Admin Panel

Unified Admin — Last update: 2020/01/10

TaxiCaller Nordic AB

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About us

Since 2011, TaxiCaller has provided indispensable software to hundreds of taxi, limo, private hire and car service companies. We've become the specialist in cloud-based dispatching, with a global presence in over 60 countries and 6 continents.

Developed by Swedish engineers with backgrounds in telecom and transport, TaxiCaller offers a truly innovative and cost-effective dispatch software that has transformed the transport industry all over the world.



Our offering

TaxiCaller offers a wide variety of solutions that will provide to your company flexibility and will let you manage your business from end-to-end in the cloud.

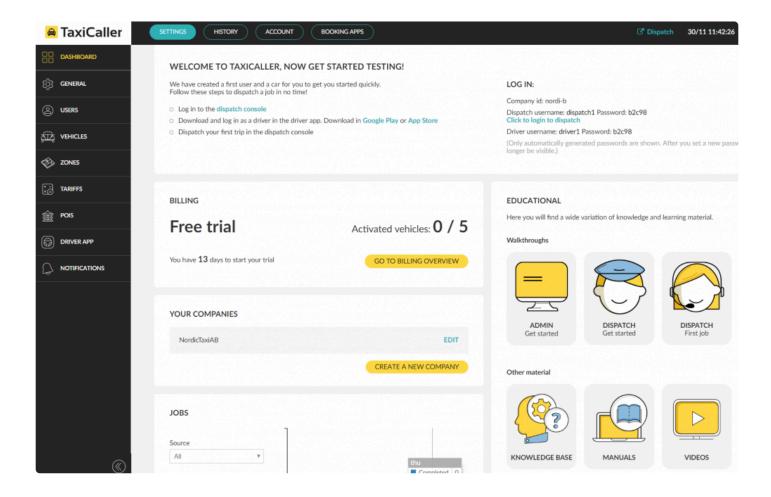
The different platforms that TaxiCaller offers are:

TaxiCaller Admin Panel

With the TaxiCaller Admin Panel, you can set and manage your entire organization's functionalities and permission.

The administrator of this account will have the privileges to set and manage the company, users, drivers, rules, and permission that will be reflected in the:

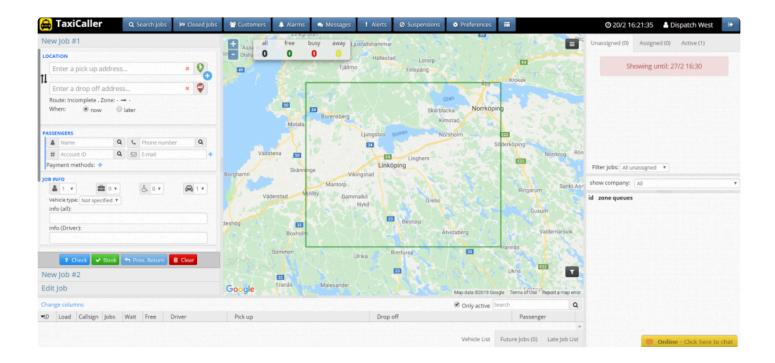
- Dispatch
- · Reception tool
- Driver App
- · Passenger App



Dispatch Consol

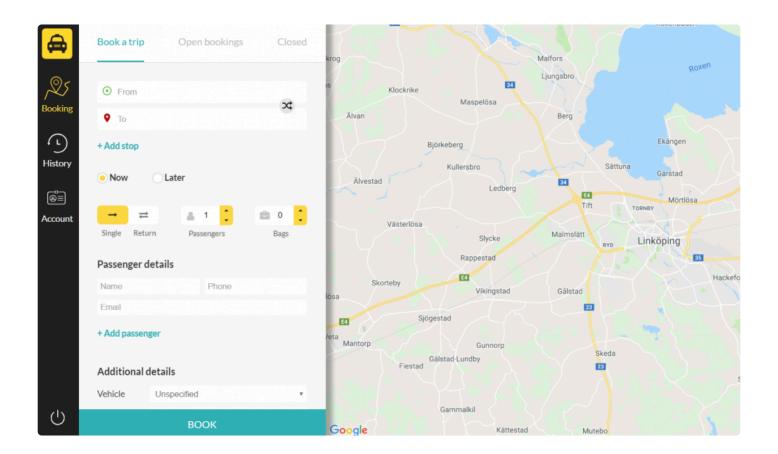
The Dispatch Consol is the software that manages all the bookings.

The dispatch user will be will be entitled to program jobs, send messages to drivers, see the history of jobs, among others.



Reception tool

Reception tool is the platform designed to enable a point of service of the dispatch software installed in a reception. For example in a tablet in the reception of a hotel or restaurant.

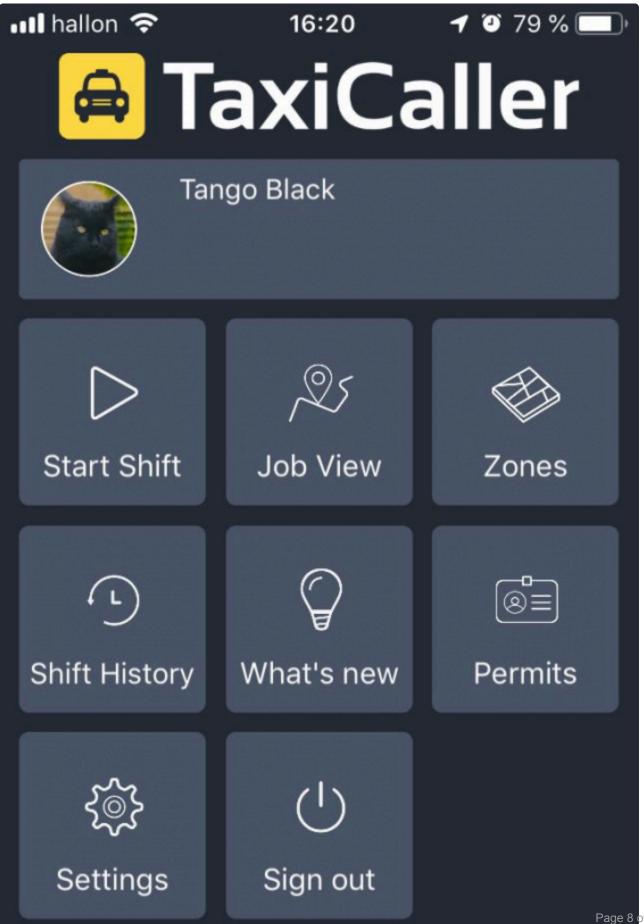


Driver App

It is the application used by the drivers to execute the jobs sent by the dispatch and reception tool.

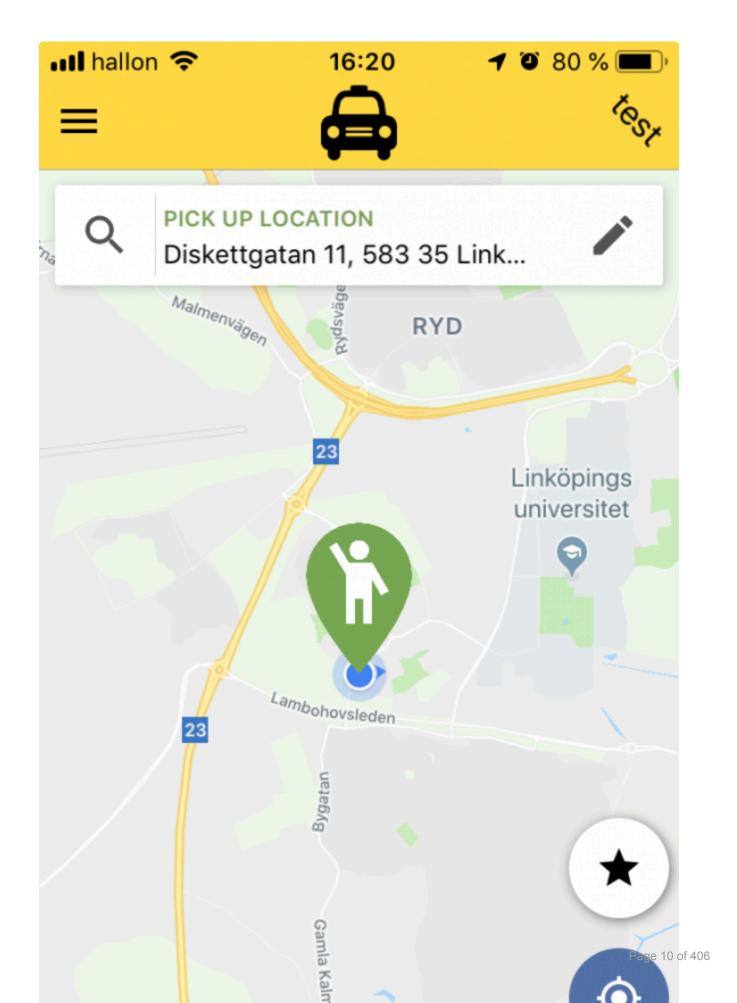
The driver app can also be set to allow street job.

It is vailable for iOS and Android



Passenger App

It is the application a passenger uses to book a job. It is available for iOS and Android





With the free trial you can try all of the products for free during 14 days. Download the applications and see it on your own with your real information!

About this manual

This manual explains all the functions of the TaxiCaller Admin Panel.

You will find detailed information that will guide you through the process of setting your company in the system.

If you require further assistance do not hesitate on contacting us via our chat. We offer live support 24/7.

If you use our legacy version of the Admin Panel, please follow the link Legacy Admin Panel Manual.

For more information about our other manuals, visit:

- Dispatch Console
- Driver Apps
- Passenger Apps
- Special Features

Please feel free to explore the various sections of the manual by choosing a topic from the left menu.

Glossary of Terms and Definitions

CLR button – Clearing button, it is the button the driver can press in the driver app when they are close to the drop-off point and will soon be ready to receive a new job.

POB - Passenger on board.

POI - Point of interest.

T-minus – The time that the system calculates from the center of the service zone to the pick-up position of the job.

T-time – The time before a job when the job should be sent to the driver.

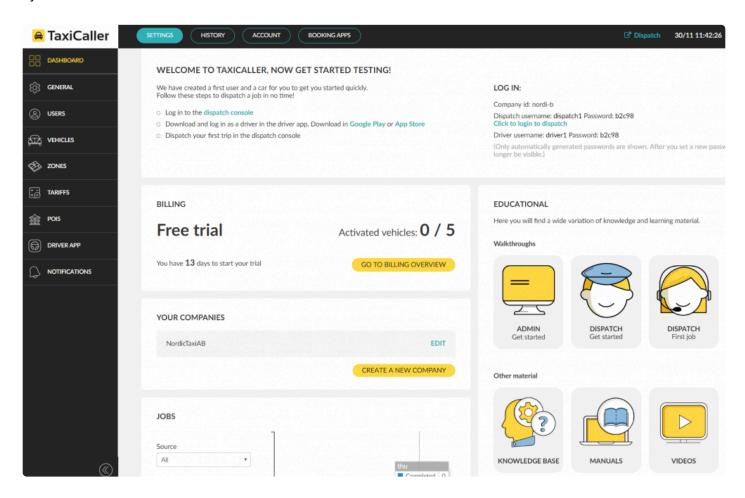
Zones – Assignment Zones – Defined areas to assign jobs to the drivers depending on their position.

Zones – Tariff Zones – Defined areas that you will set to determine the price you will charge for providing a job in that area.

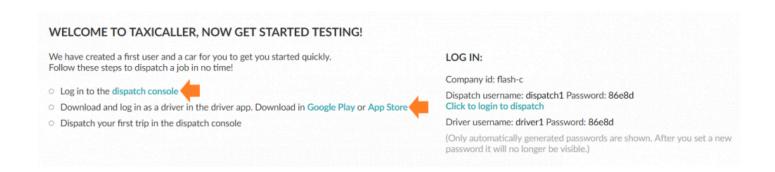
The Dashboard

The Dashboard is the first screen you will run across after you create your account.

This panel will show you an overview of your company numbers, easy access to the most relevant information of your business and links to material that will guide you through the different functions of the systems.



During your trial, you will be able to see a link to the dispatch console, the Google Play app, and the Apple Store app.



You will also find your credentials for login into the <u>Dispatch Consol</u> and the Driver App. The system for default creates a user and a vehicle that you will be able to use to login in directly and start testing the system. You will be able to change those credentials later on.

LOG IN:

Company id: flash-c

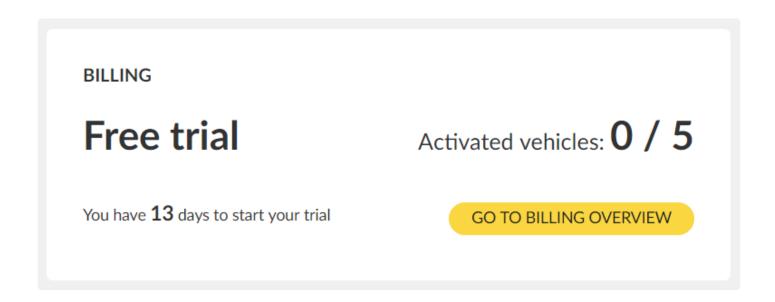
Dispatch username: dispatch1 Password: 86e8d

Click to login to dispatch

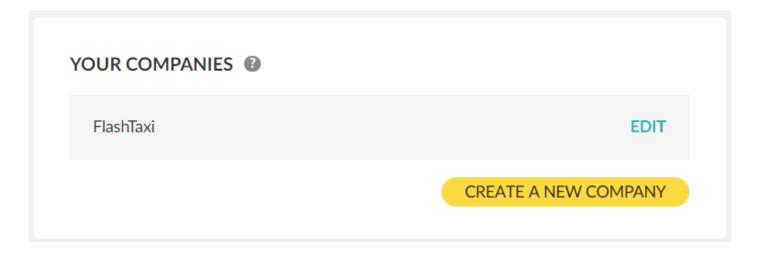
Driver username: driver1 Password: 86e8d

(Only automatically generated passwords are shown. After you set a new password it will no longer be visible.)

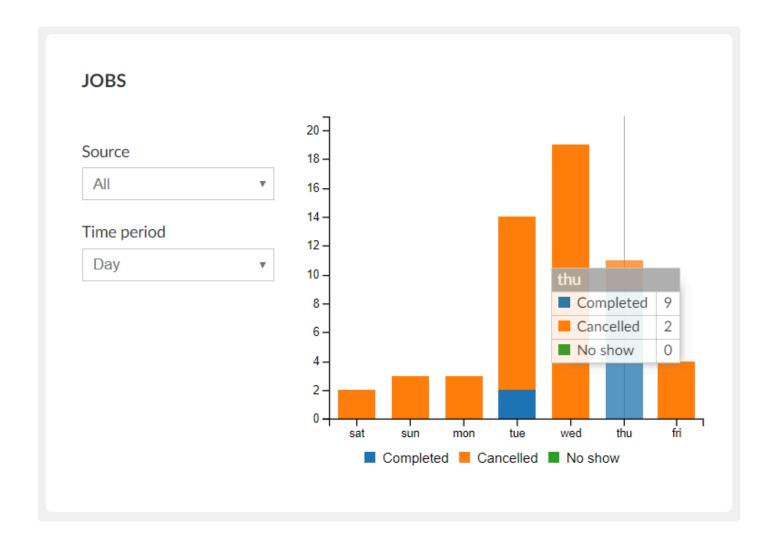
The dashboard will also display information about your billing status and your activated vehicles.



Additionally, you will be able to create a multi-company profile in your account if you would like to manage more than one fleet.



Finally, the system will show you your company statistics at a high level; and by placing the cursor over the graph the system will display specific information about that parameter.

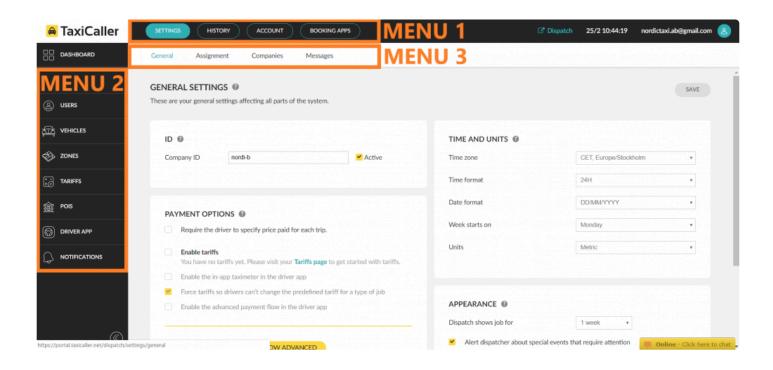


Navigating the Taxicaller Admin Panel

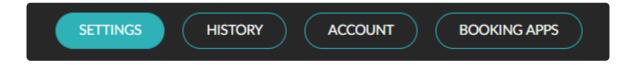
The Taxicaller Admin Panel is a robust application that comprises several functionalities.

To experience the best of the system take a look at the below section where you will find some suggestions on how can you navigate into the system.

The system is structured into three main menus where you will access all of the functionalities of the system.



The four main buttons at the top of the Admin Panel will be the main menu or menu 1 of the Admin Panel. The sections are divided by function.



Clicking on each section will display the second menu where you can access all the functionalities within that feature.

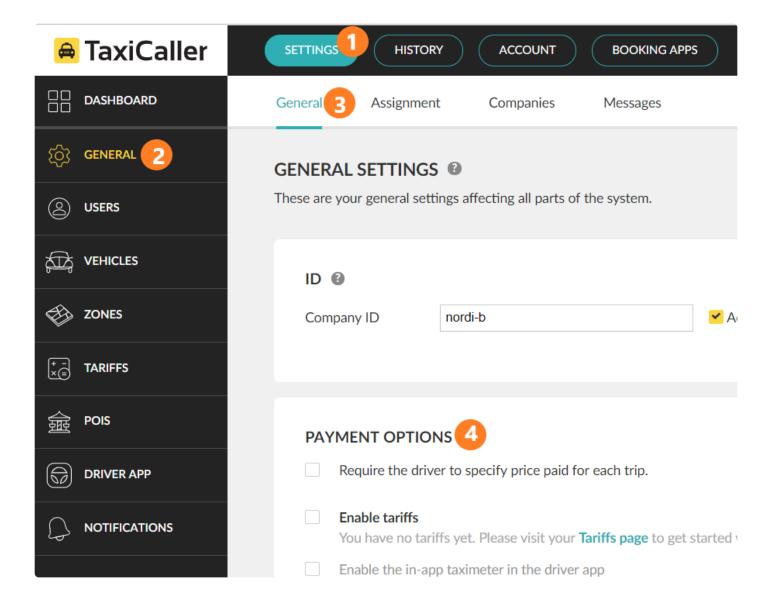
The Settings section, will be the place where you will be able to set your company in the system from scratch.

You will find all the options of **Settings Section** in the left menu or menu2. When clicking the menu 2, the system will display all the functionalities of this feature that will be available to navigate in menu 3.

When navigating into the manual, a lot of times we will recall the route where you can find a particular feature.

The notation of this route will be displayed as Menu1>Menu2>Menu3>Feature Name.

As for example: Settings>General>General Settings>Payment Options.



In the <u>Settings section</u>, you will be able to set your vehicles, users, zones, tariffs, points of interest, among others.

In the <u>History section</u>, you can see all the records about jobs, see your statistics and generate reports.

In the <u>Account section</u>, you will find your billing information, frequent customers, promotion usage and bank information.

In the <u>Booking Apps section</u>, you can control all of your booking channels, including the Web booking, the Passenger app, and the Reception tool.

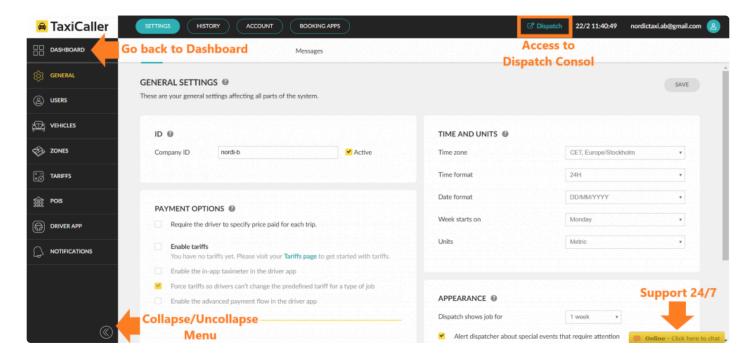
Additionally, you will find a quick link to access to the **Dispatch Consol**. In the Dispatch, you will be able to manage everything related to dispatch assignments, jobs, customers, alarms, among others. The

functionalities of the dispatch section are set in the Setting Section of the Admin Panel. To more information about the Dispatch, visit the <u>Dispatch Console Manual</u>

To find more information about the system, you can access the quick links represented with the question mark icon from the system that will pinpoint you to that specific section in the manual. You can also use the search function of the manual to find more information.



At any time, you will be able to access our support 24/7 and the dashboard.

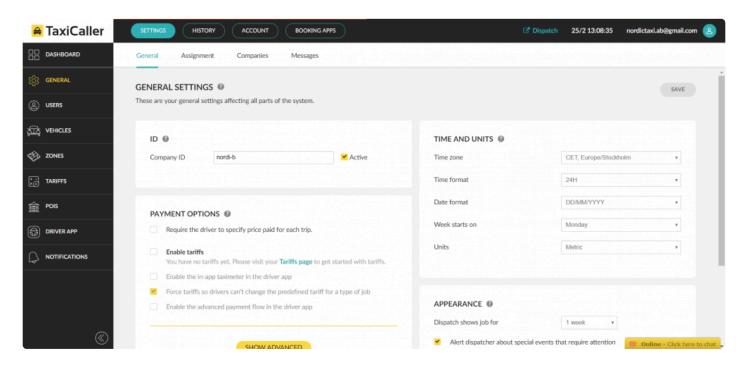


Settings

- General
- <u>Users</u>
- <u>Vehicles</u>
- Zones
- Tariffs
- POIs Points of Interest
- Driver App
- Notifications

General

Under Settings>General you will find most of the features that you will be using to set your company.



The settings will be displayed in four tabs.

Under **General** you will be able to set the time, time zone, payment methods, activate/deactivate promotions, and also some appearance settings on how would you like to display the cars on the map, among others.

In the **Assignment** tab, you will find the setting on how would you like to assign the jobs from your booking sources to the drivers. You will be able to choose if you would like to send a job to a driver if he is busy, away or clearing. Additionally, you will be able to choose if you want to set specific criteria if the job must be accepted whiting a certain time, or if the driver can hold their position in the queue if the driver is doing a quick job.

Under **Companies** you will be able to activate/deactivate your company or companies if you have a multicompany profile. You will also be able to set the booking source of your company and the operating hours ours of your business.

Finally, in Messages section you will enable if you would like to allow drivers and dispatchers to send

instant and voice messages.

In the following sections, we will go further on each of these settings.

- General Settings
- Assignment
- Companies
- <u>Messages</u>

General Settings



Once you are done with configuring this page, don't forget to click on Save to preserve the changes you have made!

The General Settings control the overall behavior of the components of the TaxiCaller Admin System.

Company ID

The Company ID is the unique identification you will use to access the Dispatch Consol. You can also activate or deactivate dispatch by ticking the box active. If your Dispatch Consol is set as inactive, you will not be able to use the Dispatch software.



When logging in into the Dispatch Consol you will be asked to write the Company ID and the credentials for the Dispatch User you have created. For more information on how to create a user visit the User Section. If you are starting with the trial, the software by default has created a user for the Dispatch Consol and a user for the Driver App, you will be able to see this credentials in the <u>Dashboard</u>.



Payment Options

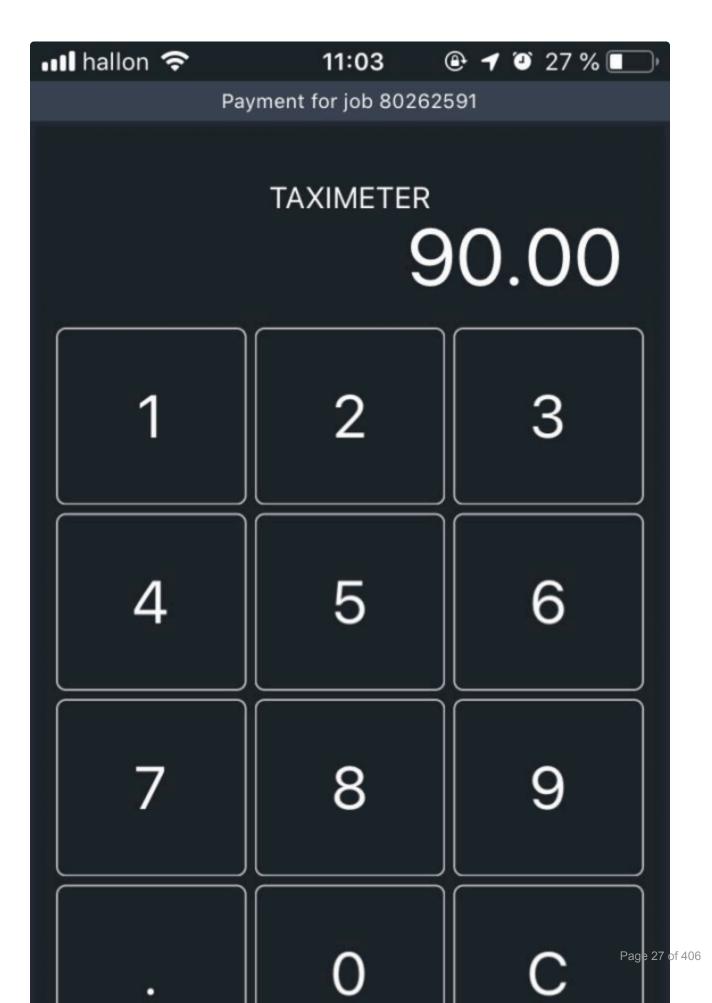
In the payment options, you will enable features on how would you like to be the Payment Process in the Driver App when the customer is finishing a trip.

PAYMENT OPTIONS Require the driver to specify price paid for each trip. Enable tariffs By unchecking this option you will disable tariffs Enable the in-app taximeter in the driver app Force tariffs so drivers can't change the predefined tariff for a type of job Enable the advanced payment flow in the driver app SHOW ADVANCED

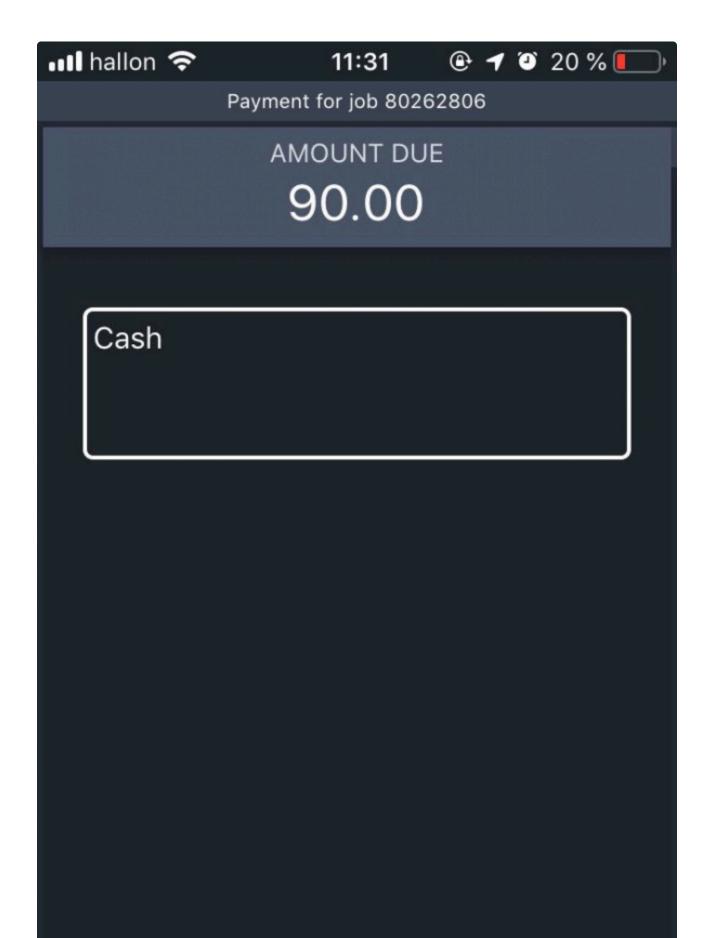
Require the driver to specify price paid for each trip:

This option enabled will display the price of the trip and the payment option to the driver in the Driver App. If you disable this option the Driver will not be able to see any information regarding the payment. If enable the Driver App will make visible the following screens.

Price of the trip:



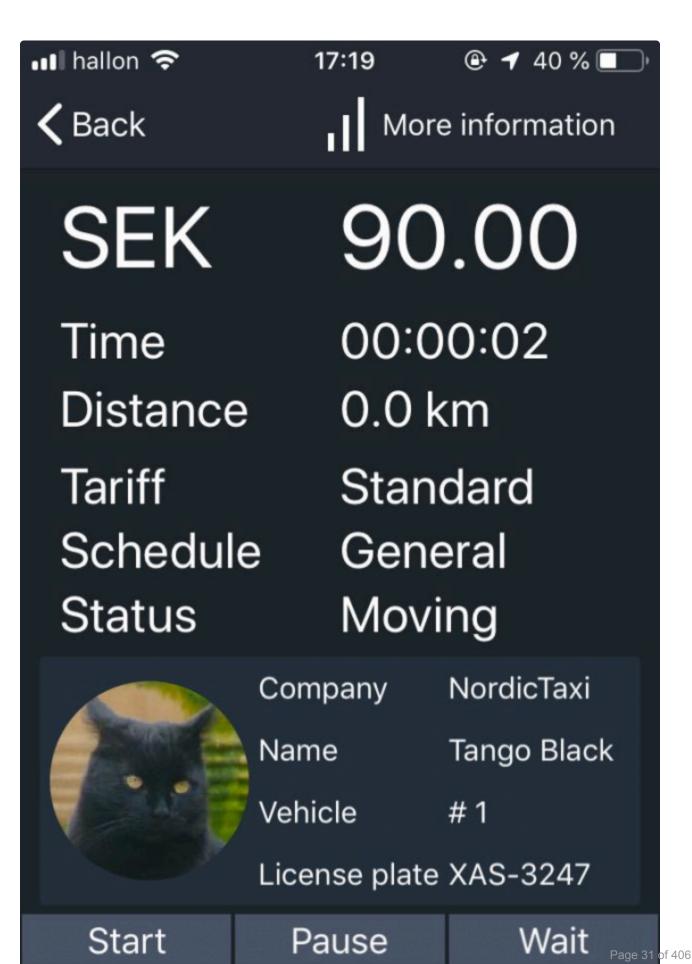
Payment option:



For the following features, you will need first to set your tariffs. You require to have the tariffs created in order to pick tariffs options. For more information about how to create a tariff please visit the <u>Tariff Section</u>.

Enable tariffs: Toggle whether you want to use the tariff options or not.

Enable the in-app taximeter in the driver app: Enables the use of the in-app taximeter in the driver app. If you have a physical taximeter device, it is 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. The in-app taximeter will look like this in the Driver App:



Delivered

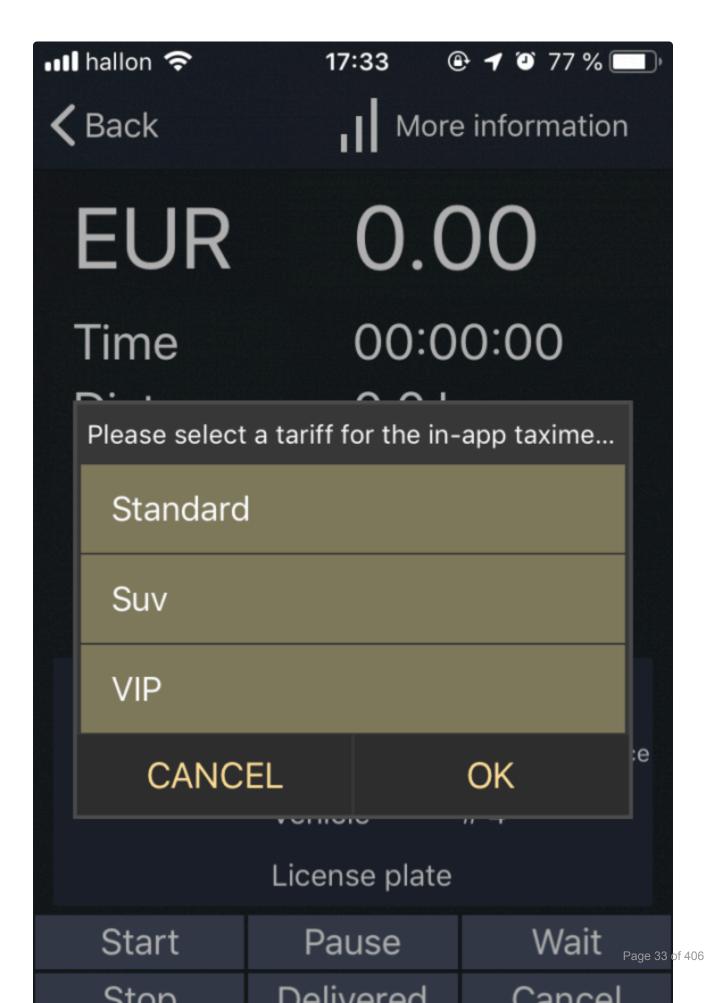
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Ston

Force tariffs so drivers can't change the predefined tariff for a type of job:

When this is disabled, the driver will get to freely choose tariffs from a list in the Driver App.

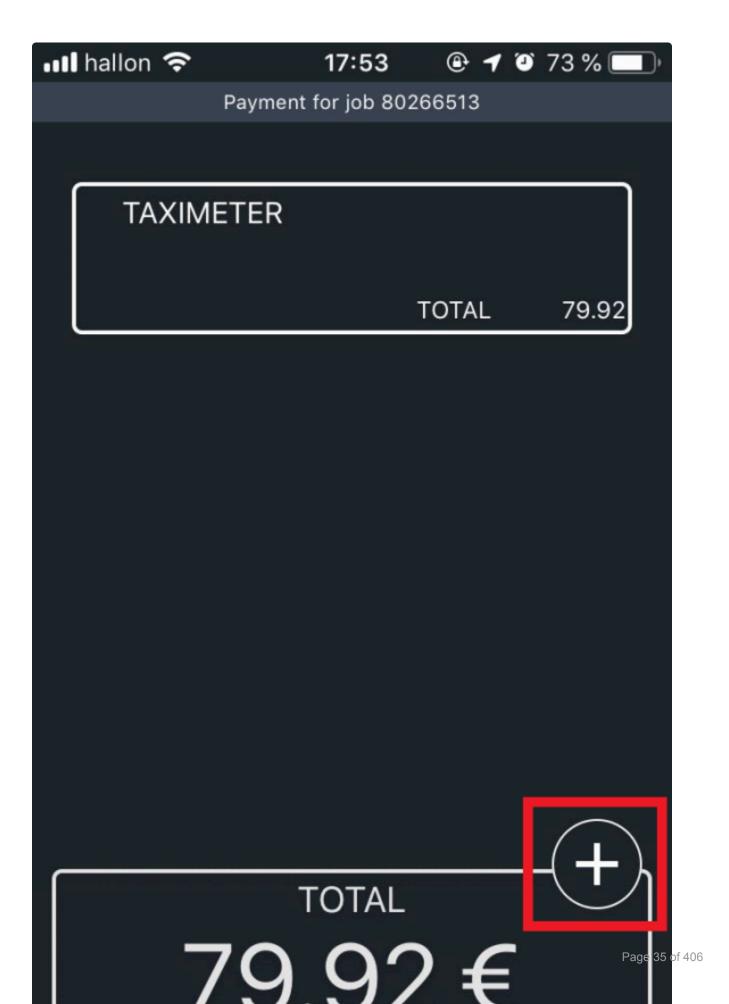
The Tariff List shown will represent the Tariff Categories set under tariffs. To learn more about tariffs go to the <u>Tariffs Section</u>.



