Admin Panel

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TaxiCaller Nordic AB

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Admin Panel Manual

This manual is about all the functions you can find in the Admin Panel

Please see our other manuals:

- Dispatch Console
- Driver Apps
- Passenger Apps
- <u>Special Features</u>

Please feel free to explore the various sections of the manual by choosing a topic from the left menu or clicking on the **Getting Started** link below.

Getting Started

Register

TRY IT FRE

Click on the sign up page by clicking here.

button placed at the top right of www.taxicaller.com or go straight to the

Enter your company name, location and phone number. Your company will be configured according to your location. The company name you enter here will be displayed on your cars on the public maps. Please use a valid email address so that your account can be verified.

Create your account

No credit card required. Cancel anytime.

Company:	Company name	
Name:	First name	Last name
Country:	Sweden	Ŧ
Email:	Email	
Phone:	+46	
Fleet size:	Please select one	Ŧ
Password:	Password	Repeat password
	Sign up	
	Already have an account? Sig	n in

Activate my account

You will receive an activation email within a few minutes. Please click the

button in the email to activate your account and to get started. You will be prompted to confirm your company name and enter the city where you will be operating. Start typing the name of your city and then choose it from the drop down menu.

Account activated!

Now we just need a few more details so we can set up your account for you.

Company name visible to customers

NY Star Taxis

City of operation

New York, NY, United States

Continue 🔶

Almost ready!

You do not need to add a credit card to your account to be able to access our 14-day free trial. Just press **Wait to be verified**, our team will be reviewing your details and approving your account.

To speed up the process, you can add your credit card details to be automatically approved so you can start your trial right away.

We're now setting up your account...

Please wait for us to verify your information to grant you access to your free trial. This may take up to 24 hours.

OR

Begin your free trial immediately!

Start exploring right away. Validate your information by simply adding your credit card details. Nothing will actually be charged.

📰 Verify with credit card now

After you register

You will get an email with instructions about what to do next. The email should contain:

- Instructions to download the TaxiCaller Driver app and log in with your driver user:
- Instructions to access the Dispatch Central and log in with your dispatcher

These users will be generated automatically and you will receive the log in information (ID, username and password) in the same email. You can of course create new users and delete old ones in the <u>Users section</u>. You can also change your company ID in <u>Settings > Dispatch</u>.

Billing

In the billing section you will be able to add funds, activate vehicles and see your rates and other information.

If you have just created your account, you might see a message **Billing not enabled**. If so, please contact us so we can enable billing for you with the correct currency and price plan.

Overview

Go to the Overview section by clicking on Billing and Overview in the Admin Panel or alternatively clicking on this link: <u>https://admin.taxicaller.net/admin/billing/overview.php</u>

You will see something like this:

Billing overview										
USD -516.00 account balance (non-refundable)		for r			ħ	Make a one time p Refill your balance with a one-ti E Add funds	me paymen			
Registered cards				Add card	Recent tra	ansactions				
brand	card number	ex	cpires		date	description	ref	amount	balance	
MasterCard	4111 11XX X000X X000X	00	000	<u>ل</u>	1/9 09:51	Vehicle activation: #1, (1-201709)	117239	-500.00	-516.00	
howing 1 to 1 of 1 entri					8/8 11:47	Vehicle activation: #3, (21-201708)	115639	-25.00	-16.00	
nowing i to i or i entri	6				1/8 12:41	Card payment	112882	400.00	9.00	₿
Jsage			period 09	/2017 -	1/8 08:08	Vehicle activation: #4, (1-201708)	112257	-500.00	-391.00	
0					31/7 13:45	Vehicle activation: #3, (38-201707)	112146	-3.00	109.00	
date	vehicle	price			22/7 16:52	Vehicle activation: #2, (37-201707)	111967	-8.00	112.00	
1/9 09:51	1, FORD	500.00			21/7 12:32	Vehicle activation: #1, (36-201707)	111932	-8.00	120.00	
1/9 18:29	2, FORD	0.00			18/7 10:38	Vehicle activation: #5, (35-201707)	111819	-11.00	128.00	
1/9 12:42	4, TOYOTA	0.00	E		17/7 12:36	Vehicle activation: #4, (34-201707)	111786	-12.00	139.00	

In the top panel of this section you can find general information like:

Your account balance: This shows the funds that you have added. If the number is negative you will not be able to activate more vehicles until more funds are added.

Cost of the next activation: Here you can see what it would cost you to activate a vehicle.

Please make sure you check this section before you activate a vehicle to see how much the activation will cost.

Add funds: Click here to add funds with your credit card if you have already registered one.

Registered cards

In this section you can see your registered cards. If you don't have any cards showing in this section, you can add one by pressing the green **Add card** button. You can delete previously added cards by clicking on the blue icon.

Usage

In this section you can see the vehicle activations. By default it will show you the activations for the current calendar month but you can view months in the past by changing the date in front of **period**:.

Recent transactions (Account statement)

Here you can see your TaxiCaller account statement with the transactions ordered by date. Every time you activate a vehicle you will see it in this section. If you add funds it will also appear as **Card payment** and you will be able to see the receipt if you click on the blue icon in the last column.

date	description	ref	amount	balance	
1/9 09:51	Vehicle activation: #1, (1-201709)	117239	-500.00	-516.00	
8/8 11:47	Vehicle activation: #3, (21-201708)	115639	-25.00	-16.00	
1/8 12:41	Card payment	112882	400.00	9.00	
1/8 08:08	Vehicle activation: #4, (1-201708)	112257	-500.00	-391.00	
31/7 13:45	Vehicle activation: #3, (38-201707)	112146	-3.00	109.00	
22/7 16:52	Vehicle activation: #2, (37-201707)	111967	-8.00	112.00	
21/7 12:32	Vehicle activation: #1, (36-201707)	111932	-8.00	120.00	
18/7 10:38	Vehicle activation: #5, (35-201707)	111819	-11.00	128.00	
17/7 12:36	Vehicle activation: #4, (34-201707)	111786	-12.00	139.00	

Let's take a look at the **description** column. It will say something like:

Vehicle activation: #1, (1-201709).

In here #1 is the number of the vehicle (set from the <u>Vehicle</u> section). The number in parenthesis is made of two parts: the 1 shows how many vehicles have been activated that month. The second number is the month that the activation applies to.

Information

Go to the **Information** tab below **Billing** in the menu or <u>click here</u>. In here you can view and change your billing and contact information.

Settings

- Set up the dispatch
- Manage your company profiles
- <u>Custom buttons in the Driver App</u>
- Establish permissions for drivers and dispatchers
- Manage your vehicle types
- Configure the notifications
- Embed a booking form into your website
- Manage permits for your drivers and dispatchers
- <u>Configure the IVR</u>

Set up the dispatch

To edit these options please click on the Edit button at the bottom of the page. Once you are done with configuring this page, don't forget to click on Save to preserve the changes you have made.

- General Settings
- Assignment
- Operating Hours
- <u>Tags</u>
- <u>POIs</u>
- Text back

General Settings

These basic settings control the general behavior of the components of the TaxiCaller system such as the dispatch console, the driver app and the passenger apps. To begin with, you can select your company ID and activate or deactivate dispatch.

ld

Id	
Company Id	CompanyID
Active	

Choose an ID of at least 4 characters which will be used by your dispatchers and drivers when logging in. This ID is not displayed to the public.

- Payment Options
- <u>Configure Online booking</u>
- Time, units and permissions
- Appearance of Dispatch

Payment Options

Please set your <u>Tariffs</u> before configuring these payment options.

Basic settings

Payment options			
Tariff	Standard Tariff	Ŧ	
Require price		In-app taximeter	
Prefill estimates	A	Legacy taximeter	4
Detailed payments		New taximeter UI	
Force tariff			

- **Tariff:** Once you have configured your tariffs, choose them from this list (usually named **Standard Tariff**), so they apply to your price estimates.
- **Require price:** If this is selected, the driver will need to enter a price at the end of a ride. Otherwise, they can finish a ride without doing so. For accounting purposes it's recommended that this is enabled.
- **Prefill estimates:** If this is enabled, the price estimate will be prefilled in the driver app when a job ends. The driver can then change this value if needed.
- **Detailed payments:** Enables the advanced payment flow in the driver app. This would include the use of Extras like toll feels, waiting rates which can be configured in the Tariffs Section.
- Force tariff: When this is disabled, the driver will get to freely choose tariffs from a list if a booking is made with Automatic tariff or if they start a street job (by pressing the **Busy** button in the app). If it's enabled, the default tariff will be applied and the driver won't be able to change it.

Taximeter Options

• In-app taximeter: Enables the use of the in-app taximeter in the driver app. If you have a physical taximeter device, it's recommended that you continue to use it, as any in-app taximeter is going to depend on external factors like the GPS settings and coverage of the device you're using.

- Legacy taximeter: Some customers will use the old version of the in-app taximeter. Deselect to use the new one instead.
- New taximeter UI: Uses the newest in-app Taximeter User Interface.

Payment Methods

These will determine what payment methods you will allow to appear as options in the driver and passenger apps.

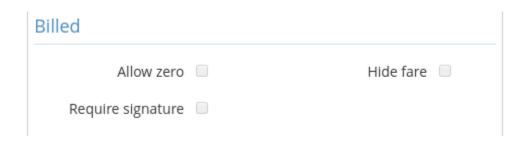
Cash

If this is selected, the option will show in the driver and passenger apps, indicating that the rides offered by your company can be paid in cash.

Cash	
Show option	¥
Allow zero	

Billed

Billed payment refers to passengers that you have already specified in the <u>Customers</u> section. The fare will then be associated to their profile and you will be able to generate invoices for them.



E-ticket

E-tickets can also be configured from the <u>Customers</u> section. With these you can offer your customers etickets for a certain value of the ride (or all of it).

To learn more about this, please check the following section: "E-tickets"

E-ticket		
	Show option	

Promotions

If you have a **Rebranded Passenger App**, you can enable payment through Promotions. To learn more about this, please check the following section: <u>Using Promo Codes</u>

Promotions	
Show option	

Card present (Card reader)

You can activate this option if you have set up a payment by card present such as **SumUp**. For more information about this <u>please click here</u>

Card present (Card	reader)
Show option	•
Processor	SumUp 🔻

In-app payment

You can activate this option if you have set up in-app payments through **Stripe**. For more information about this <u>please click here</u>



Not Settled

You might have a different card payment option that is not Stripe or SumUp. While these payment options won't be able to integrate into the apps, you can use them in parallel with TaxiCaller and choose the **Not Settled** option, where you would be prompted to enter the value of the ride so that the information can be saved in the system and appears in the generated Reports.

Not set	tled		
	Show option	Allow zero	

Please view the following article for additional information: Other card payment solutions

Not Specified (Skip)

If you enable this option, the driver will be prompted to enter a price at the end of the ride, but will be able to **Skip** doing so.

Not Specified (Skip)	
Show option	

Configure Online booking

With Online Bookings, your passengers will have the option to find your company online and make a booking directly through the internet, either with the Passenger App or a <u>Web Form</u>, without needing to talk to a dispatcher. To activate Online Bookings, please send a copy of the operations license of your company to legal@taxicaller.com.

Once your account is approved for Online bookings, you can configure the options in the <u>Admin Panel ></u> <u>Settings > Dispatch</u> > 1. General > Online Bookings

Online booking	
Bookable online	 Verify direct bookings
Display Name	New York Stars Taxi
Phone verification	Not required 🔻
Invisible	
Limit online bookings	
Online pre bookings	80%
Minimum notice	0 hours 15 minutes
Maximum notice	60 days 0 hours
Maximum ride length	124 mi
Public driver info	First NameLast Name initialLast NamePhone

• **Bookable online:** You can decide whether your company is available for online bookings or not by checking or unchecking this option.

- Verify direct bookings: If this is enabled, the passengers will be able to book online but a dispatcher will need to manually assign the bookings to the vehicles. Otherwise, the vehicles will be assigned automatically depending on the <u>Assignment</u> settings.
- **Display name:** If you have more than one company profile, you can select which one will appear as the main name for bookings.
- **Phone verification:** If this is active, your passengers will need to verify their phone number before they can make a booking in the passenger app. A four digit code will be sent as a text message to the number they enter to make sure it's authentic. This feature has been supported from the passenger app version 17.2.1 and onward.
- Invisible: If this is active, your vehicles will not be visible on the map.

Prebooking Options

Your passengers can book your company in advance if you configure your settings for it. If **Limit online bookings** is disabled, a passenger will be able to book a vehicle from your company even though all the vehicles might be busy at the time.

Limit online bookings	•
Online pre bookings	80%
Minimum notice	0 hours 15 minutes
Maximum notice	60 days 0 hours

If you do enable **limit online bookings**, you can then configure which portion of the fleet needs to be busy before a passenger can no longer book online. For example, if you select 80%, the system will disable online bookings once 80% of your vehicles are occupied. This is designed to prevent overbooking.

You can also determine which minimum and maximum notice is needed to schedule a pre booked job.

- **Maximum ride length:** Automatically determines the maximum distance you will allow your passengers to book. For example, this will prevent them from requesting a ride to a different city. This can be overridden from the Dispatch console.
- **Public driver info:** Determines what information about the drivers is visible from the passenger app.

Time, units and permissions

In the Time and units section, you can select your timezone so it applies to your entire account. It's important to configure the correct time zone for the different parts of the system to work correctly and to make sure the rides are booked at the desired time.

Time and units		
Time zone	EST, America/New_York	Ŧ
Time format	12H 🔻	
Date format	MM/DD/YYYY *	
Week starts on	Sunday 🔻	
Units	Imperial 🔻	

You can also change the formats and the units to match your preferences.

Permissions

Determine some basic permissions for drivers and dispatchers. For more advanced permissions settings, please check the <u>Permissions</u> section.

Permissions			
Allow direct assignment	•	Email reports	
Dispatcher can kick users		Edit zone queue	
Drivers can add jobs		Drivers can edit jobs	
Require GPS		Require mobile data	
Block fake GPS			

Permissions for Dispatchers:

- Allow direct assignment: Allows a dispatcher to directly assign a job to a vehicle.
- Dispatcher can kick users: Allows a dispatcher to kick
- Edit zone queue: Allows a dispatcher to move vehicles to the front of the queue.

Permissions for Drivers:

- Email reports: Drivers can email shift reports from the driver app.
- Drivers can add jobs: Allows drivers to add jobs without the intervention of a dedicated dispatcher.
- Drivers can edit jobs: Allows drivers to change some details of the jobs, such as the destination.
- **Require GPS:** If enabled, the device that runs the Driver app will need to have GPS turned on. Otherwise the driver will be prevented from starting a shift.
- **Require mobile data:** If enabled, the device that runs the Driver app will need to have mobile data turned on. Otherwise the driver will be prevented from starting a shift.
- Block fake GPS: Forces drivers to disable mock locations and fake GPS applications.

Appearance of Dispatch

Configure the appearance of the Dispatch console.

Appearance			
Dispatch version	Version 2 🔻		
Dispatch shows	2 weeks 🔻		
Dispatch alerts		Dispatch sound	
Color code jobs	•	Auto decimal price input	
Show counters		Check duplicate jobs	•
Vehicle symbol	Vehicle 🔻		

For the **Dispatch version** you can choose version 1 and 2. Version 2 is the current one, and the only one that will receive any updates, so it is recommended that you keep Version 2 in this field.

- **Dispatch shows:** Determines how far ahead the dispatch will show future jobs. You can see these jobs in the <u>Unassigned/Assigned/Active</u> list.
- **Dispatch alerts:** The dispatcher will be <u>alerted by certain events</u> that may require action or investigation.
- **Dispatch sound:** Enable sound notifications on the dispatch console. You can further configure which sounds to activate in the Dispatch console <u>Preferences</u>.
- Color code jobs: Will display jobs in different colors depending on state.
- Auto decimal price input: Will add a decimal point before the last 2 digits entered.
- Show counters: Enables or disables various daily counters in the dispatch console.
- **Check duplicate jobs:** This feature filters through jobs based on passenger name, phone number and job pick up location and gives the dispatcher a warning before creating a potential duplicate job within a certain amount of time.
- Vehicle symbol: Can display the vehicles either as vehicle icons or dots.
- **Number of new job tabs:** Usually when creating a new job in Dispach, you can see 2 more "New Job" tabs at the bottom. Here, you can set the number of tabs from 1 to 5.

- Show company in job cards: Lists company profile name under the information of the jobs that appear in the list "Unassigned/Assigned/Active" in the Dispatch console.
- Vehicle display name: Can display the vehicle names either as their id or their call-sign. Please see the <u>Vehicle</u> section for more details about this.
- Vehicle list columns: Determines which information will show in the vehicle list.

Assignment

These settings control the way jobs will be assigned from the dispatch console and how the the driver apps receive these assignments.

- Configure the Auto dispatch
- <u>Configure the dispatch Timings</u>
- <u>Assignment by zones</u>
- Driver assignment settings

Configure the Auto dispatch

This section contains settings to manage the behavior of the automatic dispatching in the dispatch console, includes **Broadcast** and **Priority settings**

If you are only starting, you can leave most of the default options on and tweak only the **Auto dispatch tries** (for the same vehicle) and the **Auto dispatch rounds** (for all the available vehicles) for the system to decide how many times to attempt dispatch. If you want the system to re-attempt dispatch to a vehicle that has previously timed-out or declined, check **Reset rejects**. For a description of the available options see below.

