How to Set Up System Defaults

SUMMARY

The system has several default options to enable the user to customize the program to fit their business. The user can set the default percentage for gratuity, select a default liability form and hide credit card information on the trip sheet just to name a few. Default criteria should be based on what will take place a majority of the time. The user can override most of the system defaults to fit the situation. For example a 15% gratuity may be the normal gratuity that is charged on a run, but the user may want to charge only 10% for a special customer. In that customer's file a 10% gratuity can be entered which will override the normal 15% that is usually charged.

HOW TO SET UP SYSTEM DEFAULTS

Any item that is followed by an asterisk (*) can be individually overridden in a customer's file to pertain to that customer.

1. On the upper menu or side icon toolbar, click on **System**, and then click on **Defaults**.
2. Enter a percentage **Finance charge** which will appear on the invoice.*
3. Enter the **Days** allowed before a finance charge will be applicable.*
4. Enter the **Gratuity** percentage.*
5. Enter the **Phone Rate** charged per minute for the cell phone in the vehicle.*
6. Check this box to print a standard **Liability** form on the trip sheet.*
7. Select the **Liability Form** to appear on the trip sheet. The program has a generic liability form which can be modified or a new one can be created.*
8. If the user would prefer a short trip sheet check **Short Trip**. When printing a trip sheet, the user can override this default by selecting Long Trip Sheet from the print menu.
9. If the user would like the routing to appear on the invoice, check the **Routing** box.*
10. Check the box to show a **12 hour format**; otherwise the military format will appear.
11. **Field Hilite** will highlight the field on the screen where the cursor is.
12. If **Force Order By** is checked, the administrator's name that is set up in the customer's file will automatically fill on the reservation in the Ordered By field.
13. A check in **Default Area Code** will automatically fill the area code entered when making a reservation or creating a customer file. The user can type over the default area code.
14. **Current Date on Reservation Screen** will automatically fill today's date on the reservation**.** The user can type over the default date.
15. **CC Info from Customer File** will take the credit card information from the customer's file and automatically fill in the appropriate fields on a reservation.
16. Enter the days for a **Billing Cycle for New Customer** record.*
17. **Company Code** allows the user to enter an identifying code for their company. For example ABC Transportation has an office in Los Angeles and in San Diego. A company

Serving the Ground Transportation Industry since 1983
Member of the NLA

12200 E. Washington Blvd. Ste. H	**562.789.9511**	**Fax 562.789.9513**
Whittier, CA 90606	**800.545.4668**	**www.lms2000.com**

1

code for the Los Angeles office might be "LA". This Company Code appears before the invoice number e.g. LA010023.

18. **Driver's Hours** integrates with the Driver/Employee Earnings, Pay and Scheduling feature. If this box is checked and a driver is unavailable according to the driver availability chart in the Driver's file, a prompt will appear when assigning the driver.

19. **Vehicle Hours** integrates with the Vehicle Rates, Income, and Maintenance feature. If this box is checked and a vehicle is already assigned or is unavailable, a prompt will appear when assigning that vehicle.

20. **Vehicle Maint** integrates with the Vehicle Rates, Income, and Maintenance feature. If this box is checked and a vehicle is due for maintenance, a prompt will appear when assigning that vehicle

21. **Autofill Choice** will automatically fill in a field from the Lookup pull down window.

22. **Print Liability from Run Type** will select the liability based on the specific run type.

23. **Print Confirmation from Run Type** will select the confirmation letter based on the specific run type.

24. **Pre-Load Lookups** will automatically load all the lookups when entering a new screen.

25. **Filter for Lookups/Tables** forces the user to type in a letter into the field to narrow down the selections from the lookups and tables.

26. **Lo/High Date Range** will prompt the user for verification when they make a reservation outside the date range. Low is for days in the past and High is for days in the future.

27. **Spot Time** is for the driver's arrival time before a scheduled run. The user can type over the default spot time when making a reservation.

28. **Stats Update** refreshes the Vital Statistics screen according to the minutes entered.

29. The **Dispatching** box pertains to certain features on the dispatching screen.
    a. A check in the **Smooth Blink** box will turn on the blinking feature on the Dispatch screen.
    b. **Blink Time (min)** will alert dispatch when a run needs a driver and/or vehicle assigned and integrates with the Driver/Employee Earnings, Pay and Scheduling and Vehicle Rates, Income, and Maintenance feature. The run will start to blink in advance of the scheduled pickup time according to the minutes entered.
    c. **Refresh Time (sec)** automatically refreshes the dispatch screen according to the seconds entered.

30. The **Printing Long Trip Sheets** box pertains to information that will print on the long trip sheet
    a. To hide the Bill To information, check **Hide Bill To Info**.
    b. To hide the credit card information, check **Hide Credit Card Info**.
    c. To hide the agency information, check **Hide Agency Info**.
    d. To hide the calculated charges, check **Hide Calculate Charges**.

31. **Company E-mail** is for entering the company e-mail address.

32. **Pager Delimiter** integrates with the Driver Text and Messaging feature. It allows the user to input characters such as an ***** or a **/** to separate the fields of text for easy viewing on the driver's pager.

33. **Auto Backup on Login** will automatically start a backup of the master data base file within the program to the hard drive. This feature is not meant to replace an additional source for backing up such as an Iomega Zip Drive or a CD backup. This is not an alternative for regular (daily is recommended) backups of the entire program to an external backup device. **LMS does not take responsibility for the failure to do regular backups of the entire program to an external device.**

34. **Multi Inv Message** allows the user to enter three lines of text which will appear at the bottom of the invoice and the multi-invoice.

35. Click on **Save** then click on **Close**.

Rev PC 07/04