



# Limousine Management Systems

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## How to Set Up Lookup Screens

### SUMMARY

The Lookup feature allows the user to select from a preset pull-down window. The user can quickly select from a list of key words. LMS Gold for Windows has a multitude of reports available, and the key ingredient to a report is consistency. You can generate reports based on lookup screens' keywords.

### LOOKUP SCREENS AVAILABLE

1. **Agency Type** is for different agency account types, such as Car Rental Company, Hotel, and Tour Guide.
2. **Checking Accounts** is for setting up different checkbooks. This lookup integrates with the Accounts Payable and Check Writing feature.
3. **Customer Types** has six different lookup topics.
  - a. **Credit Card Types** that are accepted by the company. A field is available for the user to determine which Credit Card Type will **Display on Web Res** which integrates with the Web Reservation interface. Enter **True** if the Credit Card Type is to appear and **False** if it is not to appear on the Web Reservation screen.
  - b. **Payment Types** such as cash, debit card and check. A field is also available for the user to determine which Payment Type will **Display on Web Res** which integrates with the Web Reservation interface. Enter **True** if the Payment Type is to appear and **False** if it is not to appear on the Web Reservation screen.
  - c. **Reminder Notes** allows the user to type in a reminder note, which will appear in red on the bottom of the reservation screen for a specific customer or bill to.
  - d. **Sales Person** is the person who sold the account or the specific job.
  - e. **Source Type** is for entering advertising sources and referrals.
  - f. **Account Type** is for entering the types of accounts such as Corporate or House.
4. **Destination List** allows the user to set up the most common pickup and drop-off locations and the most common from/to scenarios.
5. **Employee Types** has three different lookup topics and integrates with the Driver/Employee Earnings, Pay and Scheduling feature.
  - a. The **Pay Period Type** such as bi-weekly and salary
  - b. The **Marital Status** such as married and single
  - c. The **Employee Type** such as driver, sales representative, and mechanic
6. **Incident Tracking** has two different lookup topics and integrates with the Incident Tracking and Report feature.
  - a. An **Incident** that took place such as Late for Pickup or Car Broke Down

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- b. The **Resolution** for an incident such as Credit on Invoice or Complimentary Run
- 7. **Profit Center** integrates with the Profit Center feature. The Profit Center feature is available for companies that have two divisions (e.g. Atlanta Buses and Atlanta Limousines). This field is for the name of the different profit centers within the company.
- 8. **Reservation Types** has nine different lookup topics.
  - a. **Airline List** allows the user to list the airline and phone number.
  - b. **Airport List** is for listing the different airports such as Los Angeles, CA LAX.
  - c. **Standard Charges** brings up a table to set up the company's charges that are used on a regular basis that will print on the trip sheet. To set up Standard Charges refer to "How to Set Up Standard Charges".
  - d. **Miscellaneous Charges** are other charge types that would be applied for certain situations such as Balloons, Broken Glass and Cleaning Fee.
  - e. **Rate Types** are for different rates such as Hourly and Flat.
  - f. **Run Types** brings up a table to set up different types of runs such as Wedding and 21<sup>st</sup> Birthday. The different run types can be assigned different colors for viewing on the dispatch screen. The user can select the type of liability agreement to print at the bottom of the trip sheet and the type of confirmation letter to send according to the run type. Additional charges such as Airport Fee and Parking Fee can also be set up according to the run type. To set up the Run Types refer to "How to Set up Run Types".
  - g. **Reimbursement Types** is for the different types of reimbursements such as Flowers and Car Wash.
  - h. **Status List** is for the different stages of the run such as Has Client and Closed. The different statuses can be assigned different colors for viewing on the dispatch screen. An explanation of how to set up the Status List is included below.
  - i. **Taken By** is for listing the names of the user who takes the information.
- 9. **Vehicle Types** is for listing the different types of vehicles in the fleet such as Sedan and Hummer. A table is available for adding a Premium charge to a type of vehicle. A field is available for the user to determine which Vehicle type will **Display on Web Res** which integrates with the Web Reservation interface. Enter **True** if the Vehicle Type is to appear and **False** if it is not to appear on the Web Reservation screen.
- 10. **Vendor Types** is for adding different types of vendor accounts such as Rent and Utilities. This lookup integrates with the Accounts Payable and Check Writing feature.

## HOW TO SET UP THE LOOKUP SCREEN

This is a generic description for setting up the Lookup Screens. For further explanation for setting up Standard Charges, Run Types and Status List refer to the appropriate section.

On the upper menu click on **Lookups** then click on the desired lookup topic. A window will open for adding, editing, or deleting an entry. The program comes with a few preset lookups, which can be edited.

1. Click on **Add** or **Edit**. A window will open that allows the user to add a new lookup or to edit an existing lookup.
2. Click on **Save** then click on **Close**.