Auto dispatch			
Auto dispatch jobs		Auto dispatch tries	2 •
Require vehicle accept		Job accept timeout	45 s
Automatic job start		Jobs when busy	
Jobs when clearing		Jobs when away	
Hold for unreachable		Respect shift end	
Auto select company			
Reset rejects		Auto dispatch rounds	1 -
Reserved reject	default	•	
Clearing distance	3281 y		III
Auto Dispatch Settings			

Description of the options:

- **Auto dispatch jobs:** Enable or disable automatic assigning and dispatching of jobs. If disabled, you will have to manually assign jobs to vehicles in dispatch.
- **Require vehicle accept:** You can give the drivers an option to accept/decline jobs. Uncheck this option if you want to "hard-assign" a job (not give the driver an option to accept/decline).
- Automatic job start: Automatically start a job after it has been assigned to the driver.
- **Jobs when clearing:** The system will also consider vehicles that are currently set to "Clearing" when looking for the most suitable vehicle to assign a job to. <u>Please check the tip below for</u> <u>a description of what Clearing means.</u>
- **Hold for unreachable:** Holds a job offer for a vehicle that is temporarily unreachable (the system cannot establish a connection with the driver's device).
- Auto select company: Automatically selects a company based on pickup location. This will be particularly useful if you have more than one <u>Company Profile</u>. Please note that if a passenger uses the generic passenger app, no automatic selection can be made for them as they will look through all the taxi companies in the area that are registered with TaxiCaller. However this option will work if you have a rebranded app or use the Dispatch Console to book.
- **Reset rejects:** If you enable this option, the system will look for vehicles that have previously declined or timed-out.
- **Reserved reject:** If you choose **back to base** it means that if the reserved vehicle rejects the job, the job will go to "Assigned to: No one" instead of following regular auto assign rules (default).
- **Clearing distance:** Specifies the distance from the destination from which the driver can set his status to "Clearing".

The Clearing function allows a driver to signal to the system that they are about to finish a job and thus will be available for a new one. Drivers can do do this from the driver app by changing the current state from "POB" to "CLR". More information available <u>here</u>.

- Auto dispatch tries: This is the number of tries the system should make when automatically dispatching a job. After the determined number of tries the job will go to **Broadcast** if you have activated this option, and then it will go to **Unassigned** in the Dispatch Console. If you set an amount of tries higher than the number of currently active cars, the system will try to assign the job indefinitely until someone accepts it.
- Job accept timeout: Use this to select how much time a driver has to accept or decline a job that has been assigned to them. After this time, the job will be reassigned to a different vehicle.
- **Jobs when busy:** The system will consider vehicles that are currently set to "Busy" when looking for the most suitable vehicle to assign a job to.

- Jobs when Away: The system will consider vehicles that are currently set to "Away" when looking for the most suitable vehicle to assign a job to.
- Auto dispatch rounds: This determines how many times the same job can be offered to the same vehicle. Please use it in conjunction with **Reset rejects** so that vehicles that have declined or timed out can be considered for the next round.

Broadcast

Broadcast	
Broadcast jobs	
Broadcast if no candidates	Broadcast to busy
Offer radius	54681 y
Offer to	Radius 🔽
Select	Closest •
Duration	0:45
Popup	Fast select

Broadcast options

- **Broadcast jobs:** If all "Auto dispatch tries" have been made, a job can be broadcast to all available vehicles. Enable this option to broadcast jobs after all assignment tries have been made.
- **Broadcast if no candidates:** If no suitable vehicles are found when auto-dispatching, the job will go straight to broadcast if this option is checked.
- Broadcast to busy: The system will also offer broadcasts jobs to vehicles that are currently set to "Busy"
- **Offer radius:** The broadcast will reach the vehicles within this radius (from the pick up point) and exclude those that are too far.

• Offer to: Choose whether broadcasted jobs should be offered by radius, zone or zone chain. If you choose Radius, you will need to set your offer radius (setting above Offer to).

Radius
Zone
Zone chain

- Select: This option determines who wins the broadcast bid. It can be set to either the closest car or the first in the zone queue.
- **Duration:** This is similar to the option **Job Accept Timeout**. A driver would need to accept a bid within this time window.
- **Popup:** If this is selected, the broadcast offer will pop up on the driver app. Otherwise the bids can be seen in the **Offers** Tab in the driver app.
- Fast select: With this option enabled, the first driver that accepts the job will get it.

Priority

If you use priorities in the dispatch console, this section will come in handy. For example if you have 2 jobs in the same area (within a certain radius), and one has a higher priority than the other, the job with highest priority will effectively **block** the other jobs in the designed area, until it's assigned. The system will then go through the jobs in priority level (1 is lowest, 5 is highest).

This will allow you to give preferences to jobs marked with higher priority levels. You can use this if you have VIP customers or long route jobs that are more important, for example.

- Block radius: Select the area size that will be blocked by a job with higher priority.
- **Block by:** Instead of radius you can use zones or zone chains to block other jobs with lower priority levels.

Radius
Zone
Zone chain

• **Block same:** Will also block jobs with the same priority level, the job that's been created first (for ASAP jobs) will take precedence.

To learn how to use priorities in the Dispatch console, <u>click here</u>.

Configure the dispatch Timings

Dispatch timings		
Minimum time	0 hours 10 minutes	
Time per km	01:30 per km	
Duration estimates		
Passenger wait 00:00		
Passenger drop off	00:00	

Dispatch timings options

This section allows you to predefine a set of timing options in the system.

- **Minimum time:** Controls the minimum assignment time (T-minus) that the system will recommend for a job scheduled for later. You can see this assignment time in the dispatch console. A dispatcher will still be able to manually choose an earlier assignment time.
- **Time per km**: The value you set here will be used by the system to calculate the recommended assignment time (T-minus). It will use the distance between the pick-up site of a job to the center of the pick-up area as determined by the company profile.

For example if you set it to 01:00 per km, and the pick up site for a job is 10 km away from the center of the pick-up area, it will recommend that the job be assigned at least 10 minutes before it's due to start (it will assume that the vehicles in that area will spend approximately 1 minute driving time per kilometer).

If you set this value to a very small value (even 00:00 per km), it may still be limited with the Minimum time setting so that it never assigns a job under a certain amount of minutes, giving time for the driver to arrive to the pick-up site. Currently, you cannot set this minimum time to under 5 minutes.

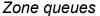
- **Passenger wait:** This can be set according to how long your drivers usually have to wait for their passengers.
- **Passenger drop off:** This can be set according to how long your drivers usually take to drop off passengers.
- The information from both passenger wait and passenger drop off is optional and would then be used to calculate job duration predictions more accurately. Since it is based on information from your company, the predictions would be customized.

Assignment by zones

The section **Zone queues** will control the assignment behavior of the zones that you can configure in the Zones section of the Admin Panel <u>here</u>.

The system will use several variables to determine which vehicle to assign a job to. As default, this will be by offering it to the vehicle that is closest to the pick-up site. However, if you enable the use of zone queues, it will also take into account which vehicles have entered a specific zone in the map, and will prioritize those.

Zone queues	
Use zone queues	
Zone queue tries	2
Always respect zone queue	
Hold queue position	



- Use zone queues: This will enable the use of zone queues. With no other modifications, it means that the vehicles that have been available the longest in a zone will be prioritized when it comes to job assignment. This way the jobs should be more fairly and evenly distributed, going to the vehicles in the zone they originated from.
- **Zone queue tries:** In here you can select either *Unlimited*, or a number of tries from *1-10*. After these tries, the system will then assign the job to the closest vehicle instead.
- Always respect zone queue: When this is active, if two vehicles are closer than 2 km from each other, the system will prioritize the zone queue selection when a job has been assigned to the closest vehicle.

* "Always respect zone queue" will only apply if the job is assigned to the closest vehicle.

• Hold queue position: If this is active, a driver will be able to hold their queue position even when taking street jobs (hailed off the street) or sets their driver app to "away".

Zone check in

Zone check in	
Zone check in	
Distance limit	10116 v
Time to enter	10:00
Report drop off zone on	drop off 💌
Sticky zones	0%

- Zone check in: If this is active, drivers can check in to zones they are not currently in. The options below, **Distance limit** and **Time to enter**, can then be used to determine how far (in time or distance units) a driver can be before they can check in into a zone.
- **Report drop off zone on:** This option decides at which point a driver is considered to be queuing for a zone in which they are about to be available (by dropping off a passenger). The default option is "Drop off" which means that the vehicle won't officially enter the queue for the new zone until they drop off the passenger. If you choose "Start", the vehicle will enter the queue for the new zone from the start of the job. Other options are "waiting" and "pick up" which function similarly.

drop off		
start		
waiting		
pick up		

• Sticky zones: This option determines how long a vehicle will keep their place in a zone queue after such vehicle has already left the zone. The time their position will "stick" is relative to the time they have spent queuing in the zone. The higher the percentage you choose here, the longest this time will be.

Short trip criteria

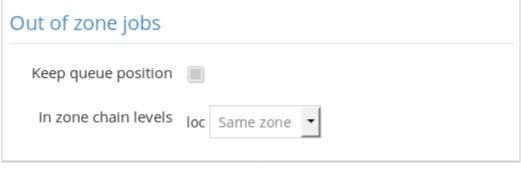
This option determines how short a job must be for a driver not to lose their place in the queue. The sliders "Max distance" and "Max duration" can be used to configure the distance and duration of what constitutes a "short job". The modifier "Require same zone" means that a driver can only have a short job in the same zone for it not to lose their place in the queue.

Short trip criteria		
Enabled		Require same zone
Max distance	12303 y	
Max duration	10:00	

Short trip criteria options

Out of zone jobs

In this section you can control whether a driver can keep their queue position even when taking out of zone jobs.



Out of Zone Options

Driver assignment settings

Driver conduct

- 1. **Driver conduct main options:** The first options in this section allow you to determine what happens when a driver declines a job offer, allows it to time out or their device become unreachable. The options here are "Do nothing", "move to the back of queue" and "set to away" (set driver status to "Away").
- 2. **Minimum pick up wait:** Determines a minimum amount of time (in seconds) the driver is required to wait at the pick up location before being able to report that the passenger was a "no show". The driver will not be able to "deliver" or "cancel job" until this time has passed.

Driver conduct			
Job offer declined	move to back of queue		
Job offer time out	move to back of queue 💌		
Device unreachable	do nothing 🔹		
Minimum pick up wait 00:00			
Presence			
Challenge after never			
Challenge variation	no variation		

Driver Conduct Options

Presence

3. **Presence challenge:** If this is active, the driver will have a pop-up appear in their driver app prompting them to tap on a button. If they fail to tap on it on time, they will be logged out from their

shift. This can be used to make sure the drivers are active and not away from their devices during their shifts.

The modifier "Challenge variation" can be used to make sure these pop-ups do not appear at predictable times, but instead vary within the specified amount of time. For example if the presence challenge is set to 3 hours, and the variation is set to 20 minutes, one driver could be challenged after 3 hours has passed, *give or take* 20 minutes or anywhere between 2 hours 40 minutes and 3 hours 20 minutes after the start of their shift or their last alert.

Driver information

In this section you will be able to determine what kind of information is available to the drivers, among other things.

Driver information					
Anonymize vehicles		SMS notify when away			
Show coming jobs		Show ASAP jobs			
Announce jobs	20:00				
Job auto status		Show client phone			
Hide job creator		No job view before shift start			
Show account info		Sound notification for 🦳 job updates			
Dispatch number	+164622023	304			

Driver Information Options

- **Anonymize vehicles:** When this option is active, the vehicle IDs will not be displayed in the zone queues in the driver app. This way the drivers won't be able to see which vehicles are queuing in which zones.
- **SMS notify when away:** When this option is enabled, the system will send a text message from the in-car Android device to the driver's personal device when a job is offered to them.

- For any SMS functionality to work, the device must be capable of sending text messages (this may not work from many tablet devices). The driver's phone number must also have been correctly entered to their user profile.
- **Show coming jobs:** When this option is enabled, the drivers will be able to see the upcoming jobs in the "Queue Show: Zones" view of the driver app.
- Show ASAP jobs: When this option is enabled, the drivers will be able to see the unnasigned ASAP jobs.
- **Announce jobs:** It's a time modifier that controls how far into the future the "Show coming jobs" will display to the driver. Usually you can set this from 15 minutes to up to an hour.
- Job auto status: Will put the driver automatically into the Waiting and Passenger on Board (POB) status unless cancelled by the driver. This will be based on the GPS position, for example, when the driver is inside a certain radius from the pick up point, it will prompt the app to automatically set the status to Waiting.
- **Show client phone:** This determines whether the driver will be able to see the passenger's phone number in the driver app.
- **Hide job creator:** Hides the name of the person (most likely, a dispatcher) who created the job for the driver.
- No job view before shift start: The drivers are not able to see the Job View screen in the driver app before they've started their shift.
- Show account info: Displays the extended information about customer accounts in the driver app.
- **Sound notification for job updates:** Enable to have a sound notification every time the status of an assigned or active job is changed.
- **Dispatch number:** Here you can enter the phone number drivers should use when calling dispatch.

Incoming job info:

Any of these settings can hide a piece of information from the driver about a job.

Incoming job info	
Hide drop off	Hide pick up
Hide drop off zone	Hide pick up zone
Hide extra info	Hide passenger

Incoming Job Info Options

- Hide drop off / Hide pick up: Will hide the origin or the destination of a job before a driver accepts it.
- Hide drop off zone / Hide pick up zone: Will hide the origin or the destination zone in job offers to the driver.
- Hide extra info: Will hide the extra info in job offers to the driver.
- Hide passenger: Hides the passenger details in job offer to driver.
- **Hide job on time out:** Hides job information on expired assignations or offers. This way the driver cannot see which jobs they missed on.

Key Maps

The Key Maps portion of the admin panel found at the <u>Dispach > Settings > 1.General section</u> is tied to "mapping bluetooth key codes" for the TaxiCaller driver app. This feature was originally designed to help drivers trigger the driver app alarm in a threatening situation without having to press any buttons on their Android device and could instead more discretely trigger the alarm by pressing a button on a small Bluetooth device in their pocket.

How to set up

- You will need a Bluetooth device
- You will need to pair this Bluetooth device with the Android driver app device.
- Once they are paired you need to go into the settings portion of the driver app by pressing the cogwheel button, in there you need to select "Debug bluetooth key codes".
- By pressing A button on your bluetooth device the driver app tell you what bluetooth key-code the button you just pressed has.
- Now you simply edit the Key Maps portion of the admin panel and assign the keys you want to do whichever task you prefer. For example you could have a "raise volume" button on a bluetooth device Accept a job and the "decrease volume" button Decline a job.

Key maps	
Driver - Android	
Action	Key code
Alarm	× 85
Accept	× 88
Decline	× 87
Forward	* 87
Back	× 88

Operating Hours

The feature found under <u>Settings > Dispatch</u> > 3. Operating Hours has now been replaced by the setting under **Companies**, where you can set the Operating Hours for each of your company profiles.

Check the section about <u>Companies</u> for more information.

Tags

Under <u>Dispatch Settings > 4. Tags</u> you can create tags which you can later set on your drivers and vehicles.

You can fully customize which tags to add and you can create up to 25 tags of each kind. To create them or

edit them, click on the button at the bottom of the screen and then click on when you're done.

t 3.0	Operating Hours	4. Tags	5. POIs	6. Text back		
id Cu	stom vehicle tag				i	d Custom use
1. N	on-smoking				1	. Female
2. P	et-friendly				2	. Male
3. Lá	arge trunk				3	a. AM Shift
4. E	co-friendly				2	. PM Shift
5.					5	j.

To add the tags to a driver or a vehicle, please check the following sections:

- 1. Add and manage users.
- 2. Add and manage your vehicles.

Text back

The feature found under <u>Settings > Dispatch</u> > 6. **Text Back** has now been replaced by the setting under **Notifications**, where you can set not only configure SMS notifications but also email messages with custom tags.

Check the section about <u>Notifications</u> for more information.

Please rest assured that everything that was possible with the Text back feature is still available now with the Notifications feature.

Manage your company profiles

You can configure the options for each of your company profiles, especially if you have multiple ones. To begin, access Settings > Companies in the Admin Panel or follow this link: <u>https://admin.taxicaller.net/</u><u>admin/settings/companies.php</u>

Active companies and Filter company rounds

You can decide which of your company profiles is active by checking or unchecking the **active** box. An inactive company won't be considered for booking.

Dashboard	Companies	New York Stars Taxl
📰 Billing 🗸 🗸	New York Stars Taxi	Active
✿ <mark>\$</mark> Settings ∽		Assignment
- Dispatch		Filter company rounds Forever
» Companies		l'ulever
	•	

Company Settings

Filter company rounds is useful when a booking is made for a specific company. The system will then make as many attempts as specified to assign the booking to *that company only*. After the attempts have been made, the booking will go to auto-assignment (any company might be assigned to the job). If you wish that the job never goes to any other company, select **Forever**.

Assignment strategies per company

You can determine the specific assignment strategy the system will use when automatically dispatching a job depending on the source of booking or the type of booking. For example, you could make it so manual bookings are assigned to the closest vehicle but mobile bookings are assigned according to the zone queue order. Move the sliding bar to change the **Search radius** for each booking source.

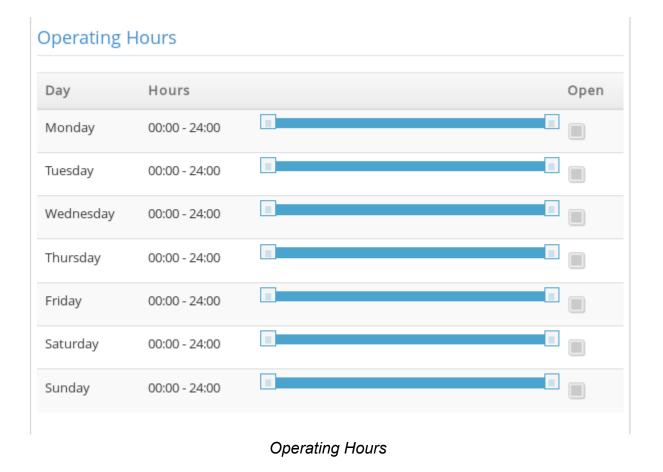


Assignment					
Filter company rounds Forever					
Booking type	Assignment strategy				
ASAP	default 🝷				
Prebook	default 💌				
Booking source	Assignment strategy	Search radius			
C manual	default 🝷	unlimited			
rep mep	default 🔹	unlimited			
📋 mobile	default 💌	unlimited			
📥 recep.	default	unlimited			

Assignment Strategies Options

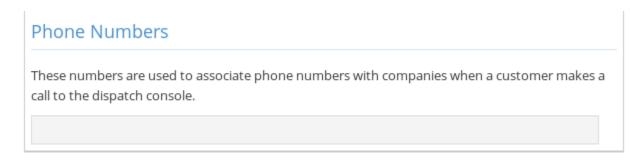
Operating Hours

Determine the operating hours for each company for each day of the week. Uncheck the **Open** box if the company is closed for service on that day.



