. Click on **Add**.
2. The **Reservation** number field will contain the word "New" until the reservation is saved. The system will automatically assign a reservation number.
3. The **Name** field is for the name of the customer/passenger. The user can type in the first few letters of the last name such as Smith. If there are several Smiths in the data base, click on the down arrow on the Name field to produce a drop-down list of all the Smiths. Click on the correct Smith.
4. When making a reservation for a customer who is not in the database, a window will appear informing the user that a profile for this customer could not be found, and a profile can be created via a customer quick form. This form is designed for quick basic information entry and the profile will need to be expanded on later. For more information refer to "How to Set Up a Customer Quick Form When Adding a Reservation". It is recommended, if the time is available, to open and create the entire customer profile as part of taking the reservation. For more information please refer to "How to Set Up a Customer Profile".
5. Tab to or click on **Account**. All the pertinent information will be taken from the customer's profile and will automatically fill on the reservation.
6. The **City/State**, **Home/Work** and **Cell/Fax** fields will automatically fill in.
7. **Bill To** will automatically fill with the Bill To number that is in the customer's profile and can be changed to reflect a different Bill To. The Bill To indicates the account that will receive the bill.
8. **Bill Name** is the name of the account that will receive the bill based on the Bill To number.
9. **Group** allows the user to assign groups an individual code for an event. The Group field can be used when a coordinator or destination manager has several people traveling to an event they are coordinating. The invoices can be printed by group(s), so that they can be easily disbursed for payment to the individual companies and/or departments that attended the event.
10. Select a **Source/Referral** from the field's drop-down list.
11. **Profit Center** is integrated with the Profit Center feature. The Profit Center feature is available for companies that have two divisions (e.g. Atlanta Buses and Atlanta Limousines). When creating reservation, the user can specify what part of the company is responsible for the reservations and sales generated for this customer. Management reports are also available that utilize this information.
12. **Status** indicates the category that this reservation falls under such as Confirmed, In Route, and Has Client. This field integrates with the Dispatch screen.
13. The **Date Field** that appears next to **Status** indicates the date the reservation was taken.
14. **Service Date** indicates the date the run is to take place.
15. The times for **Pickup** and **Drop** can be entered in a 12 hour or 24 hour format depending on the default setting in **System Defaults**.
16. Once the Pickup and Drop off times have been entered the **#Hours** (#Hrs/Pass) will automatically calculate and fill in.
17. **#Passengers** (#Hrs/Pass) is entered in the field to the right of the #Hours field.

18. **Spot Time** is for the driver's arrival time before a scheduled run. The time will automatically calculate and fill based on the Pickup time and the minutes in advance that is set up in System Defaults. The user can type over the default spot time when making a reservation.

19. **Linked** and **Res#** allows the user to link this reservation to another reservation. LMS Gold also has a feature which allows the user to duplicate this reservation. For more information please refer to "How to Duplicate a Reservation".

20. **Run Type** such as Wedding or As Directed can be selected from the field's drop-down list. This feature is linked to the dispatch screen

21. **Rate Type** of Flat or Hourly can be selected from the field's drop-down list.

22. **Account Type** such as General, VIP or Corporate can be selected from the field's drop-down list. If the client has been assigned an Account Type in their client profile, this field will automatically fill in with that information, which can be overridden if necessary.

23. Select the **Vehicle Type** such as Sedan or Bus from the field's drop-down list. This feature is linked to the dispatch screen.

24. Select the **From/To** from the field's drop-down list. The From/To list is generally used when there are frequent set pick-up and drop-off points, such as from a city to an airport or from a hotel to a conference building. This feature is linked to the dispatch screen and is very beneficial for multiple pickups in the same city to be dropped off at the same destination or city.

25. Enter the **Rate** for this run. If a Rate Table has already been created for this type of run, rate, account and vehicle and from/ to, the rate will automatically fill in. For more information please refer to "How to Set Up a Rate Table".

26. **Base Charge**, **Other Charge** and **Total Charge** will automatically calculate and fill in based on the rate and standard charges.

27. A **Deposit** amount can be entered while adding a reservation. To input additional deposits, once the reservation is saved, please refer to "How to Edit a Reservation".

28. The **Balance** will indicate the new balance due if a deposit is made when adding the reservation, or if any additional payments are received and applied to this reservation.

29. The **Payment Type** can be selected from the field's drop-down list.

30. There are fields available to enter the **Credit Card Holder** (**CC Holder**), **Number**, **Type**, and **Expiration**. If this information has already been entered into the client's profile, it will automatically fill in and can be overridden if necessary.

31. Enter the **Amount** if a deposit is to be applied to the credit card.

32. The **Approval** for the credit card can be manually entered in this field. If the program has the Credit Card Processing feature included, the approval code will automatically fill in once the transaction is completed through the credit card processing. For more information on how to process a credit card using the Credit Card Processing feature refer to "How to Process a Credit Card".

33. A field is available to enter an **Order Number** (**Ord No**) if the client requires one to appear on the reservation.