If this option is enabled, the software will automatically choose the corresponding tariff skipping this screen no matter if the booking is made via the Dispatch Consol, Passenger App, Reception Tool, Website Booking or if it is a street job made in the Driver App.

Enable the advanced payment flow in the driver app:

This feature will enable the Driver to choose additional payment options like Extras, for example, tolls. This feature enabled will allow you to click on the plus sign during the Payment Process in the Driver App when finishing a job. It will display an additional window in which you will be able to choose your extras.

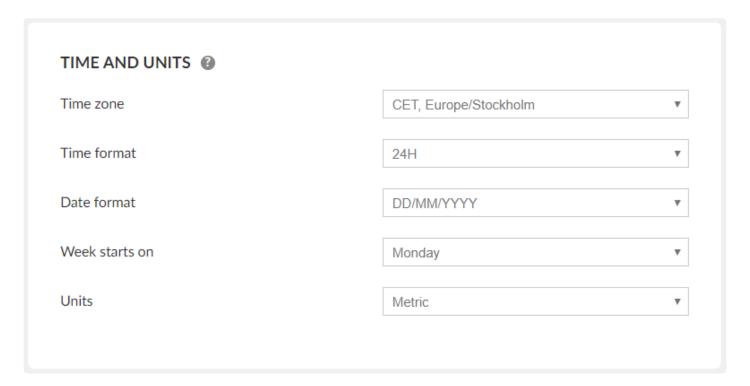




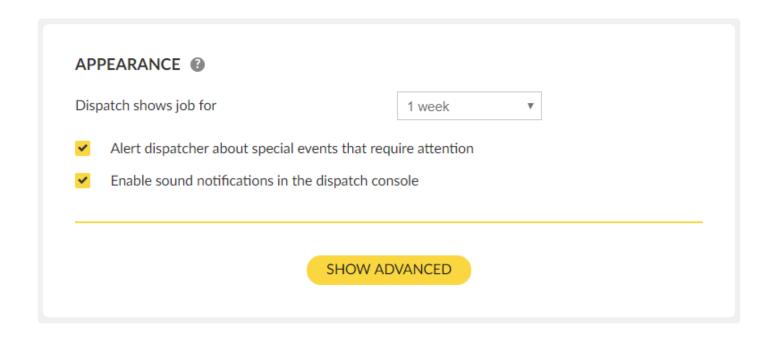
To configure advanced features related to payment, click on the button **Show advanced**. The following article will assist you with these options: Advanced Payment Options

Time and Units

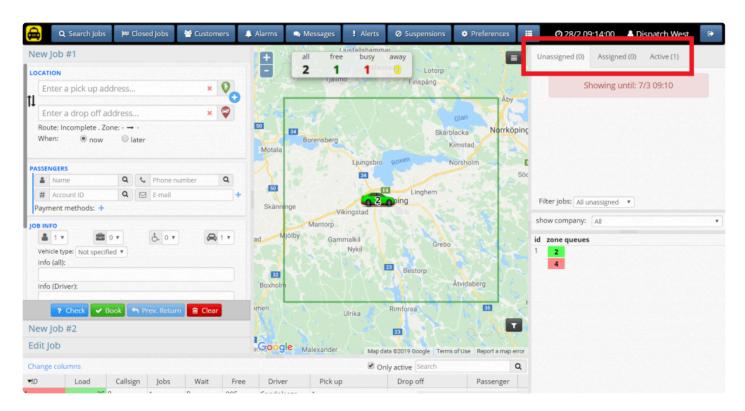
Here you can select your time zone that will apply to your entire account. It is important to configure the correct time zone, date format and units for the system to display the information as you need it and to make sure that the jobs are booked at the time desired.



Appearance

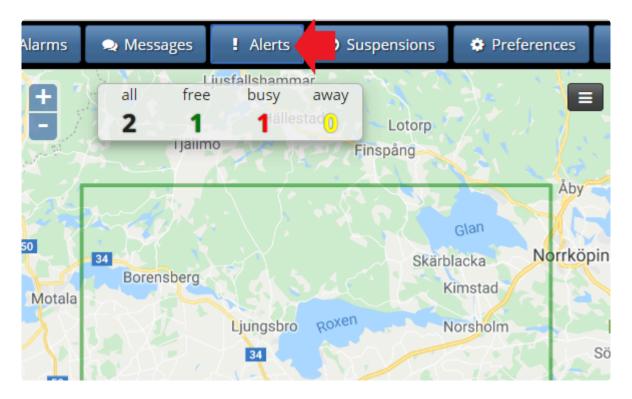


Dispatch shows job for: Determines how far ahead the dispatch will show future jobs. You can see these jobs in the Unassigned, Assigned and Active Tab in the Dispatch Consol.



For more information about the Dispatch Consol visit the <u>Dispatch Manual</u>.

Alert dispatcher about special events that require attention: Enable this function in order to activate Alerts in the Dispatch Consol. You will receive Alert notifications in the Dispatch.



For more information about this topic visit the <u>Alerts Section</u> that in the Dispatch Manual.

Enable sound notifications in the dispatch console: You can further configure which sounds to activate in the Dispatch, visit the <u>Preferences Section</u> in the Dispatch Manual.



To configure advanced features related to appearance, click on the button **Show advanced**. The following article will assist you with these options: <u>Advanced Appearance Options</u>



To configure other advanced features, click on the button **Show advanced features**. The following article will assist you with these options: <u>Other Advanced Options</u>

Advanced Payment Options

Allowed Payment Methods

The following settings will determine the payment methods that you would like to have when selecting payment options in the Dispatch Consol and Passenger App and when going through the payment process in the Driver App.

AD\	ADVANCED						
Thes	wed Payment Methods se will determine what pa enger apps.	syment methods you will allow to appear as options in the driver and					
~	Cash						
	Billed Hide	e fare Require signature					
~	In app payment Activate this option if you have set up in-app payments through Stripe.						
	E-ticket Activate if you have set up e-tickets for you account customers for a certain value of the ride (or all of it).						
	Card present	SumUp ▼					
	Activate this option if y	ou have set up a credit card reader integrated with TaxiCaller.					
	Promotions Activate if you have a R campaigns.	Rebranded Passenger App and have set up promotion codes or referral					
		card payment option that is not integrate into the apps, the driver would ne value of the ride so that the information can be saved in the system rated Reports.					
	Skip - Allow drivers to r	not specify payment method					
		HIDE ADVANCED					

Cash:

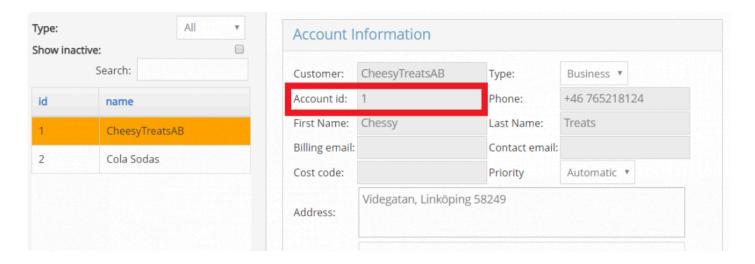
If this is selected, the option will show in the driver and passenger apps, indicating that the rides offered by your company can be paid in cash.

Billed:

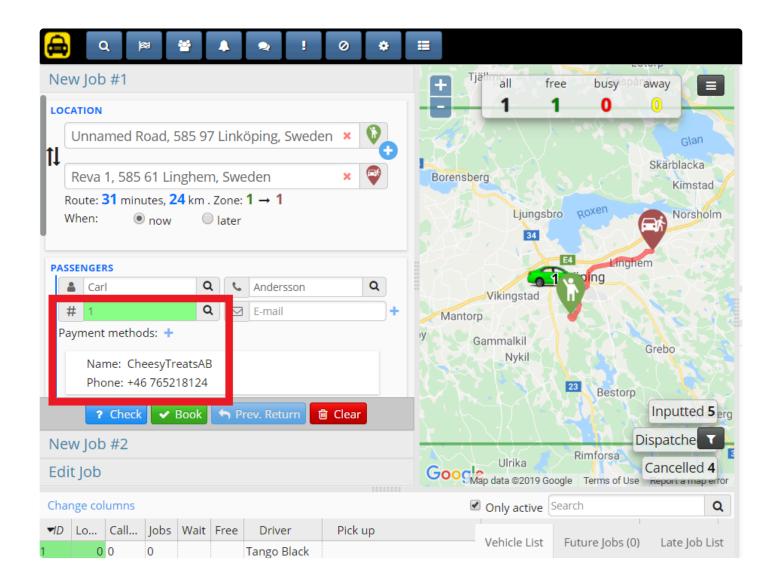
Billed refers to a payment option in which the fare is associated to a specific Customer Account, and you will be able to generate invoices for them to pay afterward. As for example, if you run a specific service for a company where your Taxi Company provides to them their taxi services, you can create the profile of this company under Customer Accounts and then the system will associate the fares to that profile. Finally, at the end of the month, for example, you will be able to run the reports to invoice all the jobs to be paid.

The customer account must be already created for enabling this feature.

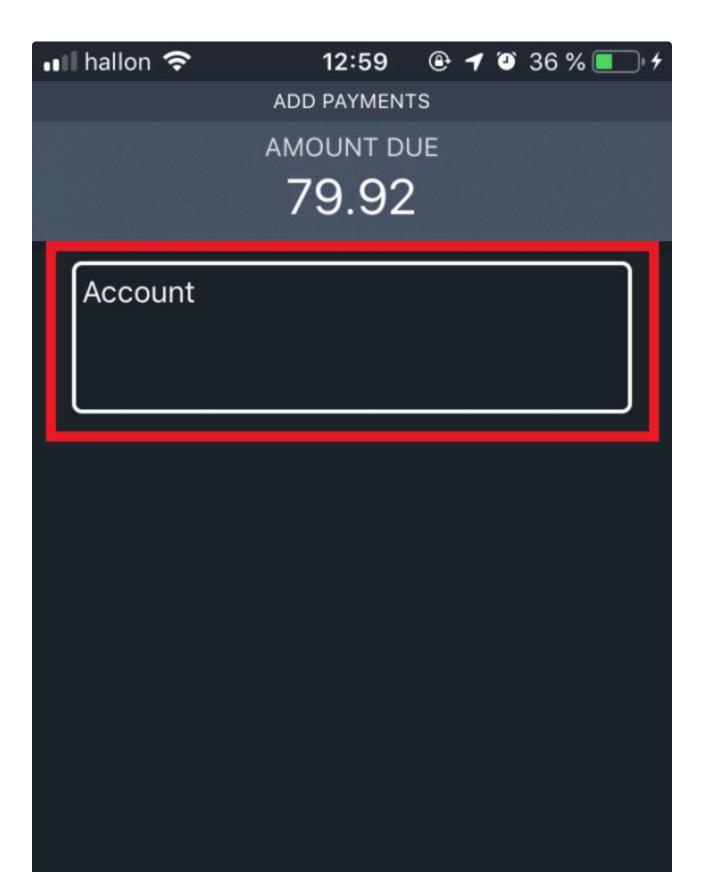
You can create a customer account under Account>Customer>AddAccount.



You will require to enter the Account ID in the Dispatch to recall the customer account.



Finally, this feature will enable the functionality of Account in the Driver App.



For more information about how to create customer accounts visit Create a Customers Account Section.



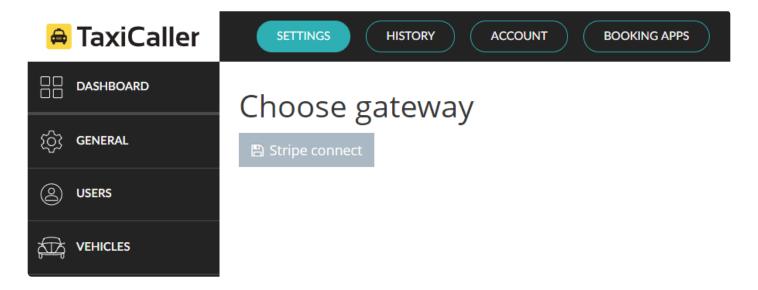
You have the option to **Hide fare** from the driver and **Require signature** from the passenger.

In-app payment:

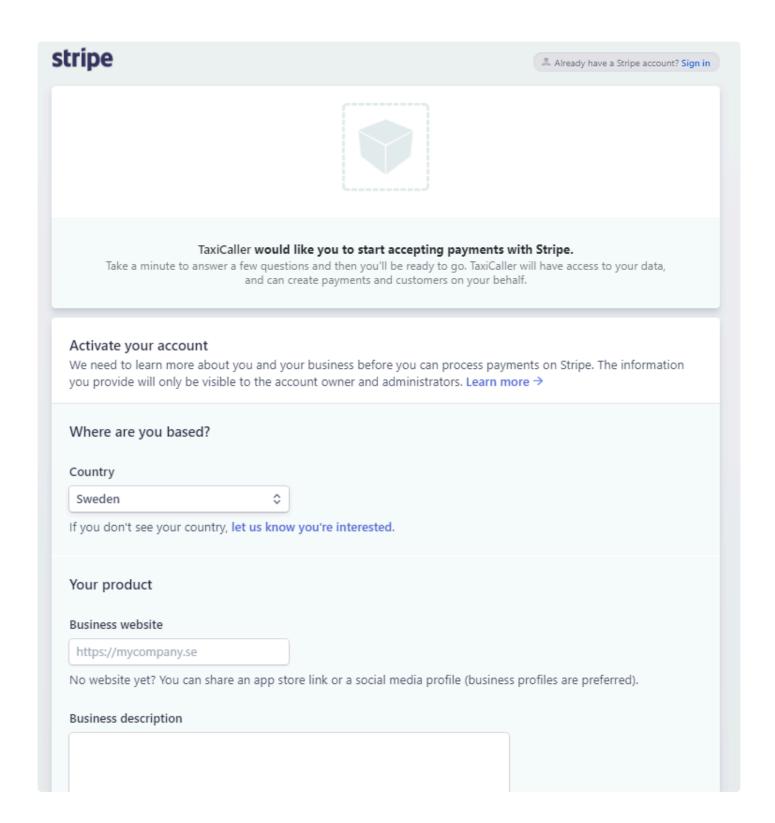
If you would like to activate an in-app payment you will need to link your account to one of the providers we partner with.

Currently, our most used provider is Stripe. To activate Stripe:

- 1. Follow the link to Activate Stripe.
- 2. Click on Stripe connect.



- 3. Sign-up if you do not have an account in Stripe.
- 4. Fill in the form and then you will be ready to go.



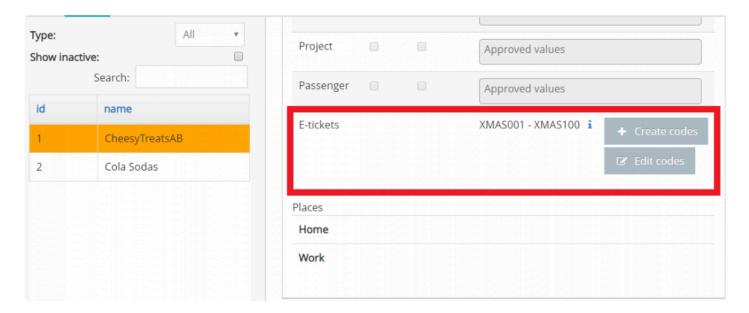
For more information about how to connect Stripe please visit the following section on <u>How to connect Stripe</u>

E-tickets:

E-tickets are electronic tickets that you can offer to your customers giving them a certain amount of the price of the ride.

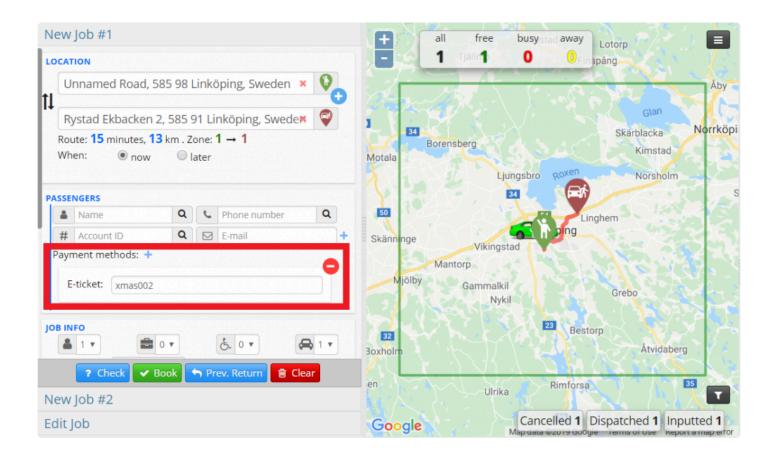
For enabling this option you will need first to create the e-tickets that you would like to give.

You can create e-tickets under Account>Customer.

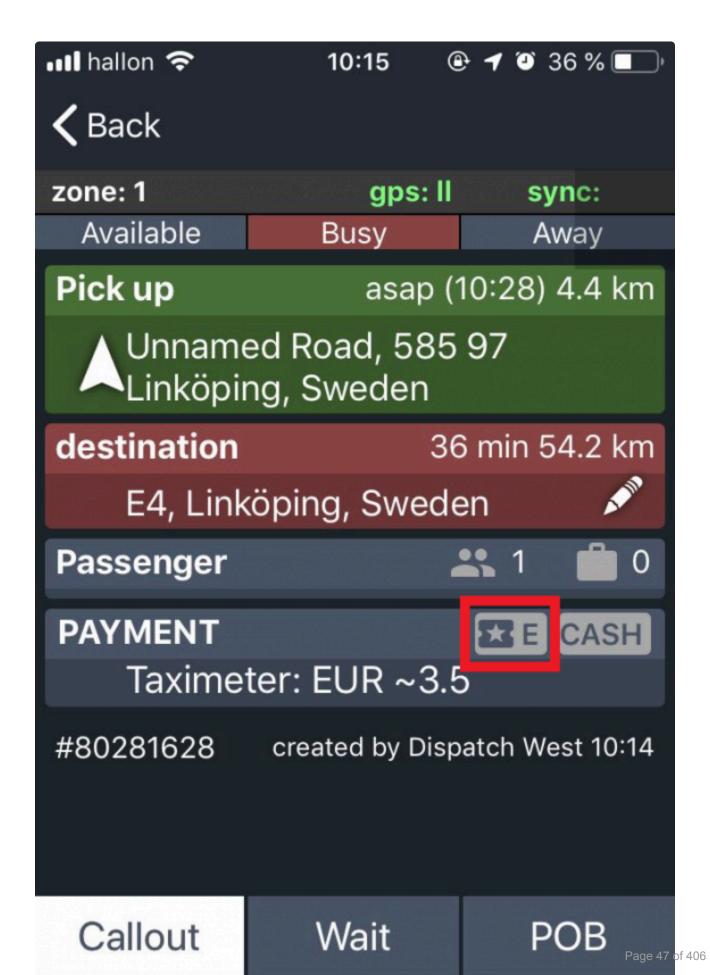


To learn more about how to create e-Tickets please visit E-tickets Section.

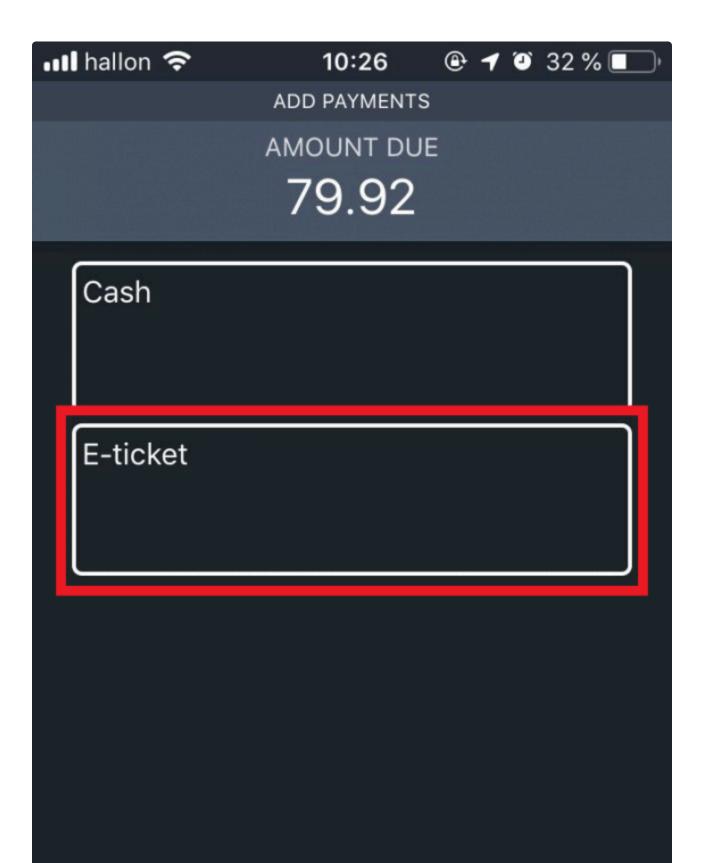
After having created the e-Tickets, you will be able to select them in the Dispatch when creating a new job under the plus sign in Payment Methods.



The selection of an e-Ticket under the Dispatch will be reflected in the Driver App with the following icon.



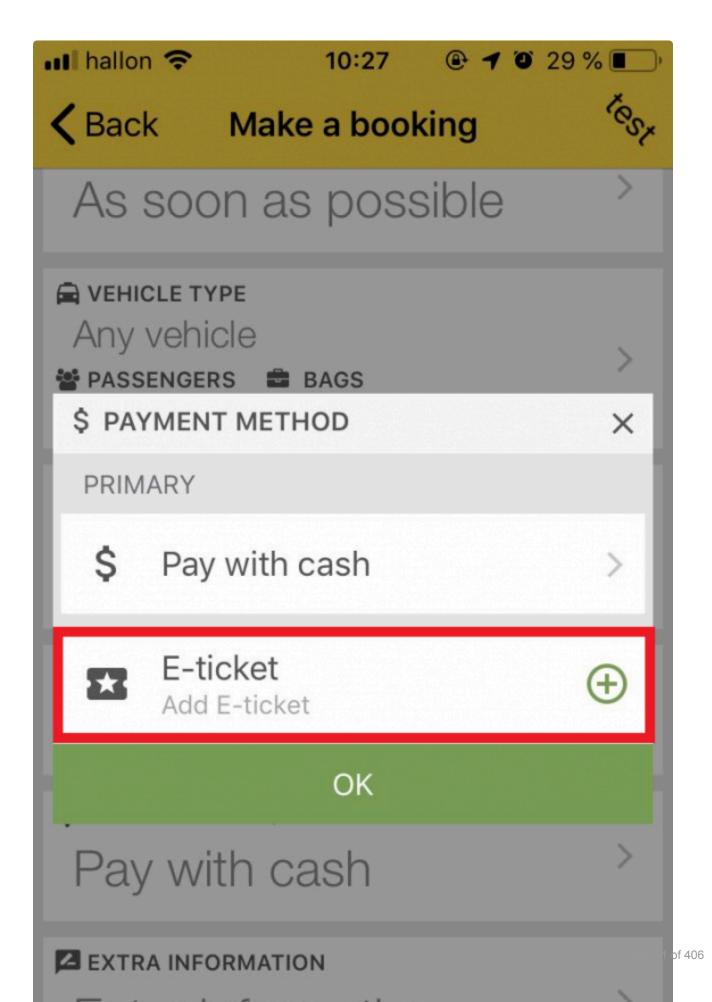
You can also choose an e-Ticket directly in the Driver App, as for example when the driver does a street job, the e-Ticket option will be available during the Payment Process.



To be able to choose the eTicket option in the Driver App you must have enabled the advance payment flow under Settings>GeneralSettings>PaymentOptions.

PAYMENT OPTIONS ② ✓ Require the driver to specify price paid for each trip. ✓ Enable tariffs By unchecking this option you will disable tariffs ✓ Enable the in-app taximeter in the driver app ✓ Force tariffs so drivers can't change the predefined tariff for a type of job ✓ Enable the advanced payment flow in the driver app

Finally, your customer will also be able to select the e-Ticket from the Passenger App.



Card present:

Card present is the option that will let your customer make the payment via a Card Reader when finishing the trip.

You can activate this option by setting up one of the providers that Taxicaller partner for this service.

Currently, our most used provider is SumUp.

To set-up SumUp you will need to:

#1 Register for an account in ".

- 2. Get a card Reader from them.
- 3. Configure the service in your account.

For more information about how to enable SumUp please visit our section on How to enable SumUp.

This feature can also be configured with other card reader providers such as Square, Go Swift and others.

Promotions:

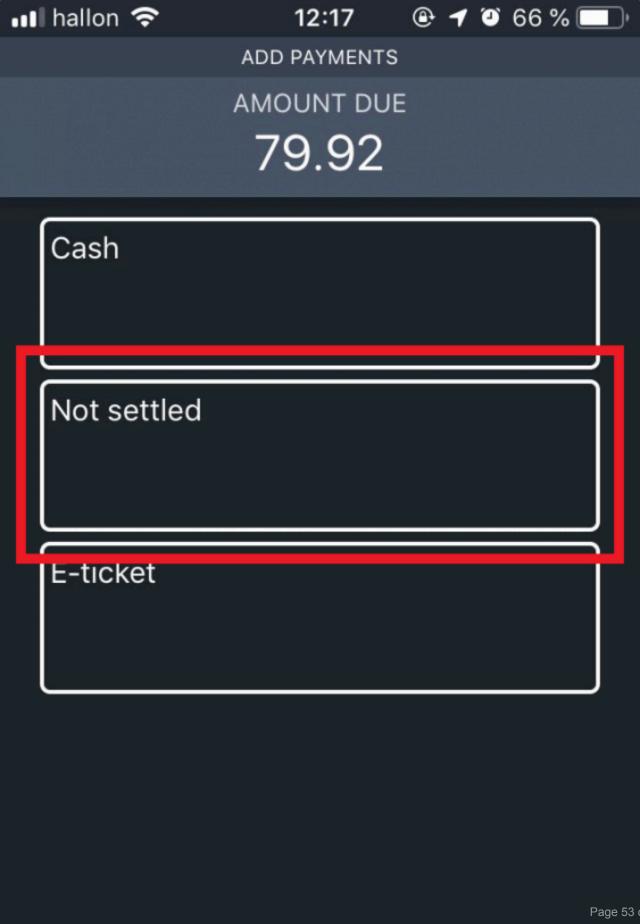
Promotions is a setting only available for a **Rebranded Passenger App**.

To learn more about how to configure promotions check the <u>Promotions Section</u>

If you are interested in rebranding your application to show your own brand please contact us via sales@taxicaller.com or via our support chat 24/7 to know more about it.

Not Settled:

This option can be enabled if you have a different Payment Options from the above described. It is important to highlight that these payment options will not be able to be integrated into the Taxicaller software, you can use them in parallel with TaxiCaller and in the Payments Options in the Driver App choose the **Not Settled** option.



In the reports, in the payment column will appear as Not Settled.

id	started	car	passenger	phone	account	Pick up	Drop off	Payment	Price
80282843	01/03/2019 12:17	1	unknown			1,	Diskettgatan 11, 583 35 Linköping, Sweden	Not settled	79.92
80282835	01/03/2019 12:17	1	unknown			1,	Diskettgatan 11, 583 35 Linköping, Sweden	Cash	79.92

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

Skip:

If this option is enabled it will allow the drivers to skip the selection of a payment method during the Payment Process.

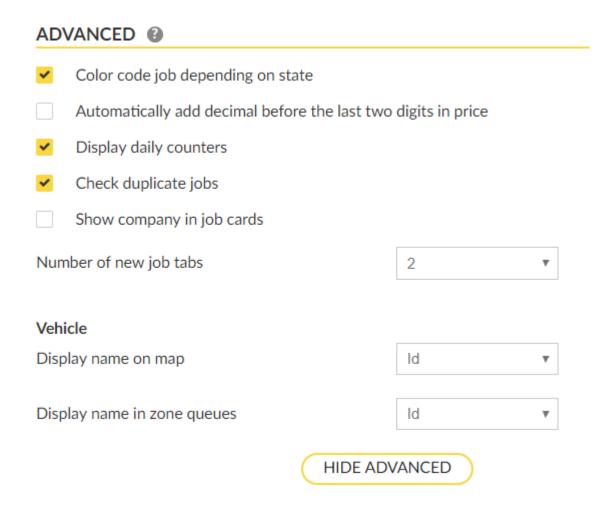
This functionality can be used if you have your own payment process that Taxicaller does not support.

If this option is activated it will be visible in the Driver App showing an extra button at the bottom of the screen named Skip.



Advanced Appearance Options

Configure the appearance of the Dispatch Console with additional options.



Color code job depending on the state:

Will display jobs in different colors depending on the state: Green – Available / Dropped off

Blue - Callout

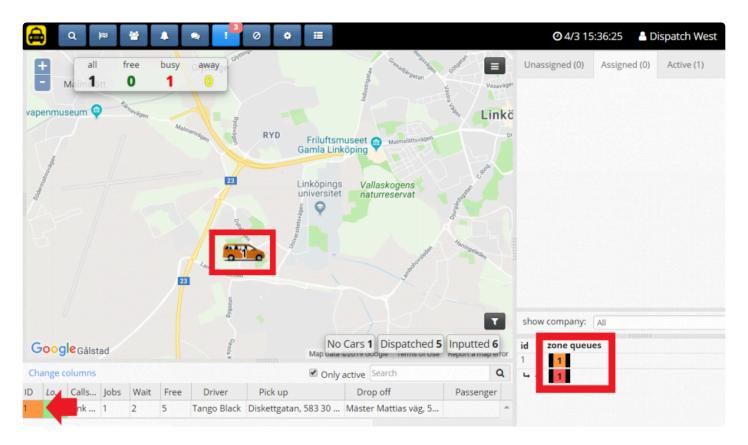
Orange/Yellow - Waiting

Red - Passenger on Board

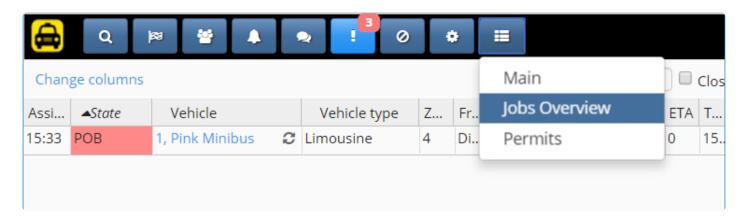
Pink/Purple - Clearing

You will see this setting visible in the different parts of the Dispatch Console: zone queues, job details, and

in the map the vehicle icon will also change color.



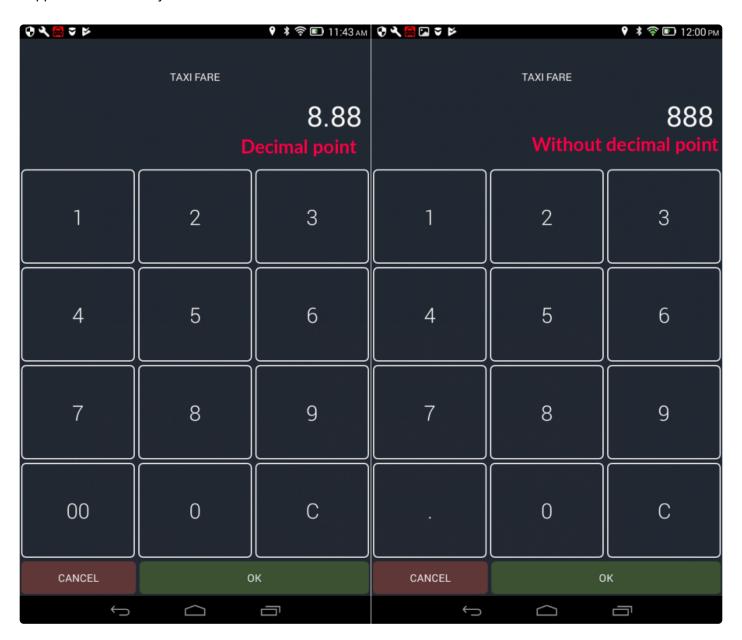
You will also see reflected the color coding in the Job Overview in the Dispatch Consol:



Automatically add decimal before the last two digits in the price:

Will add a decimal point before the last 2 digits entered in the Driver App. For example, with this option disabled, if you type the number 8 three times it will appear as "888" but if the option is enabled it will appear as "8.88".

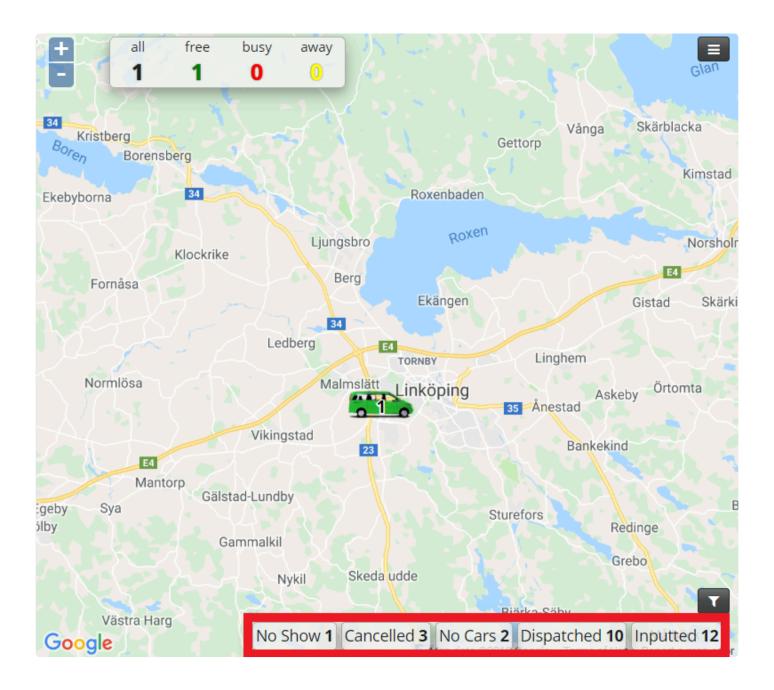
If the option is disabled you can always add the decimal point manually. This option only affects whether it happens automatically or not.



Display daily counters:

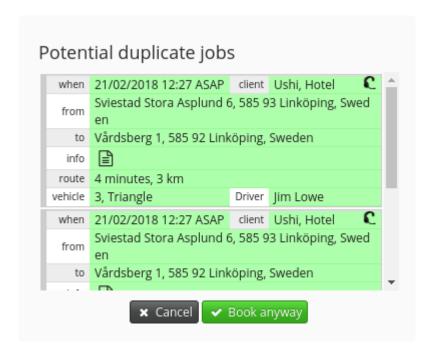
This setting enables or disables the counters at the bottom of the Dispatch Console Map. The counters reset on a daily basis.

The counters that can be displayed are No show, Cancelled, No Cars, Dispatched and Inputted, that will help you track and sort the jobs created during the day.



Check duplicate jobs:

If this feature is enabled, when creating a new job the system will automatically search recent jobs to identify if the dispatcher is potentially creating a duplicate job. The system will warn the dispatcher and will ask to confirm if he/she wants to book the job anyway.



Show company in job cards:

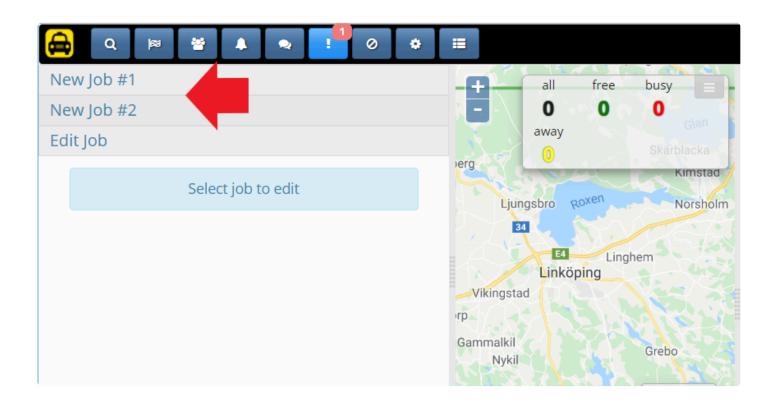
The system will display your company in the Job Card under Unassigned, Assigned and Active in the Dispatch Console.