Phone Numbers

Enter the phone number associated to this company profile. When a customer makes a call to this number and is answered in the dispatch console, the booking form will auto-fill the company.



Phone Numbers Settings

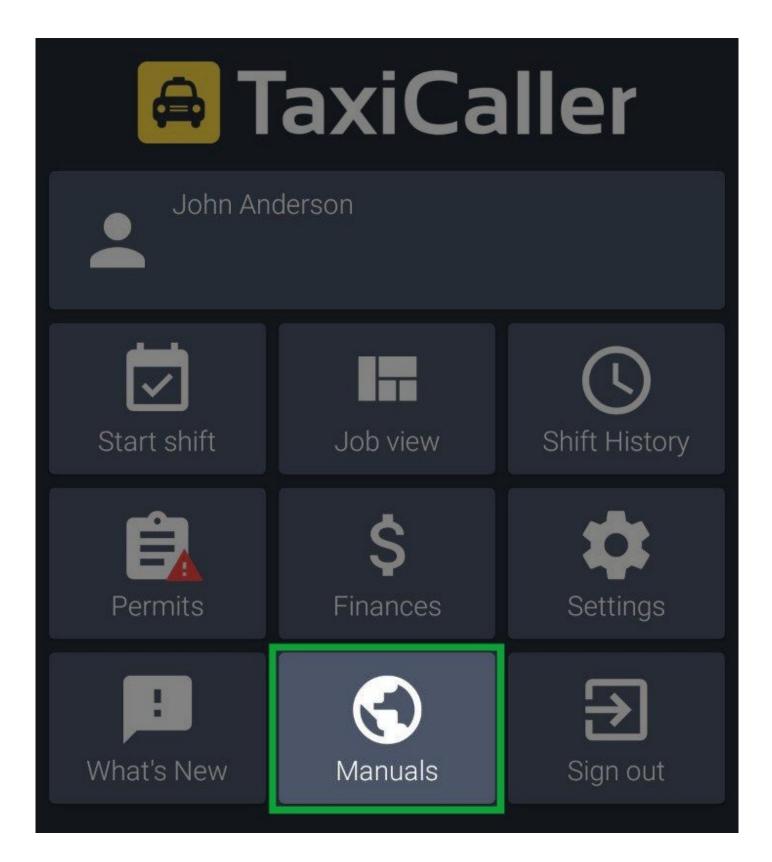
Add custom buttons to the Driver App

Create custom buttons on the driver app menu with a link to a URL of your choice.

- Press on the green plus sign to create a button.
- Write a name for the button.
- Write the URL where the button will lead.
- To add more buttons, return to the first step.
- Press **Save** when you're done.

Dashboard	Main menu		
📰 Billing 🗸 🗸	Custom buttons		
Settings V		driver app main menu to link to a L	JRL of your choice
Dispatch	Label: ×	Label:	
- Companies	Manuals		
» Driver app	URL: www.manuals.com	URL: http://www.gomple.co	
Vehicle types	✓ Enabled	✓ Enabled	
Notifications			
Embed	🖺 Save		

This will appear as a new button in the driver app. After clicking on it, the driver will be redirected to the URL that was chosen above. This will open in any browser that's already configured for the device that you're using.



Questions about this feature

Q: Nothing happens when I press my new button in the driver app!
 A: Make sure that the URL you configured for it is valid. If it's an invalid address it will not open it.

Establish permissions for drivers and dispatchers

In this section, <u>https://admin.taxicaller.net/admin/settings/permissions.php</u>, you will be able to change the permission levels for your users regarding a variety of actions such creating and editing jobs or suspending vehicles and drivers.

No one
Everyone
Level: 1
Level: 2
Level: 3
Level: 4

The permission levels are either no one, everyone, or 1-4 levels. Level 4 is the highest, which means that if you set an action to Level 4, only this type of user will be able to do it. You can assign these levels to your users in the <u>User</u> section.

Send email and SMS notifications to your passengers

You can find this feature by going to <u>Settings > Notifications</u> in the Admin Panel.

Send emails and SMS to your passengers

You can send automatic emails and SMS to your passengers at several different stages of a ride. For example at the moment when a vehicle has been prebooked.

If you have more than one passenger in a job, the notifications will only be sent to the "main passenger", or the first one that you add.

8	Dashboard	1. Customer	2. Internal - Email	3. Receipts	4. Settings	5. Tags					
	Billing	Group: Default	iroup: Default 🔻 🕂 💼								
00	Settings		Email SMS Send text messages to passengers at the different job statuses here below. Use the tags in section 6. Tags to use information from the system to make your messages more customized and informative for your passengers. To send these messages, you must download the TaxiCaller Envelope app on an Android device found under 5. Settings > Apps. Please contact us at support@taxicaller.com for the tutorial as well.								
	Dispatch										
	Companies	Use the tags i									
	Driver app										
	Permissions										
	Vehicle types	Call out	Call out Message: Off Passenger dropped off Message: Off								
»	Notifications	Passeng									
	Embed	Passeng	Passenger on board					Ŧ			
	Permits	No show					sage: Off	•			
	IVR	NO SHOW	/			Mes	sage: Off	· · · ·			
	Users	Cancele	Canceled by passenger Message: Off status_verified_prebook Message: Off								
.	Vehicles	status_v									
÷.	Zones	new pre	book			Mes	sage: Off	v			
Ţ	Tariffs				🖺 Save						

Call out	When a vehicle has been assigned, the driver has accepted the job (Status Callout in the Driver app) and is on their way to pick up a passenger.
Passenger dropped off	When the passenger has been dropped off at the end of the ride (The driver presses the button Delivered .
Passenger on board	When the passenger gets into the vehicle and the driver presses the POB button
No show	When the driver cancels a job and selects No show as a reason (after a passenger fails to show up at the point of pick up)
Canceled by passenger	When a passenger cancels the ride.
Verified Prebook	When a prebook is verified and assigned by a dispatcher (if they have enabled Verify direct bookings)
New Prebook	When a prebook is made.
Waiting for Passenger	When the driver has reached the pick up location and the driver app is in the Wait state.
Cancel	When the job is cancelled by a driver or dispatcher for any other reason.

To set up these messages:

- Under 1. Customer Select either the Email or SMS tab
- In the drop down menu to change Message: Off to Message: On for the type of message you wish to send.
- A message box will open where you can write the message you want to send to your passengers.

new prebook	Message:	On	٣
Subject			
Message			
uranoPe			
			6

Send all texts directly from each driver's device.

You can have either all texts sent from one device or the texts sent from the drivers device, or even both. To make all texts messages only send from the driver's device (the one assigned to the job), do the following.

- 1. Edit the driver's user profile and specify that they cover both the role "Driver" and "Messenger"
- 2. As long as their Android device supports sending text messages the system will handle the rest.

* iOS devices impose technical limitations that prevent these devices from being able to take the messenger role.

Send all texts from only one dedicated device.

- 1. Create one user that has the Messenger role and no other roles.
- 2. Leave this user signed in to the Envelope app
- 3. Ensure there are no drivers that have the Messenger role as well as the Driver role.

If you have a dedicated text sender and several drivers that can send text messages, but some drivers that can't, that's no problem at all. If the driver has support for sending text messages and the Messenger role he/she will be the sender. If the driver doesn't the dedicated Envelope device will.

Using tags and HTML

To personalize your message with the passenger's name and specific time and place of their pick up, you can use Tags.

new prebook	Message:	On	٣			
Subject						
Thanks for booking your ride!						
Message						
Hi, [job.cl.first_name] [job.cl.last_name]						
The vehicle with license plates [vehicle.tags.plate] will pick you up at [job.stimes.start]						
Thank you for booking with [job.co.name].						
		1.	\$			

You can use tags to write a more personalized message.

You can find these tags in the **5.Tags** tab. This way, if your passenger's name is Peter Smith, the email they receive would read:

Hi, Peter Smith The vehicle with license plates KKK111 will pick you up at 16/06/2017 13:36 Thank you for booking with Nystartaxi.

You can even use HTML formatting if you wish to add line breaks. For example, by writing at the end of each line, you would get:

Hi, Peter Smith

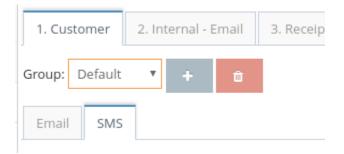
The vehicle with license plates KKK111 will pick you up at 16/06/2017 13:36

Thank you for booking with Nystartaxi.

Using Notification Groups (NEW!)

You may wish to send a specific type of message to only certain customers. If your company has VIP customers, for example, you can send custom emails and text messsages with special offers or greetings just for them. To do this:

• Click on the + button next to **Group:** to create a new group.



- You will get a pop up where you can write the group name, for example Hotel Staff then click on OK.
- Select the group you just created (instead of Default).

The messages you write under this group will only apply for this group. After this, go to the <u>Customers</u> section and assign the group to your customer account.

Send receipts to your passengers!

To be able to send receipts to your passengers, configure the settings in <u>Settings > Notifications</u> > 3. Receipts.

1. Customer	2. Internal - Email	3. Receipts	4. Settings	5. Tags			
App payr	ment receipt cu	stomize your	receipts for J	payments	below		
Field						Value	
Company r	name	[job.co.name]					
Address lin	ne 1	New York St. 110					
Address lin	ne 2						
Postal code	e					5555	
City		New York					
Country			USA				
Registratio	n number					1111	

The fields in this section will contain the information you wish to display in your receipts.

If you have more than one passenger in a job, the receipt will only be sent to the "main passenger", or the first one that you add.

Add custom fields

To add any information that is not in the section above, you can use the custom fields below. Give them a **Label** like **Pick up site** and use the tags in section 5. Tags so that the system retrieves the particular information about a job or a customer.

Custom field	Label Choose a custom label for the value field that will be represented on the receipt	Value Choose a value in this section using the tags in section 5. Tags for customized info from that job such as vehicle, driver, route or fare
Company info 1		
Company Info 2		
Job Info 1	Pick up site	[]ob.route.from_text]
Job Info 2	Drop off site	[]ob.route.to_text]
Job Info 3		

Select in which cases the receipts will be sent

Finally, select for which booking sources or payment types you'll send receipts for. You can disable all except for in-app payments.

Send receipts for	
Here you can choose from what booking sources and for what payment types to send sent from that booking source or payment type.	receipts to the passengers email address. Unselecting an item means that receipts will NOT be
Booking source	Payment type
	Billed
manual	Card present
	E-ticket
	Promotions
reception	Cash
	Receipts will always be sent for in app payments.
✓ street	
✓ web	
	🖹 Save

The envelope app

You can download the Envelope app directly from the Admin panel. You can find it in <u>Settings ></u> <u>Notifications</u> > 4. Settings and scroll down to the **Apps** subsection.

Apps		
	Text message sender	Download the TaxiCaller Envelope app to export onto an Android device to send your SMS notifications you created in section 1. Customer - SMS
		Download TaxiCaller Envelope, for android

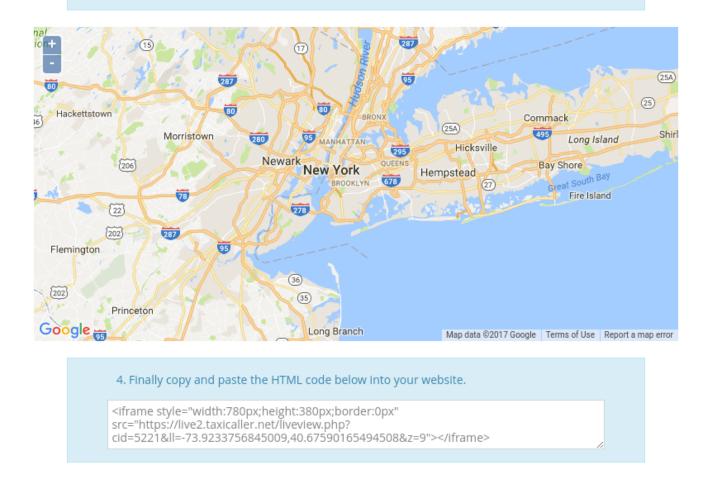
- Transfer it to the device you wish to use as a dedicated messenger.
- Log in with a messenger user.

Embed a booking form into your website

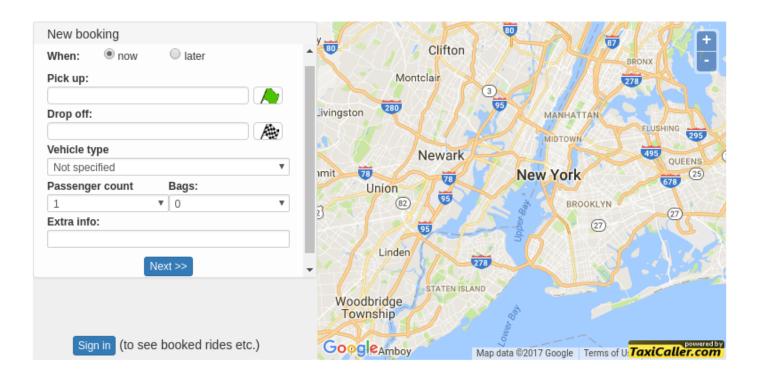
Go to <u>Settings > Embed</u> in the Admin Panel to generate your embed code. You can insert this code in your website so that it will display the booking form.

- Select your desired Map Size between Small, Medium and Large.
- Select whether you wish to allow immediate bookings from the booking form.
- Select HTTPS mode. If you choose no, it will default to HTTP mode. This depends on your website configuration.
- Zoom and position the map as you want it to be displayed on your website.

- 1. Select your desired map size. Small
- 2. Immediate booking enabled Yes 🔻
- 3. Secure HTTPS mode enabled Yes 🔻
- 4. Zoom and position the map as you want it to be displayed on your site.



• Finally, copy and paste the generated HTML code into your website. It should appear like the image below:



Manage permits for your drivers and dispatchers

With Permits, you can personalize which permits and licenses should be required of users and vehicles depending on your local regulations.

Access this by going to <u>Settings > Permits</u> in the Admin Panel.

• To begin, click on the green + sign.

ID	
	v
Name	
Type	-
Enabled	
Required	

- Give your permit an ID and a name.
- Select whether this permit applies to vehicles or users.
- If you choose User, select whether it is for drivers or dispatchers.

Enabled means that the permit field will appear for example in the driver app, allowing the driver to upload a licence or other document.

Required means that the user won't be able to start a shift if they don't have an approved permit.

ID ×	ID ×	ID ×	ID ×
1 *	2 *	3 *	4 *
Name	Name	Name	Name
COF	Taxi License	Camera Check	Driver License
Туре	Туре	Туре	Туре
Vehicle 🔻	User 🔻	Vehicle 🔻	User 🔻
	Applies to dispatchers		Applies to dispatchers
🕑 Enabled	 Applies to drivers 	🕑 Enabled	 Applies to drivers
Required		Required	
	🕑 Enabled		Enabled
	Required		Required

You can create many different types of permits

Remember to click on **Save** at the bottom of the screen before you navigate to a different page.

To read more about how the permits are approved, check out this article from the Dispatch Manual <u>Manage</u> <u>Permits</u>.

To read more about how to upload permits, check out this article from the Driver App Manual. <u>Upload a</u> <u>Permit.</u>

Configure the IVR

IVR stands for *Interactive Voice Response*. The IVR booking feature allows passengers to call a number to automatically place their booking without the intervention of a human dispatcher.

You must have an account with <u>Twilio</u> to use this feature. Please look at the following article for instructions about how to set a Twilio account: <u>Set up your Twilio account.</u>

Configure the Language

• Go to <u>Settings > IVR</u> to configure this feature.

🚯 Dashboard	Actions Menus		
E Billing ~	Language: Default 🔹 🛨		
🗱 Settings 🗸 🗸	The IVR booking feature allows passengers to call a number to automatically place their booking		
Dispatch	through address selections provided by recorded messages created below. You must have an account with Twilio to use this feature. Please contact us at support@taxicaller.com for the tutorial as well.		
Companies			
Driver app			
Permissions	Voice Settings		
Vehicle types	Default		
··· Notifications	language		
Embed	Voice Alice 🔻		
Permits			
» IVR	When a booking was successful		
🗳 Users			
🖨 Vehicles	E Save		

• The first thing to configure is the **Language** of the voice response. You can either select it at the top, or leave it as **Default** and select that **Default language** below under **Voice Settings**

- Select the voice between Alice, or a generic Man and Woman.
- Selecting the correct language is essential since this is what the Interactive Voice will try to adapt to. You can configure more than one language, making sure that the phrases that you write match the selected language.

Configure the Actions

• Configure the actions based on your preference. Placeholders such as [pickup] and [eta] will be replaced with the real value when read out.

When a booking was successful				
Do:	Hang up 🔻			
Say before hanging	A cab has been booked to [pickup] and will arrive in [eta]. Thank yo			
up:	Available placeholders: [pickup], [eta]. These will be replaced with the actual value when read out.			

- You could use the **Forward call** action to any desired phone number, such as the phone number to your dispatch central.
- Don't forget to click on **Save** once you're done.

Configure the Menus

- Select the Menu tab and click on Add new menu
- Give your menu a name and click on Create

Actions	Menus	
		You have no menus yet Add new menu
Twilio li	nk:	
🖹 Save		

- In here you can once again select the desired language and voice.
- Add a greeting which will be said before listing the options.
- You can add up to 10 menu options, that would go from 0 to 9 in the keypad. To add each additional option, click on **Add keypad option**.
- Configure the **Default Action** to know what to say if a customer presses an invalid key.