34. Select an **Order Date** (**Ord Dt**) from the drop-down calendar.

35. Select the **Order By** (**Ord By**) from the field's drop-down list of Administrators for this account.

36. A field is available to enter a **Telephone** number for the person who placed the order if it is different than the telephone numbers on the account.

37. Select the **Taken By** name for the person who took the order from the field's drop-down list.

38. A **Driver** can be selected at this time from the field's drop-down list or assigned later. A driver can also be assigned from the Dispatch screen.

39. A **Vehicle** can be selected at this time from the field's drop-down list or assigned later. A vehicle can also be assigned from the Dispatch screen.

40. The **Agency** portion of the reservation table is linked to the Agency Farm In/Farm Out and Commissions feature. For a more in-depth explanation of how to utilize the Agency portion of the reservation table to track the commission for a run, please refer to "How to Track Agency, Farm In/Farm Out & Commissions". Select the **Agency** from the field's drop-down list. The **Account #** will automatically fill in.
41. The **Agent** is the person working for the Agency.
42. The agency **Rate Type** is for the **commission** (the smaller amount) only, regardless of who collects the money.
43. Enter the **Quantity** in the field to the right of the Rate Type.
44. The **Amount** is the total **commission** that will be earned on this run.
45. **Collect** is based on the user of the program not the agency. Collect is calculated by who collects the money regardless of who does the run. A **Y** means that the user's company (your company) will collect the total amount due for the run from the customer.
46. In the **In/Out** field type an **O** for Farm Out or an **I** for Farm In.
47. Click on **Save** then click on **Close**.

HOW TO EDIT PAGE 1 OF THE RESERVATION
1. To Edit a reservation, the user will need to first find the reservation. For more information on finding a reservation refer to "How to Find a Reservation or Record".
2. Once the reservation is on the screen, click on **Edit** and then click on the field that requires editing. Changes can be made to any of the fields on Page 1 of the reservation except to the **Deposit** field. Any changes that are made to Page 1 will automatically reflect on Page 2 of the reservation. For more information on the individual fields on Page 1 of the Reservation, refer to "How to Add a Reservation".
3. When finished editing Page 1, either click on **Save** and then **Close**, or click on Page 2 to continue editing.

HOW TO EDIT PAGE 2 OF THE RESERVATION
1. To Edit a reservation, the user will need to first find the reservation. For more information on finding a reservation, please refer to "How to Find a Reservation or Record". Once the reservation is on the screen, click on **Edit** and then click on the field that requires editing. **Reserve** and the **Bill To** will automatically fill in from Page 1 and cannot be edited on Page 2.
2. **PU Date**, **Pickup** and **Drop** can all be edited on Page 2. Any changes will also reflect on Page 1. The **Hours** will automatically calculate.
3. Fields are available for **Phone In** and **Out**, **Minutes** and **Rate** if a phone charge applies.
4. The **Charges Table** on Page 2 of the reservation <u>cannot</u> be changed in the edit mode. For more information on adding and editing the Charges Table, please refer to "How to Add or Edit the Charges Table".
5. **Charges** will reflect the information from Page 1 and cannot be edited from Page 2.
6. **Deposits** will reflect the amount of the deposit made when the reservation was originally added and cannot be edited on Page 1 or Page 2. If an incorrect amount was entered, please refer to How to Correct an Incorrect Payment". If additional funds are received for this reservation, the amount should be entered in the **Received** field.
7. The **Received** field is for entering any additional payments that are received for this reservation. Once an amount is entered into the Received field a **Payment** window will appear.
   a. The **Reservation** and **Description** field will automatically fill in.
   b. The **Amount** field will fill in and can be overridden if an incorrect amount was entered.
   c. Select the **Date** the payment was received from the drop-down calendar.
   d. Select the **Type** of payment from the field's drop-down list.

        e.   Enter any **Notes** about the payment and/or the check number.

        f.   Click on **Save**, which will return the user to Page 2 of the reservation. This amount will automatically calculate and a new amount will be reflected in the **Balance** field found on Page 1 and Page 2.

8. If a **Net** amount of days applies, enter the number of days and the system will automatically fill in with the future date that reflects the Net days.

9. The **Driver Information** portion of the reservation table is linked to the Chauffeur Earnings, Pay and Scheduling feature. Once a Driver's profile has been created, the system which will automatically calculate to determine the driver's pay. The **Driver** field will already contain a driver name if one was previously assigned on Page 1 or on the Dispatch screen. The **Driver** can also be selected at this time from the field's drop-down list or the previous selection can be overridden if a change was made.

10. Enter the actual **Start** and **Stop** times for the Driver for this run. The **Hours** will automatically calculate and fill in.

11. Enter the **Time Out** and **Time In** of the garage. This field is for information purpose and does not calculate into the driver's pay.