Especially if you have a multi-company profile this feature might benefit you more. Because it will show the company that will provide that specific job.



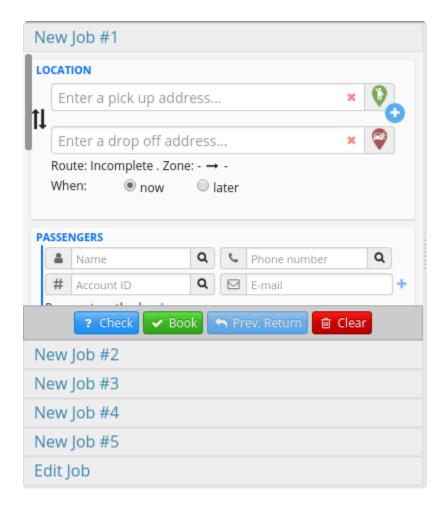
Number of new job tabs:

This feature will enable the number of Job Tabs that will display in the Dispatch Consol. By default, the system will display two job tabs.



You will be able to customize the number of job tabs that you would like to display. You can set the number of tabs from 1 to 5. Which means the number of jobs that you will be able to create simultaneously.

In this example, we have selected 5 tabs, which results in the dispatch console looking as follows:



Vehicle

Display name on map:

When displaying the vehicle on the map, you can choose if you would like to display the Vehicle's Name either as their **number/ID** or their **call-sign** assigned in the <u>Vehicle Section</u> in the Admin Panel. These are simply ways to display the vehicles to your convenience.

	•	NUMBER	CALLSIGN	4	Ġ.	ê
	•	1	Hummer Limousine	14 🔻	0 ~	4 🔻
	•	2	Luxury Sedan	8 🔻	0 ~	4 🔻
	•	3	Airport Shuttle	8 *	0 ~	4 🔻



Display name in zone queues:

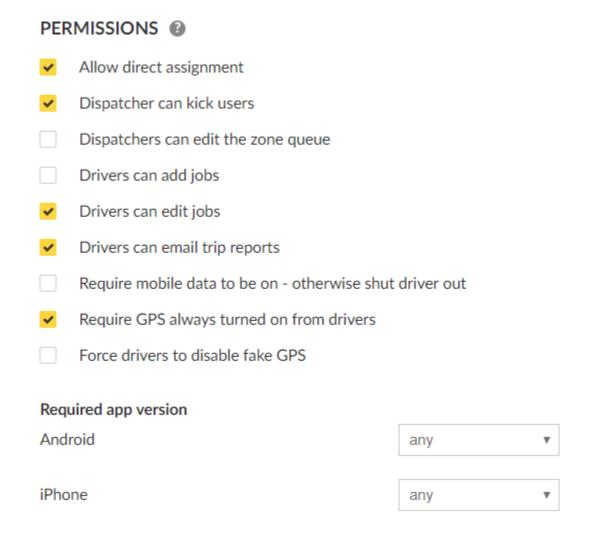
You will also be able to choose how would you like to display the Vehicle Name under the Zone Queue Section in the Dispatch Consol.



Other Advanced Options

Permissions

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

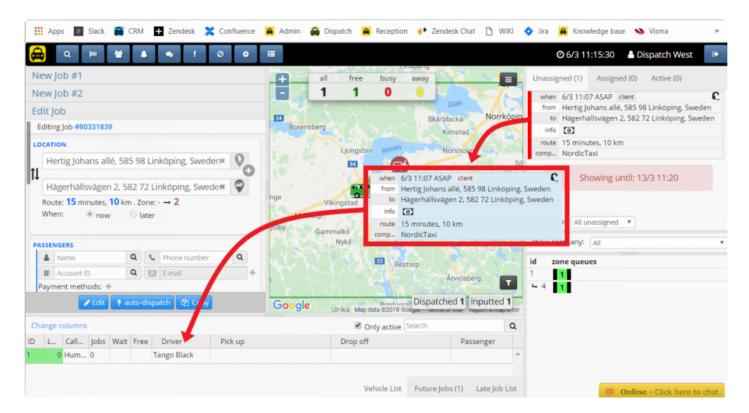


Permissions for Dispatchers:

Allow direct assignment:

In the Dispatch Consol, allow that a dispatcher can directly assign a job to a vehicle. This also is called

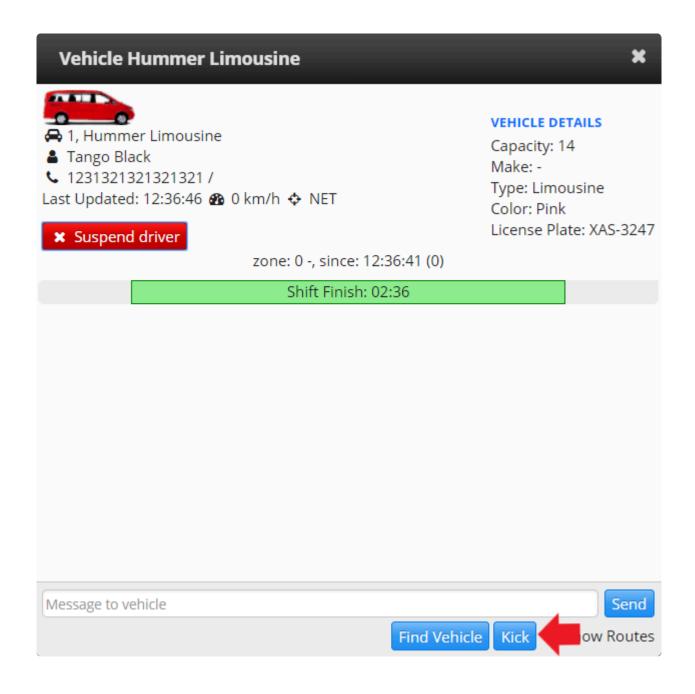
hard-assign, and you can do it by dragging the job from the Current Job Panel to the Job Details Panel.



Dispatcher can kick users:

Allows a dispatcher to kick a driver from the system.

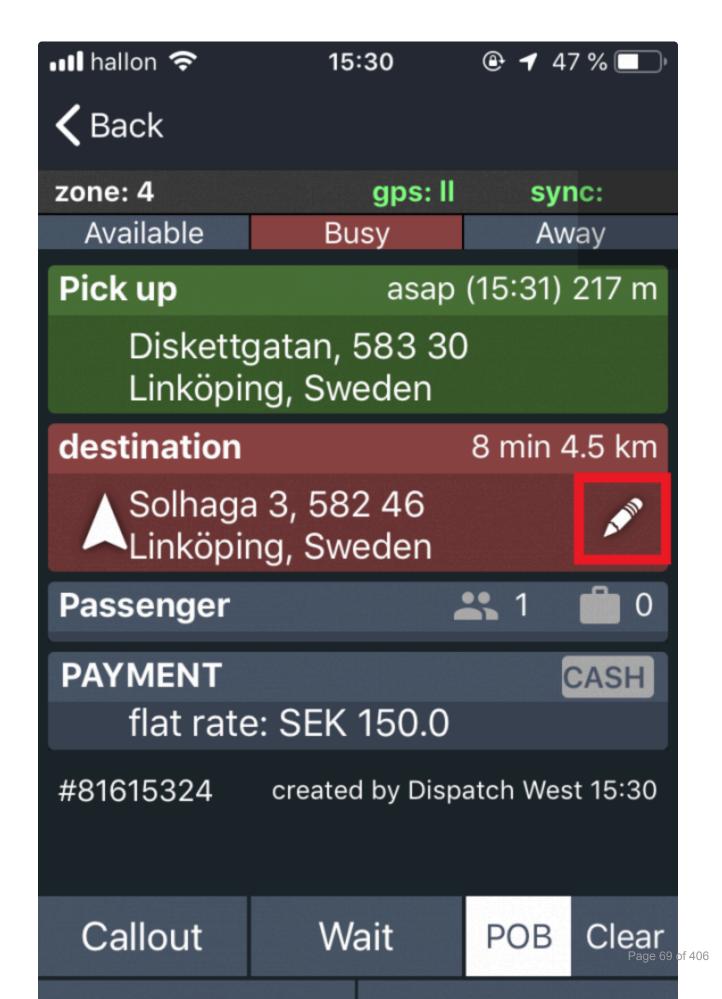
You will find the option after double clicking into the vehicle in the Job Details Panel in the Dispatch Consol.



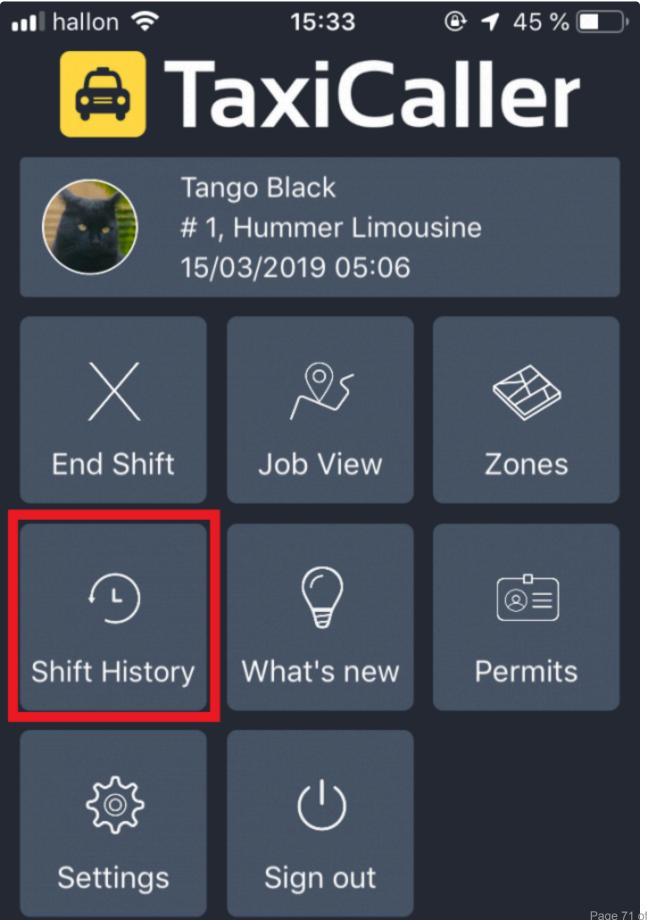
For more information about this feature please navigate in the Kick Driver Section.

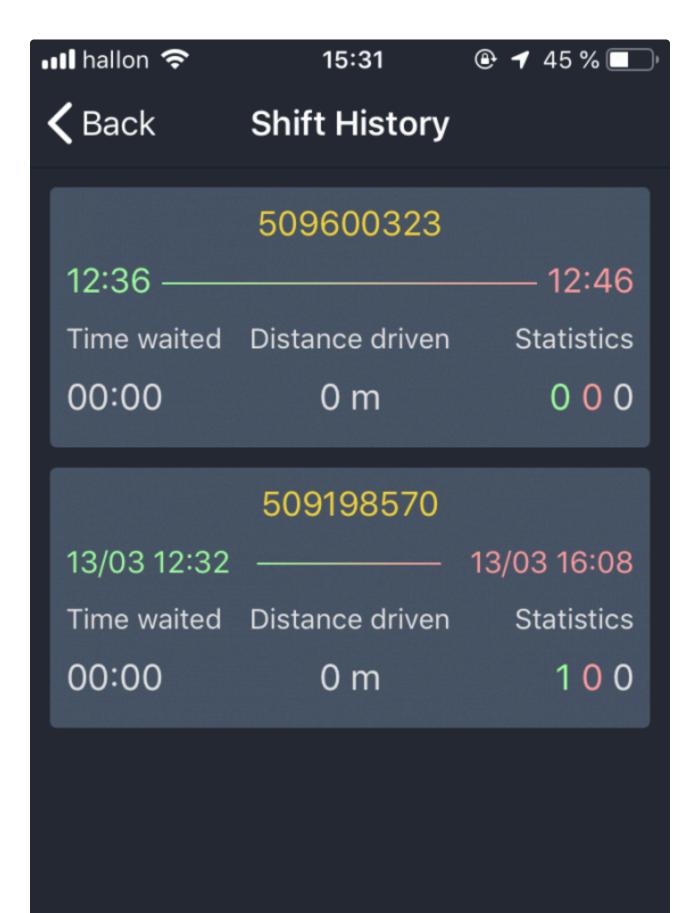
Permissions for Drivers:

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 in the Driver App when performing a job.



Drivers can email trip reports: Drivers can email shift reports from the Driver App. This feature will be accessible in the Driver App ShiftHistory>DriverReport.





Require mobile data to be on – otherwise shut driver out: 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.

Require GPS always turned on from drivers: 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.

Force drivers to disable fake GPS: Forces drivers to disable mock locations and fake GPS applications.

Required app version

Only change if you want to force your users to a specific version of the app. In most cases, this won't be necessary and you can leave both fields with **Any**.

Assignment Settings

These settings control the way jobs will be assigned from the Dispatch Console to the drivers, and how the jobs will show in the Driver App.

Auto Dispatch

Enable or disable automatic assigning and dispatching of jobs. If **Auto Dispatch** is disabled, you will have to manually assign jobs to vehicles in the Dispatch Consol.

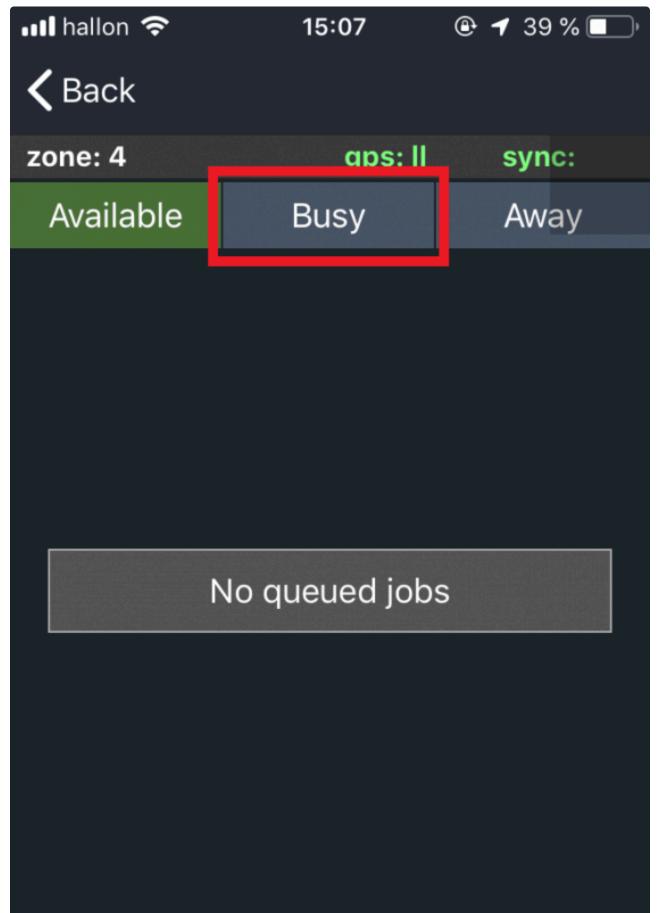
~	AUTO DISPATCH				
~	Automatically start jobs when they have been assigned				
~	Offer jobs to drivers when busy				
	Offer jobs to drivers when away				
Auto	o dispatch tries	2	v		
Amount of time for driver to accept an assigned job		0:45	0		
	Send jobs to drivers who are clearing				
Dista clear	ance from destination when driver can set ring	<u>О т</u>			
SHOW ADVANCED					

Automatically start jobs when they have been assigned:

Automatically start a job after it has been assigned to the driver without having to press **Start** in the Driver App.

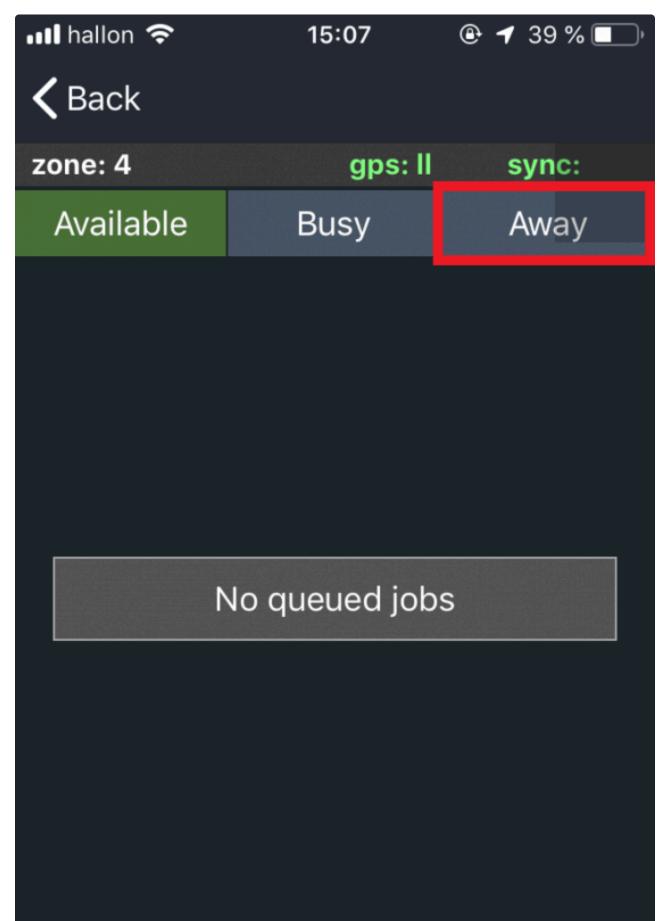
Offer jobs to drivers when busy:

The system will consider vehicles that are currently set to "Busy" in the Driver App when looking for the most suitable vehicle to assign a job.



Offer jobs to drivers when away:

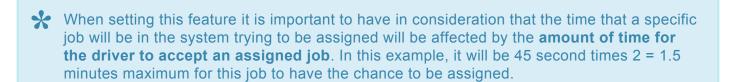
The system will consider vehicles that are currently set to "Away" in the Driver App when looking for the most suitable vehicle to assign a job.



Auto dispatch tries:

This is the number of tries the system will make when automatically dispatching a job. For example, if it is set as 2 the system will try to assign this job 2 times. Which means that if the first driver that gets the job rejects it, it will go to a second driver.

Auto dispatch tries	2	▼
Amount of time for driver to accept an assigned job	0:45	



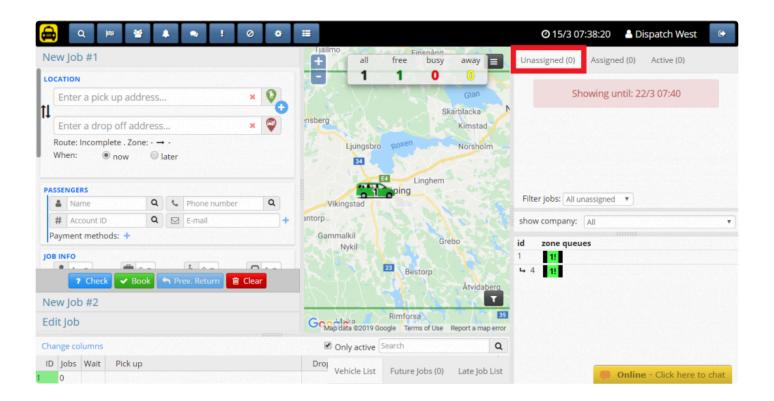
TaxiCaller strongly recommends setting this feature with a lower number of tries and a lower amount of time for the driver to accept the job. Otherwise, your company's level of service could get affected by the system trying to assign a job for a long period of time. For example, imagine that you set the Auto dispatch tries = 10 and the Amount of time = 1 minute; this means that it might take to the system 10 minutes to assign that specific job.

After the determined number of tries that you set, there are more strategies that you could follow to assign the jobs.

For example, you could enable **Broadcast**. In the same example, after trying to assign the job 2 times, if both two times the job is rejected by the drivers, it will go to broadcast. In Broadcast, it will be offered to all drivers, and if accepted by more than 2 drivers, the system will select the best driver based on the assignment rules that you have set in your account, for example, could be the closest one.

For more information about Broadcast please visit the Advanced Auto Dispatch Section.

Once in broadcast, if no driver accepts the job, the job will land into **Unassigned** in the Dispatch Console. Where you will be able to hard-assign the job directly to a driver.





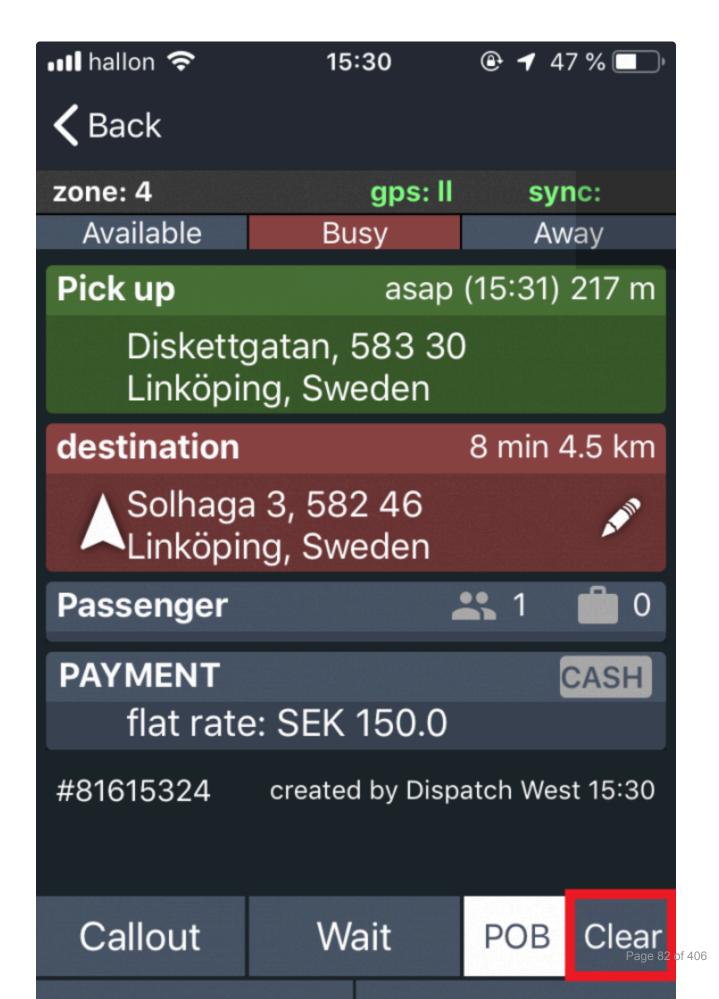
If you set a number of tries higher than the number of current active cars, the system will try to assign the job indefinitely until someone accepts it.

Amount of time for driver to accept an assigned job:

Use this feature to select how much time a driver will have to accept or decline a job that has been sorted to him/her. After this time, if the job has not been accepted or rejected, the job will be sorted to a different vehicle or will follow a specific rule that you might have set, for example, Broadcast.

Send jobs to drivers who are clearing

If this option is enabled, the system will consider vehicles that are currently set to "Clearing" (CLR) when looking for the most suitable vehicle to assign a job.



The Clearing function allows a driver to signal to the system that he/she is about to finish a job and thus will be available for a new one. Drivers can do this from the Driver App by changing the current state from "POB" to "CLR". For more information about it visit the Driver App Manual.

Distance from destination when driver can set clearing:

Specifies the distance from the destination of the job from which the driver can set his status to "Clearing". Which means that if the driver is further this limit the CLR bottom in the Driver App will not be visible.



To configure Advanced Auto Dispatch Settings, click on the button **Show advanced**. The following article will assist you with these settings: Advanced Auto Dispatch

Dispatch Timings

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

DISPATCH TIMINGS (2)				
Specify when the system assigns jobs				
Amount of time to be calculated per km	1:30 / km			
Minimum time for a job scheduled for later	10.00			
Estimates for better prediction on job durations and arrival times				
Estimated wait time for passenger at pick up	0.00			
Estimated time for passenger to be dropped off	0.00			

Specify when the system assigns jobs

Amount of time to be calculated per km:

The value you set here will be used by the system to estimate the time it will take to your driver to reach the pick-up point of the job.

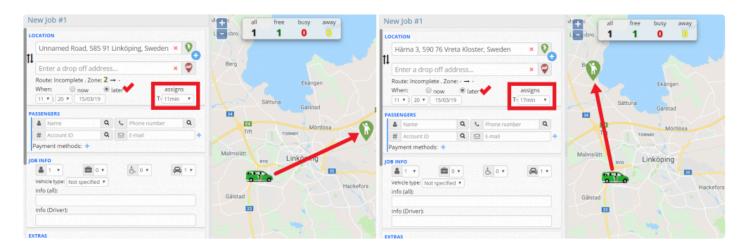
This value specifically means the time it will take to your driver to travel 1 kilometer in your service area. In other words, you will choose how many minutes you estimate your drivers will take to travel 1 kilometer (min/km) depending on the operation conditions of your city.

In the Taxicaller system, you will find this variable named as T-minus.

T-minus: The time that the system calculates from the center of the service zone to the pick-up position of the job.

And you will see this variable visible in the Dispatch Consol when doing a later job.

For example in the following jobs, the **Amount of time to be calculated per km** was set to 2:10 km, and depending on the pick-up of the jobs the t-minus changed due to the distance.





If you set this value to a very small value (even 00:00 per km), it may still be limited with the **Minimum time** feature, 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. The Minimum time can not be set for less than 5 minutes.

DISPATCH TIMINGS		
Specify when the system assigns jobs Amount of time to be calculated per km	2:10 / km	
Minimum time for a job scheduled for later	8:00	
Estimates for better prediction on job durations and arrival times		
Estimated wait time for passenger at pick up	0.00	

Minimum time for a job scheduled for later: 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.

Estimates for better prediction on job durations and arrival times

Estimated wait time for passenger at pick up: This can be set according to how long your drivers usually have to wait for their passengers.

Estimated time for passenger to be dropped off: This can be set according to how long your drivers usually take to drop off passengers.

Zone Queues



Assign the job to the vehicle that have been available in the zone for longest.

Hold queue position even when taking street jobs or when driver app is set to "away".

SHOW ADVANCED

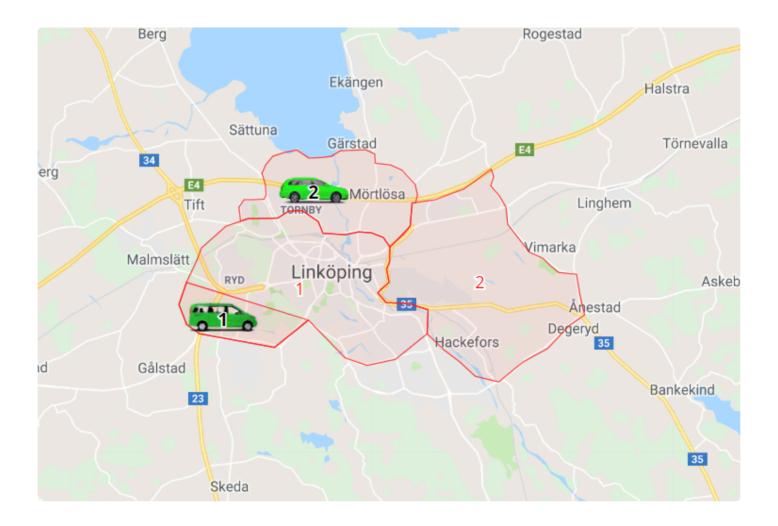
The section **Zone Queues** will control the assignment behavior of the **Assignment Zones** that you can configure in the **Zones Section** of the Admin Panel.



The system can be configured to use several variables to determine which vehicle is the most suitable to assign a job depending on your needs.

The system by default will assign the jobs to the closest vehicle from the pick-up location. However, if you enable zone queues, the rules of assignment will be based on the location of the vehicle regarding the Assignment Zone the driver is positioned in.

For example, in the following image, if the pick-up position of a job is made in the area where the vehicle 2 is located, the job will be assigned to that driver.



It will also take in consideration which vehicles have entered a specific zone in the map and will queue them in the zone queue of that assignment zone.

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.

Hold queue position even when taking street jobs or when driver app is set to "away":

If this is active, a driver will not lose its queue position when the driver has pressed the "Busy (street job)" or "Away" button in the Driver App.



To configure advanced features related to Zone Queue Settings, the following article will assist you with these options: Advanced Zone Queues

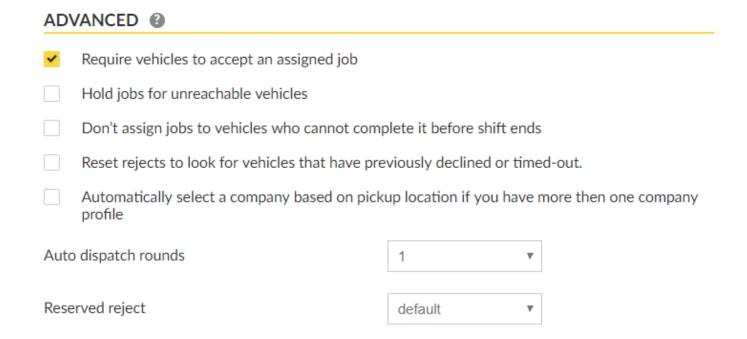


To configure other advanced features, click on the button **Show advanced features**. The

following article will assist you with these options: Other Advanced Features

Advanced Auto Dispatch

Advanced Auto Dispatch will let you set the rules of how the Dispatch Console will send the jobs to the drivers, and how the jobs will show in the Driver App.



Require vehicles to accept an assigned job:

You can give the drivers an option to accept/decline jobs in the Driver App. Uncheck this option if you want to "hard-assign" a job (not give the driver an option to accept/decline).

Incoming Job

zone: 0 **00:42**

Pick up

asap (13:16) - 8.2 km

Härna, 590 76 Linköping, Sweden

destination

18.2 km

Älvestad 4, 585 61 Linghem, Sweden

Passenger



created by Dispatch West 12:57

Hold jobs for unreachable vehicles:

Holds a job offer for a vehicle that is temporarily unreachable (the system cannot establish a connection with the driver's device).

For example, if the driver accepted a job and all of a sudden he/she losses connectivity, the Driver App will hold the job.

Don't assign jobs to vehicles who cannot complete it before shift ends:

For drivers that have set a shift ending time, make sure no jobs can be assigned that would fall beyond this time.

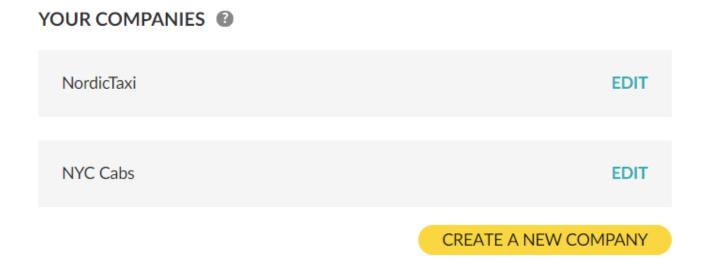
Reset rejects to look for vehicles that have previously declined or timed-out:

If you enable this option, when assigning a job the system will consider again vehicles that have previously declined or timed-out when auto-dispatching.

Automatically select a company based on pickup location if you have more than one company profile:

If this feature is enabled, when creating a job in the Dispatch Consol it will automatically select a company based on pickup location.

For this setting to work, you have to have more than one company profile in your account.

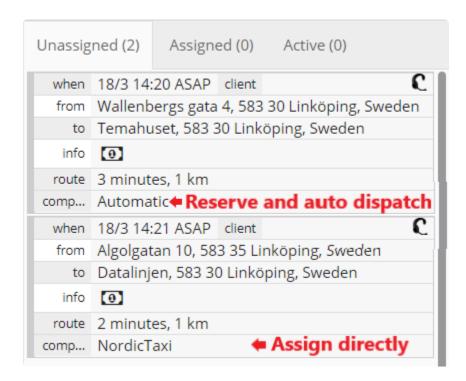


And the feature will be visible in the Dispatch Consol when booking a job, whether you chose to Assign Directly or Reserve and auto dispatch:

Assignment strategy for prebookings

Assign directly
 Reserve and auto dispatch

Assign Directly: It will assign automatically based on the assignment rules disregarding the company. Reserve and auto dispatch: It will reserve for a company based on pickup location.



Please note that if a passenger uses the generic passenger app, no automatic selection can be made for them as they would have to 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.

Auto dispatch rounds:

This determines how many times the same job can be offered to the same vehicle. You will have to use this setting in conjunction with **Reset rejects to look for vehicles that have previously declined or timed-out** so that vehicles that have declined or timed out can be considered for the next round.

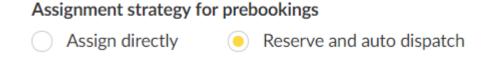
ADVANCED Output Description:			
~	Require vehicles to accept an assigned job		
	Hold jobs for unreachable vehicles		
	Don't assign jobs to vehicles who cannot complete it before shift ends		
✓	Reset rejects to look for vehicles that have previously declined or timed-out.		
	Automatically select a company based on pickup location if you have more then one company profile		

Reserved reject:

This setting can be used to enable that a vehicle can be "Assigned to: No one" in the Dispatch Consol, which means that the system will only reserve the job for a specific vehicle and if the job is rejected by the driver then the system will assign it to No one, so anybody can do the job except the reserved vehicle.

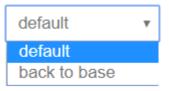
For example, this could be used if you have a specific vehicle that is the only one capable of doing a certain service, as for example if you have only one limousine in your entire fleet.

In order to make this feature work, you will need to have enabled Reserve and auto dispatch.



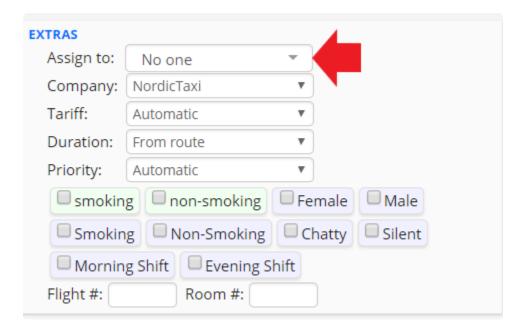
If the reserved vehicle rejects the job, the job could follow two scenarios:

Reserved reject

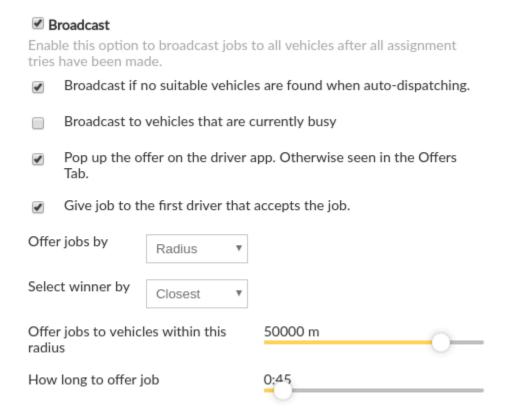


Default: it will try to auto-assign following the assignments rules you have set.

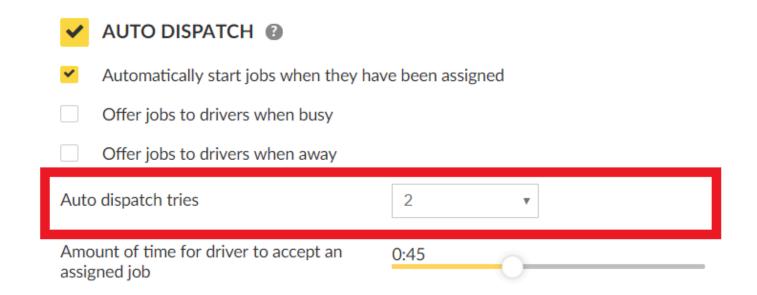
Back to base: it will appear as "Assigned to: No one" in the Dispatch after the driver rejects the job.



Broadcast:



If all **Auto dispatch tries** have been made, a job can be broadcasted to all available vehicles. Enable this option to being able to offer the jobs to all vehicles after all assignment tries have been made without any driver accepting the job. If this option is enabled the job will be offered to the Drivers in order for them to Bid on the Job.



Broadcast if no suitable vehicles are found when auto-dispatching:

If no suitable vehicles are found when auto-dispatching, the job will go straight to broadcast if this option is selected.