Keypad options			
1 •			
Option phrase:	Press [digit] if you want to make a booking.		
	This is what will be read out when the list of options is presented. Available placeholders: [digit].		
Do:	Book stored location 🔻		
Source:	Customers Saved Places 🔻		
Place:	Home v		

As an example, you could configure the number 1 in the menu to make a booking to the customer's home. You can then associate this number to a **stored location** which will be taken from the **Customers Saved Places**, for example their **Home**. This information will be taken from your customer account as configured through the dispatch console.

Please check the following article for more information about how to determine a customer's home and work place: <u>Store preset locations for your customers.</u>

Verify your settings

Once you have these instructions, including the <u>set up of the Twilio account</u>, you can verify that it works by calling the number provided by Twilio.

Use the keypad to navigate the options presented by the IVR and see how they interact with the system to test your IVR set up. Call from a known phone number, or attach the phone number that you're testing with a customer account in the dispatch console. Ensure that the IVR recognizes you based on the information on that customer account.

To get rid of the Twilio-demo message at the start of the call, you will have to upgrade your Twilio account to a full version.

Additional fees may apply based on Twilio's costs and terms of use.

Set up your Twilio account

Signing up with Twilio

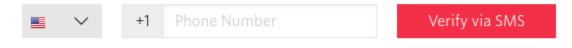
If you don't yet have a Twilio account, please follow these steps, otherwise go to the next section below to configure your Twilio account with TaxiCaller.

- To create an account with Twilio, visit the following link: https://www.twilio.com/try-twilio
- Sign up with your name, company and email address.
- In the options below, make sure you choose Voice, IVR Phone menus, and I'm not a developer.

Sign up for free				
John	Smith			
NY Taxis				
john@nytaxis.com				
	•••••			
Strong				
WHICH PRODUCT DO YOU PLAN TO USE FIR:	ST?			
Voice		\sim		
WHAT ARE YOU BUILDING?				
IVR - Phone Menus		\sim		
CHOOSE YOUR LANGUAGE				
I'm not a developer		\sim		
POTENTIAL MONTHLY INTERACTIONS (OVER	SMS, CHAT, VOICE, & VIDEO)			
Somewhere in between		\sim		
Get Started By clicking the bu	tton, you agree to our <u>legal policies</u> .			
Already have an account? Login				

• After you confirm your details. you will need to verify yourself either by SMS or by a phone call.

We need to verify you're a human.



We will send a verification code via SMS to number above

Or, we call you instead.

The phone number you provide will be used for authentication when you login to Twilio Console. Twilio supports SMS and Voice as authentication methods.

Configuring Twilio

- You will be taken to the Twilio console after signing up.
- Make sure you are in the **Programmable voice** section.
- Click on Get your first Twilio number to generate the number where your customers will be able to call to get the IVR service. You will be able to search for other numbers if you don't like the first one provided. * Click on Choose this number

1. Get a Number

In order to make calls or send messages through the Twilio API, you need to get a Twilio phone number.

Get your first Twilio number

- Once you have selected a number, click on Manage Phone Numbers
- Click on your phone number in the list.

Use the Twilio link to connect TaxiCaller and Twilio

- Go to the TaxiCaller admin panel where you <u>configure the IVR</u>, and copy the link that they provide at the bottom of the screen.
- Paste the Twilio link from TaxiCaller into the Twilio console in the top Webhook field
- When you're done, click **Save** and continue configuring your IVR settings.

Add and manage users: Drivers, dispatchers and messengers.

Your entire team can be managed from the Users section in the Admin Panel.

B	Dashboard		Search:	
	Billing	~	user	
00	Settings	~	Anderson, John	Î
꺌	Users	•	Johnson, Mary	C
⋳	Vehicles		Clark, Anthony	Ð
÷.	Zones		Young, Paul	•
Т	Tariffs		Wright, Kevin	•
	Reports	~	Thomas, Mark	Ð
	Replay		Walker, George	Ð
	Planning	~	Lewis, Tim	Ð
	Customers	~	Hall, Jason	Ð
			Lopez , Daniel	Ð
	Promotions	~	Roberts, Jeff	.
-	POIs		Showing 1 to 47 of 47 en	
47	Jobs	~	-	Previous Next
<u>.III</u>	Statistics	~	+ Add User	

Add a new Dispatcher

A Dispatcher will be operating the Dispatch console, controlling the incoming bookings and dispatching them, and in general will have an overview of how the rides and drivers are functioning on a day to day basis.

Once in the **Users** section, click on the **Add user** button on the right side of the screen or at the bottom of the screen. Make sure you select the right **Role**, as a Dispatcher. You can just fill in the name, username, and password so that they can use the dispatch console. The rest of the details are optional but recommended.

Sele	ect or add a new user
	+ Add User

While a user can have all three roles, they can only be logged in with one session at the time. For example a user that is both a messenger and a driver, currently signed in with the Envelope app as a messenger, will get logged out as soon as the same user info is entered to log in the driver app.

Add a new Driver

For a Driver user you can just fill in the name, username and password so that they can use the Driver app. The rest of the details are optional but recommended. Make sure you select the right **Role**, as a Driver.

General				
Roles	🖻 💮 Driver	Standard	7	
	🗆 🜔 Dispatcher	Standard	τ	
	🔲 🗹 Messenger			the second
Username	driver1			- Andrew -
Phone Number	+16465426132			A
First Name	John			- I have
Last Name	Anderson			
Password	New Password			Change Remove
Driving license				
Operator license				
Address				
Note				
Tags 🔲 Ferr	nale 🕑 Male 🔲 AM Shift 🔅) PM Shift		

If you add a phone number, this will be displayed to the passengers after a successful booking. You can also add <u>user tags</u> that can be used for additional information.

Add a new Messenger

If you have activated <u>SMS notifications</u>, the messages will be sent from the device where the messenger user is logged in. Make sure that this device is capable of sending SMS.

These messages can be sent directly from the Driver App. For example, a message can be sent to the passenger when a driver is assigned to their ride. For this to work, the driver in question needs to also have the messenger role and their driver app must be installed in a device capable of sending SMS.

The Envelope app

If no drivers are assigned as messengers, but you still want the SMS notification functionality to work, you'll need to have at least one Android device capable of sending SMS with the Envelope app installed. You can download the Envelope app from the <u>Admin panel – Settings – Notifications – 5. Settings</u> and then export it to an Android device.

Configuring the SIP Phone options (VoIP)

If you want your Dispatchers to be able to receive calls from passengers to make bookings, you can enable the SIP Phone.

*	This article will tell you how to enable a dispatcher for the use of the SIP Phone. For more information check our main <u>Softphone guide</u> .					
	Enable Phone					

Phone		
	Enable phone 🛛	

Select the dispatcher user in the Admin Panel > Users and scroll down until you find Phone.

Check Enable phone. This will expand the settings to allow you to enter details about your specific service.

Configure Phone

Enter the User, Domain and Port as given by your VoIP provider.

Proxy, Expires and Keep-alive interval can be optionally filled out if your provider requires it. They can be left blank otherwise.

Enable phone	۲	
User		
Domain		
Port		
Proxy		
Expires		seconds
Keep-alive interval	0	seconds

Populate on Answer call or Incoming call

Choose whether the booking field in the Dispatch console should populate with the passenger details associated with the number when the call comes in or only after it's answered.

Populate on	answer call	Ŧ
Clean jobs		
Reset job counts		
Caller-id	Replace	with
Version	external	Ŧ
Force transfer		

Clean jobs

This option controls how much information from the previous job should populate the "New job" tab upon the caller ID appearing. If you enable this option, only the pick up, drop off, passenger and phone number will populate. If you do not have this option enabled, all information such as number of passengers, number of bags, vehicle type, info written in the information box, as well as any potential tags will all be populating the booking form.

New Job #1							
LOCATION							
Enter a pick up addr	ess.			×	Q		
T↓ Enter a drop off add	Enter a drop off address						
Route: Incomplete . Zone		• -					
When: now later							
PASSENGERS							
A Name	Q	ۍ	Phone number		Q		
# Account ID	۹		E-mail		+		
Payment methods: 🕇							

Reset job counts

This option is similar to "Clean jobs", but it only controls the number of passengers, bags wheelchairs and cars set to any previous jobs. So if you enable only this option but not the "Clean jobs", only the counts (passenger, bags, wheelchair and cars) will be reset on the job details, whereas the information in the info box, potential tags and vehicles type selection will still be included.

Caller-ID replace [] with []

This option allows you to handle different formats of telephone numbers in a standardized way. For example, some PBXs add an extra 0 as a prefix to a phone number. If this is the case with your phone system, you may set it to "Replace 0 with [blank]", which will then remove the 0 and simply use only the telephone number.

Or for example, if you want to remove potential country codes from phone numbers, you may do "Replace +1 with [blank]", which will remove the +1 from being added to the booking form.

Version

Please choose "External" unless specifically indicated. The SIP Phone might not work as intended if another option is chosen.

Force transfer

This will present a button in the Dispatch console that allows for transferring a call. The function for call transfer will heavily depend on your VoIP provider.

- When you enable this option, the button will appear but if it's not covered by the VoIP provider, it will not function.
- Sometimes when a VoIP provider has support for transferring calls this option should show up automatically without having to check the option "Force transfer"
- If you aren't sure, you can test enabling it and see what happens, as some VoIP providers simply don't state explicitly whether transfers are possible or not.
- If you need to know more, please contact your VoIP provider.

Add and manage your vehicles

Navigate to the <u>Vehicle section in the Admin Panel</u>, to create and manage your vehicles. In this view you will see a vehicle list and each vehicle you select will be shown on the right side of the screen. You can use the search bar at the top to easily filter through a large amount of vehicles.

	🔒 TaxiCaller	- ad	min	
æ	Dashboard		Search:	
	Billing	~	vehicle	
0	Settings	~	✓ 1, Car 1	``
	Users		🗸 2, Car 2	
	Vehicles		🗸 3, Car 3	
÷.	Zones		🛩 4, Car 4	
Т	Tariffs		✓ 5, Car 5	
2	Reports	~	✓ 6, Car 6	
►	Replay		✓ 7, Car 7	
m	Planning	~	✓ 8, Car 8	
*	Customers	~	 ✓ 9, Car 9 ✓ 10, Car 10 	
	Promotions	~	✓ 10, Car 10	<u> </u>
#	POIs		e n, carn	<u> </u>
	Jobs	~	Showing 1 to 45 of 45 entries	Previous Next
	Statistics	~	+ Add Vehicle	Freedous Next

These vehicles are *virtual representations* of the vehicles you have physically. Although you cannot delete a vehicle, you can always reassign one of these virtual representations so it matches a different physical vehicle if you need to do so.

Adding a vehicle

If you don't have a vehicle yet you will not see any cars in the list. Begin by clicking on the **Add Vehicle** button either in the middle of the right-hand panel or at the bottom of the screen.

Sele	ct or add a new vehicle	
	+ Add Vehicle	

 Give the vehicle you are creating a Number and a Callsign. The Callsign, which is the name of the vehicle that will be displayed online for dispatchers and in the apps, can be changed later if you wish to rename it. However, *once created you cannot change the number*, which is the internal ID for this vehicle.

The list of vehicles that appears in various parts of the system such as the driver app, will be ordered by **Number** from smaller to bigger.

 Next you can specify all the characteristics of your virtual vehicle so it matches the actual physical one. Add the number of passengers, bags and wheelchairs that are supported, the type, make, color, license and chassis number for each of the vehicles. You are free to add as much or as little information depending to your local regulations (only number of passengers, bags and wheelchairs are obligatory).

Passengers:	4 •	Bags:	4 🔻
Wheelchairs:	0 •	Type:	Sedan 🔻
Make:	Toyota	Image:	sedan 🔻
Color:	Yellow 🔻	Color name:	Yellow
License Plate:	xxx111	Chassis Number:	12345
Enabled:	×	Phone Number:	

If you want to add information for a vehicle that is not specified in any of the fields, you can use <u>Custom Vehicle Tags</u>, for example "**Pet-friendly**".

3. **ENABLE YOUR VEHICLE**. You won't be able to use the vehicle if it's not enabled. This means that you can remove the checkmark to prevent drivers from accessing this vehicle.

Remove the **Enabled** checkmark if you want to avoid a vehicle being accidentally activated by a driver logging into it.

Reserve a vehicle for a driver or device.

Use the fields **Reserved for**, **Belongs to**, **Drives for** and **Approved devices** (the latter option is found after scrolling all the way down in this panel), to limit the vehicle to be accessed only by certain drivers. To find the device ID, check the bottom of the screen in the **Driver App**, this ID is unique for each device and if you restrict the vehicle this way, a driver can only start a shift from this particular phone or tablet.

Reserved for	Anderson, John
Belongs to	New York Stars Taxi 🔻
Drives for	New York Stars Taxi
	(all if none selected)

Other properties

Hailable: It means that a driver of this vehicle will be able to press the **busy** button in order to take a street job. However, disabling this option won't prevent the vehicle from being hailed from an online booking form or passenger app unless **Online bookings** is disabled or the vehicles made invisible in <u>Settings > Dispatch</u> > 1. General.

Create your own vehicle types

In <u>Vehicles > Vehicle types</u>

You can create up to 10 custom vehicle types to apply to your vehicle settings. Remember to click on the Save button after adding a type.

Type name		
Toyota Prius	✓Enabled	8
	✓Enabled	
+ New type		

You can apply these settings to your vehicles in the <u>Vehicle</u> section.

Configuring your assignment zones

If your company covers a large enough area, you might need to divide it in zones, to determine assignment rules according to these.

To set up your zones, click on the **Zones** button on the left side menu in the Admin Panel. Alternatively you can click <u>here</u>.

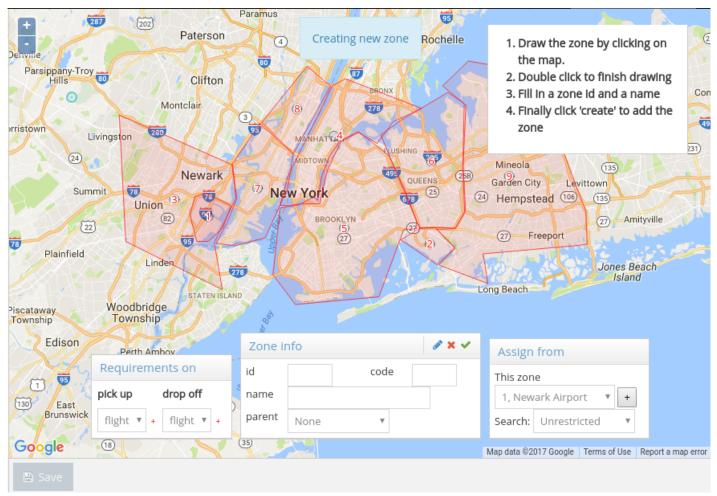
æ	Dashboard		Zones		+ Paramus Yonkers Vorkers
	Billing	~	1	Newark Airport	
o;	Settings	~	2	JFK Airport	And A Clifton
205	Users		3	Newark	Montclair 500
_	Vehicles		4	Manhattan	
			5	Brooklyn	(24) Mineola
n -	Zones		6	Queens	Summit To New York (3) (4) Herensteed (10) (7)
Ţ	Tariffs		7	Jersey City	
∞	Reports	~	8	North Bergen	Plainfield
•	Replay		9	Hempstead	Linden Jon Long Beach
#	Planning	~			wy Woodbridge Township

Once the zones are set, you can further configure the assignment behavior from <u>Settings ></u> <u>Dispatch</u> > 2. Assignment. You can read more on how to do this by visiting the following section: <u>Assignment by zones</u>.

Note that these zones are different from the <u>Tariff Zones</u> that you will configure in the <u>Tariff</u> <u>section</u> of this guide.

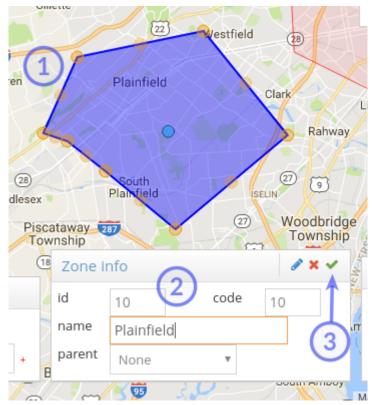
Adding a new zone

- Navigate to the **Zones** section of the Admin Panel if you are not already there.
- Click on the New Zone button at the bottom of the page. A group of small panels will appear on the map, along with the possibility of drawing the zone on said map. You can zoom in and out of the map by using the scroll wheel of your mouse, or by clicking on the + and – signs on the upper left corner of the map.



Draw a zone by clicking on the map and moving your mouse to form a polygon. You can edit this shape later.

• Once you have drawn the map, give it an id, code and name, these are the only obligatory fields. You can then configure the rest as will be explained below, or you can click on the green checkmark to confirm that you want to create the zone.



1. Draw the map. 2. Give it an id, code and name. 3. Click on the green checkmark to confirm.

The green checkmark is only to confirm the zone creation but will not be automatically saved until you click on the **Save** button. After you have added your zones, please remember to Save them before you navigate away from the page.

Assign From

The default behavior for zone queues is that the vehicle that has waited the longest in the zone will get assigned first. The **Assign from** section is an advanced optional setting that you can use if you want to give preference to available cars in a different zone, for example if you set one zone as a taxi stand, you can then set this taxi stand under the **Assign from** section of other zones. If you add more than one zone to this area, they will be listed in the order of priority (#1 gets first priority).

Assign	from		
	Newark Airport IFK Airport	t	
2, JFK A	Airport	Ŧ	+
Search:	Unrestricted		T

To delete these zones from the list, simply click on the **x** next to them.

The option of limiting the **Search** lets you select within which distance from the pick up location the system should look for a free vehicle, if no available vehicles are found in the zone chain. You're able to either select a distance in km or set it to **Unrestricted** if the distance should not matter.