12. If the driver is to be paid at the **Hourly 1** rate recorded in their profile, enter the amount of time at the Hourly 1 rate. If the driver is to be paid at an **Hourly 2** rate, then enter the amount of time at the Hourly 2 rate. An amount can be entered in both fields if the driver is to be paid a portion of the run at the Hourly 1 rate, and a portion of the run at the Hourly 2 rate.
Place a check mark in the **Premium 1** (**Prem 1**) or **Premium 2** (**Prem 2**) box if the Hourly rate is to include a premium amount.
If the driver is to be paid a **Flat** amount enter the dollar amount. If the driver is to be paid a **Percentage**, enter the percentage and the system will calculate the dollar amount.

13. The **Gratuity** percentage will automatically fill in from the percentage that was entered in the driver's profile. This percentage can be overridden. The system will automatically calculate the dollar amount.

14. The **Reimburse** field will reflect the total amount that was entered to reimburse the driver. The Reimbursement field <u>cannot</u> be changed in the edit mode. For more information on adding or editing a driver reimbursement, please refer to "How to Add or Edit a Driver Reimbursement".

15. The **Vehicle Information** portion of the reservation table is linked to the Vehicle Rate, Income and Maintenance feature. Once a Vehicle's profile is created, the system will utilize the information entered in the Vehicle Information portion of the reservation in numerous management reports and for tracking Service Intervals. The **Vehicle** field will already contain a vehicle name if one was previously assigned on Page 1 or on the Dispatch screen. The **Vehicle** can also be selected at this time from the field's drop-down list or the previous selection can be overridden if a change was made.

16. Enter the **Miles Out** and **Miles In** once the run is complete. The system will automatically calculate the **Totals**.

17. If the vehicle required fuel, enter the **Gallons** (**Gals**) and **Price** and the system will automatically calculate the **Total** dollar amount.

18. Click on **Save** and then click on **Close**.

HOW TO SET UP A CUSTOMER QUICK FORM WHEN ADDING A RESERVATION
When making a reservation for a customer who is not in the database, a window will appear informing the user that a profile for this customer could not be found and a profile can be created via a customer quick form. This form is designed for quick basic information entry and the profile will need to be expanded on later. It is recommended, if the time is available, to add the customer profile as part of taking the reservation. For more information on how to add a customer profile refer to "How to Set Up a Customer Profile".

1. If the user would like to create a customer profile via the Customer Quick Form, click on **Yes**. If the user clicks on **No,** a customer profile will not be created for this customer. It is suggested that if this is a "one-time" customer to click on **No** and continue inputting the reservation information.
2. In the **Name** field the user can enter either the name of a company or the name of an individual. If the name of a company is entered, click on or tab to the **Attention** field to enter an individual's name for that company if desired.
3. If the customer profile is for a company, type in the address for the company. If it is for an individual who regularly travels under a company, it is recommended to type in the **Home** address of the individual. This information is vital for routing when the individual requires a pickup from home. If the individual requires a pickup from the office, this information is available for routing from the company's profile.
4. Click on or tab to and enter the **Home** and **Work** phone numbers.
5. Fields are available for entering the **Cross Street**.
6. Select a **Source/Referral** from the field's drop-down list.
7. The **Account Type** can be selected from the field's drop-down list.
8. If the user would like to create a customer profile for this client, click on the box next to **New Account**. The system will automatically create a customer profile and assign an account number to the client. If the user does **not** want to create a profile for this customer, do **not** place a check mark in the New Account box. The Bill To field will still function even though a New Account was not created.
9. The **Bill To** number will show the word "New" until a new customer profile is saved **or** a bill to is selected from the field's drop-down list. When a new customer profile is saved, the program automatically assigns an account number and a bill to number, which is the same. If an individual does most of their traveling under a company, it is suggested to select the company's bill to number from the field's drop-down list to be saved with the profile. When the individual would like to have a trip billed to them personally, the user can easily override the bill to of the company and enter the bill to for the individual (which is also their account number) on the reservation screen.
10. Click on **Save**.

HOW TO ADD OR EDIT A DRIVER REIMBURSEMENT
1. To Add or Edit a Driver Reimbursement, the user will need to first find the reservation that the reimbursement applies to. For more information on finding a reservation, please refer to "How to Find a Reservation or Record".
2. Click on **Page 2** and then click on **Related**.
3. Click on **Reimburse**. A Reimbursement window will appear.
4. To Add a reimbursement, click on **Add**. To Edit an already existing reimbursement, highlight the item and click on **Edit**. A **Reimburse** window will appear.
5. Select the **Type** of reimbursement from the field's drop-down list.
6. Enter the **Amount** and the **Date**.
7. A field is available to enter any **Notes** for this reimbursement.
8. Click on **Save**.

HOW TO FIND A RESERVATION
1. To **Find** a reservation, click on **Reservation** on the upper menu or side icon toolbar.
2. Click on **Reservation** and then click on **Find**.
3. Fields are available to enter the last **Name, Reservation Number** or the **Phone Number**. If the last name or phone number is entered, the program will bring up all the reservation for that name or phone number. To scroll through the reservations, click on the < > arrows at the bottom of the reservation screen.