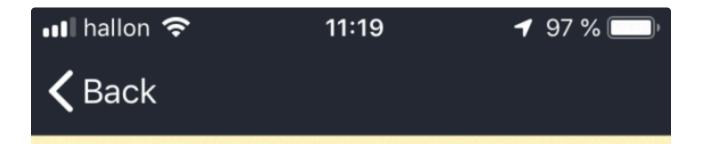
For example, if someone is trying to book a job with a particular type of car and there is none connected then the job will be broadcasted.

Broadcast to vehicles that are currently busy:

The system can also offer broadcasts jobs to vehicles that are currently set to **Busy** or are in the middle of a job.

Pop up the offer on the driver app. Otherwise seen in the Offers Tab:

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.



PICK UP

01:00 2.4 km



Majgatan 31, 582 46 Linköping, Sweden

1. Downtown

DESTINATION

3.5 km

Änggatan 3, 582 45 Linköping, Sweden

1. Downtown

PASSENGER



0



1

OFFER

DECLINE

BID TIME LEFT 00:22

Give job to the first driver that accepts the job:

It's a way to "fast select"; the first driver that accepts the job will get the job with no regards to other broadcast settings.

Offer jobs by:

This is another strategy you can use to enable how to Broadcast a job.

Choose whether broadcasted jobs should be offered by radius, zone or zone chain.

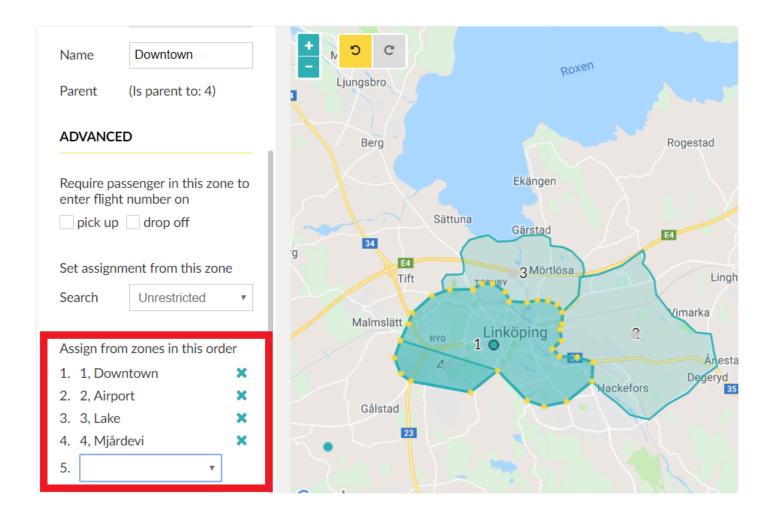
Offer jobs by



By Radius means that the job will be only offered to drivers that are located within a certain radius from the pick-up position of the job.

Zone, will only offer jobs based on the assignment zones that you have set.

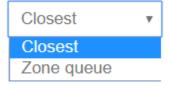
Zone Chain, will broadcast within the same zone order you have set in Settings>Zones>Advanced.



Select winner by:

This option determines who **wins** the broadcast bid. It can be set to either the closest car or the first in the zone queue.

Select winner by



Offer jobs to vehicles within this radius:

If you select Offer jobs by Radius, with this setting you will be able to choose the radius from the pick-up location of the job where you would like to broadcast the job, excluding those that are too far away.

Offer jobs to vehicles within this radius



How long to offer job:

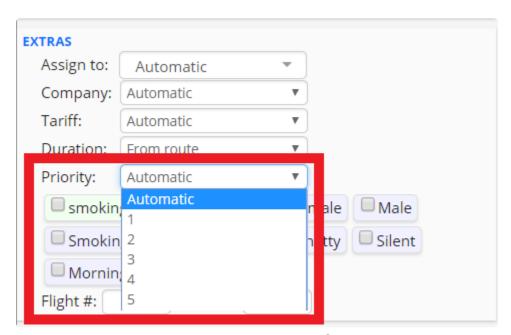
A driver would need to accept a bid within this time window.

How long to offer job



Priority

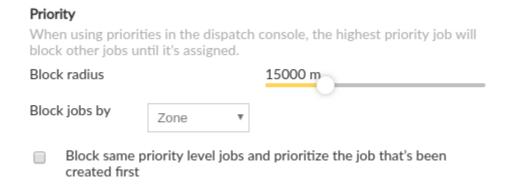
If you use priorities in the dispatch console, this section will come in handy.



Priorities in the Dispatch Consol

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 the 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 where 1 is lowest and 5 is highest**.

The following settings will allow you to give preferences to jobs marked with higher priority levels. You can use this for example if you have a VIP customer or if you have a long-route job that you would like to prioritize.



Block radius:

Select the area size that will be **blocked** by a job with higher priority.

Block jobs by:

Instead of radius you can use zones or zone chains to block other jobs with lower priority levels.

Block same priority level jobs and prioritize the job that's been created first:

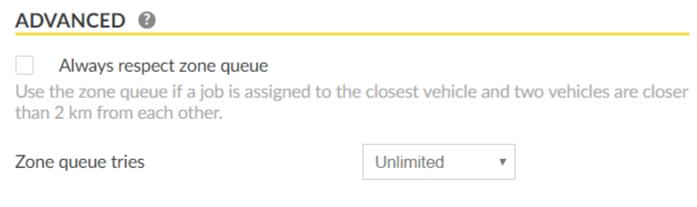
Will also block jobs with the same priority level, the job that's been created first or ASAP jobs will take precedence.



To learn how to use priorities in the Dispatch console, click here.

Advanced Zone Queues

Advanced Zone Queues will let you set the rules of job assignments of the Assignment Zones that you can configure in the <u>Zones Section</u> of the Admin Panel.

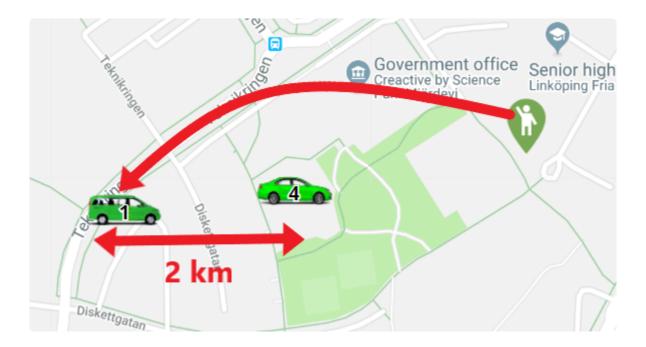


After these tries the system will assign to the closest vehicle.

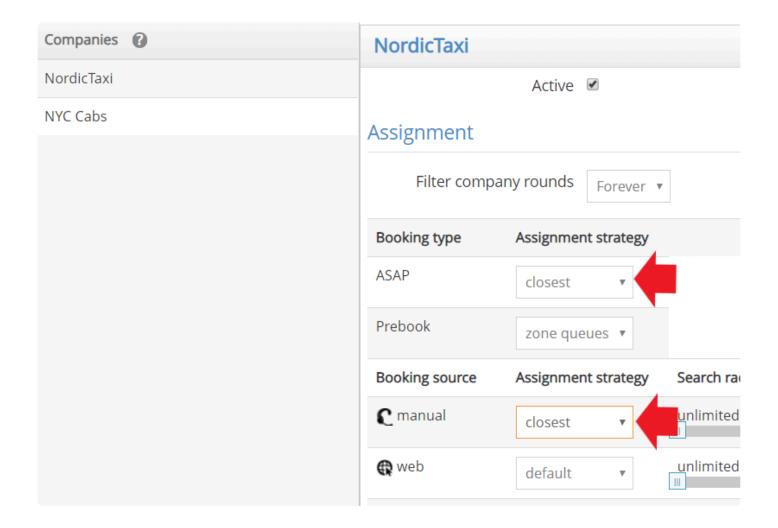
Always respect zone queue:

When this is active, if two vehicles are closer than 2 km from each other, the system will prioritize whoever is first in the zone queue even if this vehicle is farther away.

As for example, if this feature is enabled and a passenger makes a booking, the job will be assigned to the vehicle that has been waiting longer even if it is farther away, **but within a radius of 2 km from the closest vehicle**. In this case, the job will go to vehicle 1 even though vehicle 4 is closest to the pick-up position, because it will respect the Zone Queue where vehicle 1 queued first.

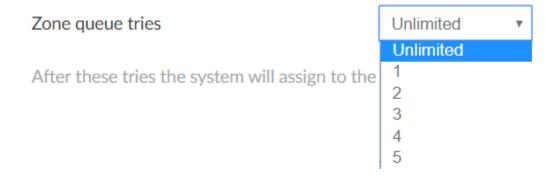


This feature will only apply if the assignment strategy of the company profile is set as the closest vehicle under Settings>General>Company.



Zone queue tries:

It means that the system will try to assign the job based on zone queues. With this setting, you will select the number of tries that you would like for the system to run the assignment within the zone queues. You can select either Unlimited, or a number of tries between 1 to 10. After these tries without success, the system will assign the job to the closest vehicle instead.



Zone Check in:

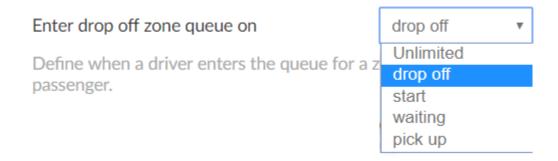
Let drivers check-in to zones they are not currently in, so they can start queueing. The options below determine how far away they can be before checking-in.



The features **Distance limit** and **Time to enter** can be set to determine how far in time or distance a driver can be located before they can check in into a zone.

Enter drop off zone queue on:

With this setting, you will be able to decide at which point of the current job do you want the driver to start queuing in the zone where the drop-off of the passenger will occur.



Drop off the vehicle will start queueing in the zone (where the drop-off will occur) right after the Driver drops-off the passenger.

Start, the vehicle will start queueing when the driver starts the job.

Waiting, when the driver press waiting in the Driver App, the vehicle will start queueing in the drop-off zone. **Pick-up**, the vehicle will start queueing when starting a street job (pressing the Busy bottom in the Driver App).

Sticky zones: This option determines how long a vehicle will keep their place in a Zone Queue after the vehicle has left that zone.

As for example, if one vehicle was in a zone for 100 minutes and then the driver left the zone, this setting will determine how many minutes would you like to allow the driver to keep the queue position of the zone that he/she just left. In this example, since it is set as 10%, it means it will stick in the zone 10 minutes, which is the 10% of 100 minutes. If the Driver comes back to the zone within 10 minutes he/she will keep the position in the zone queue otherwise if the driver comes back after 10 minutes it will loses its position.

Sticky zones

10%

Short trip criteria

This option determines how short a job must be for a driver not to lose their queue position.

The sliders **Max distance of short job** and **Max duration of short job** will determine the duration that you would like to set for the short job.

The setting **Require the job to be in the same zone** means that a driver will not lose its queue position only if the short job is made in the same zone he/she is queueing.

~	Short	Trip	Criteria
---	-------	------	----------

Determines how short a job must be for a driver not to lose their place in the queue.

Require the job to be in the same zone

Max distance of short job

Pisabled

Max duration of short job

Pisabled

Out of Zone Jobs

Enable this setting if you would like to allow to your drivers to maintain their queue position even when taking jobs **out of the zone** they are currently queuing.

Out of Zone Jobs

Keep the queue position even when taking an out of zone job

In zone chain levels

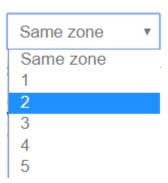


Determine how far down the zone chain a job is considered out of zone.



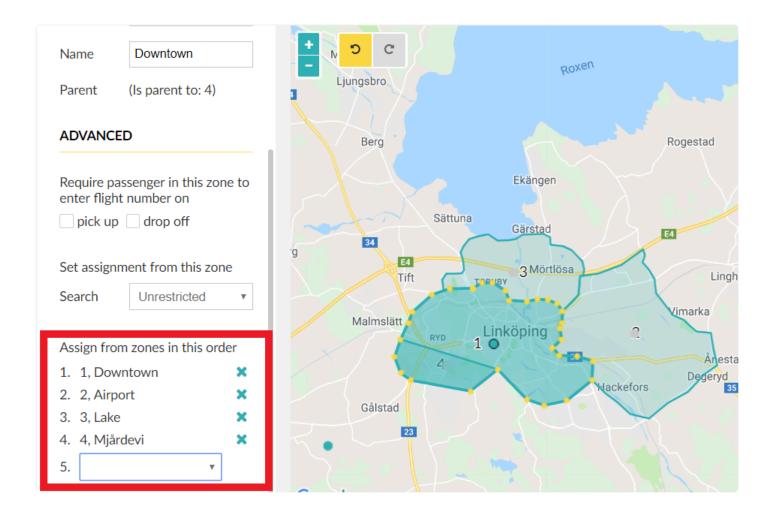
With the setting **In zone chain levels** you will determine how far in the zone chain would you want to consider **out of the zone**.

In zone chain levels



As for example, if you have a zone chain of 4 zones and you set **In zone chain level: 2** it will only consider 2 places in the zone chain as **out of the zone**. In this example will be Downtown and Airport. It means that if you allow that the driver does not lose its queue position when doing **out of the zone jobs** this will only apply when the job is done in Downtown and Airport.

For more information about Zone Chains please visit the **Zone Section** in Settings>Zones>Advanced.



Other Advanced Features

Driver Information

In this section, you will be able to manage all the features on how would you like to show the job information to the driver.

DRIVER INFORMATION **		
SMS notify a driver set to away when a job is offered to them.		
Enable sound notification for job updates		
Job auto status Automatically puts the driver into the Waiting and Passenger on Board (POB) status based on the GPS position unless cancelled by the driver.		
Dispatch phone number		

SMS notify a driver set to away when job is offered to them:

If enabled, it will allow you to notify the driver (via SMS) when it is set as **Away** in the Driver App that there is a job available.

In order to make it work, you will need to add the phone number of the driver in the field Phone Number under Settings>Users>Create and Modify your Users.



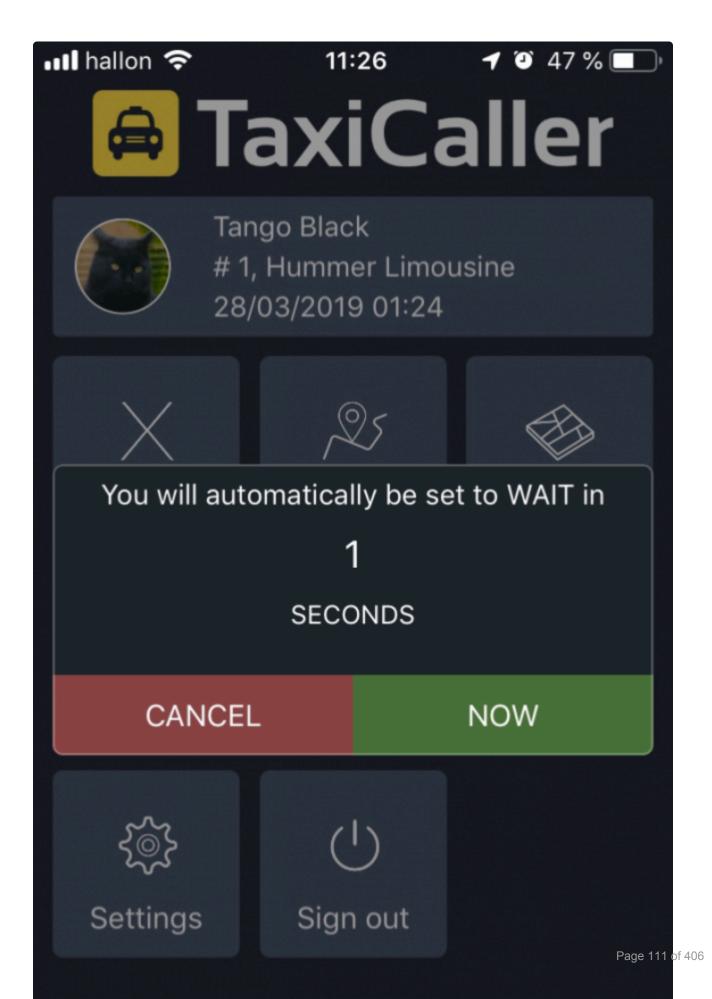
*Setting only available for Android devices

Enable sound notification for job updates:

When enabling this setting, the system will enable sound notifications In the Driver App to let the driver know about incoming jobs.

Job auto status:

If you enable this function the driver's status will be automatically updated based on the GPS position. In the Driver App, this will be visible when the system pops-up automatic status notifications like the following shown below. The system will send notifications whenever is changing from one status to another.



Dispatch phone number:

You can add the dispatch phone number in this field to make it visible to the driver.

*Setting only available for Android devices

Information shown in the driver app

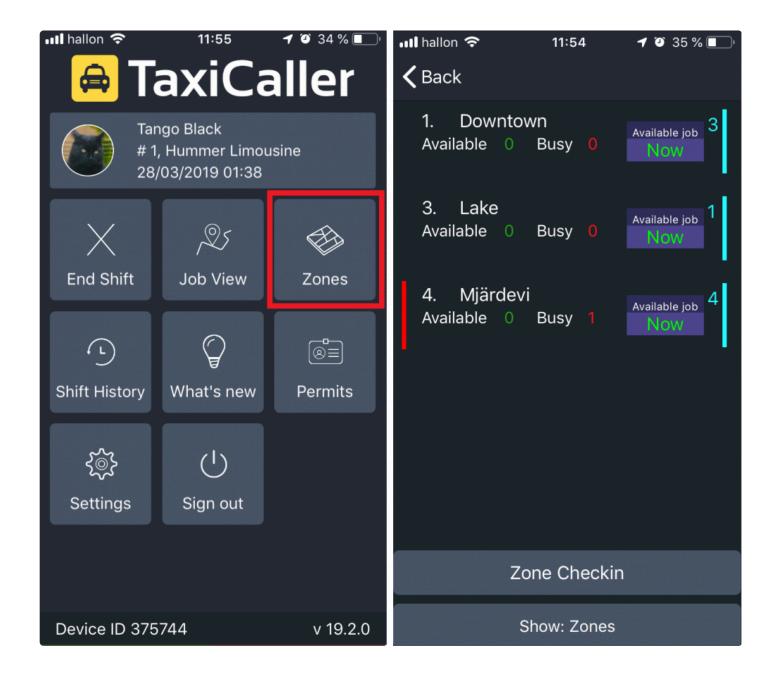
The following settings will allow you to select what information about the jobs would you like to make visible for your drivers.

Information shown in the driver app			
~	Show coming jobs in the zone queue in the driver app		
~	Show unassigned ASAP jobs		
	Show client phone		
~	Show extended information about customer accounts		
	Hide the job creator name for the driver		
	Hide the job view before shift start		
	Hide vehicles IDs in the zone queue in the driver app		

Show coming jobs in the zone queue in the driver app

If enabled, the driver will be able to see the incoming jobs of the different assignment zones that you have created.

To make this visible in the Driver App, the driver will need to click on Zones and then select **Show: Zones** in order to see the incoming jobs per zone.



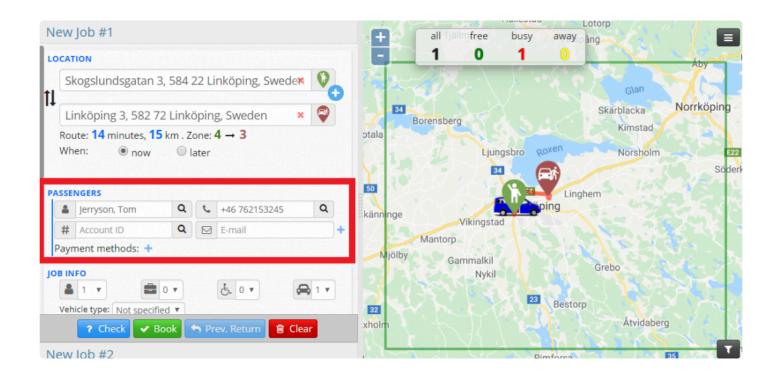
Show unassigned ASAP jobs

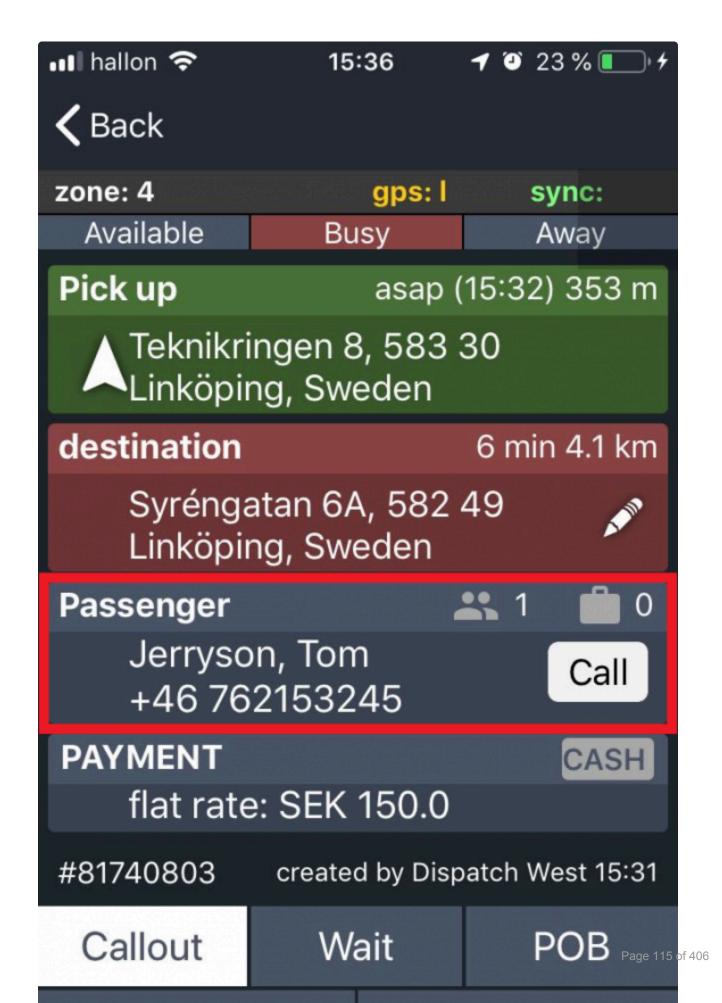
You will be able to see the unassigned ASAP Jobs.

Show client phone

If this feature is enabled it will show to the Driver the phone number of the Customer.

For this setting to work, you will need to enter the Passenger phone in the Phone field in the Dispatch Consol.





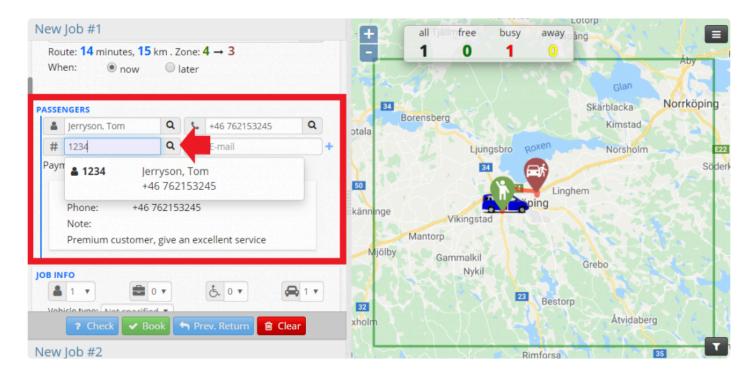
Show extended information about customer accounts

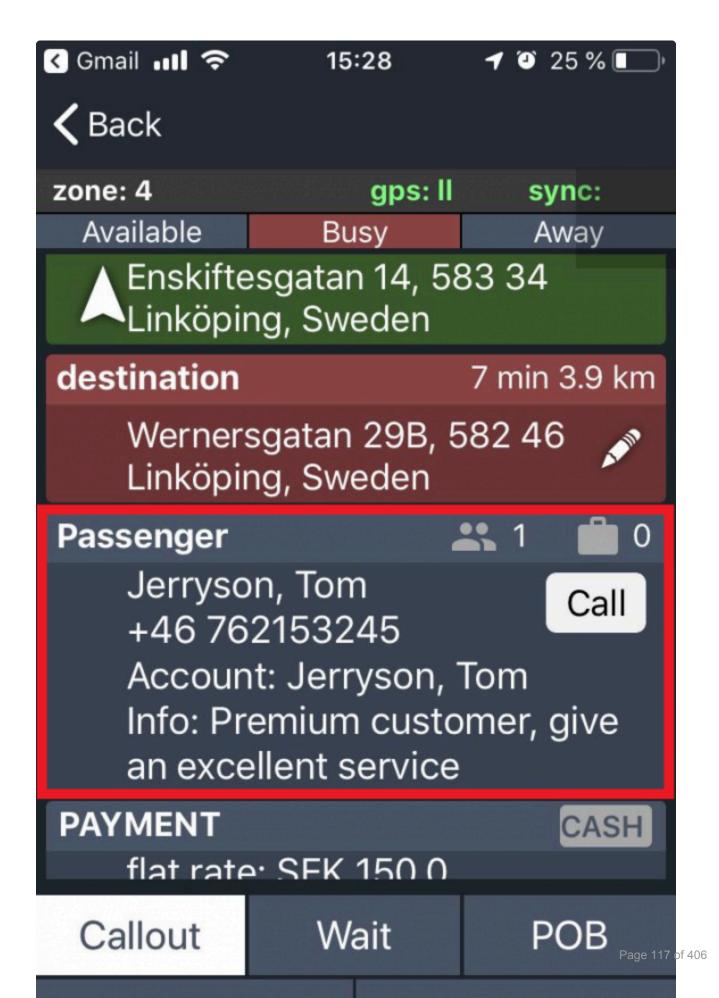
This feature will show extended information of the customer account you have created under Account>Customers.

In order to make this feature work, when creating a Job in Dispatch you will need to search for the account of the Customer you have previously created.

To know more about it please visit the Create a Customer Account Section

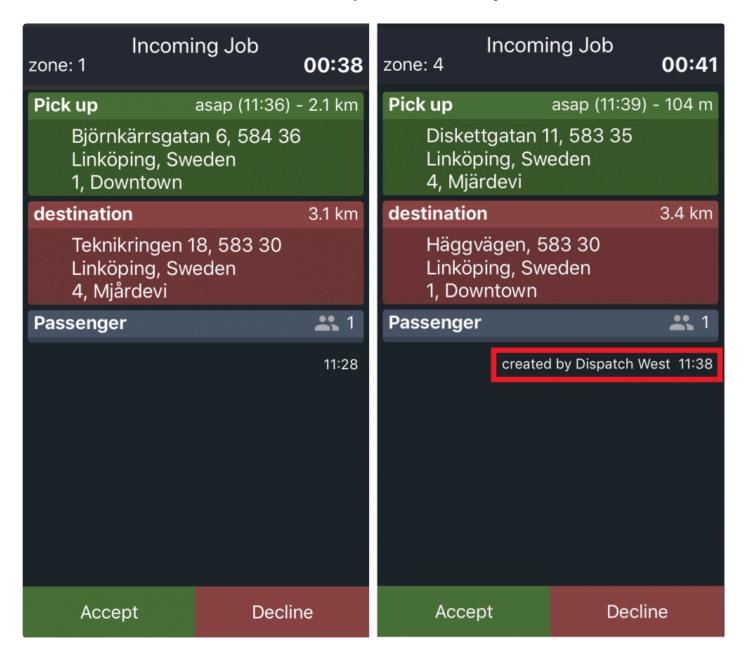
Selecting a specific customer account will automatically populate the Passenger Fields in the Dispatch Consol that later will be displayed in the Driver App when doing a job for that specific client, disable this setting if you do not want to show this information to the Driver.





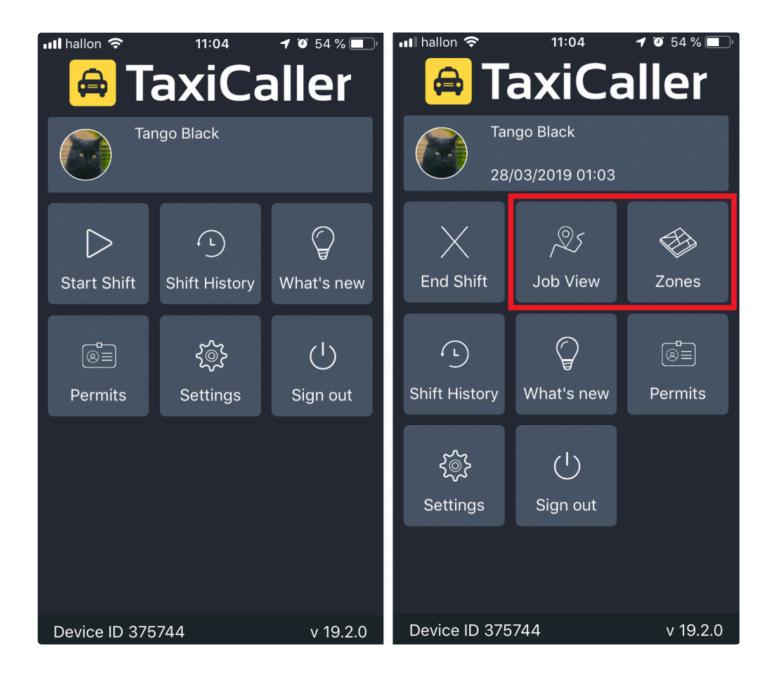
Hide the job creator name for the driver

If enabled the Driver will not know who created the job he/she is receiving.



Hide the job view before shift start

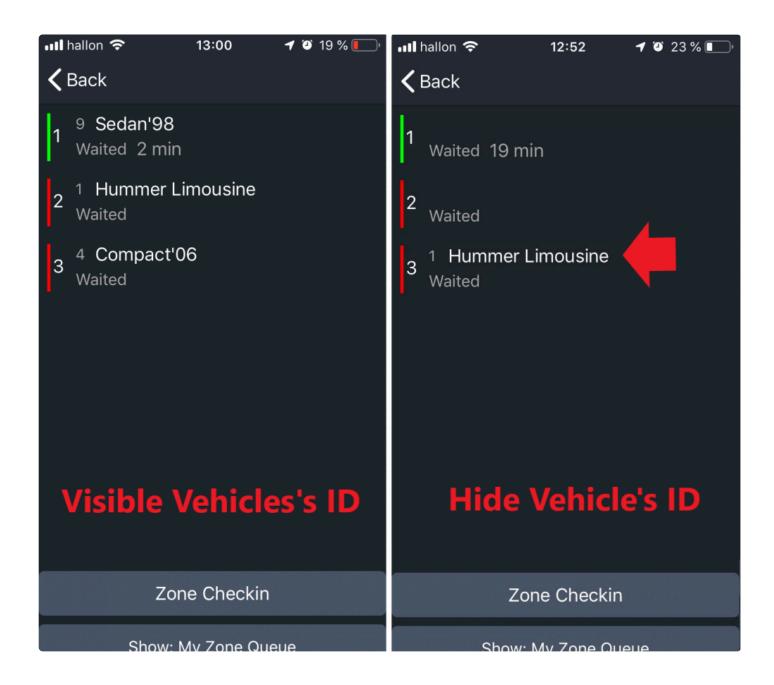
This setting will hide **Job View** and **Zones** in the Driver App before the driver starts the shift.



Hide vehicles IDs in the zone queue in the driver app

If activating this feature, the drivers will only see visible their own vehicle id, in this example, **1 Hummer Limousine**.

Otherwise, if it is not enabled, you will be able to see which vehicle is in which position of the zone queue.



Show coming jobs within

You will be able to select a time range from when you would like to visualize jobs in the Driver App.

Show coming jobs within



Hide jobs older than

With this setting, you will be able to select after how much time you would like to stop displaying old jobs.

Hide jobs older than

Openurs 21	minutes

Incoming job information

Additionally, you will be able to customize how would you like to display the information about a coming job to the driver.

You can play around with the following features hiding or displaying the information depending on your business needs.

Incoming job information		
	Hide pick up before accepted	
	Hide drop off before accepted	
	Hide pick up zone	
	Hide drop off zone	
	Hide passenger details	
	Hide extra info	
	Hide job info after offer expires	

Driver Conduct

If the driver has not been able to accept the jobs; it is possible to enable some features about how would you like to approach this actions.

DRIVER CONDUCT

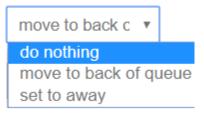
If job offer is declined move to bac ▼

If job offer times out move to bac ▼

If device is unreachable do nothing ▼

If the driver rejects, times-out or the device is unreachable you can choose from three actions what would you like to do.

If job offer is declined



Do nothing: if you want that the system remains with no action at all. Move to back of queue: the driver will lose its zone queue position. Set to away: set the status of the driver as Away in the Driver App.

You can also define the minimum amount of time you want to allow the driver to wait at the pick-up location.

Minimum time required to wait at pick up location

1:30

Finally, with the **Presence Challenge** feature you will be able to keep active monitoring on your drivers.

Presence challenge

Enable a pop-up to appear in their driver app prompting them to tap on a button to make sure the drivers are active . If they fail to tap on it on time, they will be logged out from their shift.



The driver will receive a pop-up window in which they will be required to Accept in order to prove they are still active. If the driver fails to accept the system will finish the driver's shift.

You can define the frequency that you would like to send the pop-up window, for example, every 1 h 30 min. You will also be able to define the variation of the notification, so it does not always go at the same time but randomly in a range. In this example, we set the variation to 15 min, which means that the system will send the notification randomly between 1:30 - 1:45 [h:min].

This setting will be visible in the Driver App looking as following.

message

from Server

Please confirm that you are still working.

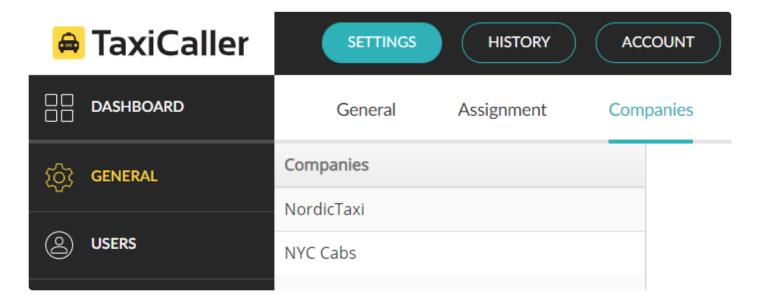
Time: 03:54

Companies

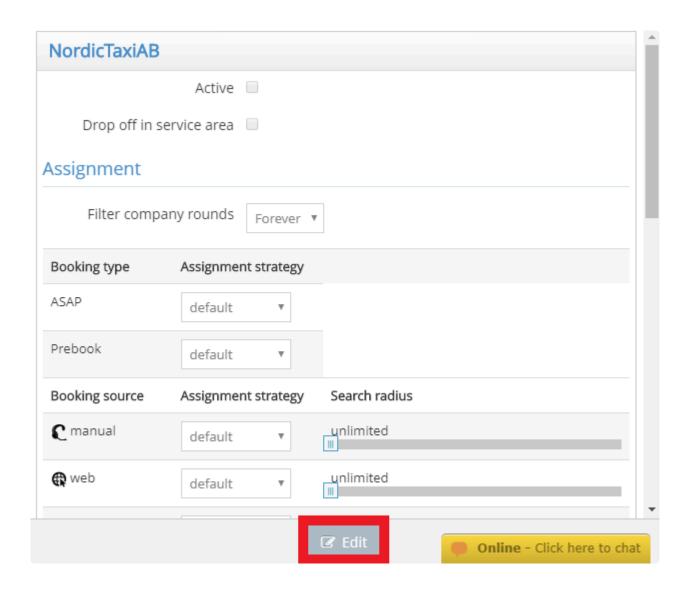
In this section, you will be able to configure the profile of your company.

And if you would like to have a multi-company profile follow to <u>Create New Companies Section</u> to know more about how to create new company.

If you have a multi-company profile you will need first to select from the left menu the company that you would like to start with.