Requirements On

This setting can be used to ask the passenger to specify a flight number when booking to or from this zone. This setting is useful for airport zones. To use, click on the red plus sign (+) under **pick up** or **drop off**.

Requirements on									
pick up X flight		drop off							
flight 🔻	+	flight 🔻 +							

How to configure tariffs and pricing

TaxiCaller supports many different ways of calculating prices for a ride. The different parameters for calculating prices include geographical zones, time of the day, day in the week, and of course distance and total time for the trip.

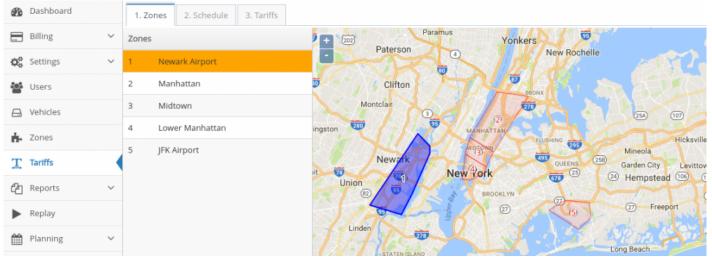
- <u>Create Tariff Zones</u>
- <u>Configure your Tariff Schedules</u>
- <u>Tariffs</u>

Create Tariff Zones

If you have already created <u>assignment zones</u>, the creation of tariff zones is similar, although its purpose is quite different. Tariff zones would let you, among others:

- Assign Flat tariffs from one tariff zone to another.
- Assign **Zone tariffs** within a single zone.
- Create **Tariff rules** involving a tariff zone.

However, it is not required for you to set Tariff Zones, if you don't wish to make tariffs that depend on the location. In that case, you can move forward to the creation of <u>Tariff Schedules</u>.



Create Tariff Zones

Create a Tariff Zone

- In the Admin Panel, go to the Tariffs section by clicking on the button on the left side of the screen.
- Click on the **New Zone** button. A small panel will appear on the map.
- Draw the zone by clicking on the map and forming a polygon.
- Double click to finish drawing.
- Enter an id, code and name for the tariff zone.
- Click on the green checkmark to create.



Please remember to save your tariff zones by clicking on the Save button before navigating away from the page. The green checkmark only creates the zones but they won't be automatically saved!

Configure your Tariff Schedules

While the creation of tariff zones is optional, you need to add at least one schedule before you can establish the tariffs in the next section. The simplest schedule you can add is a single Standard one that covers everyday at all times. However you can also create different schedules to set up different prices depending on the day or the week or time of the day.

🚯 Dashboard		1. Zones	2. Schedule	3. Tariffs						
- Billing	~	12 am 1 am							base	
😋 Settings	~	2 am							Days Mon-Thu Weekends	
📽 Users		4 am 5 am 6 am								
🖨 Vehicles		7 am 8 am								
📩 Zones		9 am 10 am 11 am								
Tariffs		12 pm 1 pm								
P Reports	~	2 pm 3 pm 4 pm								
Replay		5 pm 6 pm								
Hanning	~	7 pm 8 pm 9 pm								
★ Customers	~	10 pm 11 pm								
📢 Promotions	~	12 am 🖵	mon	tue	wed	thu	fri	sat	sun	
POIs			id: 2, name: Days Mon-Thu Monday, Tuesday, Wednesday, Thursday,							
🛷 Jobs	~					: Weekends				
III Statistics	~				Friday, Satur	day, Sunday,				
Messages	~					create				

A tariff schedule for Mon-Thu daytime (in green) and Fri-Sun (in yellow)

Creating a Tariff Schedule

- In the Tariffs section in the Admin Panel, click on the second tab 2. Schedule.
- Scroll down until you find the Create button. Click on it.
- A new panel will pop up in your screen, in which you can select the times for your schedule. Click on the plus sign (+) for each day of the week.
- Drag the sliders with your mouse or the arrow keys in the keyboard to adjust the time.

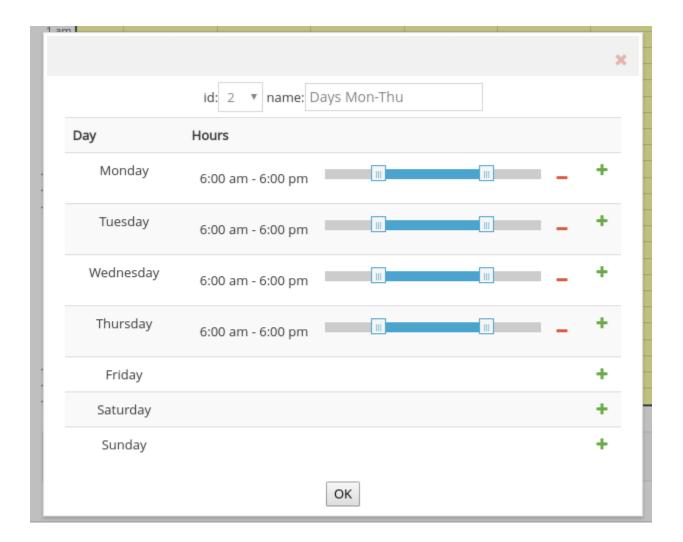
1 am		
		×
	id: 2 🔻 name: Nights	
Day	Hours	
Monday	6:00 pm - 12:00 am	+

• You can add two different time sections to the same day by clicking on the plus (+) sign again to bring out another slider. The only restriction is that the *earlier* time should be placed on the top slider.

For example if you want a tariff that applies from 7:00 pm to 3 am on the next day, you'd have to add two different bars, one for the previous day until midnight and another for the next day from midnight on.

Day	Hours	
Monday	12:00 am - 3:00 am	+
	7:00 pm - 12:00 am	
Tuesday	12:00 am - 3:00 am 🔲 🔲 🗕	+
	7:00 pm - 12:00 am	

• After configuring the time for all the days, click on the **OK** button.



After you have created the schedules you need, don't forget to press on the **Save** button or your changes won't be recorded.

Tariffs

It's now time to finally configure the actual tariffs making use of the Tariff Zones and Schedules.

- Click on the third tab in the Tariffs section. 3. Tariffs
- By Default, your tariff will be named **Standard Tariff** but you can change this name.
- Make sure that you have the appropriate currency at the top of the screen, as well as the measurement units: Imperial or Metric.

Wehicles Name: Standard Tariff Currency: US Dollar Taximeter fare increment: 0.00 Units: Imperial Tariff rules Tariff groups Extras	Users Users	1. Zones 2. Schedule 3. Tariffs
Lipits: Imporial & Tariff rules Faring groups Fytras	🖨 Vehicles	Name: Standard Tariff Currency:
Tariffs Units: Imperial Tariff rules Tariff groups Extras	📩 Zones	US Dollar Taximeter fare increment: 0.00
	T Tariffs	Units: Imperial Tariff rules Tariff groups Extras
Reports V Standard +	🖆 Reports 🗸 🗸	Standard +

At this point you should be able to go back to <u>General Settings – Payment Options</u> to make sure it says the name of your tariff (for example "Standard Tariff"), instead of "Disabled".

After this, you can configure the Tariff categories, each category will occupy a tab and within each you will be able to select flat and zone tariffs, taximeter tariffs and waiting rates. You can have for example two different categories, one for big vehicles and one for small vehicles.

- Setting zone and flat tariffs
- Setting the taximeter tariffs
- Setting the initial waiting rate for a ride
- Tariff rules

After your categories are made, you can then move on to Tariff Rules.

- Tariff rules
- Set up extra tariffs

Setting zone and flat tariffs

Zone Tariffs

To work with zone tariffs, you can set a price for each zone.

name	zone	Days Mon-Th	u	Weekends			
Newark	1, Newark Airport	20.000	-	30.000	-	edit	delete
Manhattan	2, Manhattan	15.000	-	22.000	-	edit	delete
Midtown	3, Midtown	10.000	-	12.000	-	edit	delete

Zone Tarlff

For example, you can set a price for the Manhattan zone for USD 15. Any job that happens within this zone will get this tariff.

More commonly however, you will have jobs that go from one zone to another. For example if a passenger books a ride from Manhattan (USD 15) to Newark Airport (USD 20), the price of the ride will be the *highest* of those two zones (USD 20).

A common usage of Zone Tariffs is to set up a zone in the center of a city with the lowest price, then assigning higher prices to the zones, depending on how far from the center they are.

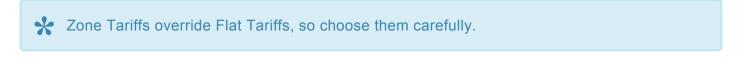
Creating Zone Tariffs

- Click on the Create button under Zone Tariff
- Give it a name and select the zone that is involved.
- Click on OK
- Write the price on the field or fields depending on the number of schedules.
- Click on the **Save** button at the bottom of the screen.

		20110 10111		
				×
name:	Newark			
zone:	tariff zone 🔻	1, Newark Airport	۳	
		ОК		

Flat Tariffs

Flat tariffs are normally used for trips between cities but can also be used within a city for certain purposes. However for trips within a city, it can be preferable to use zone tariffs instead.



To create a flat tariff, follow these steps:

Click on Create

		Fla	t Tariff	
rank name	from	to	return <mark>Weekd</mark> reate	ays Weekends

- Enter the name of the flat tariff.
- Select the two price zones between which the flat tariff will apply. In this example, we'll
- Check the "return" box if you wish to have the same price for both directions.
- Press the OK button.

						×
name:		Downtown	n	to Airport		
from:	ta	riff zone 🔻		1, Downtown	۳	
to:	ta	riff zone 🔻		2, Airport	۳	
return:						
		OK	(

• Write the price in the field or fields depending on how many tariff schedules you have.

			Flat Tariff							
rank	name	from	to	return	Days Mon	-Thu	Weekends	5		
1	Manhattan to EWR	2, Manhattan	1, Newark Airport	yes	30.000	-	30.000	-	edit	delete
2	Manhattan to JFK	2, Manhattan	5, JFK Airport	yes	35.000	-	35.000	-	edit	delete
			create							

Remember to click on **Save** at the bottom of the screen or your changes won't be recorded.

Setting the taximeter tariffs

The taximeter tariffs consists of two parts, one for the tariffs when the trip starts "Taximeter" and one part <u>Waiting Rate</u> handling the tariffs if the passenger doesn't show up in time at the pick up address.

We will start with the settings for the trip:

- 1. Start by pressing one of the "create" buttons below "Taximeter". One set of parameters can be configured for each schedule.
- 2. In the popup window that appears you can set the "start price" in the currency you have configured for your company. Some taxi companies have a start price that includes a certain distance of the trip. If that is the case you enter the distance in the input field after "for first" (the unit is either yards or meters). In this example no start price is included, so "0" is set in the "for first" field.

start price:	30.000	for first	1000	m		×
	distance rate:	20.000	per	1000	m	+
time rate:	0.000	per	60	S		
traffic rate:	0.000	per	60	S		
minimum price:	0.000					
			ОК			

Setting up the Taximeter

- 3. Now the distance rate can be added. In this example the rate is USD 2.5 per 1000 m (1 km). This means that the taximeter will add USD 2.5 for each kilometer of the ride.
- 4. You can add a time rate. In this example the taximeter will increase USD 1 for every minute of the ride.
- 5. The traffic rate is added to the taximeter whenever the taxi is standing still, e.g. when waiting for a traffic light to switch to green. If you do not wish to use a traffic rate, this value can be set to 0.

If you wish to have both a time rate and a traffic rate, this is possible and both rates will add to the total price.

- Based on the GPS coordinates and calculated speed the taximeter determines if distance, or traffic rate should be running. They can never run at the same time (since one is for standing still and the other is for when moving).
- 6. The minimum price ensures that no job will have a lower price than this value, even if it's a short ride.
- 7. Finally, press the "OK" button and then enter the parameters for the other schedules you might have and remember to press the "Save" button at the top of the screen.

The **traffic** rate was previously called **wait** rate, which is not the same as the waiting rate you can configure in the <u>following section</u>

Setting the initial waiting rate for a ride

You can add a waiting rate to the final price if the passenger should pay an extra fee for every minute the taxi has to wait at the pick up address before the passenger shows up.

1. Start by pressing one of the "create" buttons below "Waiting rate". Also here we specify one set of parameters for each one of our three schedules.



- 1. In the popup window that appears we start with specifying that the passenger doesn't have to pay anything if he or she is less than two minutes late (120 seconds).
- 2. If the passenger is more than two minutes late we add an extra fee of USD 1 per additional minute the taxi driver has to wait on the passenger.
- 3. Finally, press the "OK" button and then enter the parameters for the other schedules you might have and remember to press the "Save" button at the bottom of the screen.



What is the difference between the Waiting rate and the traffic rate that I can specify in the <u>Taximeter section</u>?

The *waiting rate* applies only to the initial time a vehicle must wait for the passenger to board, after the status is set to **wait** in the driver app, either by pressing the button or by having it set automatically after a

certain amount of time. Once the passenger has boarded, the *traffic rate* (if set) would apply whenever the vehicle stops (for example at a traffic light or a coffee shop). The wait rate is based on GPS information and no button needs to be pressed for it to start applying.

Tariff rules

The tariff rules is a tool that allows you to specify which tariff category should be used at what point. You can have the system automatically select a tariff category based on several factors such as booking source, vehicle type, or number of passengers, among others. This can be useful if you, for example, would like to have different prices when booking from the passenger app or from the dispatch console.

1. Start by clicking on the button "Tariff rules".



2. If for example you would like to have one tariff for a ride booked from the passenger app (mobile) and a different one for a ride booked from the dispatch console (manual), you can configure it as follows:

		Name:	Standard T	ariff	C	urrency: US	5 Dollar		*	Units:	Metric	* Tarifi	frules	Tariff grou	ıps
Iff Passenger App	Tariff Dispatch Conso	le +													
								Name							
							F	Tariff Passenger App							
								i anni i assenger ripp							
								Zone Tariff							
Tariff rules															3
Tariff rules # Company	Booking so	irce Vehicle t	type	Passen	gers	Zones			Tai	riff grou	ıp Tarifi	f			3
	Booking sou	irce Vehicle t	type	Passen mln	gers max	Zones from			Tai	riff grou	ıp Tarifi	r			;
	Booking sou				max			Zone Tariff		riff grou		f Iff Passeng	er App	• 00	;

- 3. Select only the fields that will directly affect the rule. Leave the others blank.
- It is suggested to leave all other fields blank when creating a rule. Every field you specify will affect the way the tariff is applied. For example, if you select a company name, the tariff will only be applied if you book a job specified for that company name, even if you only have one company.
- 4. The tariffs that you are able to choose for the last column are the ones that you have already created in the **3. Tariffs** section.

The order of the rules matters! The rules will be applied from top to bottom, so please take this into consideration.

Set up extra tariffs

- Go to the <u>Tariff section</u> in the admin panel.
- Choose 3. Tariffs
- Select Extras

Taximeter fare increment:	0.00	Units:	Imperial 🔻	Tariff rules	Tariff groups	Extras	
		1 1					

• A new pop up window will appear. You will see two panels with trip.meter and trip.flat, which are the default tariffs.

Extras				×
Add extra fees here tha settings.	at your driver can add to paymen	ts. Must have "Detailed	l payments" checked in Dispatc	h
trip.meter	Ê	trip.flat	6	1
Title	Taximeter	Title	Fixed price	
Sub-title		Sub-title		
Sub total	 Fixed amount Percentage 	Sub total	 Fixed amount Percentage 	
	USD 0.00		USD 0.00	
Tax rate (%)	0.00	Tax rate (%)	0.00	
Discount multiplier	1	Discount multiplier	1	
Fixed		Fixed		
		L		•

- Scroll down until you find a small panel where you can Add a new extra.
- Choose the type of extra from the drop down menu, for example Road toll
- Click on the Add button

	Add	
	Road toll Add	
extra.toll]	Ê
Title	Road toll	
Sub-title		
Sub total	 Fixed amount Percentage 	

- You can add up to 6 extras, but each extra must have their own category. You can edit the title of the extra tariff, but not the category. In the example above, the category is **extra.toll** but the title is **Road toll**.
 - To save, exit the extras panel by pressing on the **X** and click on **Save** at the bottom of the Tariffs screen.

Frequent questions

Q: I want to add another trip.meter extra, but it's not saving. What do I do?
 A: You can only add one extra of each category. Since trip.meter and trip.flat are the default tariffs, you cannot add more of the same.

Tariff groups

You can create a tariff group and then go to a customer account under Customers > account and set the group to a particular customer (or several).

First select "Custom" and then select one of the tariff groups you have created.

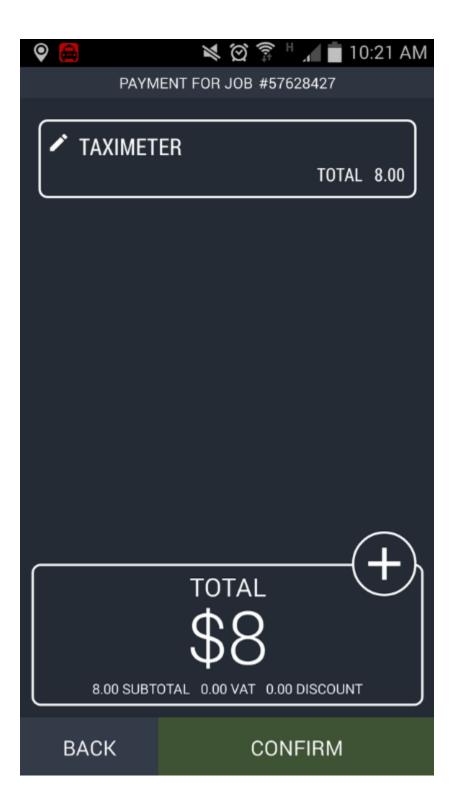
This way you can create <u>tariff rules</u> that only apply to these customer accounts.

How to allow tips for your rides

You can do this with both the default and the detailed payment flow (adjusted from <u>Settings > Dispatch > 1</u>. <u>General > Payment Options</u>).