## HOW TO SET UP STANDARD CHARGES

Standard charges are for charges that are charged on every run.

1. On the upper menu, click on **Lookups**, click on **Reservation Types** and click on **Standard Charges**.
2. A window will open for adding, editing, or deleting an entry. Click on **Add** or **Edit**. The program comes with a few preset lookups. 100 Service Fee, 200 Gratuity, 250 Surcharge,

400 Phone Charge, 510 Airport Fee, 520 Parking Fee, 530 Tolls Fee, 540 Misc Fee, 800 Misc. Charges and Xxx Discount can be modified but they can not be deleted.

3. The Sequence number represents a charge, such as 100 represents Service Fee. The sequence number is used to create formulas. For simplicity it is recommended to use a block of a hundred numbers to represent certain types of service, such as the 500's represents different types of parking and tolls. The sequence number also determines the order the charges will print on the trip sheet.
4. Type in the **Description** for the sequence number.
5. The **Formula** is created by using the sequence numbers. Not every standard charge will require a formula. A formula is used when a standard charge involves other standard charges to determine its charge.

For example:

Seq	Desc	Formula
100	Service Fee	
110	Meet/Greet	
115	PU/Drop/Stop	
120	Other	
200	Gratuity	100-115

The Gratuity is calculated based on 100 Service Fee, 110 Meet/Greet and 115 PU/Drop/Stop. It does **not** include 120 Other.

6. **Value** and **Percent** determine the dollar amount for each charge. In the example above for Gratuity, it was determined that Gratuity would be based on Service Fee, Meet/Greet and PU/Drop/Stop. If 15.00 is the Value and a Yes is typed into Percent, Gratuity would be based on 15% of the total of Service Fee, Meet/Greet and PU/Drop/Stop. All sequence numbers having a formula will require a **Yes** for Percent to calculate.
7. If the charge is a flat amount such as \$8.00, type in 8.00 for the Value and **No** for the Percent.
8. The user may want a charge description to appear on the trip sheet, but the dollar amount or percentage varies with every run. If this is the case, the Value would be 0.00, and the Percent could be Yes or No. The amount can then be typed in on the reservation. All sequence numbers having a formula will require a **Yes** for Percent to calculate.
9. **Tax** is an informational column. If the charge is taxable, type a **Yes** in this column.
10. **Driver Percent** integrates with the Driver/Employee Earnings, Pay and Scheduling feature. If the driver is paid on a percentage basis, which is recorded in the driver's file along with the percentage amount such as 30%, and a percentage of the standard charge, which in this case is 30%, is part of their pay, type a **Yes** in the **Driver Percent** column.
11. **Driver Gratuity** integrates with the Driver/Employee Earnings, Pay and Scheduling feature. If a percentage of the charge is to be included in the driver's gratuity, then type a **Yes** in **Driver Gratuity**. The percentage amount is taken from the driver's file.
12. Click on **Save** then click on **Close**.

## HOW TO SET UP RUN TYPES

1. On the upper menu, click on **Lookups**, click on **Reservation Types** and click on **Run Types**.
2. A window will open for adding, editing, or deleting an entry. Click on **Add** or **Edit**. A window will open to add a new run type or edit an existing run type.
3. Click on or tab to **Color** if selecting a color for viewing on the dispatch screen. Select a color from the chart and a number that represents that color will appear in the box.
4. Click on or tab to **Liability Agreement**. A liability agreement can be assigned by the run type or left blank. The program comes with a standard liability form that the user can

- edit, or create a new one. To assign a liability agreement by run type, click on the picture of the open folder to select a liability form for the run type.
5. A **Confirmation Letter** can be assigned by the run type or left blank. The program comes with a standard confirmation letter that the user can edit or create a new one. To assign a confirmation letter, click on the picture of the open folder to select a confirmation letter for the run type.
  6. Click on or tab to **Airport Fee, Parking Fee, Toll Fee, and Miscellaneous Fee** and type in a dollar amount if a special fee applies for this type of run.
  7. **Display on WebRes** integrates with the Web Reservation interface. Enter **True** if the Run Type is to appear and **False** if it is not to appear on the Web Reservation screen.
  8. Click on **Save** then click on **Close**.

#### **HOW TO SET UP THE STATUS LIST**

1. On the upper menu, click on **Lookups**, click on **Reservation Types** and click on **Status list**.
2. A window will open for adding, editing, or deleting an entry. Click on **Add or Edit**. A window will open that allows the user to type in a new status or edit an existing status.
3. When adding, type in the new status and click on **Save**.
4. If the user would like to assign a color for viewing on the dispatch screen, click on the newly created status from the list and click on **Edit**. Click on or tab to **Text Color** if assigning a color to the text. Click on **Back Color** if assigning a background color.
5. Click on **Save** then click on **Close**.

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