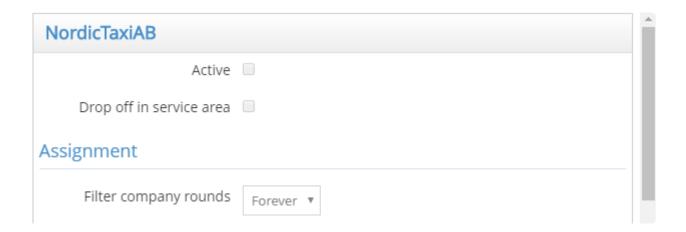
To start editing, scroll down and click the Edit bottom.



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.

You can also tick for enabling that the drop off of the service must be in the service area of the company.



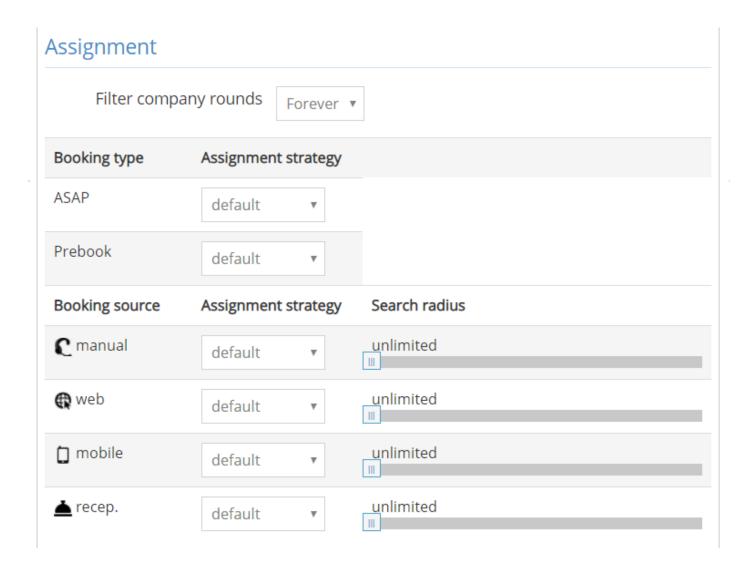
Filter company rounds is useful when a booking is made for a specific company. The system will then make as many attempts as specified to assign the booking to *that company only*. After the attempts have been made, the booking will go to auto-assignment (any company might be assigned to the job). If 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 can make that 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.

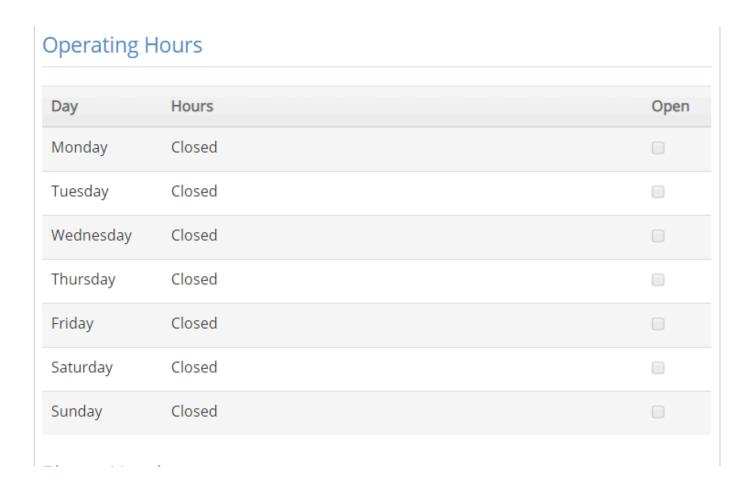


The settings from Booking type override those from Booking source



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

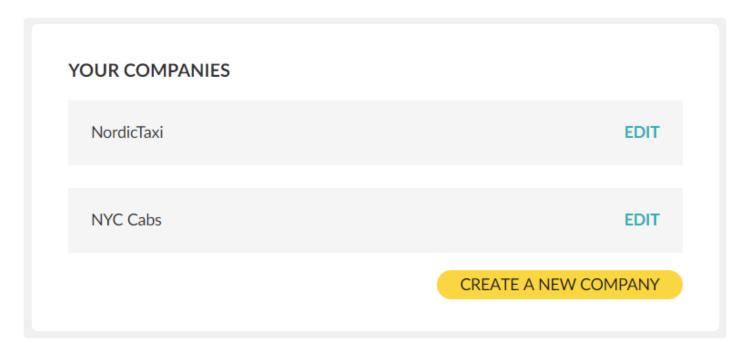
Enter the phone number associated to this company profile. When a customer makes a call to this number and is answered in the dispatch console, the booking form will auto-fill the company.

Phone Numbers

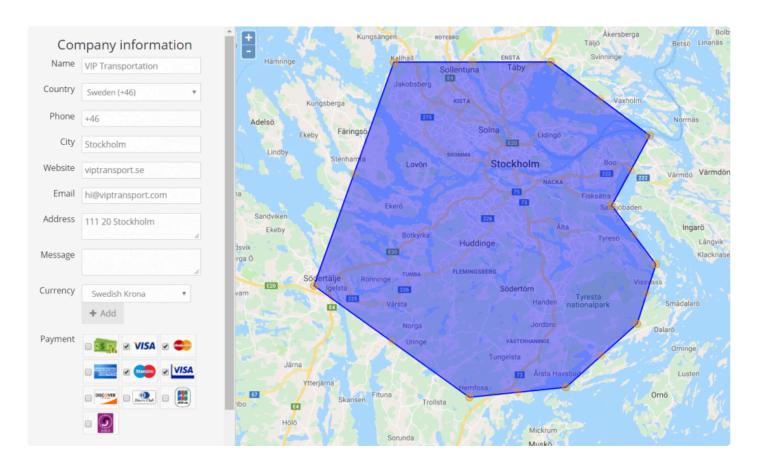
These numbers are used to associate phone numbers with companies when a customer makes a call to the dispatch console.

Create New Companies

To create a new company go to the main page or dashboard and click *Create a New Company* in the section Your Companies.



When setting up new companies you will need to provide general information about the company, currency, payment and extra services you might want to serve.



You can set extra services to specify that you provide air conditioning, 24/7, handicap, eco-friendly, airport, luggage and pet-friendly cab services.



Submit the information before closing the window to save changes.

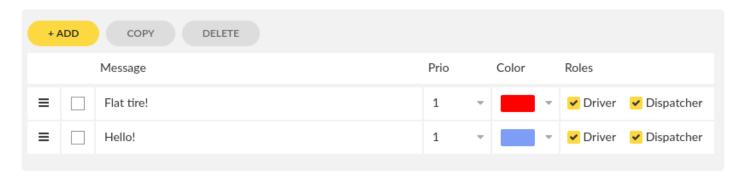
Messages

Message Settings

In this section you can:

1. Set preset messages

that your dispatchers and drivers can add with a single button click.



2. You can also configure the message permissions

For example, if your users can send **instant messages** and **voice messages** to other drivers, dispatchers or both.

AUTHORIZE OPTIONS

- Allow drivers to send custom messages
- Allow dispatch to send custom messages

Drivers can send instant messages to:

- Drivers
- ✓ Dispatchers

Drivers can voice messages to:

- Drivers
- ✓ Dispatchers

If you disable allowing users to send custom messages, it means they will only be able to click on the preset messages you set up.

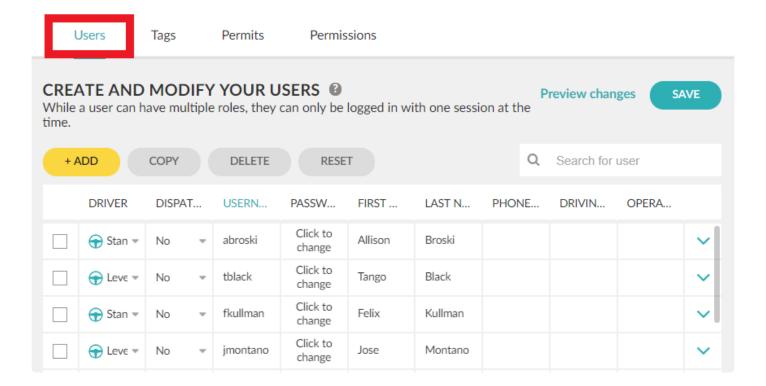
Users

- Create and Modify your Users
- <u>User Tags</u>
- <u>User Permits</u>
- <u>User Permissions</u>

Create and Modify your Users

Here you can add and manage your users, drivers, dispatchers and messengers. When you first create your account at TaxiCaller you will automatically have at least one driver and one dispatcher so that you can begin trying out the system without any extra complications.

From this section of the Admin Panel you will be able to modify your current users or create new ones as needed.



Add a new Dispatcher

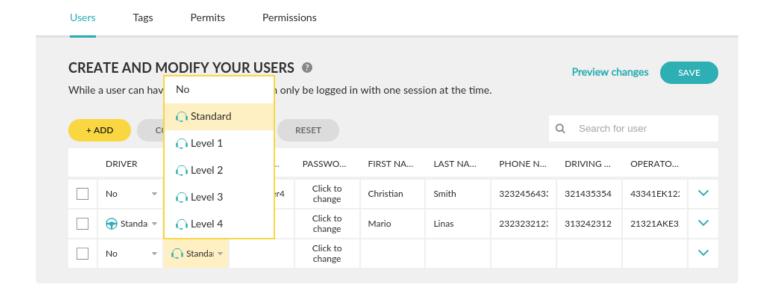
A Dispatcher will be operating the Dispatch console, controlling the incoming bookings and dispatching them, and in general will have an overview of how the rides and drivers are functioning on a day to day basis.

- Once in the <u>Users section</u>, click on the **Add** button.
- A new row will appear containing the new user. As a default, this will be a Driver (It will say "Standard" under the "Driver" column).
- To make the user a Dispatcher only, select "No" under the Driver column and "Standard" under the

Dispatcher column.

• Give them a username and password so they can log in, and a name and last name.

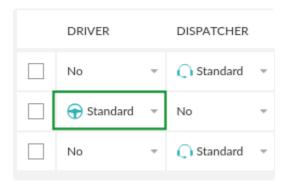
Press "Save" on the top right corner of the panel.



While a user can have all the 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

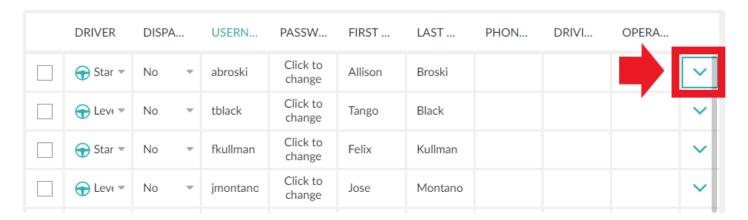
- Once in the <u>Users section</u>, click on the **Add** button.
- A new row will appear containing the new user. As a default, this will be a Driver (It will say "Standard" under the "Driver" column).
- Give them a username and password so they can log in, and a name and last name.
- Press "Save" on the top right corner of the panel.



If you add a phone number, this will be displayed to the passengers after a successful booking.

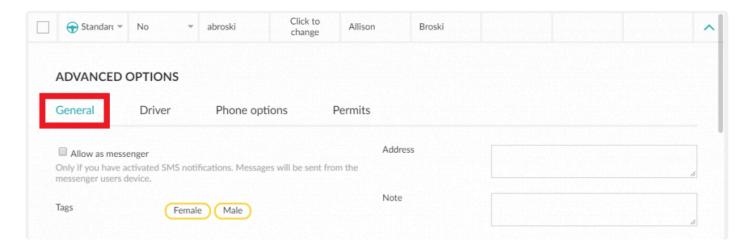
Advanced Options for Users

To access to the advanced options for users click on the arrow to display de menu.



General

In this section, you can specify if your user is going to be a messenger. You can also add an Address and a Note for the user if desired. This information will not be available to passengers or unauthorized users.

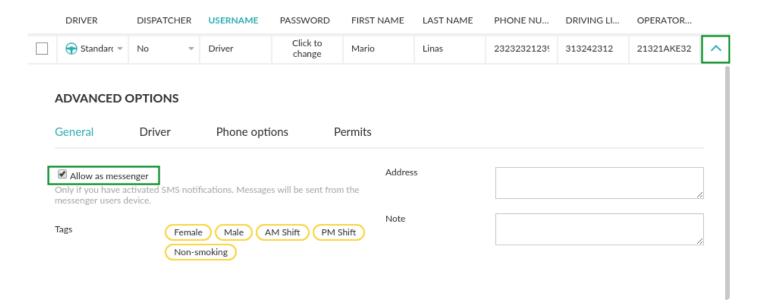


Add a new Messenger

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.

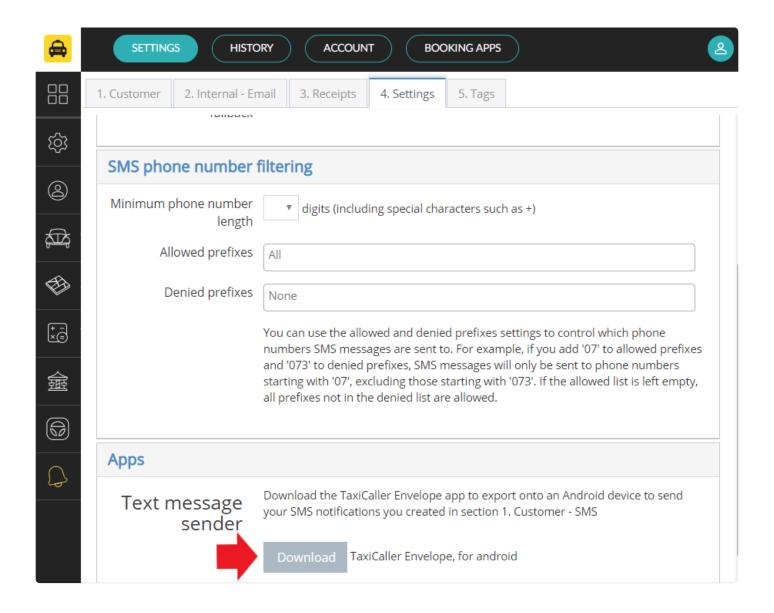
To enable this role check the box "Allow as messenger" and save the changes on the top right corner of the panel.



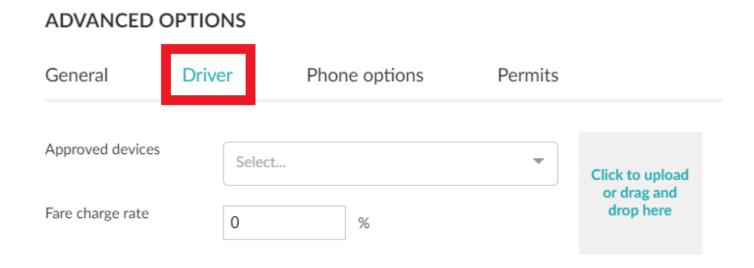
You can also add User Tags that can be used for additional information. Follow the <u>link</u> for more information about it.

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 <u>Envelope app</u> installed. You can download the Envelope app from the Admin panel > Settings > Notifications > Settings > Apps; download it and then export it to an Android device.



Driver



Approved devices

Use this option to limit this driver login to only certain devices. 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 log in this way, a driver can only start a shift from this particular phone or tablet.

Fare change rate

This option is to be with the Bank feature. You can read more about this here.

Driver picture

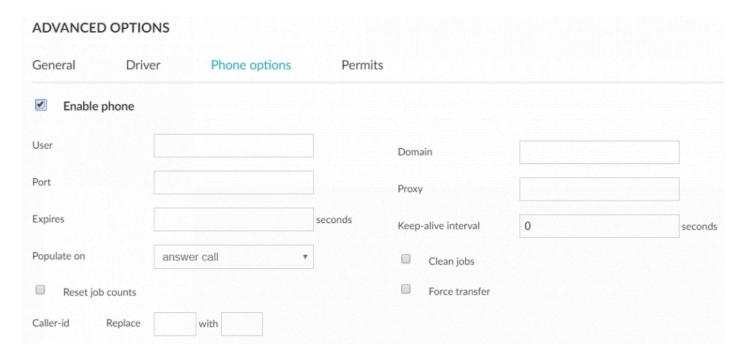
Add a picture that may show when a passenger books a ride.

Phone options - Caller ID

For this feature to work, you will need first to enable the phone options in a dispatch user.



Then, you will need to get a VoIP service provider to be able to get the credentials needed to connect with Taxicaller softphone.



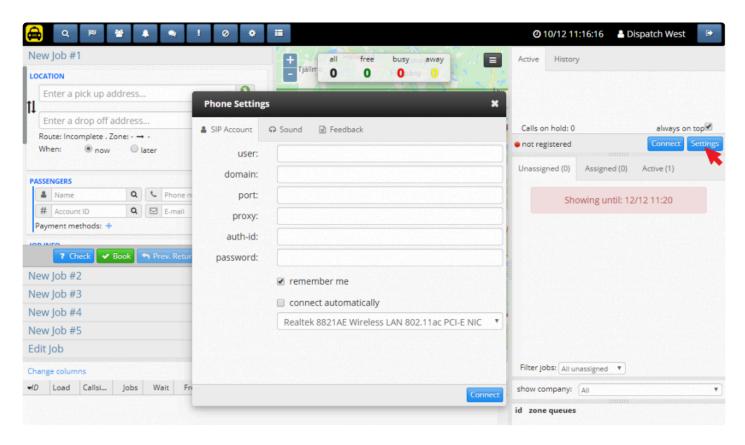
We have a standalone softphone client that technically should be compatible with any VoIP provider that supports the SIP standard, so if you have a VoIP provider in mind but are not sure whether they would be compatible with our softphone or not, you should check if that provider can **connect their VoIP service to a third-party softphone using the SIP standard**.

To download Taxicaller softphone please click on the following link <u>Download Taxicaller Softphone</u>, you will need to have installed the softphone before trying to integrate with your VoIP provider.

Once you have:

- 1. Enabled the dispatch user
- 2. Downloaded the Taxicaller softphone
- 3. Gotten your credentials from your VoIP provider

You will need now to configure the Dispatch user both in the Admin Panel and Dispatch Consol.



The VoIP providers that Taxicaller recommends are:

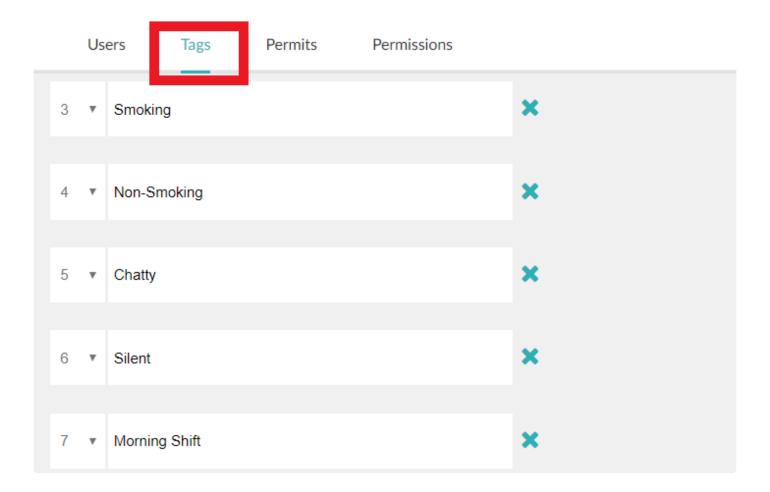
Ring Central http://www.ringcentral.com/ VOIP Studio http://voipstudio.com Sip Trunk (USA) https://www.sip.us/ Cellip (Sweden) https://www.cellip.com/

If you are interested in integrating with VoIPStudio please check the following article: <u>How can I integrate VoIPStudio?</u>

Permits

User Tags

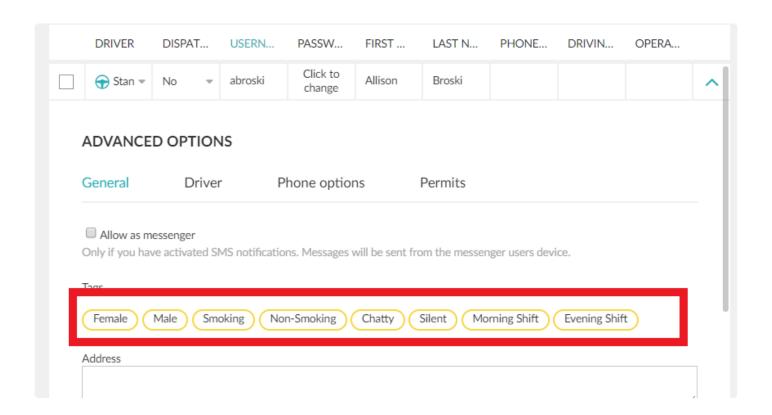
Create user tags

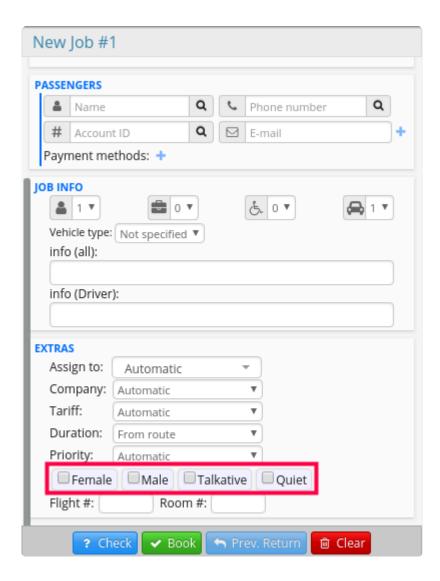


In the **Tags** tab you can create tags which you can later set on your drivers and dispatchers.

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 **Add** button at the bottom of the screen. Write the tag name, assign a number to it (from 1 to 25) and then click on the save button at the top right.

Set the tags for each user in the <u>users tab</u>. The tags will be visible in the dispatch console but not for the passengers. It's for internal use only.





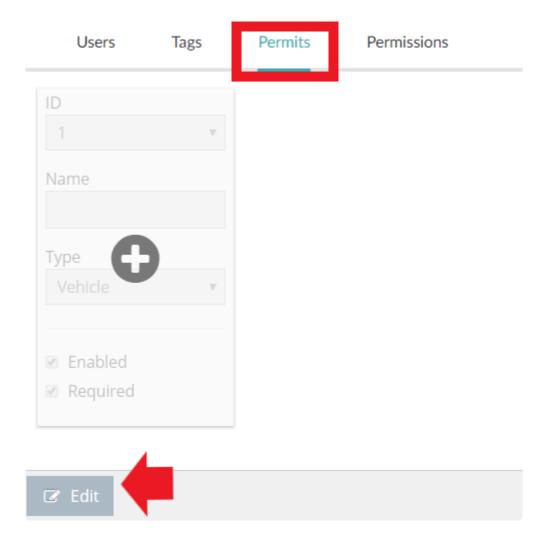
User Permits

Manage permits for your drivers and dispatchers

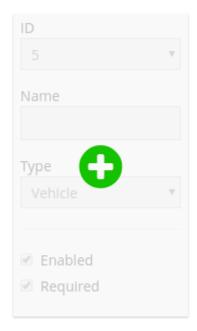
With Permits you can personalize which permits and licenses should be required of users depending on your local regulations.

Access this by going to Settings > Users > Permits in the Admin Panel.

To start editing this features click on the edit button at the bottom of the screen.



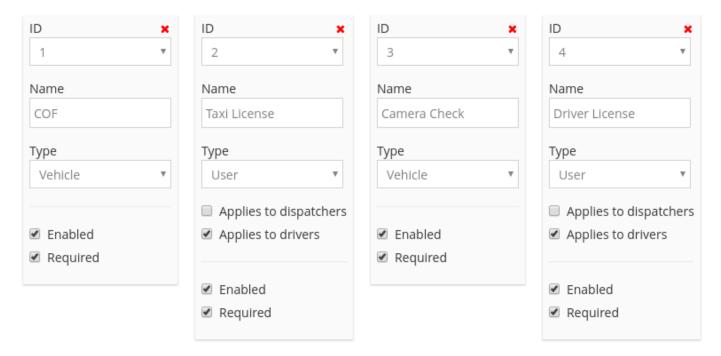
Then, click on the green + sign.



- 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.



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 Manage Permits.

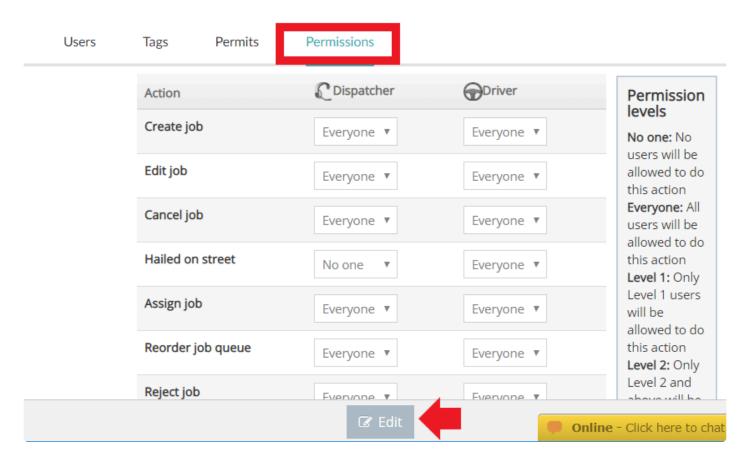
To read more about how to upload permits, check out this article from the Driver App Manual. <u>Upload a Permit.</u>

User Permissions

Establish permissions for drivers and dispatchers

In this section, you will be able to change the permission levels for your users regarding a variety of actions such as creating and editing jobs or suspending vehicles and drivers.

To start editing this feature click on the button edit at the bottom of the page.



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>Users</u> section.

Permission levels

No one: No users will be allowed to do this action **Everyone:** All users will be allowed to do this action

Level 1: Only Level 1 users will be allowed to do this action **Level 2:** Only Level 2 and above will be allowed to do this action

Level 3: Only Level 3 and above will be allowed to do this action

Level 4: Only Level 4 will be allowed to do this action

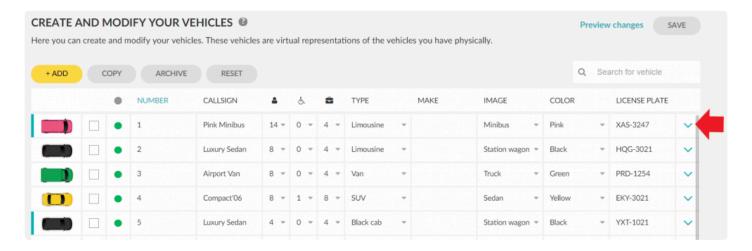
Vehicles

- Create and Modify your Vehicles
- Vehicle Types
- Vehicle Tags
- Vehicle Permits
- Vehicle Archive

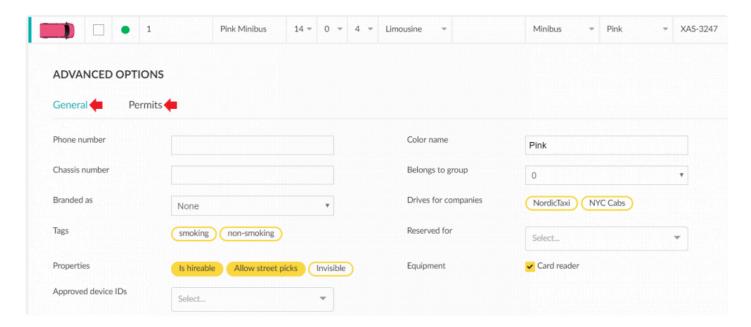
Create and Modify your Vehicles

Navigate to the Vehicle section of the Admin Panel, to create and manage your vehicles.

In this view, you will see a vehicle list. You can use the search bar at the top to easily filter through a large number of vehicles. You can configure the basic options directly on the list, for example, the number of passengers, type of vehicle, color, among others.



You can access the advanced options of each vehicle by clicking on the right side arrow. In the advanced options, you can define General and Permits settings.



Advanced Options for Vehicles

General

Under general, you will find options that will further describe your vehicles such as color and chassis number, but also you will be able to pick tags that were previously defined in the <u>Vehicle Tags Section</u> section.

You will also find settings that can be enabled if you want that a particular vehicle:

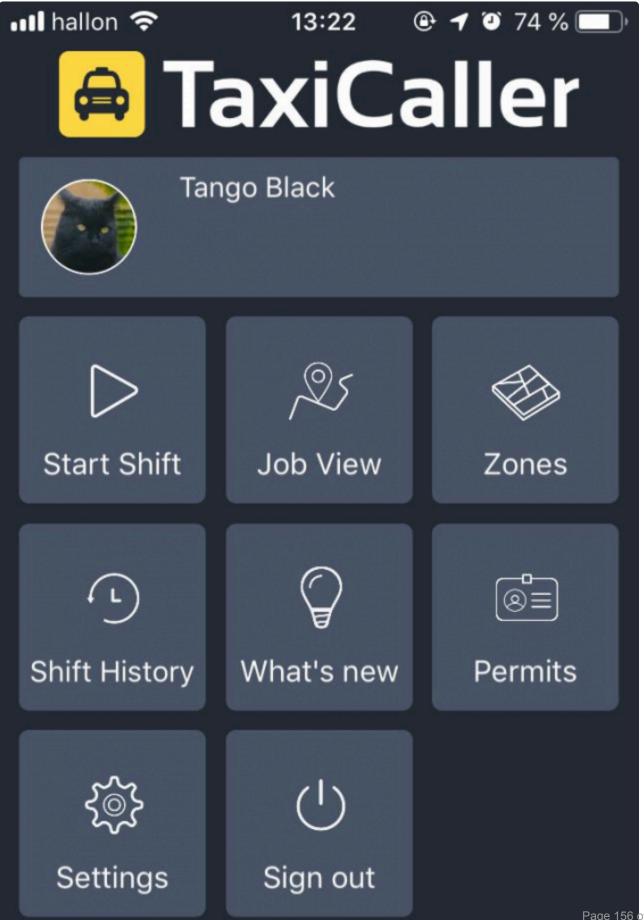
- Can be reserved for a specific company or driver.
- Belongs to a specific group.
- · Has a card reader.

Additionally, you will be able to select the properties of the vehicle if you want that a vehicle is:

- Hireable, which means that the vehicle can accept jobs.
- Allow street picks, when you want to allow that a vehicle can start jobs when hailing.
- Invisible, if you want the cars to not appear on the passenger app until a booking is made.

Finally, you can set an Approved Device, if you want that a vehicle uses a specific device.

For setting an approved device, look for the Device ID that you will find in the bottom of the driver app screen.



And type in the field the ID number.

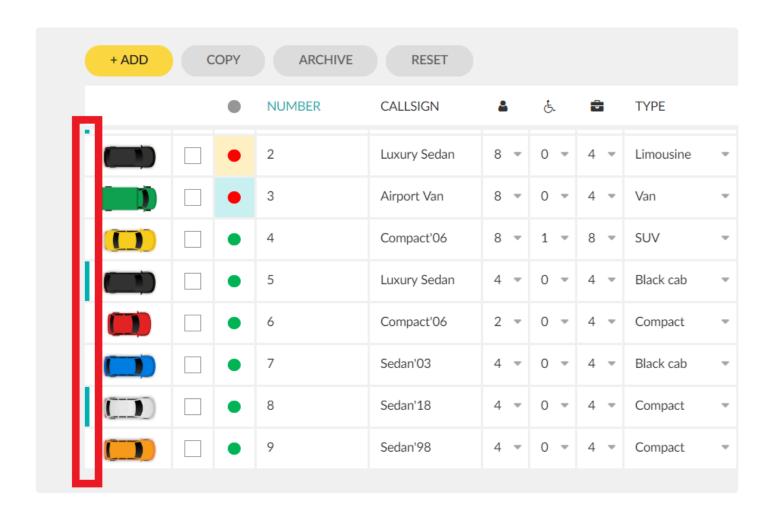
Approved device IDs



We recommend that when setting vehicles try to keep it simple. Some of these options will be used later when filtering cars to provide a specific job and if the car is not called/filter by those specific attributes the system will display that 'There are no cars available'.

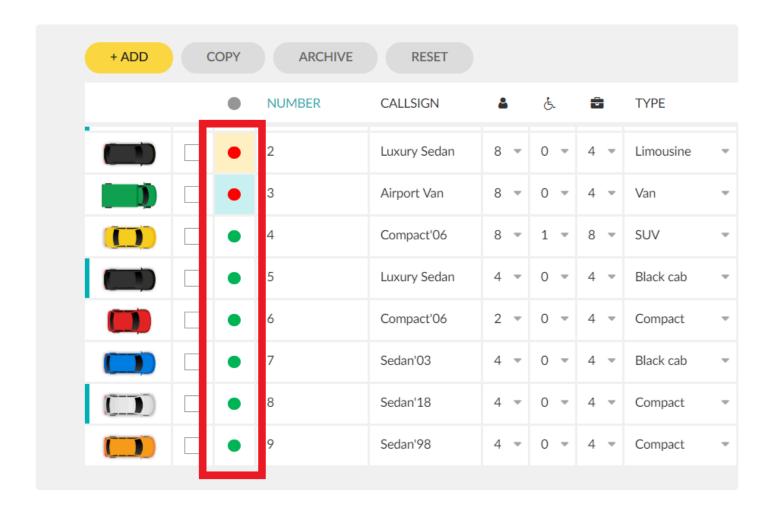
Note:

When navigating in this page, you will find a column on the left side of the page that will get highlighted whenever a car has been activated. A car gets activated whenever a driver logs-in into that car during this month.



Activated vehicles are billed. If you want to prevent get billed by mistake because a car was activated by mistake we recommend you to disable the vehicle or archive it.

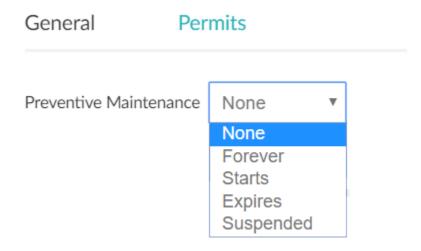
Enabled vehicles are shown with a green dot. If you want to disable it press the dot to change it's status to disabled = red.



In order to archive a vehicle please take a look at the <u>Vehicle Archive Section</u>.

Permits

Under permits, you will be able to select if you want to establish a permit for that specific vehicle. Note that if your vehicle does not comply with the permit, the car will not be available to be picked by a driver.

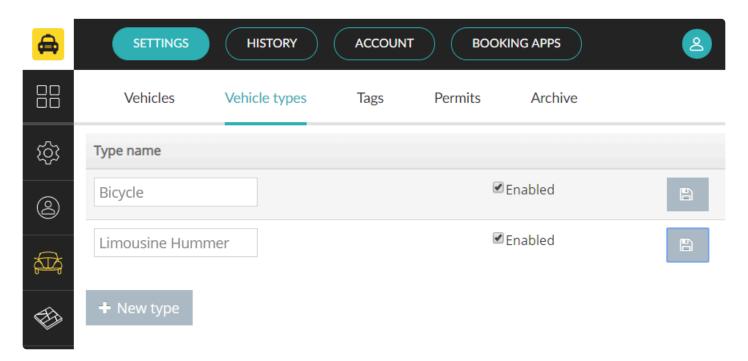


Permits must be created previously in order to appear in this section. For more information on how to create permits visit the <u>Vehicle Permits Section</u>.

Vehicle Types

It is possible to define new types of vehicles depending on your business needs.

With this feature you will only need to type the vehicle type that you need and save it. It automatically will appear for selection on the list of vehicles of the <u>previous section</u>.



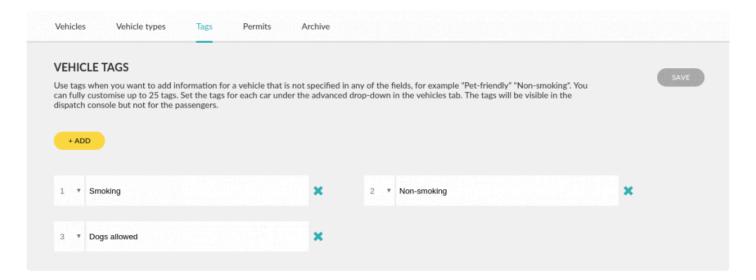
Note: The system will only allow the creation of 10 vehicle types.