Method 1 – Just adding a higher paid value will register the extra amount paid as a tip.

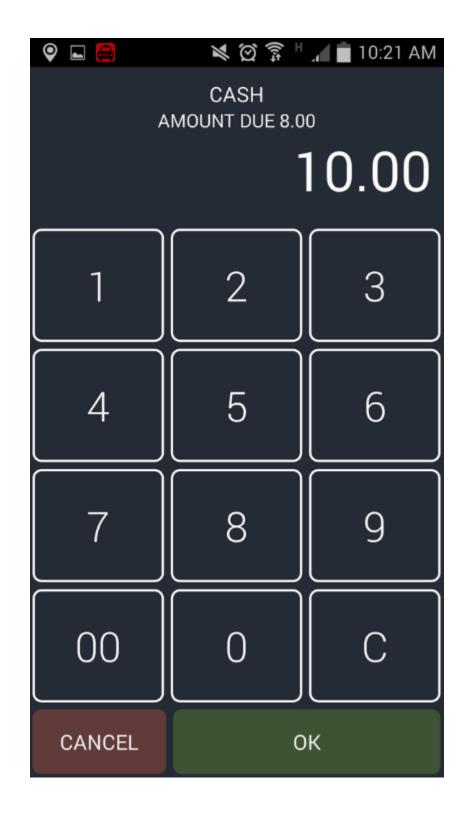
Once you have a price from either the in-app taximeter or just a quoted price (if you don't use the in-app taximeter) you confirm or edit this cost and move forward.



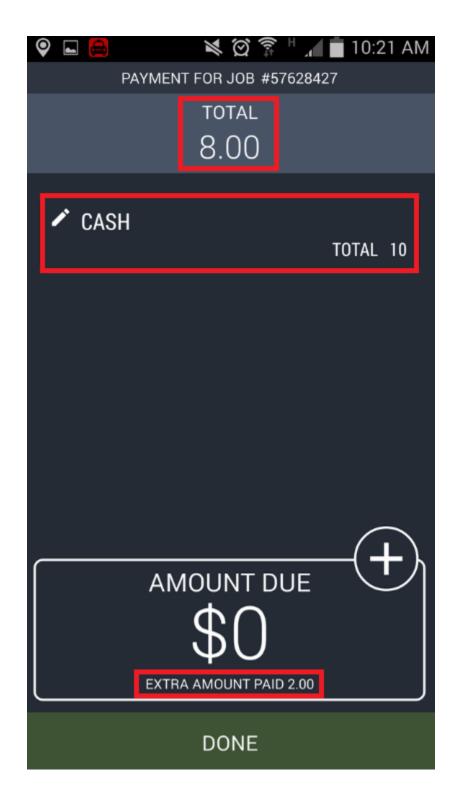
You select the payment method (which will also be the payment method you tip in)

🝳 🖬 📇 🙀 🙀 🏹 🛱 📈 💼 10:21 AM
ADD PAYMENT
AMOUNT DUE
8.00
PROMOTIONS
E-TICKET
CARD PRESENT
CASH
NOT SETTLED
BACK

When you specify how much cash you want to pay, going above the amount due automatically turns this into an "extra payment" which is interpreted as a "tip"



In the example below you can see that the "Total" amount is USD 8, but the amount paid in cash is 10, making it an **extra payment** of USD 2.00 (as you can see at the bottom as well "extra amount paid 2.00")



In the fare receipt (found in the job editor) it looks like this, where you can see the "total tip" amount included.

Fare receipt				×					
	8.00	0 USD							
		Fare							
TaxiMeter	Subtotal	VAT	Discount	Total					
	8.00	-	-	8.00					
Tip	Subtotal	VAT	Discount	Total					
	-	-	-	2.00					
	Pay	yments							
Cash	Amount	Reference	Reference						
	10.00	-							

Method 2 – Tips configured as an "extra" cost

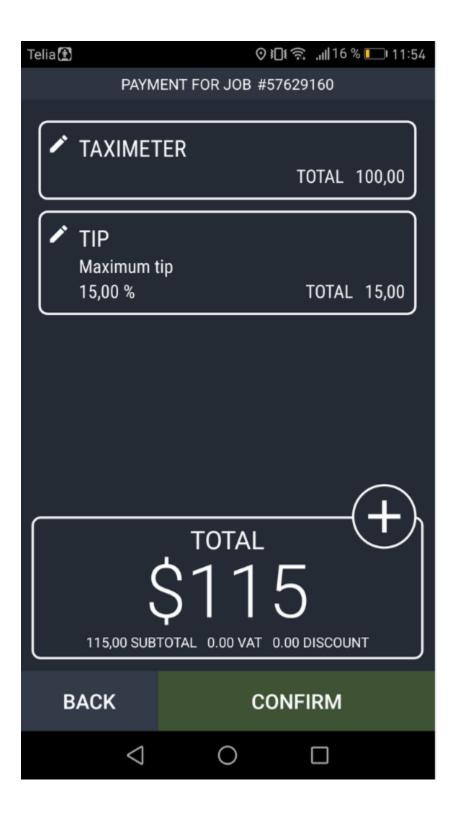
The other way to do tips is by adding "Extras" in the form of percentage. The most common ones to add would be 5%, 10%, 15% (this you have to do manually of course)

This method requires that you have detailed payment flow enabled from <u>Settings > Dispatch</u> > 1. General > Payment Options

You can add extras in the Tariffs section of the Admin Panel

Extras					
Add extra fees here th	at your driver can add to paymer	nts. Must have "Detailed	d payments" checked in Dis	patch s	settings.
extra.soil		extra.bike		Ŵ	
Title	Тір	Title	Тір		
Sub-title	Minimum tip	Sub-title	Maximum tip		
Sub total	 Fixed amount Percentage 	Sub total	 Fixed amount Percentage 		
	5.0 %		15.0	%	
Tax rate (%)	0.00	Tax rate (%)	0.00		
Discount multiplier	1	Discount multiplier	1		
Fixed	9	Fixed	Ø		
trip.meter	圇	trip.flat		Ŵ	Add
Title	TaxiMeter	Title	Fixed price		Taxi fare - metered 🔻 Add
Sub-title		Sub-title			
Sub total	Fixed amount	Sub total	Fixed amount		

Telia	⊘ :□:	i 🗟 🚛 16 % 🗔 11:53 ااا
	ADD COST	
TIP Minimum tip 5,00 %		TOTAL 5,00
TIP Maximum tip 15,00 %		TOTAL 15,00
	BACK	
\triangleleft	0	



Generating reports

In this section of the admin panel, <u>Reports</u>, you can generate various types of reports on your usage of the system.

Before you can generate the reports, you naturally need to have entered at least some jobs to the system, for there to be any results to display in the reports. All reports can be downloaded and saved in PDF, CSV and XLS (Excel sheet) formats.

Standard Reports

Billing	~	Report:	driver shifts	2 •
😋 Settings	~	Period:	today 3	
Users				
- Vehicles		id Las	t Name	First Name
🔥 Zones		0 45731	all Anderson	John (4)
T Tariffs		45733	Clark	Anthony
⊷ උතු Reports	~	45734 45735	Young Wright	Paul Kevin
» Standard 1	-	45736	Thomas	Mark
- Custom		45737	Walker	George
- Editor		45738 45739	Lewis Hall	Tim Jason
		45740	Lopez	Daniel
Replay		45741 45742	Roberts	Jeff Allan
Planning	~	45743	Jackson	Brian
Customers	~		Garcia	Dave
Promotions	~	Showing 1	to 44 of 44 entri	Previous Nex
POIs			5 9	et

- 1. Click on Standard
- 2. Select the type of report, for example driver shifts
- 3. Select the time period for your report.
- 4. Select the details, for example which driver should appear in the report.
- 5. Click on Get
- 6. View your report on the right side of the screen.

Closed job	losed jobs New York Sta											
		period: 2017/02/01 00:00 - 2017/02/	07 23:5	9								
Start Duration F	Passenger	route	car	Driver	cost code	price						
02/06/2017												
L1:08 AM 00:07		from: 159 Remsen Ave, Brooklyn, NY 11212, USA	25	26, driver		37.00						
L1:08 AM 00:07		to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull from: 159 Remsen Ave, Brooklyn, NY 11212, USA	41	42, driver		37.00						
L1:08 AM 00:07		to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull from: 159 Remsen Ave, Brooklyn, NY 11212, USA	40	41, driver		37.00						
L1.08 AMI00.07		to: 57-12-57-18 74th St, Middle Village, NY 11212, USA	40	41, unver		37.00						
L1:08 AM 00:06		from: 159 Remsen Ave, Brooklyn, NY 11212, USA	21	22, driver		37.00						
L1:08 AM 00:06		to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull from: 159 Remsen Ave, Brooklyn, NY 11212, USA	30	31, driver		37.00						
1.00 11100.05		to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull		00 44		07.00						
L1:08 AM 00:05		from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	22	23, driver		37.00						
L1:08 AM 00:05		from: 159 Remsen Ave, Brooklyn, NY 11212, USA	24	25, driver		37.00						
L1:08 AM 00:05		to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull from: 159 Remsen Ave, Brooklyn, NY 11212, USA	35	36, driver		37.00						
		to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull										
L1:08 AM 00:02		from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	3	Young, Paul		7.30						
L1:08 AM 00:02		from: 133 W 24th St, New York, NY 10011, USA	26	27, driver		7.30						
L1:08 AM 00:03		to: 404 Lafayette St, New York, NY 10003, USAnull from: 133 W 24th St, New York, NY 10011, USA	20	21, driver		7.30						
L1.00 AMI00.03		to: 404 Lafayette St, New York, NY 10003, USAnull	20	zi, unver		7.50						
L1:08 AM 00:02		from: 133 W 24th St, New York, NY 10011, USA	2	Clark, Anthony		7.30						
L1:08 AM 00:02		to: 404 Lafayette St, New York, NY 10003, USAnull from: 133 W 24th St, New York, NY 10011, USA	28	29, driver		7.30						
		to: 404 Lafayette St, New York, NY 10003, USAnull										
L1:08 AM 00:02		from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	9	Lopez , Daniel		7.30						
L1:08 AM 00:02		from: 133 W 24th St, New York, NY 10011, USA	15	16, driver		7.30						
L1:08 AM 00:02		to: 404 Lafayette St, New York, NY 10003, USAnull from: 133 W 24th St, New York, NY 10011, USA	36	37, driver		7.30						
		to: 404 Lafayette St, New York, NY 10003, USAnull										
L1:08 AM 00:04		from: 32-15 76th St, Flushing, NY 11370, USA to: 94-14 114th St, South Richmond Hill, NY 11419, USAnull	19	20, driver		27.00						
11:08 AM 00:04		from: 32-15 76th St, Flushing, NY 11370, USA to: 94-14 114th St, South Richmond Hill, NY 11419, USAnull	39	40, driver		27.00						
2017/06/20 11:11		(c) TaxiCaller			page 1 of 4							
		(a) resonance			page 2 of 4	POF						

You can generate up to 11 types of standard reports this way.

driver shifts
account jobs
account summary
closed jobs
car jobs
driver jobs
dispatcher jobs
driver jobs summary
dispatcher jobs summary
summary - drivers
summary - cars

The reports that have to do with jobs, such as car jobs, closed jobs, etc can be generated also as **Legacy reports**. This only means a slightly different configuration of fields and how

A.

the information is presented. However, the non-legacy version is always recommended as it is the one that will continue being updated from now on.

Some reports may use certain abbreviations for Payment Methods like C – Cash, A – Account, E – e-tickets, PC – Promo codes, etc. To see more about what these abbreviations mean please check the following article from our knowledge base: https://www.taxicaller.com/en/help/kb/725981

Custom Reports

If you should need to generate reports with information that is not easily displayed in the Standard Reports, you can use Custom ones. We have 5 built-in types, namely for Account jobs, Driver jobs, Finished jobs, Multi company and Zone-report. They generate dynamically which means that you don't have to press a button to generate them.

B Dashboard		Driver jobs *	PDF	XLS CS	sv json																	
E Biling	~	🛗 Last year																				
Q [®] Settings	~	Driver	Driver id	Job id	Date	Start	End	Passenger	Pick-up	Drop-off	Vehicle #	Company Id	Account Id	Driver	Tartff	Extra 1	Extra 2	Extra 3	Sub total	Discount	FOP	Payable
😸 Users		Any driver *	45731	5171918	12/02/201	12/02/201	12/02/201	Smith,		415	1	45670		Anderson,	2.50				2.50	0.00	0	2.50
🖨 Vehicles					0	6 07:59 AM	6 07:59 AM	, Y 1	York, NY York, 1	Ave, New	lew		John	John	Jonn							
📩 Zones										10017,												
I Tariffs			45731	5171921	12/02/201	12/02/201		Smith, Peter		415 1 Madison	1	45670		Anderson, John	13.00	2.00			15.00	0.00	0	15.00
2 Reports	~			6	0	AM	AM	, New	Broadway Madison , New Ave, New York, NY York, NY		Ave, New		John	John								
- Standard									10012,	10017, USA												
 Custom 			45731	5172088	12/07/201		12/07/201 6 09:13	Jack Johnson	4619 5th Ave,	1001 Eastern	1	0		Anderson, John								
- Editor					0	AM	AM	Journau	Brooklyn, NY 11220	Plowy,				Journ								

But the most useful part of the custom reports is the Editor. In here you will be able to select exactly which fields you would like to show in your reports.

Ð	Dashboard		This report template is	nis report template is read-only. If you want to edit this template, please clone it first.												
	Billing	~	Select report	R	eport title	Re	eport name	F	age type	Page orientation	Page numbering	Font size	2			
	011116		Account Jobs 🔹	+ /	Account jobs	A	ccount jobs		A4 *	Landscape 🔻	1	8				
¢°	Settings	~	Columns	2)												
	Users															
0	Vehicles			Colu	ımn 1			Colui	mn 2			Colu	imn 3			
			Header				Header				Header					
n -	Zones		[localize(Account	_id)]			[localize(Job_id)]				Date					
г	Tariffs		Row Content				Row Content				Row Content					
			[account.name]				[job.id]				[]ob.stimes.sta	rt.date]				
ත	Reports	~	ID		Weight ?		ID		Weight ?		ID		Weight ?			
	standard		account_num		1		lop_Id		1		date		1			
_	stanuaru		Header Align		Row Align		Header Align		Row Align		Header Align		Row Align			
- (Custom		Left	٣	Left	Ŧ	Left	٣	Left	٣	Left	٣	Left			
•	iditor 1															
	Replay			Colu	ımn 4			Colui	mn 5			Colu	imn 6			
	Planning	~	Header				Header			Header						
	i ai i i i i i i i i i i i i i i i i i	Ť	Start				End			Passenger						
k	Customers	\sim	Row Content				Row Content			Row Content						
			[job.stimes.start]				[job.stimes.drp]				[job.client.name]					
Þ	Promotions	~	ID		Weight ?		ID		Weight ?		ID		Weight ?			
	POIs		start		1		end		1		passenger		1			
T	1015		Header Align		Row Align		Header Align		Row Align		Header Align		Row Align			
i an	Jobs	\sim	Left	٣	Left	Ŧ	Left	٣	Left	٣	Left	٣	Left			
<u>.u.</u>	Statistics	~														
R,	Messages	~		Colu	ımn 7			Colui	mn 8			Colu	imn 9			
_	Deed.		Header				Header				Header Vehicle #					
0]	Bank	~	Pick-up				Drop-off									
			Row Content				Row Content				Row Content					
			[]ob.route.from_t			[job.route.to_text]				[vehicle.num]						
	ID Weight ?						ID	Weight ?		ID Weight ?						

- To begin, click on the **Editor** subsection in the left side menu.
- Click either on:
- The plus sign to create a new report type from scratch
- The **Clone Report** sign to create a copy of one of the built-in reports, to then make the changes you need.
- Give your report type a title and a name. You can also configure some formatting options that can be found at the top of the Reports screen.

The report columns

Each column that will appear in the editor will be represented by one of these small panels. To create one just click on the green + sign and then enter the information.

Columns

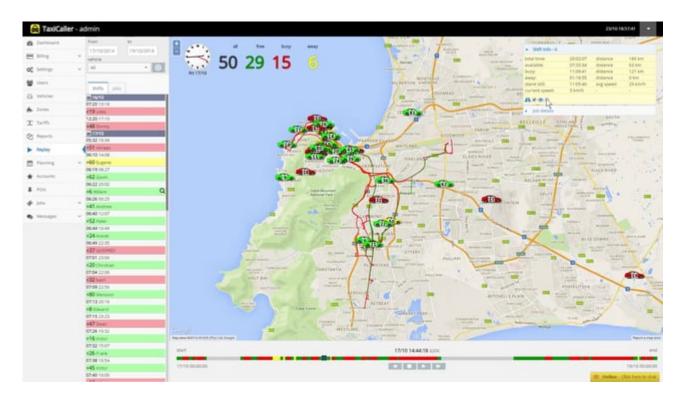
Colu	mn 1		umn 2
Header		Header	
Name			
Row Content		Row Content	
[account.name]			
ID	Weight ?	ID	veight ?
name	1		
Header Align	Row Align	Header Align	Row Align
Left v	Left 🔻	Left	Left •

Row content

To enter the row content you will use variables (placeholders) that will retrieve the information about your jobs from the database. These variables are represented by Keys which you can see on the right side of the screen.

The Replay feature

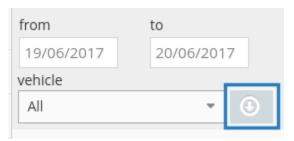
Replay traces the routes for all your vehicles in arrears. See where all or just one of your vehicles have been at any time. You can watch the following video to see it in action:



How to use:

- Select a time period and a vehicle (or All to get an overview).
- Press the arrow to search.





- You should see a list now with the results, there you can select to see either the Shifts or the Jobs tab.
- Select a shift or a job (or none to see all)
- Use the time slider at the bottom of the screen to Replay the time period you need to see. You can change the speed, start, stop and rewind at any time using the play control keys.