Vehicle Tags

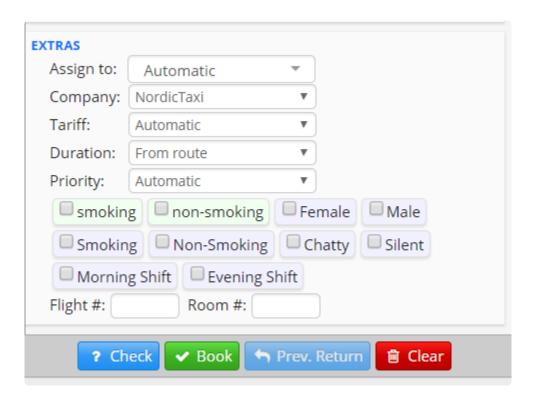
Vehicle tags is a feature that will let you add more information on the services that you provide to fully customize a job.

The system will allow you to add up to 25 tags. To create them or edit them, click on the Add button and then click on Save when you're done.

The tags will represent characteristics of the service that you provide. You will be able to assign this tags to a particular car in the <u>advanced options</u>.



You can select them in the <u>Vehicle advanced options</u> to describe the vehicle and later on will be available in the dispatch to select specific services when booking a job.



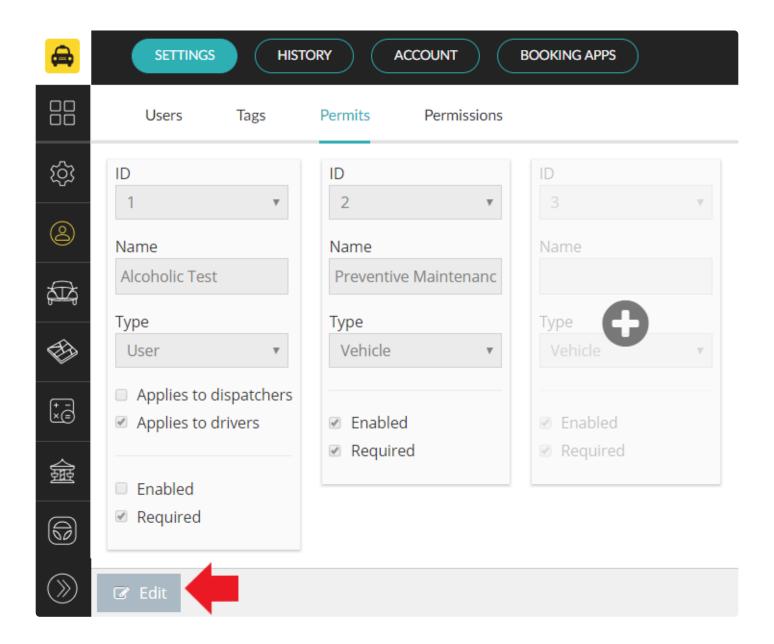
Vehicle Permits

Manage permits for your vehicles

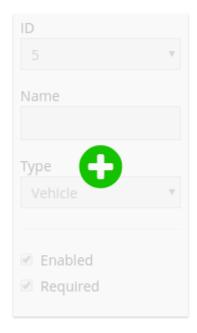
With Permits, you can personalize which permits and licenses should be required for vehicles depending on your local regulations. This works in the same way as the <u>user permits</u>.

Access this by going to Dispatch > Settings > Vehicles > Permits in the Admin Panel.

To begin editing, scroll down and press the edit button.



Click on the green + sign.

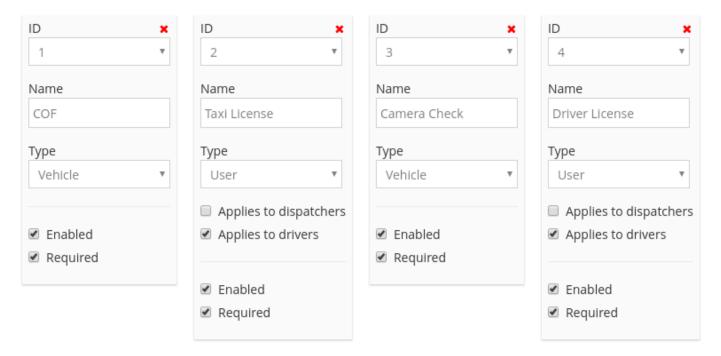


And start setting your permits:

- · 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.



You can create many different types of permits

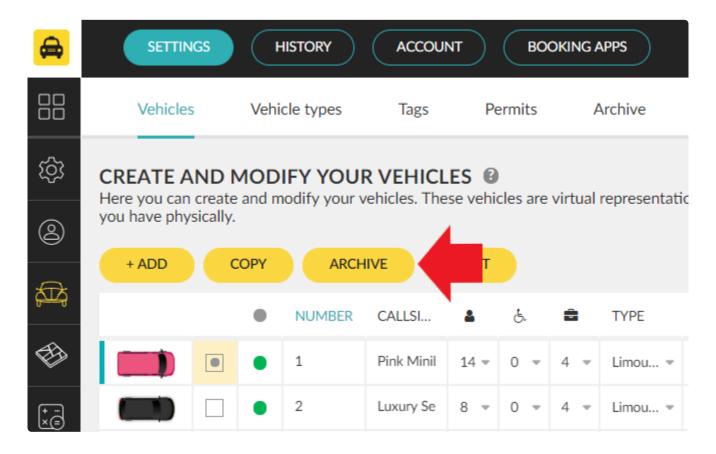
Remember to click on **Save** at the bottom of the screen before you navigate to a different page.

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

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

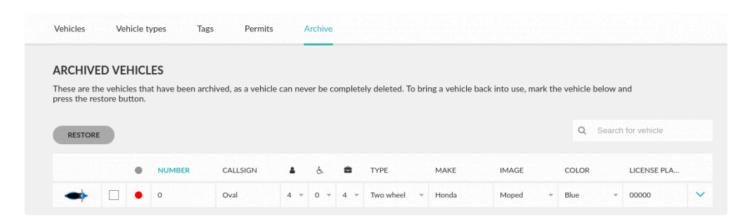
Vehicle Archive

In the Vehicle tab you can **Archive** a vehicle when you're not using it.



You can see a list of these archived vehicles in the last tab Archive.

Archived vehicles will not be billed and furthermore you will not be able to use them.



To bring a vehicle back into use, mark the vehicle and press the **restore** button.

Vehicle Classes

Vehicle Booking Options

Vehicle Classifier

Zones / Assignment Zones

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Note that these Zones are different from the <u>Tariff Zones</u>.
Assignment Zones: Defined areas to assign jobs to the drivers depending on their position.
Tariff Zones: Defined areas that you will set to determine the price you will charge for providing a job in that area.

In this section, you will be able to define the zones in which you would like to provide cab services.

Tariff zones are used to create specific tariffs that you want to apply when billing. On the contrary, the zones in this section define the areas where you will be able to assign jobs, in other words, the zones in which you want to operate.

Create and Modify your Assignment Zones

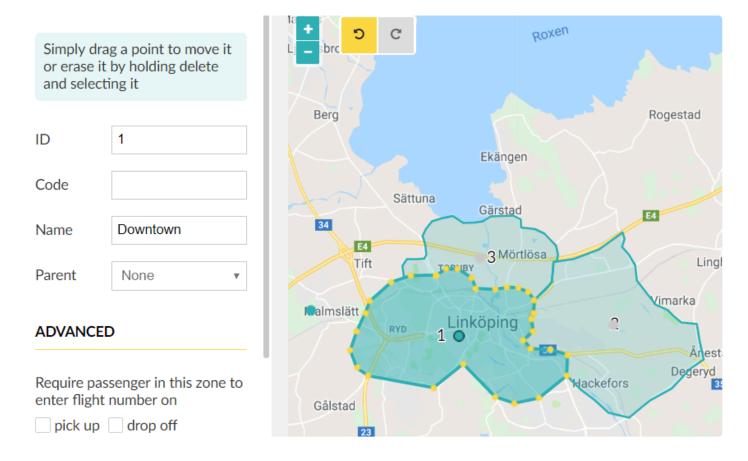
If your company covers a large area, you might need to divide it into zones, in order to determine how would you like to assign the drivers into the jobs.

Adding a New Zone

Click on the **Add Zone** button. It will enable a green dot on the map where you can draw the zone by clicking into the 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 at the left corner of the map.



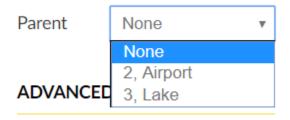
Once you have drawn the zone, give it an id and name, these are the only obligatory fields. You can then configure the rest as will be explained below, or you can click on Done button at the bottom of the menu. Save the changes before leaving the page.



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The zones 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.

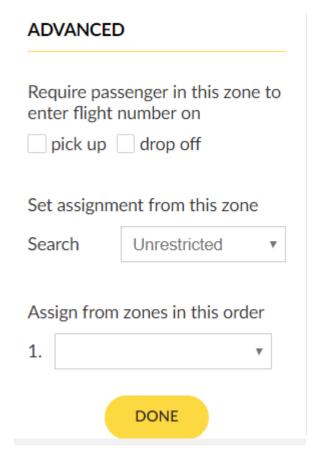
Under the parent option, you can select if you want to define the zone as a child of another zone. This function will enable that, the rules assigned to the parent will be also reflected in the children. This option, for example, is useful when defining Taxi stands, where you will need to create a specific assignment zone (child zone) for the taxi stand to operate inside a bigger zone (parent zone).



Advanced Options

The default behavior for zone queues is that the vehicle that has waited for 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.

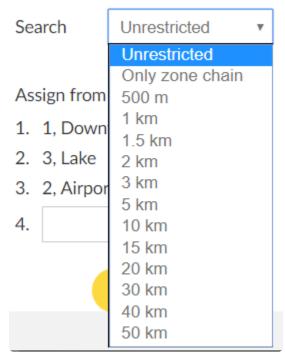
Check the option "Require passenger in this zone to enter flight number on" if you want to establish as mandatory that the passenger when booking enters the flight number, for example in Airport Zones.



Set assignment

Will allow you to assign a job under different options from where the pick-up of the job was made. For example, let's say that your company has a big zone of operation, by enabling this option you could select that the job is only assigned to vehicles that are located within 10 kilometers from the job-pickup.

Set assignment from this zone



Assign from

You can also add the order for the system to assign the jobs. For example, in the following the system will prioritize to assign the jobs first 1. Downtown, then 3.Lake and finally the drivers that are in 2.Airport.

Assign from zones in this order

To delete zones from the list, simply click on the cross beside the name of the zone.



Import and Export Zones

If you wish to have a back up of your zones, to copy your assignment zones to your tariff zones, or to transfer your zones to a different TaxiCaller account, you can import and export zones as GeoJSON files.

Exporting

- 1. Go to <u>Settings > Zones</u> in the Admin panel.
- 2. Find the "IMPORT AND EXPORT ZONES" button at the top right of the page.
- 3. Click on "EXPORT"
- 4. Your file should begin downloading to the default local download folder.

Importing

- 1. Go to <u>Settings > Zones</u> in the Admin panel.
- 2. Find the "IMPORT AND EXPORT ZONES" button at the top right of the page.
- 3. Click on "IMPORT"
- 4. Select the GeoJSON file from your computer in the dialog that appears.

Notes

- Exporting from external locations is possible as long as ID, code and name properties are specified.
- The expected projection is the standard EPSG:4326 / WGS 84. Only polygons without holes are supported, all other features will be ignored.

FAQ:

Why is my imported GeoJSON not showing up as a zone?

Tariffs

In the following section, you will be able to set the tariffs and rules you would like to follow for your company.

- Create Tariff Zones
- Configure your Tariff Schedules
- Setting Tariffs

Tariff Zones

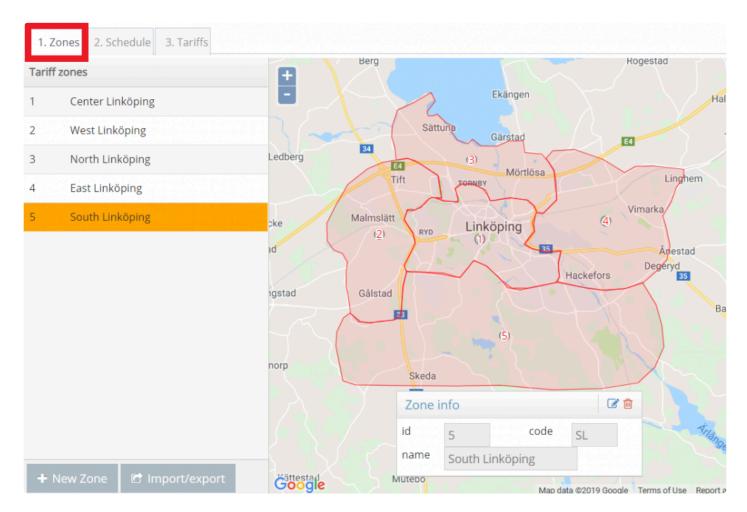
If you have already created <u>Assignment Zones</u>, the creation of tariff zones is similar, although its purpose is quite different.

Tariff zones are used to create specific tariffs that you want to apply when billing based on the area the job was performed.

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>Tariffs Schedule</u>.



Create a Tariff Zone

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.



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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!

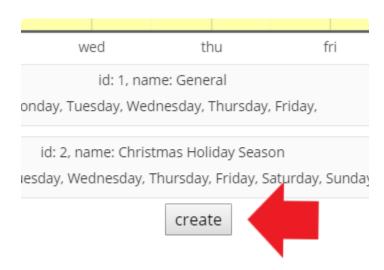
Tariffs Schedule

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 every day at all times. However, you can also create different schedules to set up different prices depending on the day, the week or time of the day.

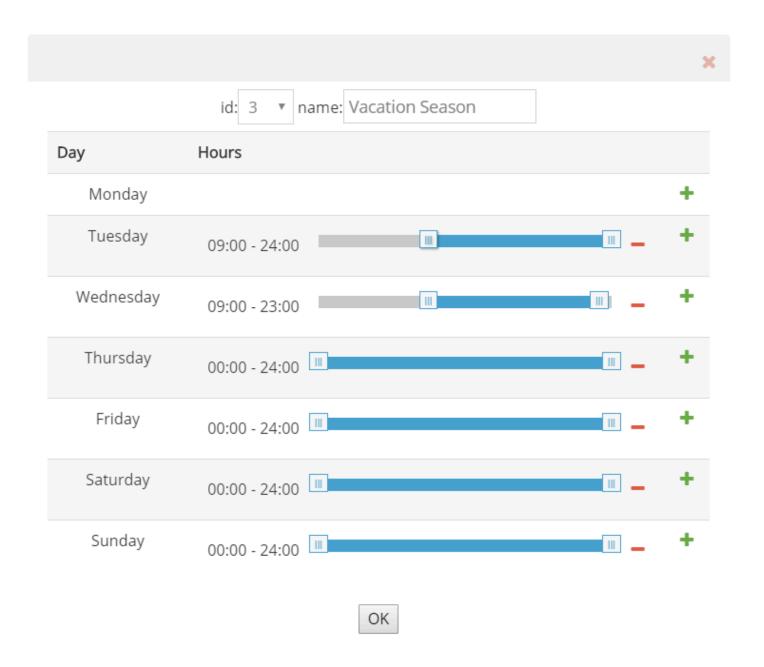


Creating a Tariff Schedule

· Scroll down until you find the Create button. Click on it.

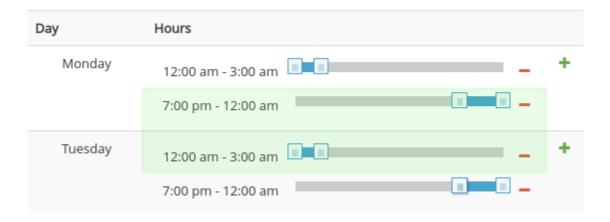


- A new panel will pop up in your screen, in which you can select the times for your schedule. Click on the plus sign (+) for each day of the week.
- Drag the sliders with your mouse or the arrow keys in the keyboard to adjust the time.
- Do not forget to add a name for your schedule.

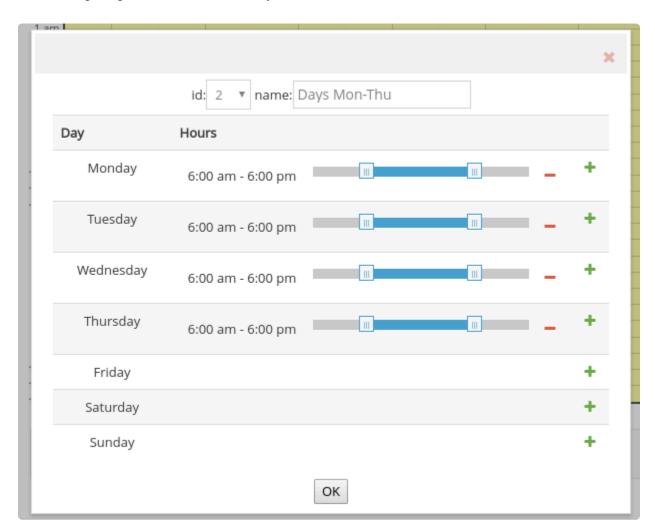


• You can add two different time sections to the same day by clicking on the plus (+) sign again to bring out another slider. The only restriction is that the *earlier* time should be placed on the top slider.

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.



• 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.

Note:

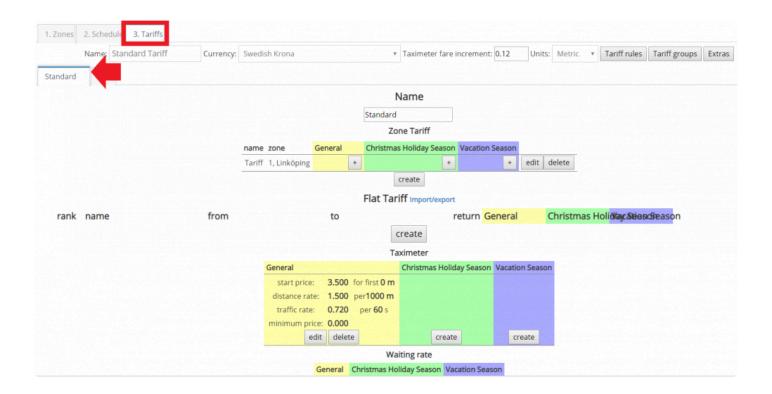
The maximum number of schedules is 10.

Admin Panel - Unified Admin TaxiCaller Nordic AB

Setting Tariffs

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

- By Default, your tariff will be named **Standard** 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.





At this point you should be able to go back to Payment Options to make sure your tariff is enabled.

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.

In the following articles, you will find information about how to set tariffs based on different variables.

Zone Tariffs

- Fat Tariffs
- Taximeter Tariffs
- Waiting Rate
- Tariff Rules, Groups and Extras

Note:

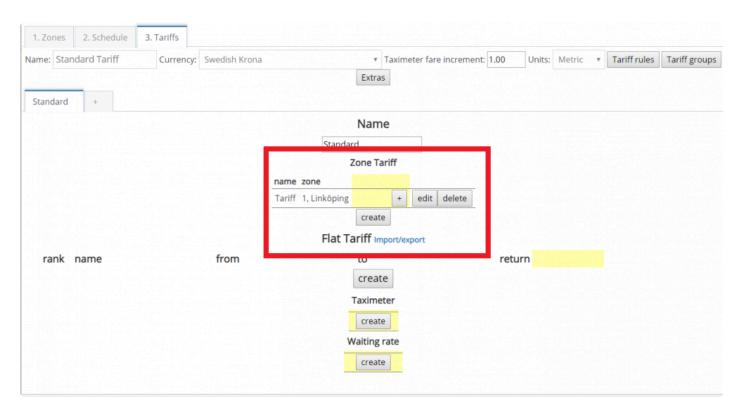
The maximum number of categories is 300.

If you have less than 10 tariff categories you can have unlimited flat tariffs.

If you have more than 10 tariff categories you can have max 10k total flat tariffs.

Zone Tariffs

Zone tariffs will let you create different tariffs depending on the area the job took place.



To work with zone tariffs, you can set a price for each zone. If you have created different schedules in the previous section, you also will be able to create a tariff for each of the schedules you have created. As for example in the following, the schedules created in the previous section were General, Christmas Holiday and Vacation.

name	zone	General		Christmas Holiday Season			Vacation Season		
Center Zone	1, Center Linköping	150.000	-		180.000	-	180.000	-	edit delete
West Zone	2, West Linköping	180.000	-		200.000	-	200.000	-	edit delete
North Zone	3, North Linköping	175.000	-		175.000	-	175.000	-	edit delete
				create					

If you set a tariff of 150 in Center Linköping for example, any job that happens within this zone will get this

tariff.

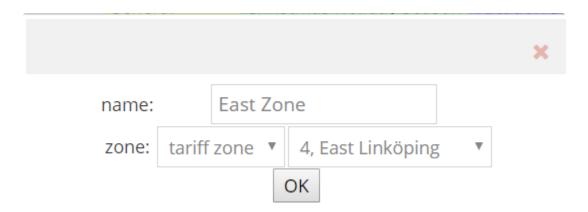
However, if you have jobs that go from one zone to another. For example, if a passenger books a ride from Center Linköping to West Linköping, the price of the ride will be the highest of those two zones, in this case, 180 under the General Schedule.

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

To create a zone tariff:

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



Flat Tariffs

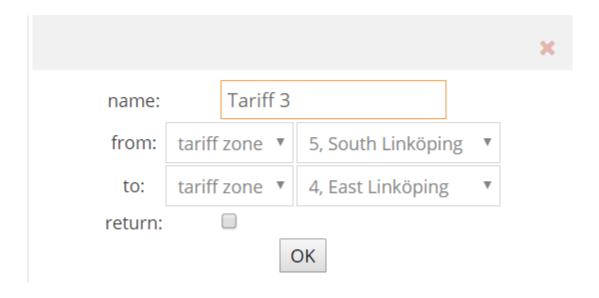
*

Zone Tariffs override Flat Tariffs, so choose them carefully.

Flat tariffs are normally used for trips between cities but they can also be used within the city if your company requires it, although it is more recommended to use zone tariffs for trips between cities.



To create a flat tariff, follow these steps:



- 1. Click on Create.
- 2. Enter the name of the flat tariff.
- 3. Select the two price zones between which the flat tariff will apply.
- 4. Check the "return" box if you wish to have the same price for both directions.
- 5. Press the OK button.
- 6. Write the price in the field or fields depending on how many tariff schedules you have.



max schedules: 10 max cateogires: 300

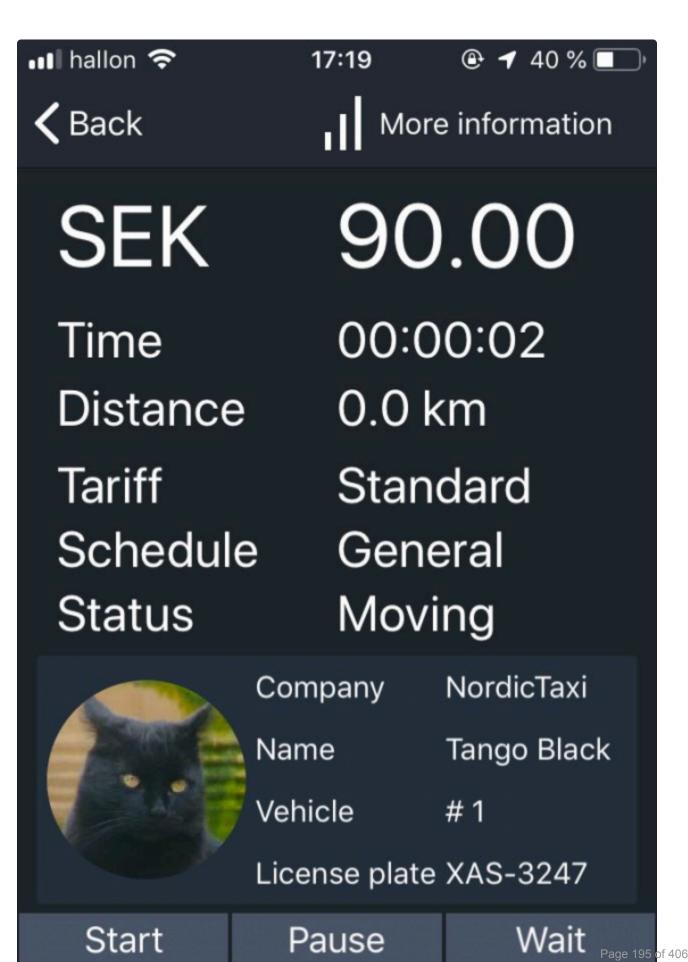
if theyhave less than 10 tariff categories they can have unlimited flat tariffs

if they have more than 10 tariff categories they can have max 10k total flat tariffs

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

Taximeter Tariffs

Taximeter tariffs will enable an in-app taximeter in the driver app for calculating the price of the job.



Delivered

Cancal

Ston

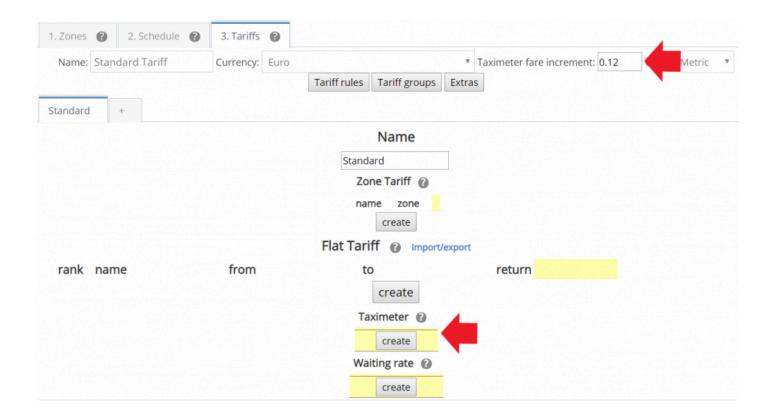
To enable taximeter tariffs you must check the box "Enable the in-app taximeter" in the admin panel that you will find in <u>settings>general>payment options</u>.

PAYMENT OPTIONS

- Require the driver to specify price paid for each trip.
- Enable tariffs
 By unchecking this option you will disable tariffs
- Enable the in-app taximeter in the driver app
- Force tariffs so drivers can't change the predefined tariff for a type of job
- Enable the advanced payment flow in the driver app

The taximeter tariffs consist of two parts:

- · Taximeter fare increment
- Taximeter



Taximeter fare increment

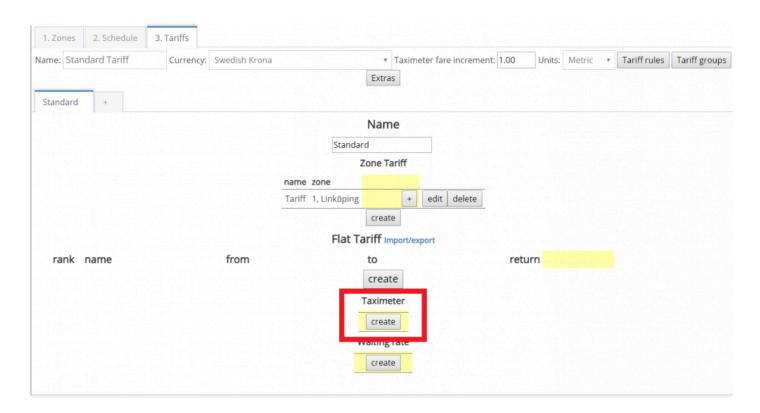
This option is only for display purposes.

It is the ratio at which the taximeter will **display** the increment to the bill in every 10 seconds.

As for example, if the "taximeter fare increment = 0.12", it means the taximeter will display an increase of 0.12 cents each 10 seconds.

Taximeter

To begin creating a taximeter tariff, click on the button create under Taximeter.



Depending on the needs of your company you can set different rates.



Start price___for first___m

Define the price at which you would like to start the taximeter, define for how long do you want to have that tariff.

For example, 3.48 Euros for the first 3000 m.

Distance rate__per___m

Determine the price you would charge for meters/yards traveled.

For example, 1.20 Euros for each 1000 m.

Time rate per__per__s

With this option, the taximeter will increase the amount of money you fill every certain time.

For example, 1 Euro for each 1000 m.

Traffic rate per__per__s

The traffic rate is added to the taximeter whenever the taxi is standing still, define how much you would like to charge per time elapsed.

For example, 2 Euros for every 120 seconds.

Minimum price___

Define the minimum price of the job.

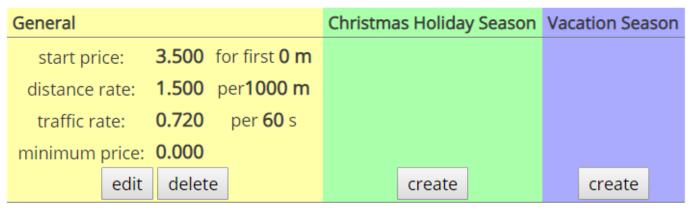
If both **Distance rate and Traffic rate** are enabled, the software will switch between both depending on which is the higher on the traveled distance.

If you do not wish to use any of these parameters, set its value to 0.

Press the "Save" button at the top of the screen when you are finished.

You can set independent taximeter tariffs in each of the schedules created.

Taximeter 🕜





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.



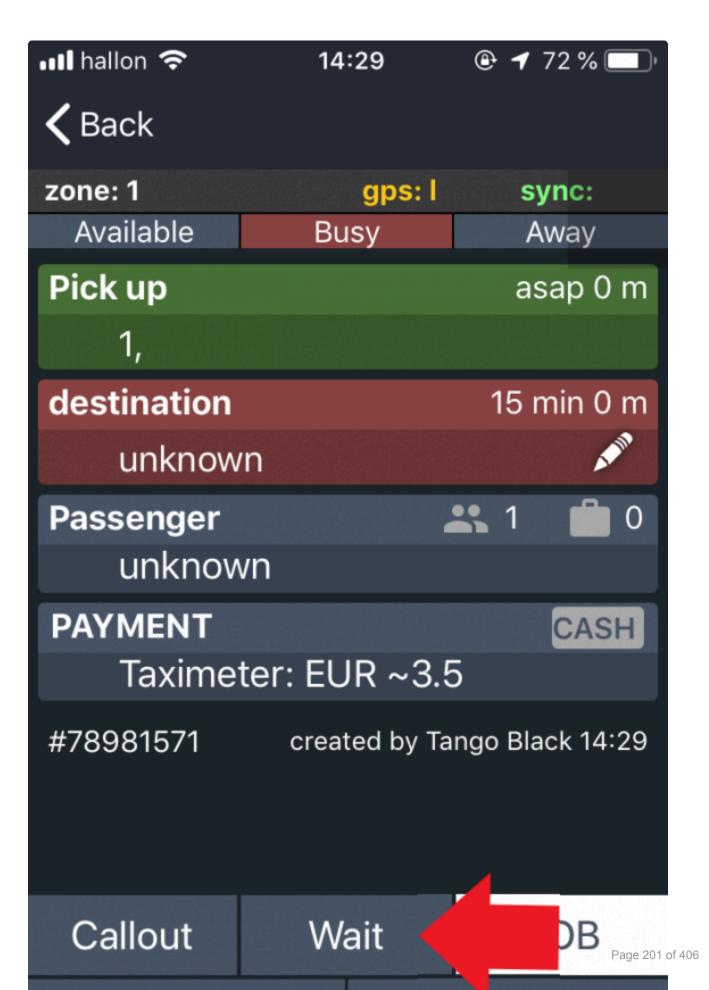
Based on the GPS coordinates and calculated speed the taximeter determines if distance or traffic rate should be running. They can never run at the same time (since one is for standing still and the other is for when moving).

Waiting Rate

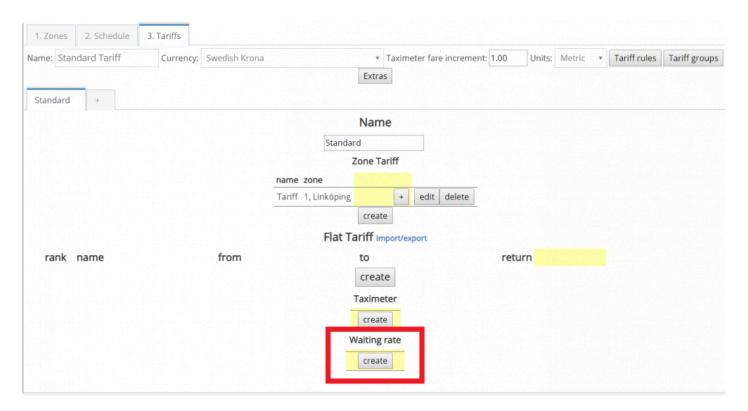
The waiting rate is an option you can set to charge the customer if the driver requires to wait for the passenger at some point while doing the ride.

The wait button on the driver app it is only visible when the passenger is on board (POB).

The waiting fare will only be added after the Taximeter has started, either by pressing the button start or POB in the driver app.



To begin, press on the create button under waiting rate.



Set how much you would like to charge the customer for waiting. You can also specify if you would like to give some free charge.

For example:



You can set different waiting rates in the different schedules you have created.

Waiting rate 🔞

General	Christmas Holiday Season	Vacation Season			
Free: for first 0 s	Free: for first 0 s	Free: for first 0 s			
Then: 0.400 per 60 s	Then: 0.600 per 60 s	Then: 0.500 per 60 s			
edit delete	edit delete	edit delete			

Press the "Save" button at the bottom of the screen to save the changes.

Tariff Rules, Groups and Extras

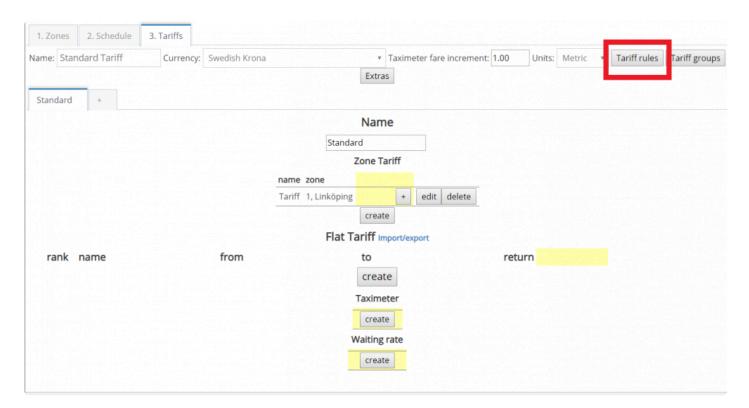
Tariff Rules

Tariff rules are the criteria the system uses to compute how much a customer must be charged for a specific job. The system will automatically select the tariff based on several factors such as the booking source, vehicle type, number of passengers and zones.



If you do not create any rule the system will assign tariffs in the following order flat tariffs, zone tariffs and taximeter

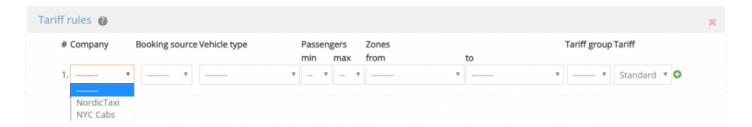
To begin setting the Tariff rules, click on the button Tariff Rules.



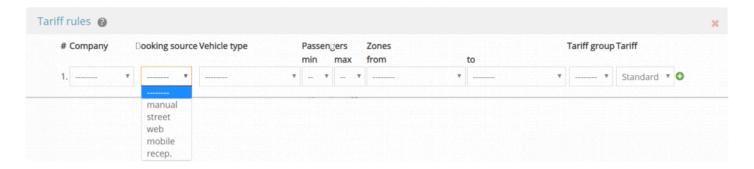
The order of the rules matters! The system will read the rules from top to bottom. Please set the rules from specific to general.

The criteria or constraints that you can select for setting your rules are:

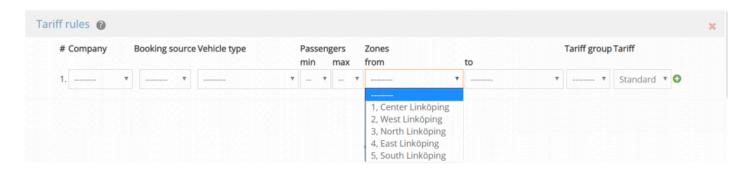
1. Rules that are applicable to only a specific company.



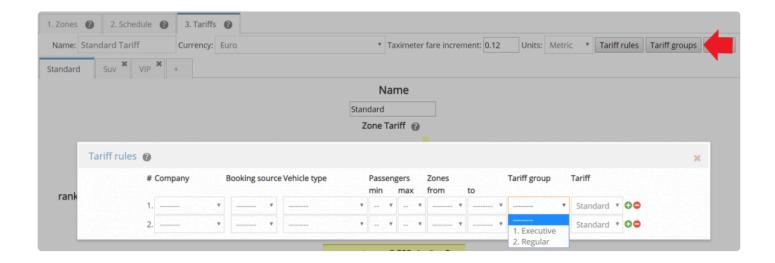
2. Rules that depend on the source of booking.



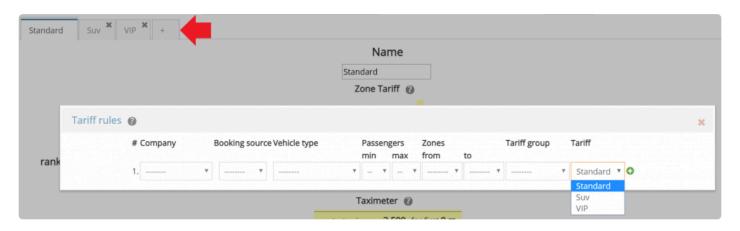
3. You can set rules based on zones.



4. You can previously define a tariff group to be able to specify that a certain rule is only applicable to a specific group.



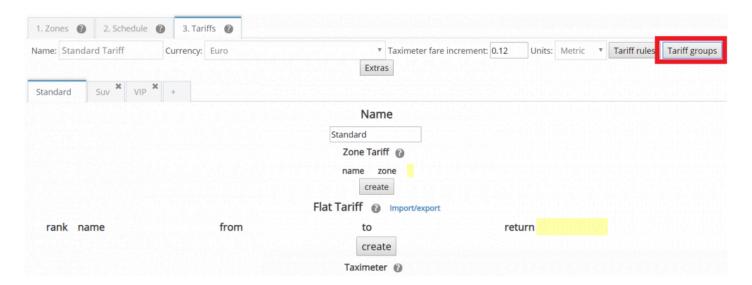
5. Rules that are only applied to a specific tariff category.



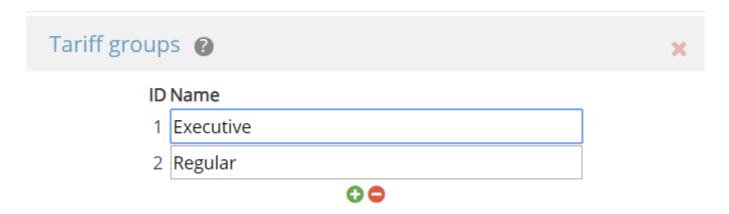
- We strongly recommend all of our customers to keep it simple while setting tariffs rules. If you are a big taxi company we suggest you to standardize your tariffs if you have not done it yet. As complex as tariff rules get, as complex, It will be for you to be able to manage your different prices.
- Every field you specify will affect the way the software calculates the tariff. For example, if you select a company name, the tariff will be only applied if you book a job specified for that company name, even if you only have one company. It is suggested to only select the fields you need and leave all other fields blank when creating a rule.

Tariff Groups

To start adding tariff groups, click on the button Tariff Groups.



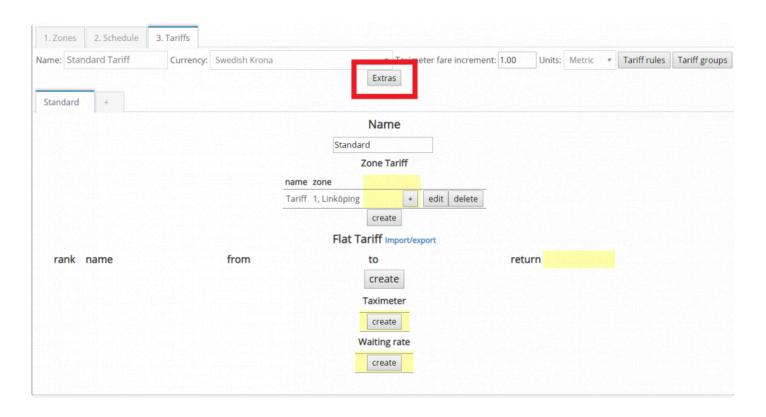
You can add and delete tariff groups that you would like to set.



Extras Tariffs

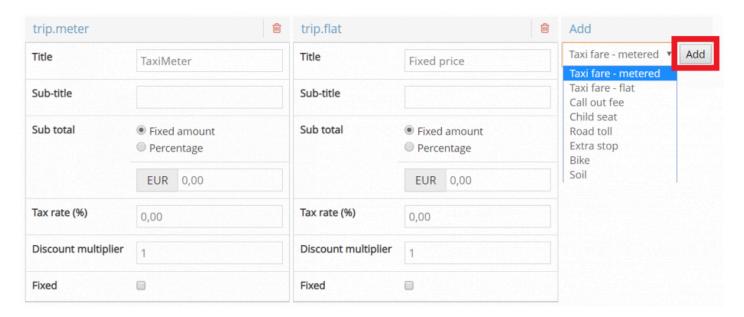
Extra tariffs are extra charges that you might need to consider when providing a job, for example, tolls.

To begin setting extra tariffs click on the button Extras.



A new pop up window will appear. And you will see two tariffs already created: Taximeter and Fixed Price. Taximeter and Fixed Price are the default tariffs that the system creates for running properly.

To start adding extra tariffs click on the Add button.





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 tariffs, exit the extras panel by pressing on the **X** and click on **Save** at the bottom of the Tariffs screen.

The extra tariffs will be available to select in the Driver app. First got to settings>general>payment options and check the box Enable the advanced payment flow in the driver app.

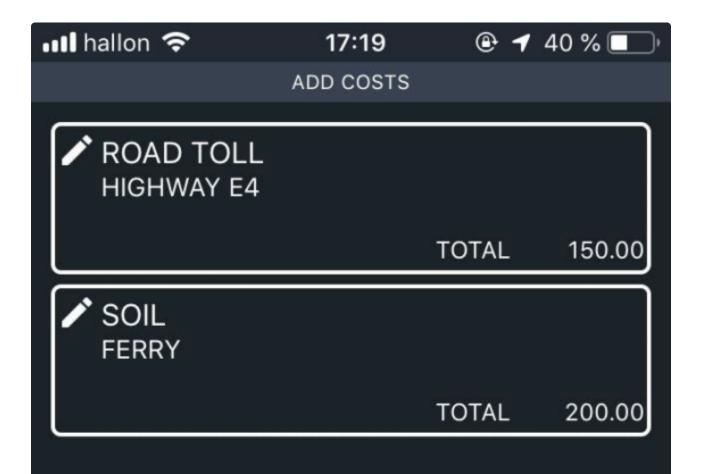
PAYMENT OPTIONS

- Require the driver to specify price paid for each trip.
- **Enable tariffs** By unchecking this option you will disable tariffs
- Enable the in-app taximeter in the driver app
- Force tariffs so drivers can't change the predefined tariff for a type of job
- Enable the advanced payment flow in the driver app

Once in the app, the option will be available when paying the bill. The driver can access to the extra tariffs pressing the plus button.



Finally, the driver will be able to select the toll.



Frequent questions



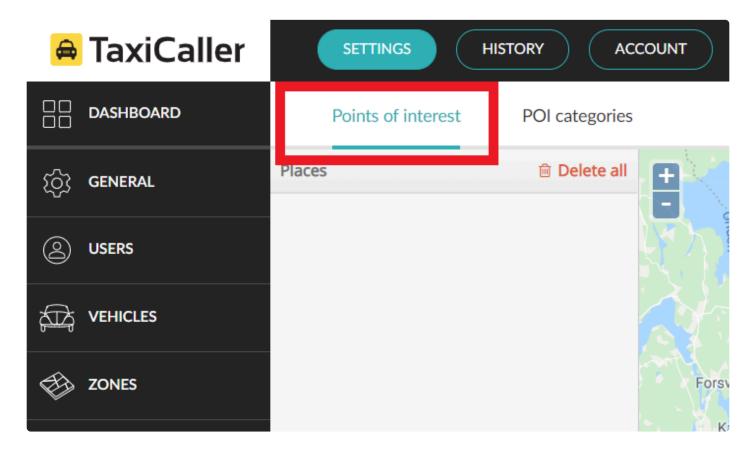
Q: I want to add another trip.meter extra, but it's not saving. What do I do? A: You can only add one extra of each category. Since trip.meter and trip.flat are the default tariffs, you cannot add more of the same.

POIs – Points of Interest

Points of Interest
POI categories

Points of Interest

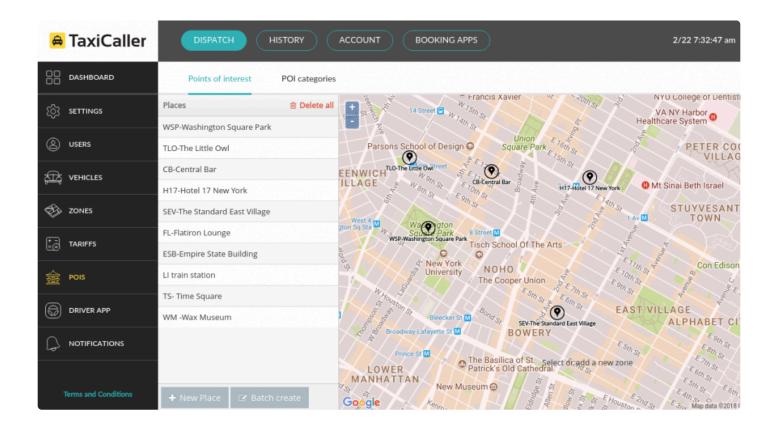
This feature allows you to add points on the map for places that aren't indexed by Google Maps or simply to speed up the booking process. Dispatchers only need to start typing the name of the POIs in the pick up or drop off address bars for them to be selectable.



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

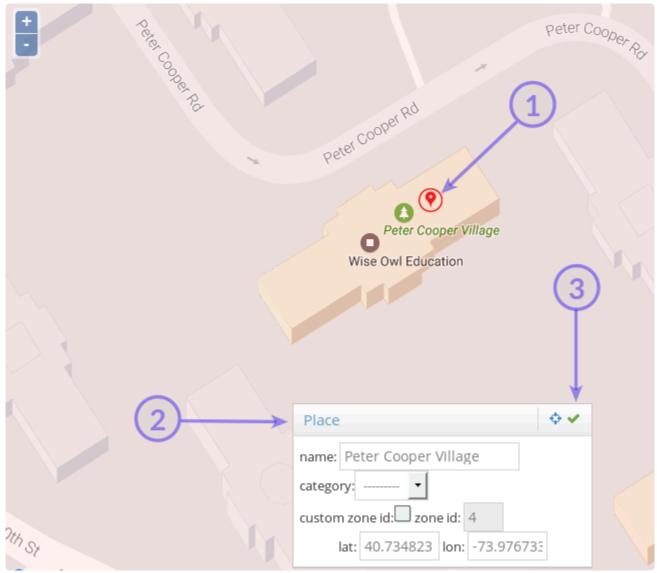
Create POIs.

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: <u>Points of interest</u>



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.

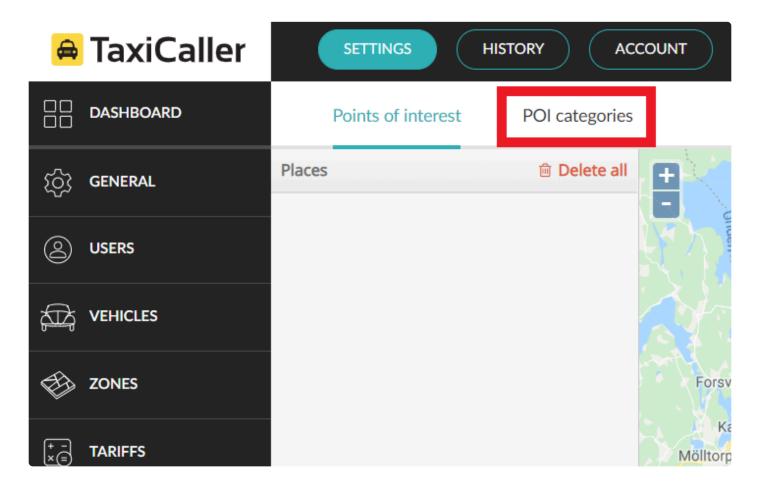
- 1. Move the red mark to the desired place. Alternatively, change the coordinates directly into the dialog window.
- 2. Give it a name. If you have added categories for your POIs (explained below), you can apply the category to your POI now.
- 3. Click on the green checkmark to save.



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

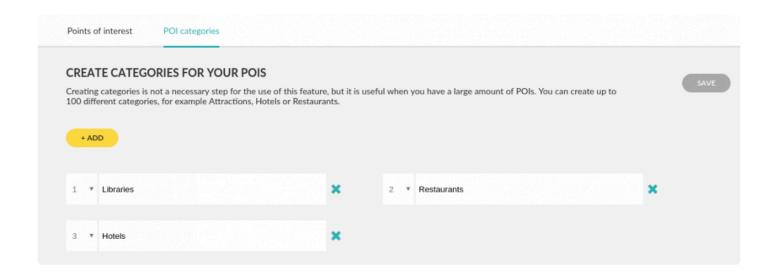
POI categories

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 to the second tab POI categories and start adding them directly. Once you are done adding the categories, click on Save.



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")

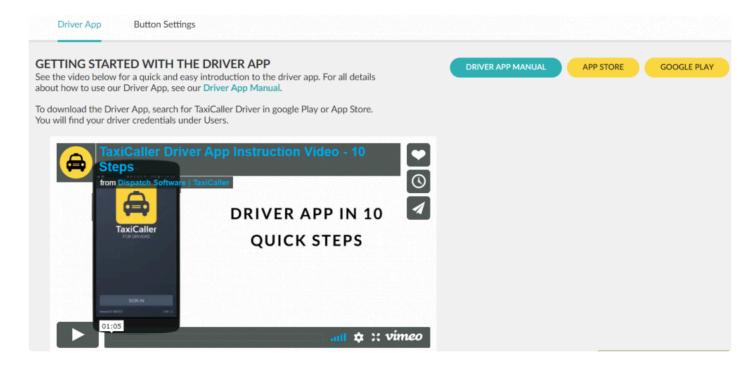
After "coords", write the longitude and latitude for the POI in the brackets. Coordinates are in the format of decimal degrees, multiplied by 1e6, so for instance 58.234234 is entered as 58234234.

Driver App

Getting started with the App Button Settings

Getting started with the App

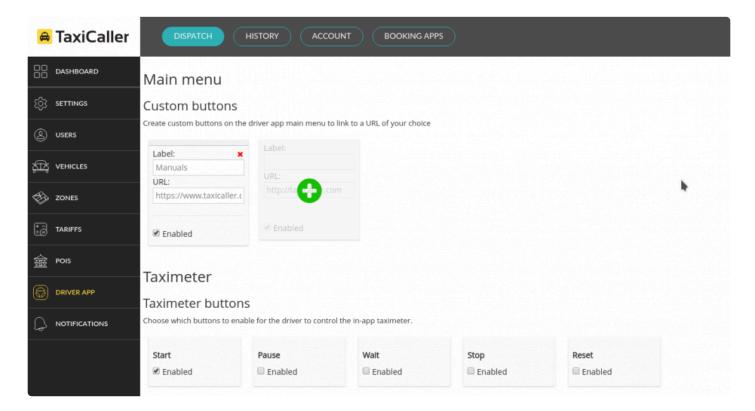
To get started with the driver app download the app in the App Store or Google Play Bottom and visit the Driver App Manual.



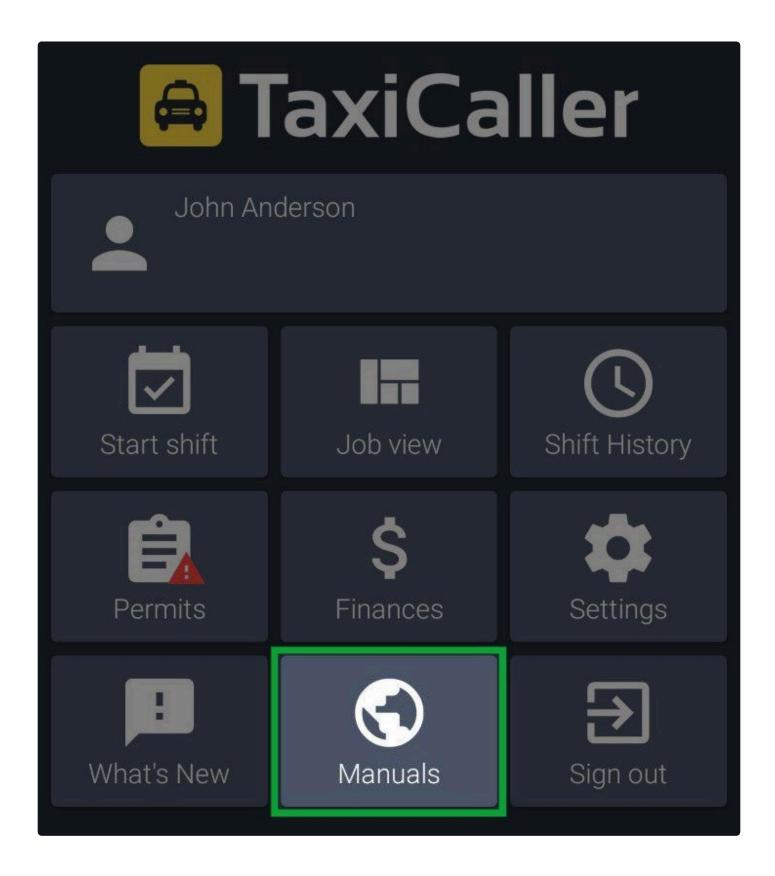
Button Settings

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.



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.

Notifications

Customer

Internal - Email

Receipts

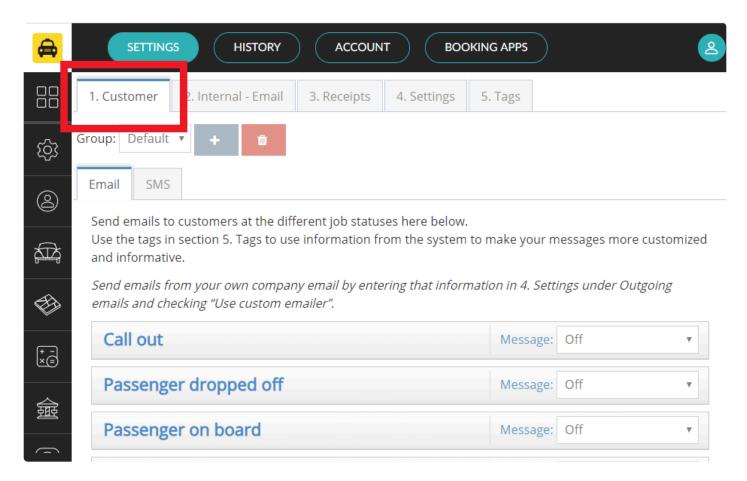
Notifications Settings

Notifications Tags

The Envelope App

Customer Notifications

You can find this feature by going to <u>Settings>Notifications>Customer</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.

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
Status Verified Prebook	When a prebook is verified and assigned by a dispatcher (if they have enabled <u>Verify direct</u> <u>bookings</u>)
Canceled by passenger	When a passenger cancels the ride.
Status Assign Timeout	
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)
New Prebook	When a prebook is made.
Cancel	When the job is cancelled by a driver or dispatcher for any other reason.
Waiting for Passenger	When the driver has reached the pick up location and the driver app is in the Wait state.
Status Created ASAP	

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.



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.

- 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.



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

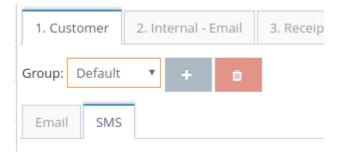
The vehicle with license plates KKK111 will pick you up at 16/06/2017 13:36

Thank you for booking with Nystartaxi.

Using Notification Groups

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 messages 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.

FAQ:

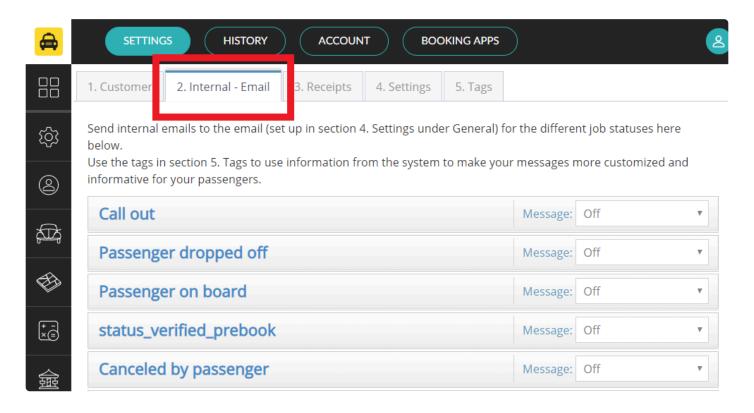
Why is the passenger getting the default SMS / email notification even after creating a separate notification group for them?

Internal - Email

Send internal emails to your company crew.

You can send automatic emails for different status of the job to your personal. You can also add personalized messages using the tags in the <u>tag section</u>.

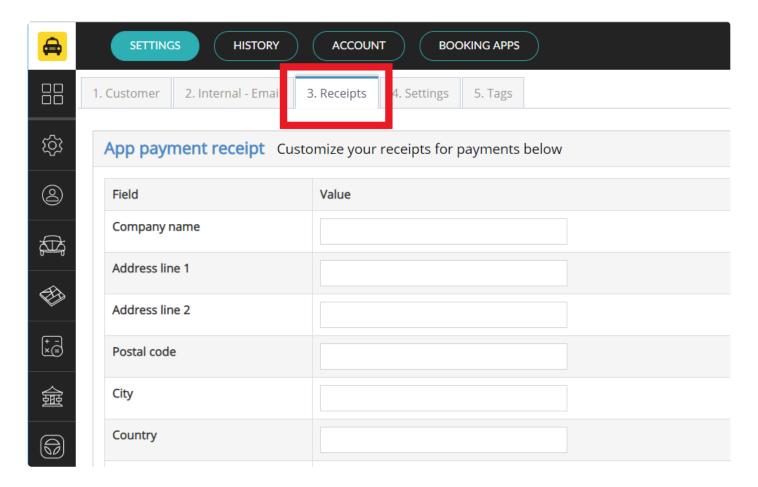
The internal emails notifications are configured in the same way the customer notifications that were mention in the <u>previous section</u>.



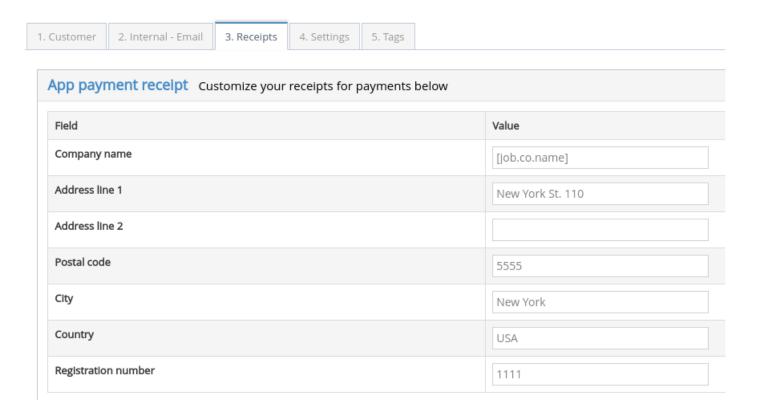
Receipts

Send receipts to your passengers!

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



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.

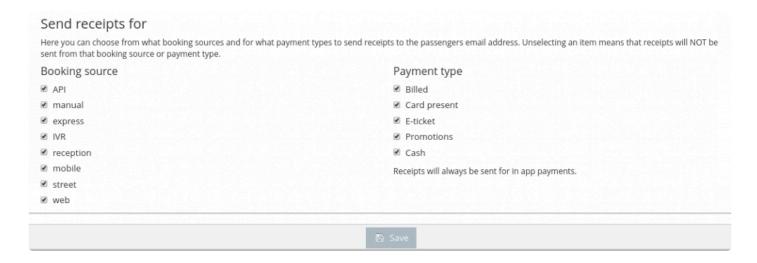
Add custom fields

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.



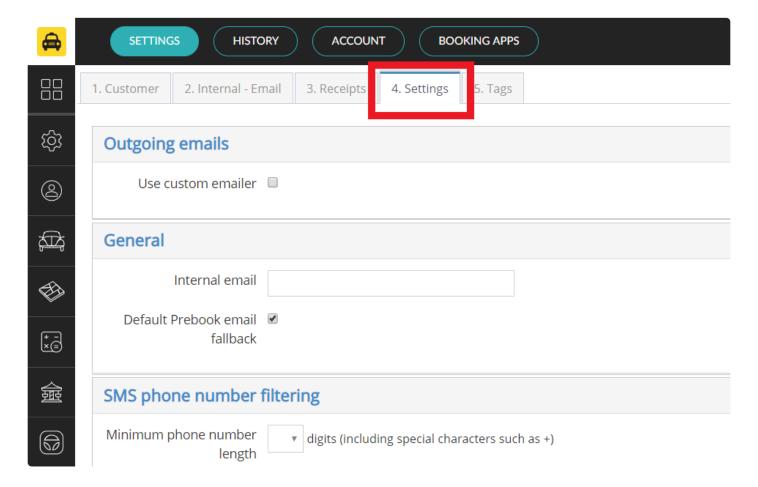
Select in which cases the receipts will be sent

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



Notifications Settings

In this section, you will be able to manage the source of the notifications from your company.



The Envelope App

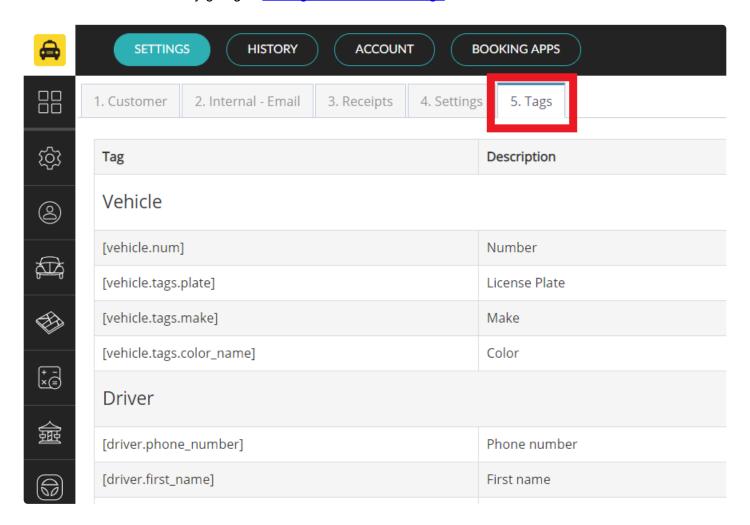
You can download the Envelope app directly from <u>Settings>Notifications>Settings</u> in the Admin Panel. Scroll down to the **Apps** subsection.



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

Notifications Tags

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



You can create personalized messages for your rides adding the following tags to the message in the <u>Customer</u> section and <u>Internal-Email</u> section.

Tag	Description		
Vehicle			
[vehicle.num]	Number		
[vehicle.tags.plate]	License Plate		
[vehicle.tags.make]	Make		
[vehicle.tags.color_name]	Color		
Driver			
[driver.phone_number]	Phone number		
[driver.first_name]	First name		
[driver.last_name]	Last name		
Passenger			
[job.cl.first_name]	First name		
[job.cl.last_name]	Last name		

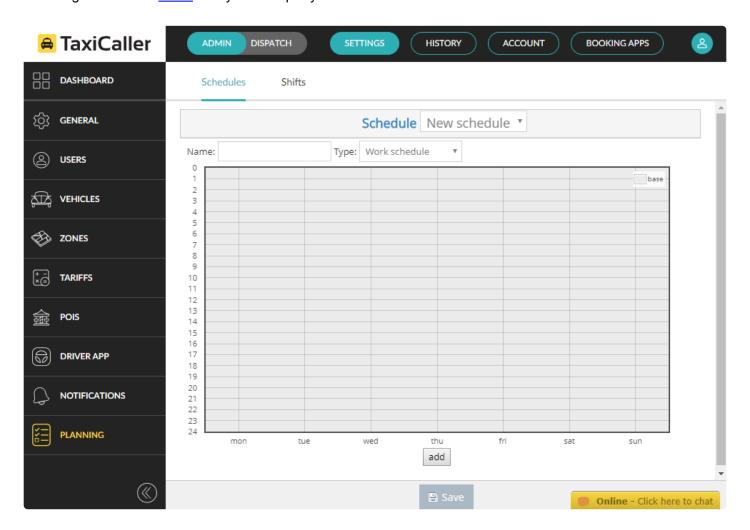
Route			
[job.route.from_text]	Pick up		
[job.route.to_text]	Drop off		
[job.route.pickup.eta]	Estimated pick up time		
[job.when]	Actual pickup date and time		
Timestamps			
[job.stimes.start]	Job start date and time		
[job.stimes.arv]	Arrival date and time		
[job.stimes.pob]	Passenger on board date and time		
[job.stimes.drp]	Drop off date and time		
[job.stimes.clo]	Job closed date and time		
Fare			
[job.extra.tags.fare.price]	Quoted price		
[job.extra.tags.fare.currency]	Quoted currency		
[fx.amount(pay_shares.fare.grand_total)]	Fare grand total		
Other			
[job.co.name]	Company name		

Planning Shifts

Planning Shifts will allow you to manage your drivers' work schedules to allocate and optimize your resources.

You will have plenty of room to plan the schedule of your drivers through the shift section.

The first step you will need to follow is to generate the <u>schedule</u> of your driver and once created you will be able to generate the <u>shifts</u> that your company will follow.

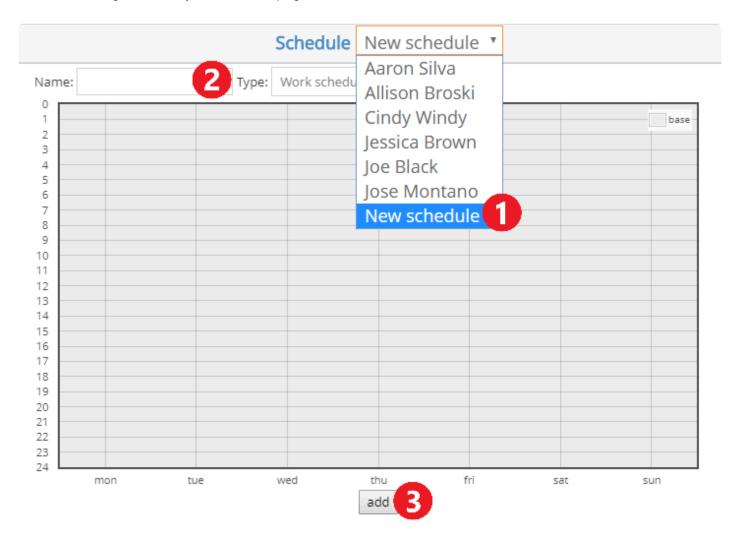


Shift Schedules

To create a new Schedule:

- 1. select under Schedule>New schedule
- 2. enter the name of the schedule and
- 3. click on "add" to select the working hours of that particular driver

Save the changes before you leave the page.

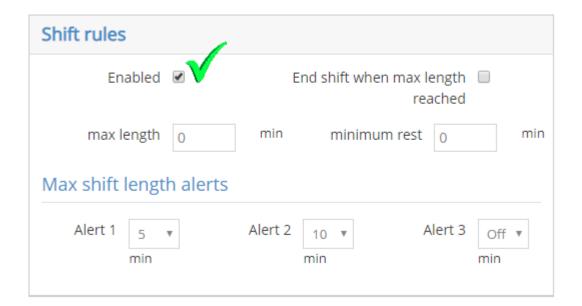


Shift Settings

To activate the shift function you must tick the option Shift enabled.

There are several options you can set up depending on how you would like the system to behave.

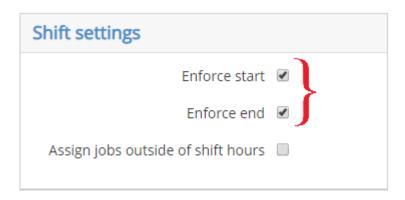
- max length, you can set the max length of the driver's shift.
- minimum rest, define the minimum rest in between shifts.
- End shift when max length reached, you can enable to force the end of the shift when the max length of the shift has reached.
- Max shift length alerts, there are three alerts you can set to notify the driver that his/her shift is about to end.



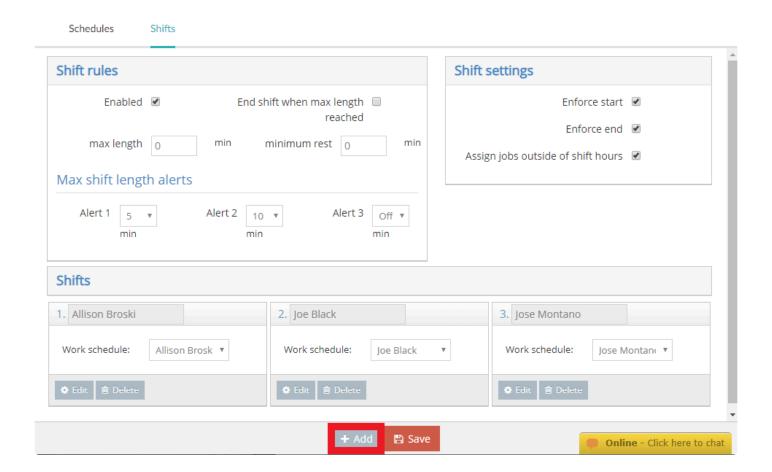
Shift settings

If activating **Enforce start** and **Enforce end**, the app will automatically start and finish the drivers' shift in the driver app when their shift schedule is in progress.

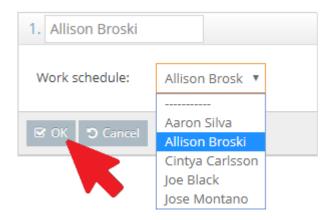
Assign jobs outside of shift hours, enable this option if you still would like to assign jobs to the drivers even though they are not in their shift hours.



To add a new shift, click on **Add** and select the driver you would like to create the shift. After finishing click on Ok and then Save.

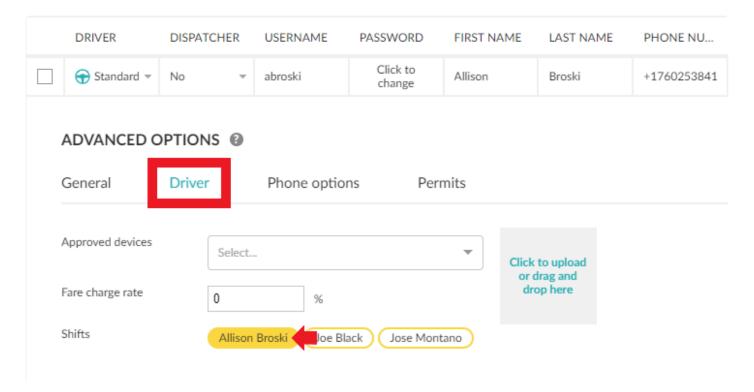


Select the driver you want to create the shift, click on Ok and save the changes before leaving the page.



Finally, you will need to activate the shift under the driver's profile in settings>users.

Select under your driver's profile the schedule you would like to add for that specific user.