Start	19/6 09:34:31 20X	end
19/6 00:00:00		20/6 00:00:00

Buttons from left to right: Rewind, Stop, Play, Forward. The blue square indicates the current speed which can be changed by pressing rewind or forward repeatedly.

***** The Replay feature needs at least 2 major things to record the rides:

- 1. A fully functioning gps on the vehicles
- to register their physical movement.
- 2. A driver shift that has already finished (by pressing the End Shift button). The shift needs
- to be longer than 15 minutes (otherwise it's considered too short to be recorded as a shift).

Planning tools

Schedules

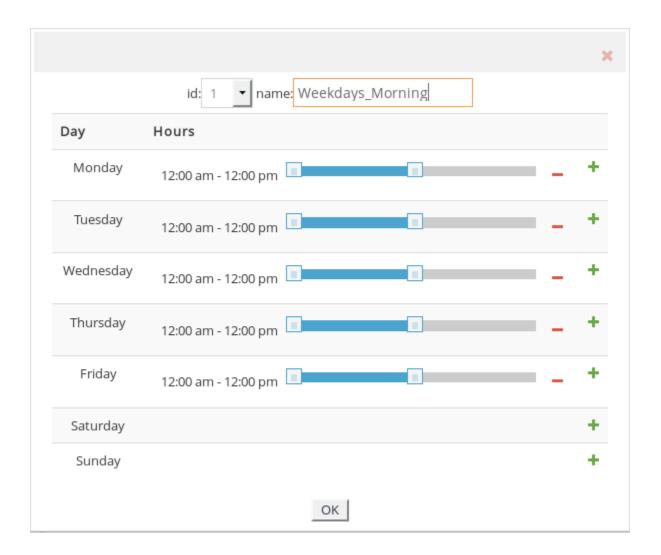
You can use this tool as a planner for your staff, to keep track of the shifts for your drivers or payment schedules.

At the moment this is only a visual tool; what you choose in this panel will not be enforced in the apps.

🚯 Dashboard					Schedu	le Driver S	hifts 📩		
Billing	~	Name: [Driver Shifts		Type: Work	schedule 🔻	1		
😋 Settings	~	12 am 1 am					-		base
📽 Users		2 am 3 am 4 am							Weekdays_Morning
- Vehicles		5 am 6 am							
📩 Zones		7 am 8 am 9 am							
Ţ Tariffs		10 am 11 am 12 pm							
P Reports	~	1 pm 2 pm							
Replay		3 pm 4 pm 5 pm							
🛗 Planning	~	6 pm 7 pm							
» Schedules		8 pm 9 pm 10 pm							
- Shifts		11 pm 12 am							
Calendar		id: 1, na	mon me: Weekdays_1	tue Morning	wed	thu	fri	sat	sun
🗙 Customers	~	Monday	, Tuesday, Wedi	nesday, Thurso	lay, Friday,				2

To add a schedule:

- go to the **Planning** button on the side bar of the Admin Panel and select Schedules.
- Click on the **add** button below the empty schedule.
- Give your schedule a name and add the hours by pressing on the + button.



- Move the sliders to set the working hours for each day. This will work the way it does for" tariff schedules":#tariff-schedules. f you need to add more than one time interval for a single day, just press the plus sign again for that day and add more time intervals. If you want to remove a day, just press the minus sign to the left of the plus sign.
- Press the **OK** button.
- Press the Save button.

Shift rules

Some locations have specific rules for how long drivers are supposed to work at the time. The shift rules tool will allow you to control this.

Shift rules are actually enforced in the driver apps once you mark the **Enabled** option, so choose them carefully. This means that once a driver passes their maximum shift length, they will not be able to receive jobs or to take hailed jobs.

Shift rules										
Enabled	End shift when max length reached									
max length 840	min	minimum rest	600	min						
Max shift length alerts										
Alert 1 90 🕶 min	Alert 2 30	▼ min	Alert 3 5	▼ min						

- End shift when max length reached: will automatically kick out a driver that has surpassed their maximum shift length.
- **Max length**: Time in minutes for the maximum shift duration. This means that if you want to enforce a maximum of 12 hour shifts, you'd have to enter **720 min**.
- **Minimum rest**: After a shift has ended, the driver will be kept from starting a new one until this time has passed. For example, after every shift, the driver needs to rest at least 8 hours, you would write **480 min** in this field.

Alert the drivers

Use the **Max shift length alerts** to notify the drivers that their shift is about to end. You can set up to 3 alerts.

Shifts

This is also a visual tool just like the schedules. You will be able to add shifts for each of your staff members, and choose schedules for them.

1. John Anderson		2. Maria Muñoz	
Work schedule: Payment schedule:	Driver Shifts 👻	Work schedule: Payment schedule:	Driver Shifts 💌
🗢 Edit f 🗎 Delete		🗹 OK 🏾 🖸 Cancel	

Managing customer accounts and invoicing

Customer accounts can be used to make booking extra easy for regular customers. There are two different types of customer accounts: business and personal accounts. In each customer account you can specify whether the customer should pay for the trips directly (direct) or if they should be invoiced (billed).

To create an account

- Start by clicking on **Customers** and then **Accounts** in the menu on the left hand side. <u>Alternatively</u> <u>click here.</u>
- At the bottom of the screen you will see the **Add account** button, before you press it, select whether this will be a **Business** or a **Personal** account. You can change this later.

Basic options

Account Information				
Customer:	New York , Hotel	Туре:	Business 🔻	
Account id:	1612091	Phone:	+17125489566	
First Name:	Hotel	Last Name:	New York	
Billing email:	hotelnewyork@hotel.com	Contact email:	hotelnewyork@hotel.com	
Cost code:	850	Priority	Automatic 💌	
Address:	45th Street, NY			
Info:				
Options:	Active	Payment:	billed 🔻	

Enter the basic information about your account, for example the name, email and address. The account id can be any number or word that you can use to quickly identify the account and enter it in the dispatch. If you don't enter an ID, it will be generated automatically.

Make sure the account is **Active** by checking the box and select the type of payment that will apply to this account.

Account is bookable:				
before	•	29/06/2017		

Make sure that the account is bookable by scrolling down and selecting the appropriate option, either **Forever** or **Before**, **After** or **Between** certain dates.

After configuring these basic options you are ready to use the account for easy booking. Click on the **Save** button.

Advanced Settings

To get the best of this feature you can take a look at the following articles:

- <u>Company discounts</u>
- Link passengers to an account
- <u>Account signature</u>
- E-tickets
- Invoices
- <u>Set automatic priorities for your accounts</u>

Company discounts

In the Account section of the Admin Panel, you can apply company discounts to specific business accounts.

To apply discounts:

- Select the account you want to edit
- Scroll down until you see **Company discount:** and click on the **Edit** button.

Company discount:	15	(%)
Driver discount:	5	(%)
Apply discount at:	Poi	nt of sale 💌
Handling fee:	0	(%)

If you're offering a discount to the passengers of a certain company, you can determine where this discount is coming from. **Company discount** means that this percentage that is discounted to the value of the ride, will be charged to the company. You can also choose that a discount be charged to the driver.

You can choose to apply the discount either at the **Point of sale** or by **Invoice**.

With Handling fee you can set an extra fee that will be added to the payable amount.

Link passengers to an account

This feature can be used along <u>reception desk booking</u>. This can be useful for companies who have one person who books all the taxi rides for the company's employees. This feature can also be used by, for example, hotels and restaurants to easily book a taxi for their guests.

How to link a user:

- In the <u>Admin Panel > Customers > accounts</u>, find the business account that you wish to link users to.
- Scroll down to the bottom until you see the Linked users subsection.

Linked users Invite users	s to link them to their account	
hotelnewyork@hotel.com	Reception Admin	5
Link passenger	les: 🗹 Reception 🗹 Admin	Link
Invite passenger	Email Roles: 🕑 Reception 🕑 Admin	Send invite 🕤

• Under Invite Passenger, write down the email for the passengers that you wish to link.

If your passenger has registered through one of your rebranded apps or through embedded web booking, you will probably find their address already in the database if you start typing their address in the "Link Passenger" field.

Roles:

- The reception role allows the invited user to log in into the reception tool.
- The **admin** role is to allow the invited user to be able to link users themselves. A user with the **Reception** role only is unable to link users.

What happens after inviting a user:

By doing this, a confirmation email will be sent to the email address. If the holder of the email address already has a passenger account at TaxiCaller, they just have to log on to TaxiCaller as a passenger or alternatively to the reception tool and will be able to start making reservations through the account.

If the holder of the email address doesn't have a passenger account yet, they just need to create a passenger account with that address.

Remember to always select direct payment for accounts intended for guests to the customer, e.g. hotels and restaurants.

Account signature

We now have an option to require account customers to sign for their payments in the driver app.

Enable account signatures

You can enable this feature in two ways:

a. For all accounts:

- Go to <u>Settings > Dispatch > 1. General</u>
- Find Billed in the Payment options.
- Mark the box that says **Require Signature**.

Billed	
Allow zero	Hide fare
Require signature	

b. For specific customer accounts:

- Go to the <u>Customers</u> section.
- Choose Yes on the Require signature setting for that particular account.

		1	
None	*		
Notification g	roup		
Default 🔻			
Require signa	ture		
Default 🔻			
Required field	s		
Field	Query	Optional	Permitted values
Cost code	_	_	
COSt COde			Approved values
Reference			Approved values Approved values

2. How it looks in the driver app

The driver will now require the passenger to sign to complete the job.

🖗 🗈 🗖 🏛 🕷	? 🔟 🗃 😪 🕨 📂 🛛 🖄 불 14:39
Ар	prove charge
	\$22.00
Account	Smith, Peter
Signee	Smith, Peter
	that this information is correct stated charge to be applied to my
Signature	
CLEAR	ety Smt
BACK	APPROVE
\triangleleft	0

For additional information about how it works in the driver app, check this article.

3. View the signature in the receipts

The new signature screen will be shown when adding an account payment if required for that customer. After the passenger signs for the payment on the tablet or smartphone, the signature will then be visible on the receipt for that job in the Job Editor in the admin panel.

Fare receipt				×
	22	2.00 USD		
		Fare		
Taxímetro	Subtotal	VAT	Discount	Total
luxinet o	22.00	-	-	22.00
		Payments		
Account	Amount	Reference		
Signed	22.00	5953a3ae9ad	5953a3ae9adb894410280528	
		λ	Petro	m

Receipts for jobs can be seen by clicking 'i' under the payment column in the Admin panel.

E-tickets

You can create and give away batches of taxi vouchers (e-tickets) for cheaper or free taxi rides to your corporate customers.

Each e-ticket has an unique ID that limits the usage to a single occasion. The value of the e-ticket can be setup to either cover the whole trip or to be a fixed price that will be withdrawn from the total price of the ride.

To use an e-ticket the passenger will only need to know the e-ticket's ID. When an e-ticket has been used for a taxi ride, the usage will be reported your taxi company so that the corporate customer account can be charged with the correct amount.

To find more information about e-tickets, please check the following article: e-tickets.

Invoices

This allows you to generate finished invoices for your account customers. Once an invoice is generated, you simply download it to your computer, and it's ready to be sent.

To generate invoices:

• Choose **Customers** in the sidebar in the Admin Panel and select <u>Invoicing</u>.

h	Invoice generator: 🗸 Ready		Settings	Generate	
#	Date	Account	Customer	I	nvoice total
	📩 Down	load selected	🛍 Delete selected	$z \leftrightarrow \cdot \rightarrow$	

• Click on **Settings** to configure your invoices.

Invoice settings		×
Invoice title		
Registered name		
Registered address		
Registered tax text		
Tax name	e.g. VAT/GST	
Tax rate	0.00 %	
Tax included		
Number formula	[counter]	
Print environmental info		
Use legacy generator		
	🖺 Save	

• Click on **Generate** and select a date range.

Generate invoices		×
Processing options		
Counter start	1	\$
Date of issue	30/06/2017	
Between	01/05/2017 30/06/2017	
	► Start	

• You will then see the invoices that fall into the chosen range. If the process has been successful then you will see a green checkmark alongside the text **Finished**

Invoi	ce gene	Settings Generate		
#	Date	Account	Customer	Invoice total
2	30/6	1612021	Smith, Peter	44.00
1	30/6	1612091	New York , Hotel	137.50



- Select the invoices from the companies you need and click the **Download selected** button. If you wish to delete invoices, click on the **Delete selected** button. You can always generate the invoices again.
- The download location will depend on your browser configuration. You will get a pdf invoice file ready to be sent or printed.

Hotel	s						Acc		1612021 voice da		
	New Yor	k 34 St		period: 2017/05/03	L 00:00 - 201	7/06/30 00:00					
					ce Number: 2						
Start	Passenger	route			car	Driver	Pay	Fare	discoun	settled	payabl
Cost co	de: none										
2017/06	6/28										
08:34	Smith, Peter	to: 2-8 Nathan D F	Perlman Pl, New	v York, NY 10007, USA v York, NY 10003, USA	1	John, Anderson	А	22.00			22.0
08:39	Smith, Peter	CO2: 0.33 Kg, NO #5175726 from: 1		v York, NY 10007, USA	1	John, Anderson	А	22.00			22.0
			Perlman Pl, New	v York, NY 10003, USA	-						
		с	- A	44.00	Total Fare (Including VAT: 6.07) Discount				44.00		
					Collect						
					Payab				44.00		
		Credit Handling Fee/Adjustments		-							
						ode Total			44.00		
		С	- A	44.00		are (Including VAT: 6.07)		44.00		
						Discount					
		Environmental info			Total C				44.00		
		CO2: 0.65 Kg, NO: 0.06 Kg, trees: 0				Payable Handling Fee/Adjustmer	te.		44.00		
	002. 0.05 kg, NO. 0.00 kg, 1285. 0				Invoic				44.00		

2017/06/30 10:35

(c) TaxiCaller

page 1 of 1

Set automatic priorities for your accounts

The job priority feature can now be applied directly to a customer account. If you have regular VIP clients, or accounts that need to be handled as quickly as possible, you can set a priority level on their account in the Customers section of the admin panel as seen below. If you set the priority level to anything other than default, the system will block other jobs until that account booking is handled. Priority level 5 is the highest and priority level 1 is the lowest.

Account I	nformation				
Customer:	New York , Hotel	Type:	Business 🔻		
Account id:	1612091 Phone:		+17125489566		
First Name:	Hotel	Last Name:	New York		
Billing email:	hotelnewyork@hotel.com	Contact email:	hotelnewyork	@hotel.com	
Cost code:	850	Priority	Automatic 🔻		
Address:	45th Street, NY		Automatic 1 2		
			3 4		
Info:			5		

To read how to apply these priority levels in the dispatch console in all other cases, please check the following article: Add a new job – Extra Information

Create promo codes and vouchers

Configuring promo codes

Go to the admin panel under <u>Promotions > Campaigns</u> to set up your discount codes.



Create a new promotional offer using the **Add** button at the bottom left corner of the page, and choose in the drop down whether to add a Referral code or a Promo code.

Name	Туре	Value	Validity (Claim)	Validity (Consu	Status	Usage (Claim)	Usage (Consume)
			÷	1 - 0 of 0	÷		
+ Add Refe	rral 🔻						

- Promo codes are like electronic discount vouchers that passengers can use towards their ride.
- A **referral code** is a discount that a passenger can receive when inviting friends to use your apps.

You can have many different promo codes, but you can set up only one referral campaign. Setting up the referral campaign works the same as a promo code, so you can follow the instructions below for that as well.

Once you add a new promo code, you can set it up with your own preferences. The section **Promo code** specifies the "code" (in this case it's "HOLIDAY") that the passengers would need to type in the passenger app to redeem the offer.

Name: Holiday special							
Туре	Pron	mo code					
Promo code		HOLIDAY					
Usage limit		Claim	Consume				
per client	Amount	15.00	15.00				
	Vouchers	3	3				
total	Amount	1500.00	1500.00				
Vouchers		300	300				
Claim	before	▼ 31/03/20	016				
Consume	before	▼ 31/03/20	016				
Sender	Sender						
Message	Message USD 5 off any ride!						
Value	USD 5.00						
Created: 24/02/2016							

When you're done configuring, hit "OK" to save the promo code.

- The **Name** section of the promo code will show up when a passenger goes to redeem the code in the app (as seen in the picture on the right, "Holiday special")
- **Claim** is the amount of promotions a passenger can apply for and "Consume" is how many they can actually use. Just like with physical vouchers, a passenger may have 10 but they can only use 2.
- **Amount** is the total monetary value and "Vouchers" is the amount of promo codes. You can choose also amounts and vouchers per client and total.

In our example, the per client amount limit is USD 15 and the vouchers are set to 3 for both claim and consume. This means that each passenger can use 3 of our Holiday special promo codes at USD 5 each, for a total discount of USD 15.

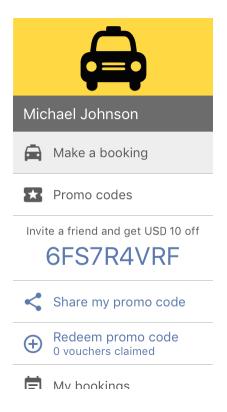
We've also set a total limit to USD 1500 and 300 vouchers, so 100-300 passengers will be able to use this promo code depending on how many vouchers are used per person.

Name: Holiday special						
Туре	Pror	Promo code				
Promo code		HOLIDAY				
Usage limit		Claim	Consume			
per client	Amount	15.00	15.00			
	Vouchers	3	3			
total	Amount	1500.00	1500.00			
	Vouchers	300	300			
Claim		▼ 31/03/20	16			
Consume		▼ 31/03/20	16			
Sender						
Message USD 5 off any ride!						
Value USD 5.00						
🗢 Edit			Created: 24/02/2016 14:46			

Redeeming and using promo codes

Redeeming promo codes

- In the passenger app, open the menu by clicking the button in the top left corner.
- Hit **Promo codes** and then "Redeem promo code". Now type in the code we specified in step 1. In this example we used "HOLIDAY" as a code.
- Type your promo code, and then press the "REDEEM" button.

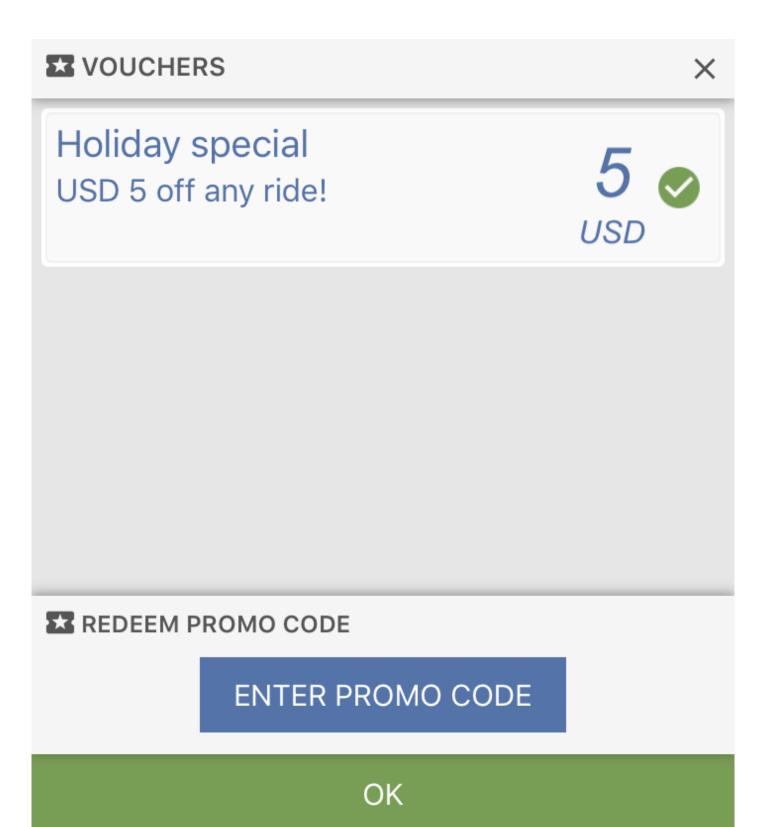


⊕ REDEEM PROMO CODE						
Holiday special USD 5 off any ride	5					
HOLIDAY						
Back	Redeem promo code					

You can also add a promo code in the Payment Method section on the booking details screen after the passenger has chosen a pick up location for their trip.

Using promo codes and booking a job

- In the passenger app, start to place a booking.
- After setting the pick up address and arriving to the booking details view, you can select to use a promo code. Do this by pressing "Payment Method" in the booking form, then tap Promotions to add your code.
- Hit "OK" once you've selected which one to use and then proceed to complete the rest of the booking details to place the booking.

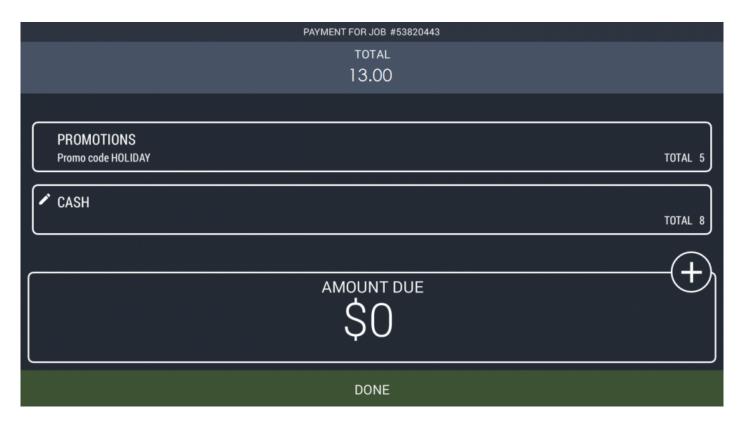


Consuming promo codes in the driver app

Now that we have placed a booking with a promo code from the passenger app, we'll go through how this looks from the driver's perspective.

Detailed Payments are required for promo codes to be consumed from the driver app. Turn this setting on under Settings > Dispatch > 1. General > Payment Options > Detailed payments.

Completing the job as a driver will now take you to the cashiering view. Once you've specified the costs and proceed to the step of specifying payment methods, any promo code that was attached to the booking by the passenger will automatically be consumed and displayed together with the rest of the payment methods you specify after that.



If the passenger did not book from the app but knows the promo code, or simply forgot to add it, the driver can also add it by pressing the Promotions tab and entering the code.

Click on "Done" when you're happy with your input. This will complete the ride and will trigger the receipt to appear in the passenger's view. More on that in the next step.

Receipt of the ride

As mentioned in the previous step, once the driver completes the job, a receipt will automatically appear on the screen on the passenger app, outlining the details of the ride. Here, you can see both the costs (taxi fare, possible extras) and what payment methods were used to pay for the ride as specified by the driver (in this example voucher and cash.)

	YOU RATED YOUR SERVICE ×
20.00	$\star \star \star \star \star$
4	Great service!
	RECEIPT
	12/12/2016 10:12 ti
	YOUR DRIVER HAS BEEN
iej .m	John
	\$13.00
UKK	FARE
(TaxiMeter SUBTOTAL 11.00
6	Extra waiting 00:34 SUBTOTAL 2.00
E	PAYMENTS
	Promotions 5.00 Promo code HOLIDAY
¢	Cash 8.00
•	ОК
G	POOKED TIME

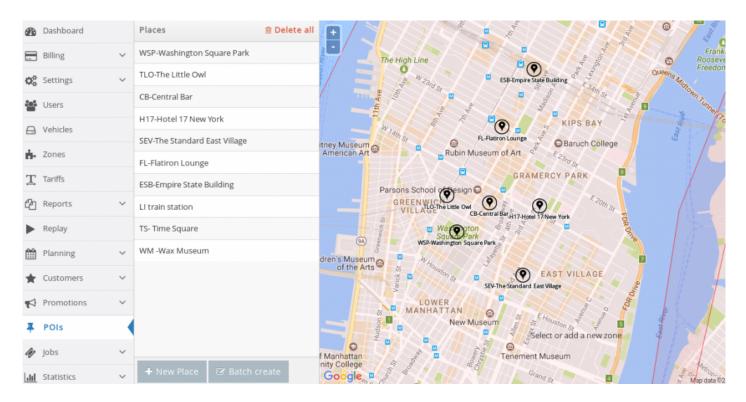
POIs – Points of Interest

This feature allows you to add points on the map for places that aren't indexed by Google Maps or simply to speed up the booking process. Dispatchers only need to start typing the name of the POIs in the pick up or drop off address bars for them to be selectable.

This article describes how to create POIs. For their usage in the Dispatch Console, check the following article: <u>Using Points of Interest</u>

Create POIs.

To create the POIs for your company, please scroll down the main menu on the left side of the Admin Panel until you find the option POIs. Alternatively, you can visit the following link to do so: https://admin.taxicaller.net/admin/pois.php

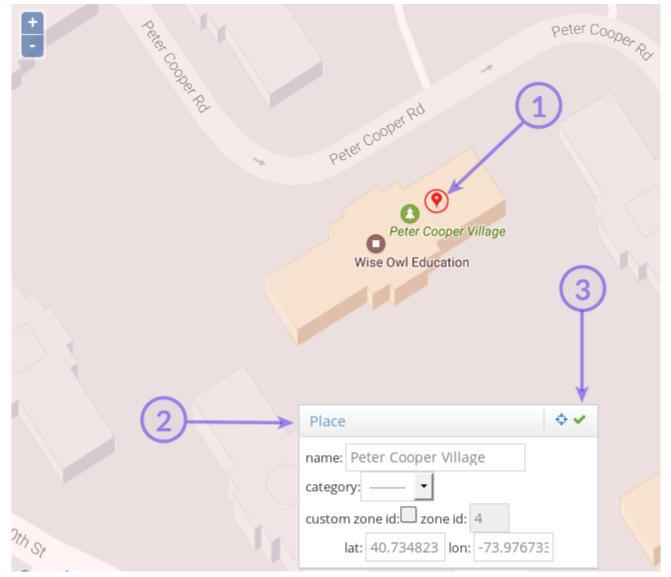


Click on the **+ New Place** button at the bottom of the screen. A small window will appear in the middle of the map, along with a red mark that you can move to the location you want to make into a POI.

1. Move the red mark to the desired place. Alternatively, change the coordinates directly into the dialog window.

2. Give it a name. If you have added categories for your POIs (explained below), you can apply the category to your POI now.

3. Click on the green checkmark to save.



1. Move the red mark to the desired place. 2. Enter a name. 3. Click on the green checkmark to save.

Create categories for your POIs.

Creating categories is not a necessary step for the use of this feature, but it is useful when you have a large amount of POIs. You can create up to 100 different categories, for example **Libraries** or **Restaurants**.

Go	o to <u>Dispatch</u>	<u>Sett</u>	<u>ings > 5.</u>	POIs and st	art adding then	n by clic	king on	the	₿ Ed	it butto	on. Once yo	ou are
do	ne adding the	e ca	tegories, o	click on	Save							
Ð	Dashboard		1. General	2. Assignment	3. Operating Hours	4. Tags	5. POIs	6. Text bac	k			
	Billing	\sim					i	d Custom	POLcate	agony		
Q ⁰	Settings	~					1			26019		
*	Dispatch						2	. Restau	rants			
	Companies						3					
	Driver app						4					
	Permissions						6					
	Vehicle types						7					
	Notifications						8					
	Embed						9					
	Permits							0.				
	IVR							1. 2.				
:0:	Users							3.				
	Vehicles						1	4.				
	Zones						1	5.				
	Tariffe							ා Ca	ncel	🖹 Save		

Add up to 100 categories for POIs

Batch create POIs (Advanced)

POIs are batch added in the following format (note the square brackets at the beginning and end):

```
[
{ "name": "name_of_node_1", "coords": [lon, lat] },
{ "name": "name_of_node_2", "coords": [lon, lat] },
]
```

Each new node that you add will need to be its own line and each line is separated by a comma:

```
{ "name": "JFK Airport", "coords": [-73780327, 40641311] },
```

Under "name", write the name of that POI (for example: "name": "JFK Airport") After "coords", write the longitude and latitude for the POI in the brackets. Coordinates are in the format of decimal degrees, multiplied by 1e6, so for instance 58.234234 is entered as 58234234.

How to edit job details

In the section called "Jobs", all your closed jobs will be listed. Here, you can both view and edit any information of a job. Any changes made here will be applied to the job in the database, so when you generate reports afterwards, the changes you have made will be reflected.

You can use the "search" feature to filter jobs based on details, or by job ID.

	0	Search	Pas details *	senger Ph	one	All T All T	to	all * Q Search				
	O	Dearch		rce: all v	2	when: before v 29/06/2017	sort: ck	ased V descending V	0	4		(5)
ld 3	Started	car	Passenger	Phone	account	pick up		drop off	payment		price	edit
5175725	06/28/2017 8:38 am	19	Smith, Peter	+46739034084	1612021	196 Park Pl, New York, NY 10007, USA		2-8 Nathan D Perlman Pl, New York, NY 10003, USA	Cash	i	8.50	Ø
5175724	06/28/2017 8:38 am	32	Smith, Peter	+46739034084	1612021	196 Park Pl, New York, NY 10007, USA		2-8 Nathan D Perlman Pl, New York, NY 10003, USA	Cash	i	8.50	Ø
5175726 i	06/28/2017 8:39 am	1	Smith, Peter	+46739034084	1612021	196 Park Pl, New York, NY 10007, USA		2-8 Nathan D Perlman Pl, New York, NY 10003, USA	Billed	i	22.00	Ø
5175723 i	06/28/2017 8:34 am	1	Smith, Peter	+46739034084	1612021	196 Park Pl, New York, NY 10007, USA		2-8 Nathan D Perlman Pl, New York, NY 10003, USA	Billed	i	22.00	Ø
5175722 i	06/28/2017 8:31 am	1	Smith, Peter	+16465876952		390 Pearl St, New York, NY 10038, USA		374-388 Pearl St, New York, NY 10038, USA	Cash	i	55.00	Ø
5175721 i	06/28/2017 8:29 am	1	Smith, Peter	+16465876952		5 St James Pl, New York, NY 10038, USA		5 St James Pl, New York, NY 10038, USA	Cash	i	33.00	C

The Clearing CLR State

If a vehicle is in the **clearing (CLR) State**, it means that even though they are currently busy with a job, they will soon become available to take new jobs.

However, the system can be configured in such a way that jobs can still be assigned to busy vehicles as long as they are in the clearing state. To activate this setting make sure that "Jobs when clearing" is checked in the Admin Panel. <u>Settings – Dispatch.</u>

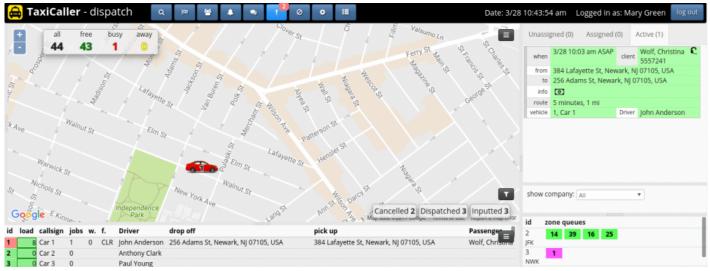
1.	1. General 2. Assignment		3	8. Operating Hours	4. Tags	5. POIs	6
	Auto	dispatch					
	Au	to dispatch jobs		Auto d	lispatch tri	es 2	r
	Requir	e vehicle accept	×.	Job ac	cept timeo	ut 60	s
	Aut	omatic job start	1	Job	s when bu	sy 🔲	
	Job	s when clearing		Job	s when aw	ay 🔲	
	Hold	for unreachable		Resp	ect shift er	nd 🔲	
	Auto	select company					
		Reset rejects		Auto disp	oatch roun	ds 2	r
		Reserved reject	def	fault 🔻			
	C	learing distance	0 m			_	

Then use the modifier *Clearing distance* to select how far from the destination a vehicle can be considered to be in the CLR state. You can select anything from 0 to 3000 meters (3281 yards). At this point, the the driver will see a CLR button in the driver app and will be able to press it.

🚫 🔍 🚍 🌫 🕅 🔮	🗖 🖆					🗙 🛜 🗊 4:04 pm
current	Taximeter	Queue	Offers	С Мар	C dispatch	Chat
Pick up				ASA	P (04:04 pm) 225 y	/
	384 Lat	^f ayette St, Ne	wark, NJ 071	05, USA	C	Available
drop off					4min 1300 y	1 TT SITTERIOTE
•	256 A	dams St, Nev	wark, NJ 0710)5, USA		
Passenger					count 1 bags ()
		Wolf, C CALL	hristina 5557241			Busy
Price		Taximeter	r: USD ~4.7			Away
Callout	Wait	POB	CLR	Delivere	ed Cancel joł	
		zone: 3 - 1/1	gps: 🌤 sync: S			
		Ĵ	\Box			

A current job with the Clearing button available

Once the driver is in the clearing state, the dispatcher will also be able to see this from the Dispatch console. In the screenshot below, vehicle 1 is in the clearing state, this will be represented by a CLR tag under the f. column in the vehicle list, and a magenta color in the zone queues.



how a dispatcher will see a vehicle in the clearing state

Automatic Accounting for Drivers

With automatic accounting for drivers, you can assign a balance or *allowance* to each driver and make a charge for each job that is dispatched to them. This feature allows you to set your fare charge rate for each driver and track driver transactions to make driver payments simple and easy.



Enable the feature

- In the Admin Panel, Go to Bank and Automatic Accounting
- Click on Edit and Check on Enabled

Т	Tariffs		Automatic acco	ounting			
2	Reports	~	Enabled	2			
40			Enforce funds	Ū.	Source from	Deposit account	*
	Replay		Minimum funds	USD 0.00	Transfer to		
	Planning	~		0.00	Transfer to	Target account	*
*	Customers	~	Charge on	Start 🔻			
	Promotions	~	Transfer to				
₽	POIs		Description	0			
47	Jobs	~	Charge type	Fixed *			
h	Statistics	~	Amount				
2	Messages	~					
0	Bank	~					
»	Automatic accounting		ා Cancel 🖺	Save			

- Click on the green + sign to add a charge. You can add different charges corresponding to each job stage. The 5 different job stages available are: Accept, Start, Reject, Cancel and Deliver.
- Set either a Fixed fare that will apply to all drivers, or a Dynamic fare that can be different for each driver.

• Click on the **Save** button.

You can only set a Dynamic fare when the "Charge on" is set to "Deliver".

Set the fare charge rate for each driver.

If you have chosen a Dynamic fare to charge on Deliver, you will need to configure the fare change rate for each driver. To do this:

- Go to the Users section in the Admin Panel
- Select a driver and scroll down to the bottom of their profile until you find the **Driver Options**.
- In here you will be able to enter a Fare charge rate in percentage form.

Driver options		
Approved devices	Approved device ids	
	0.00	96
	R	

Anonymize data

In the Admin Panel you can access the new section Anonymize as part of the GDPR compliance. There you will be able to manage, download or delete the data of current customers and jobs. You can access this section by going here https://admin.taxicaller.net/admin/anonymize.php

As a general rule you will only be able to delete data older than 6 months.

Select by jobs: You can anonymize old trips or jobs from specific clients searching by client name, phone numbers, account number, and other personal information.

Select by customer: You can search the customer information that you wish to anonymize, for example old customer accounts that haven't been used in a given time. Select them by first name, last name, account ID, etc.

If your search results in fewer than 5 accounts, these don't need to be older than 6 months to anonymize.

Remember that you can download all the information by clicking on the Download button.

To prevent accidental deletion of information, we will ask you to type the word Anonymize before any changes are made.

Remember that records may be stored in our backups for a limited time. Please note that any attempts to retrive anonymized data from our backups will be charged at an hourly rate, regardless if restoration is successful or not.