History

- Reports
- Replay
- Jobs
- Statistics
- Promotions usage
- <u>Driver ratings</u>
- <u>Messages</u>
- Anonymize

Reports

Standard Reports

Custom Reports and Editor

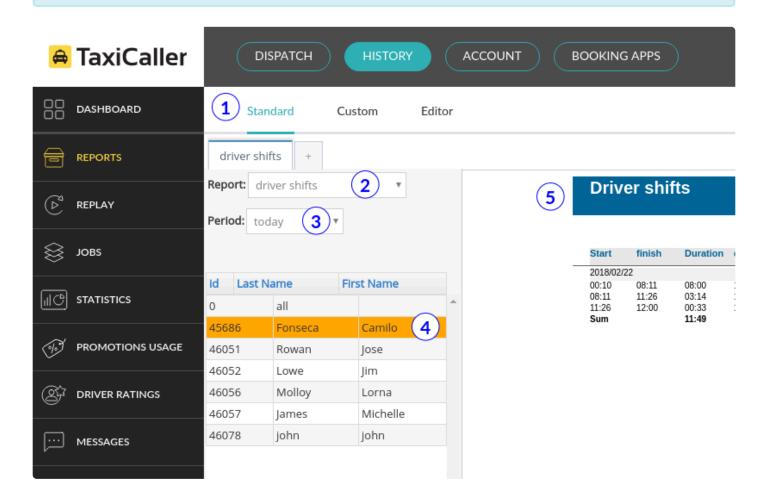
Standard Reports

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



- 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 and click on Get.

5. View your report on the right side of the screen.

Closed jobs					New York Stars Taxi					
period: 2017/02/01 00:00 - 2017/02/07 23:59										
Start	Duration	Passenger	route	car	Driver	cost code	price			
2/06/20	017									
1:08 AN	100:07		from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	25	26, driver		37.00			
1:08 AN	100:07		from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	41	42, driver		37.00			
1:08 AN	100:07		from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	40	41, driver		37.00			
1:08 AN	100:06		from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	21	22, driver		37.00			
1:08 AN			from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	30	31, driver		37.00			
1:08 AN			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			
1:08 AN			from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	24	25, driver		37.00			
1:08 AN			from: 159 Remsen Ave, Brooklyn, NY 11212, USA to: 57-12-57-18 74th St, Middle Village, NY 11379, USAnull	35	36, driver		37.00			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	3	Young, Paul		7.30			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	26	27, driver		7.30			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	20	21, driver		7.30			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	2	Clark, Anthony		7.30			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	28	29, driver		7.30			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	9	Lopez , Daniel		7.30			
1:08 AN	100:02		from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	15	16, driver		7.30			
1:08 AN			from: 133 W 24th St, New York, NY 10011, USA to: 404 Lafayette St, New York, NY 10003, USAnull	36	37, driver		7.30			
1:08 AN	100:04		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			
1:08 AN	100:04		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			
017/06/	20 11:11		(c) TaxiCaller			page 1 of 4				

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



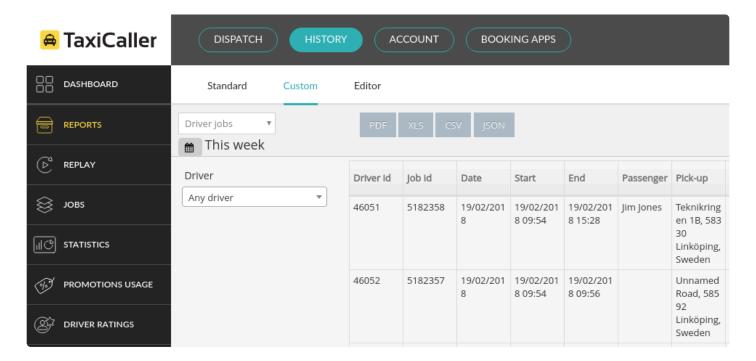
The reports that have to do with jobs, such as car jobs, closed jobs, etc can be generated also as **Legacy reports**. This only means a slightly different configuration of fields and how the information is presented. However, the non-legacy version is always recommended as it is the one that will continue 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 and Editor

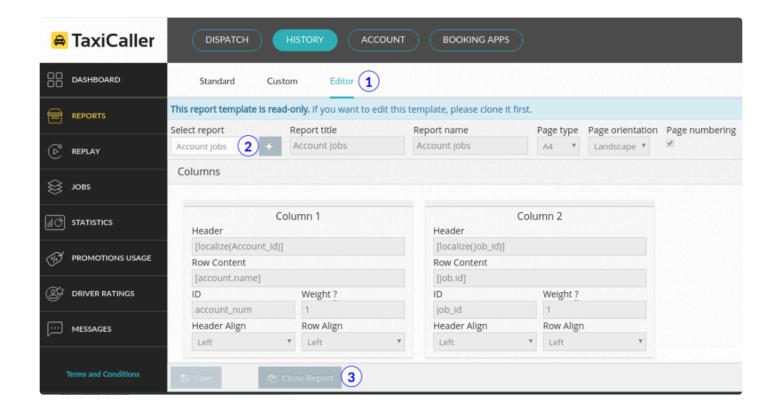
Custom Reports

If you 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.



Editor

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.

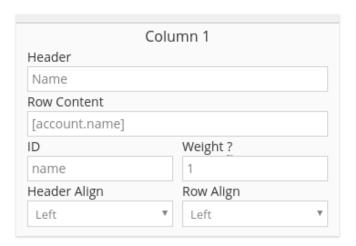


- To begin, click on the Editor tab at the top of the screen.
- · Click either on:
- · The plus sign to create a new report type from scratch
- The Clone Report sign to create a copy of one of the built-in reports, to then make the changes you need.
- Give your report type a title and a name. You can 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





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.

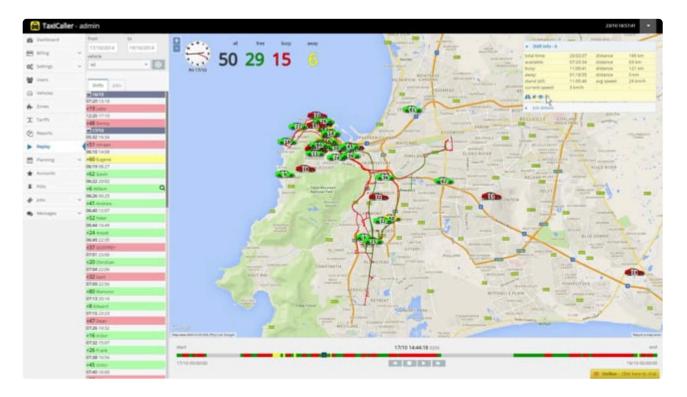
Editor

Replay

Replay traces the routes for all your vehicles in areas. See where all or just one of your vehicles have been at any time.

To access this go to <u>History > Replay</u> in the admin panel.

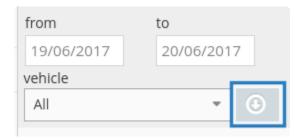
You can watch the following video to see it in action:



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.



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:

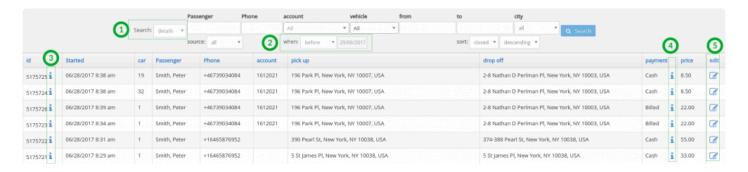
- 1. A fully functioning gps on the vehicles to register their physical movement.
- 2. A driver shift that has already finished (by pressing the **End Shift** button). The shift needs to be longer than 15 minutes (otherwise it's considered too short to be recorded as a shift).

Jobs

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 afterward, the changes you have made will be reflected.

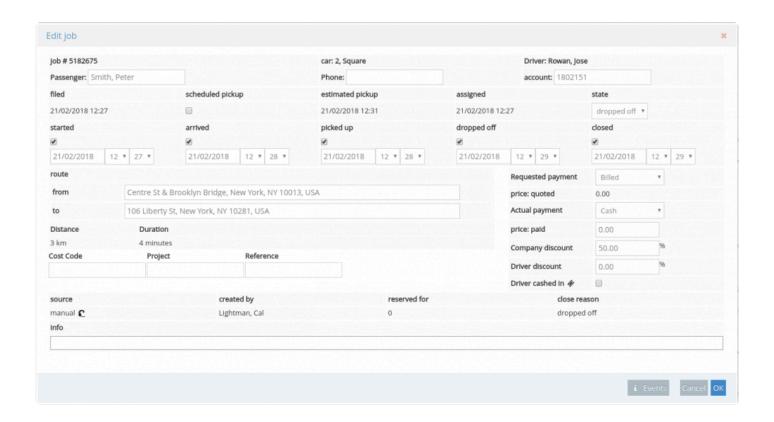
You can find this feature by going to History>Jobs in the Admin Panel.



- 1. You can use the "search" feature to filter jobs based on details, or by job ID.
- 2. Choose the time range for the jobs you want to view.
- 3. Click on the i in the second column to see the job events.

Job events					
Time	Event	Ву	Vehicle		
21/2 12:28:01	Created	Lightman, Cal	-		
21/2 12:28:01	Auto assigned	system	#3, Triangle		
21/2 12:28:47	Driver declined	Lowe, Jim	#3, Triangle		
21/2 12:28:47	Auto assigned	system	#2, Square		
21/2 12:29:33	Driver declined	Rowan, Jose	#2, Square		
22/2 01:31:17	Canceled	system	-		

- 4. Click on the ${\bf i}$ under the payment column to see the receipt.
- 5. Edit job details by clicking on the icon in the last column.



Statistics

Statistics Dashboard
Statistics Goal

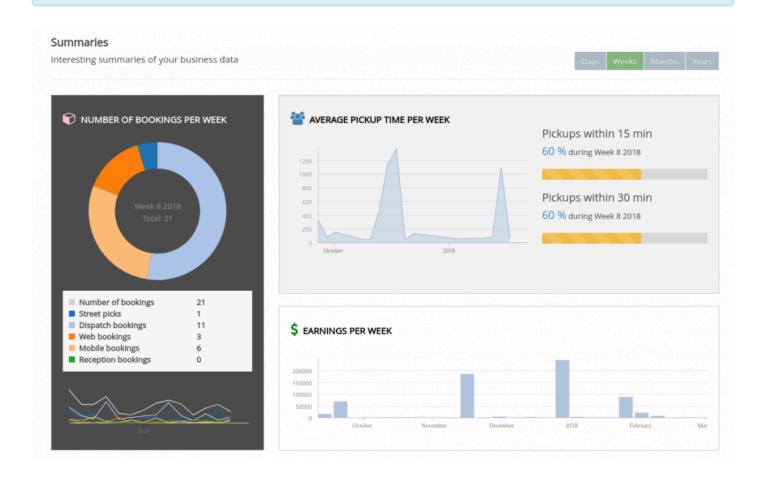
Statistics Dashboard

See your company statistics

In the statistics section under History you can see several statistics about your company such a number of bookings per week. You can also set goals and track their progress.



You need to set up tariffs before you can access these statistics.



Statistics Goal

Promotions Usage



To learn how to set up your promotions, click here: Create promotions.

In this section under <u>History > Promotions usage</u>, you can track the usage of the promo codes. Select the promo code from the drop down menu to view the usage data for each one.

Driver Ratings

When your passengers give ratings to your drivers, you can check the results in this section at <u>History > Driver ratings</u>.

You will be presented with an overview of the ratings, but you can view individual drivers at specific dates selecting the options at the top and clicking on Search.



Messages

You have access to the chat message history between your dispatchers and drivers. To do this, access <u>History > Messages</u> in the Admin Panel.

Choose sender, receiver, and date and click on **Search**.



To **configure** your message options, check the <u>Messages Tab</u> under Settings > General>Messages.

Anonymize

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.

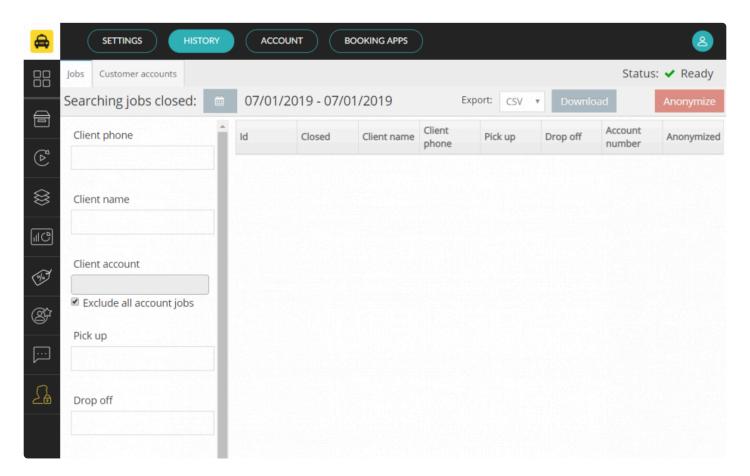
To prevent accidental deletion of information, we will ask you to type the word Anonymize before any changes are made.



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.

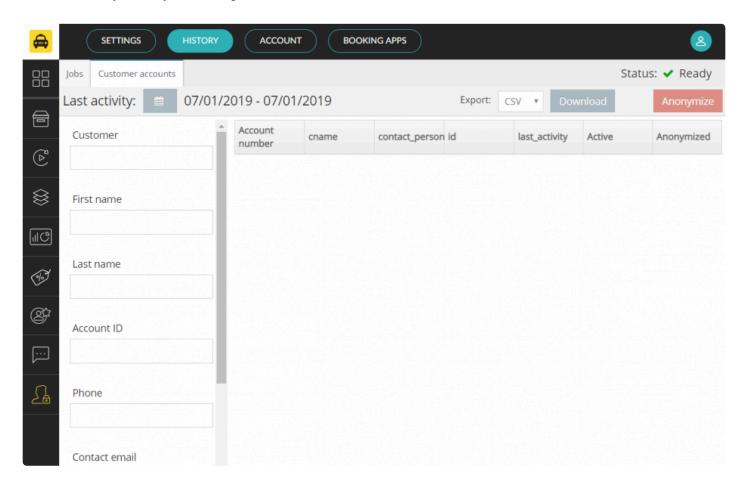
Anonymize Jobs

You can anonymize by searching jobs.



Anonymize Customer Accounts

You can anonymize by searching customer accounts:



Account

- Billing
- <u>Customers</u>
- Promotions
- Bank

Billing

Billing overview
Your billing information
How it works

Billing Overview

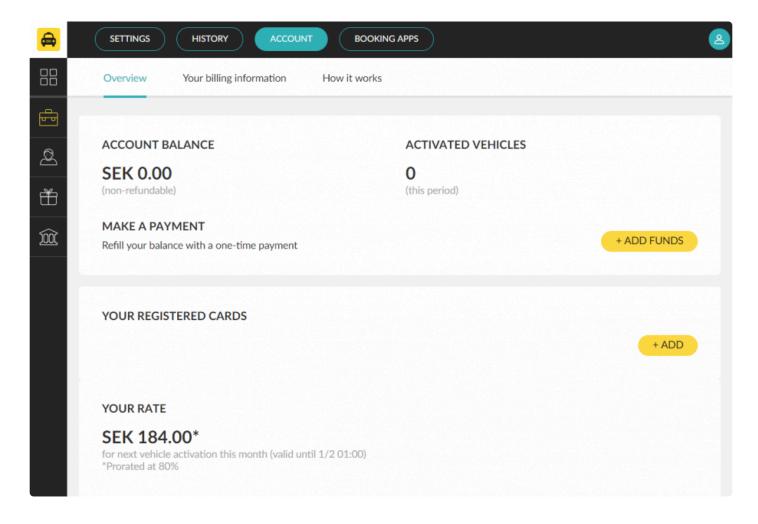
In the billing section you will be able to add funds, activate vehicles and see your rates and other information.



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

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

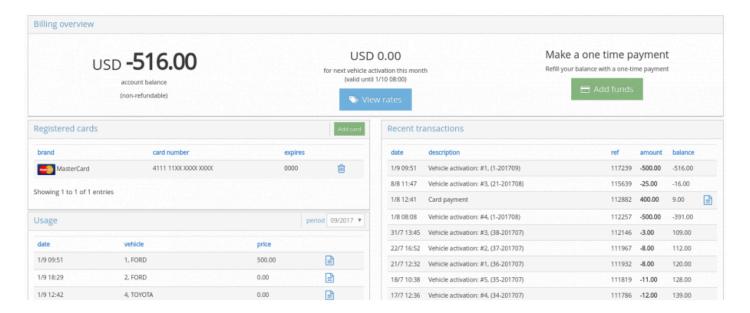
able to activate more vehicles until more funds are added.

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.

Recent trans	sactions				
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	

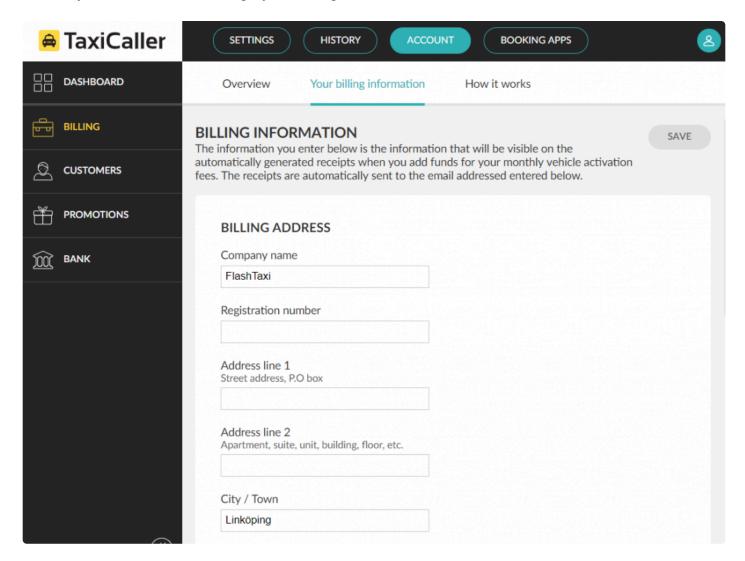
Let's take a look at the **description** column. It will say something like:

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.

Your Billing Information

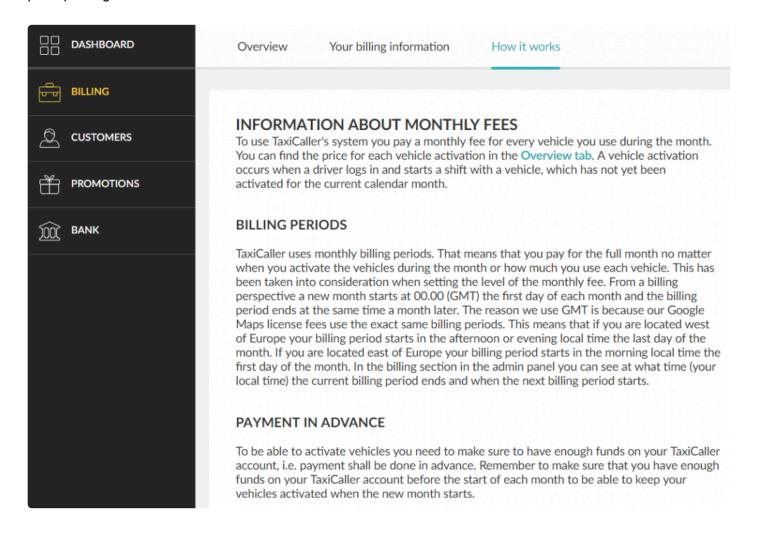
In here you can view and change your billing and contact information.



How It Works

Here you will find information about how TaxiCaller works.

If you manage a fleet over 20 vehicles contact support@taxicaller.com and ask for our volume discounted price packages.



If you want to learn more about billing please click on the following section How it works.

Customers

Accounts Invoicing

Customer Accounts

Customer accounts are accounts that you can create to manage the bookings of a specific client of yours. With customer accounts, you will be able to track the bookings made for a specific customer, generate invoices and e-tickets.

Create a Customer Account

Account Signature

E-tickets

Company Discounts

Link Passengers to an Account

Set automatic priorities for your accounts

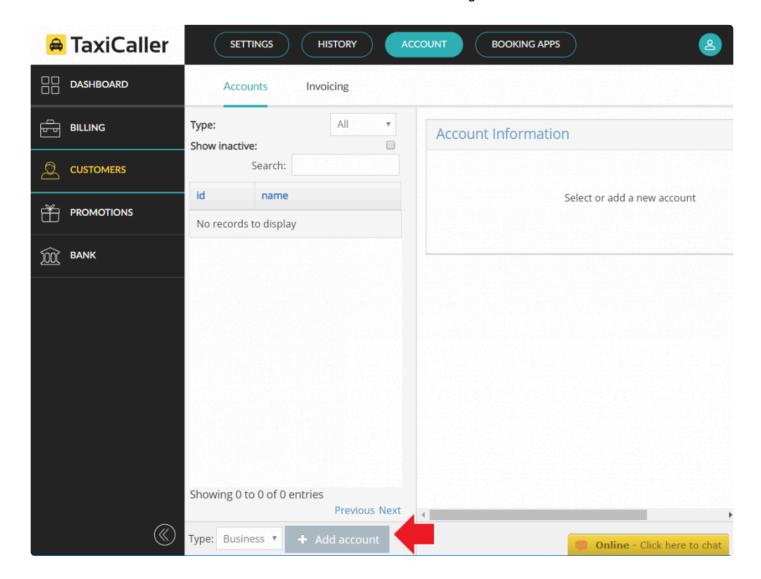
Information and Settings of Customer Accounts

Account and Contact Information

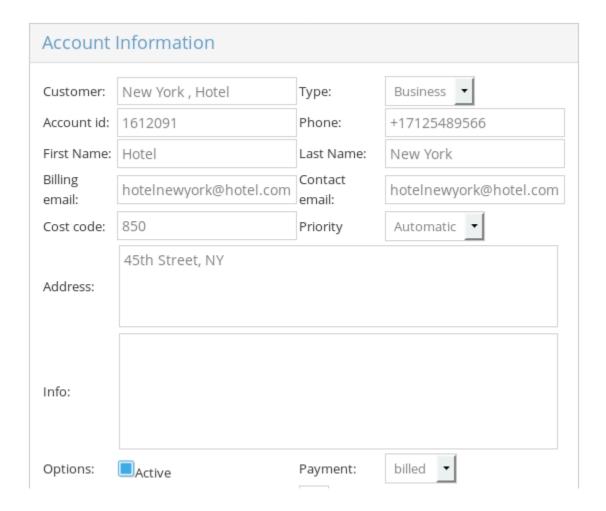
Customer accounts can be used to make booking extra easy for regular customers. There are two different types of customer accounts: business and personal accounts. In each customer account, you can specify whether the customer should pay for the trips directly (direct) or if they should be invoiced (billed).

Account

- Start by clicking on **Accounts** at the top bar of the admin panel and then **Customers** in the menu on the left hand side. <u>Alternatively 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.

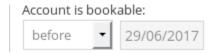


Basic options



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.



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.

Contact Information

Fill the information of your customers to have it saved and available at any time.

Customer Account Settings

Choose the type of account, if it is a business account or a personal account.

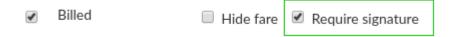
Account signatures can be used to require account customers to **sign for their payments in the driver app**.

Enable account signatures

You can enable this feature in two ways:

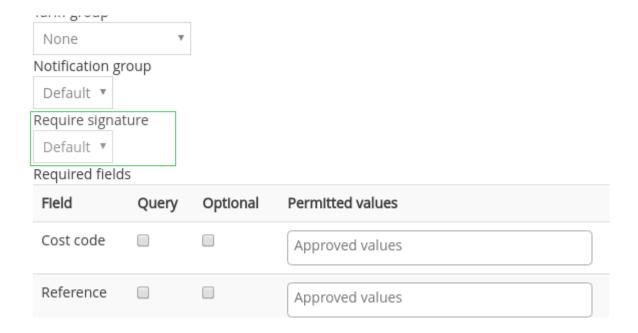
a. For all accounts:

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



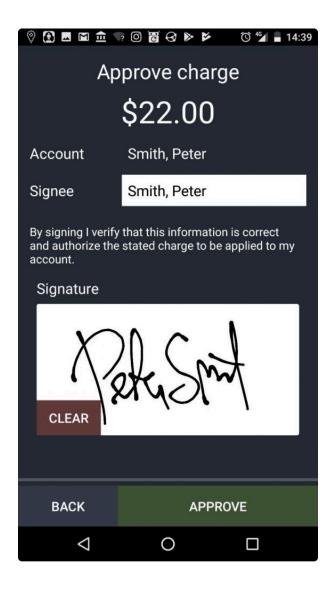
b. For specific customer accounts:

- Go to Account > Customers.
- · Select the account.
- Scroll down and choose Yes on the Require signature setting for that particular account.



2. How it looks in the driver app

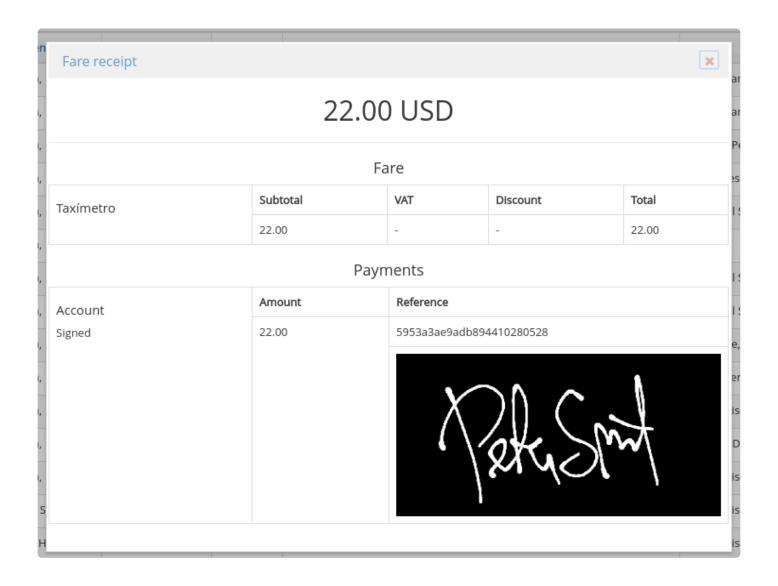
The driver will now require the passenger to sign to complete the job.



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 <u>Job Editor in the admin panel</u>.

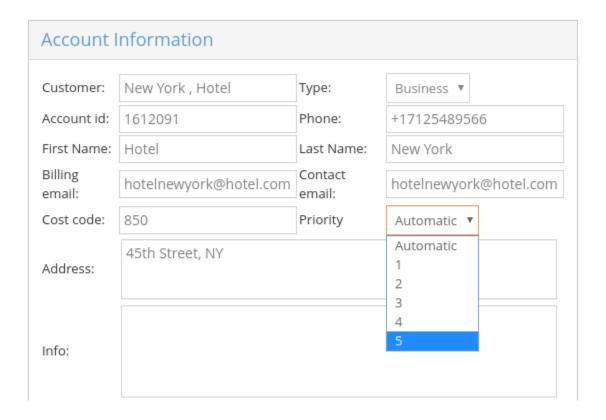




Receipts for jobs can be seen by clicking 'i' under the payment column in the Admin panel.

Priorities

The job priority feature can 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.



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

Payment Settings

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.



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.

Advanced Options for Customer Accounts

Cost code

Reference

Project

Passenger Name

Linked Users

Invite account

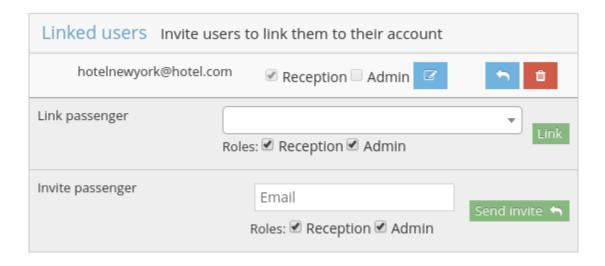
Type the email of the customer you would like to invite.

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



• 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 <u>reception tool</u>.
- 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.

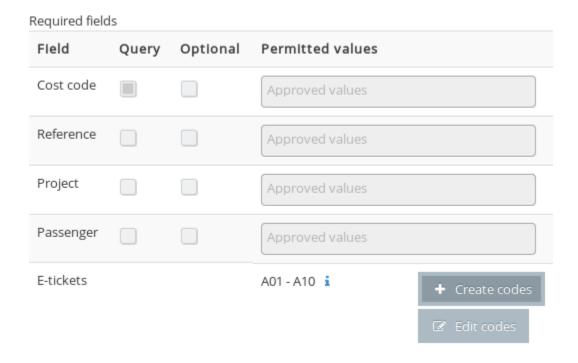
E-tickets

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

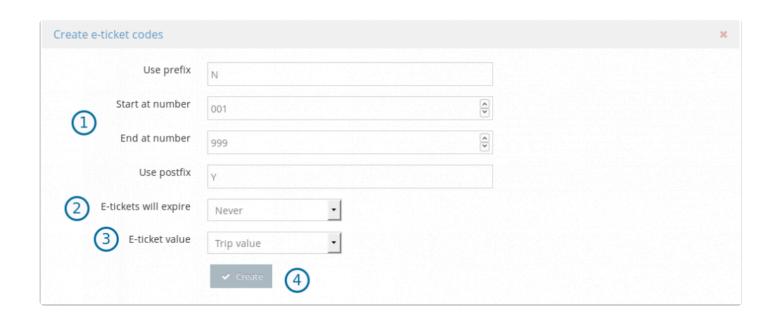
To be able to choose the eTicket option in the Driver App you must have enabled the advance payment flow under Settings>General>GeneralSettings> PaymentOptions.

Creating e-tickets

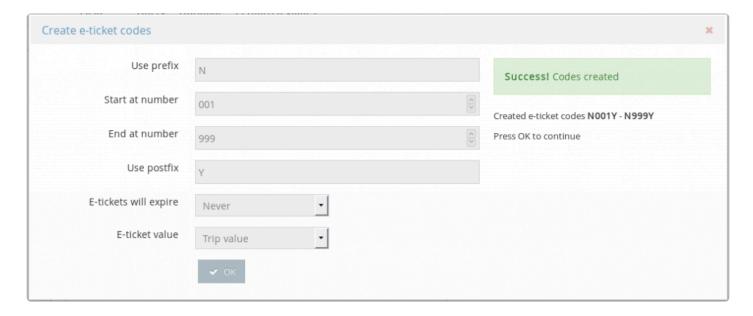
- Go to Accounts > Customers
- · Select the account where you wish to enable e-tickets.
- Scroll down until you find the Required fields section.



Click on Create codes. A panel will appear.



- 1. The prefixes and postfixes will appear at the beginning and end of each code. You can also leave these empty if you only want codes with numbers.
- 2. Expiration: You can enter a date here or set it to Never
- 3. Value: You can enter a fixed value here or make it valid for whatever the trip value ends up costing.
- 4. Click on Create. You will get a confirmation if this is successful.



e-tickets are one-use only, which means that even if they cover a higher value than the cost of the trip, you cannot use the remainder of the e-ticket. It's consumed in its entirety.

Using e-tickets

1

Make sure the option is valid in <u>Dispatch > Settings</u> under Payment Options.

Using e-tickets from the passenger app

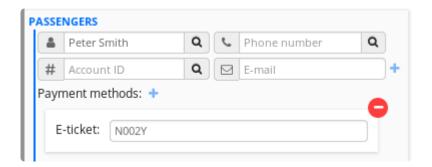
When you book a ride, select **Payment methods** and then **E-tickets**. You can then enter the e-ticket code.

Using e-tickets from the driver app

If a passenger forgets that they had an e-ticket at the point of booking, they can still use it at the end of the ride and the driver can enter the code at the end of the payment flow.

Using e-tickets from dispatch

When booking a job, click on the + sign next to **Payment methods**. Enter the e-ticket code.



Controlling e-ticket usage

After you have created e-tickets, you will be able to see the latest you've created under e-tickets.



- Click on Edit codes. A panel will appear listing your e-tickets.
- Control which e-tickets will be valid or invalid. At the moment you cannot delete batches of e-tickets.

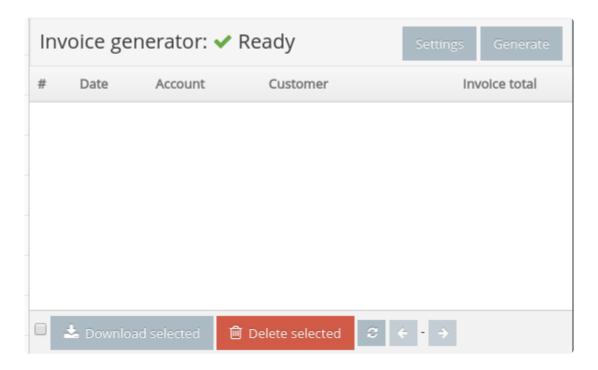
• Click on **Status** for information about usage.

Invoicing

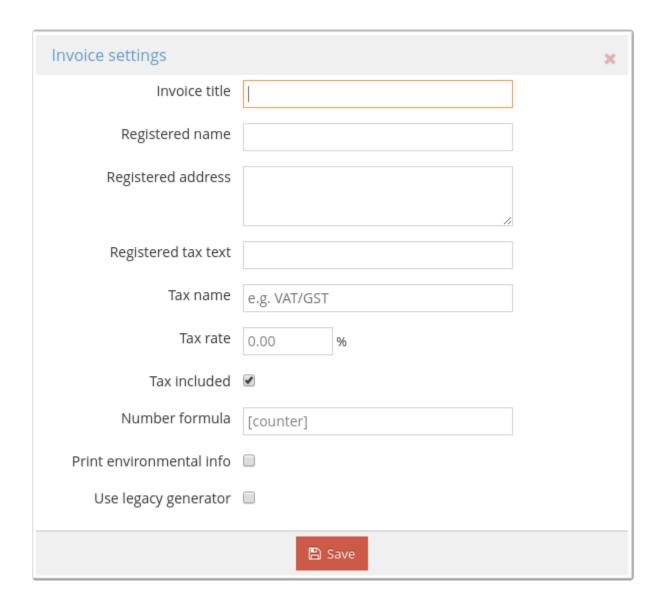
This allows you to generate finished invoices for your account customers. Once an invoice is generated, you simply download it to your computer, and it's ready to be sent.

To generate invoices:

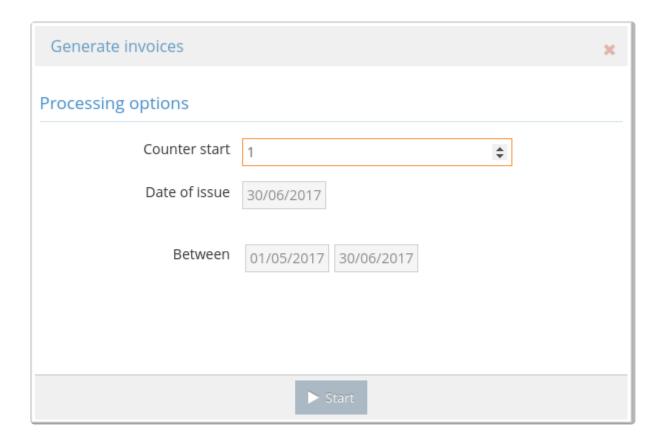
• Choose Account > Customers in the Admin Panel and select the Invoicing tab.



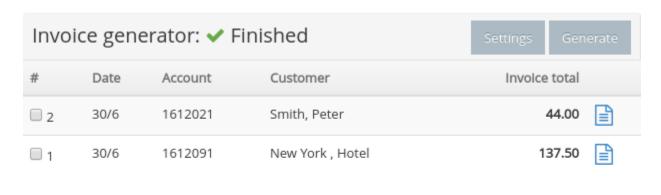
· Click on **Settings** to configure your invoices.

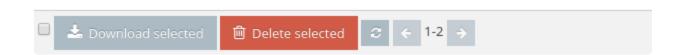


• Click on **Generate** and select a date range.



• 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**





· 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.

Hotels					Account #1612021 - Smith, Peter Invoice date: 2017/06/30					
	New Yor	k 34 St	period: 2017	/05/01 00:00 - 2017 Invoice Number: 2	/06/30 00:00					
Start	Passenger	route		car	Driver	Pay	Eare	discoun	settled	payable
Start	rassenger	Toute		Cai	Dilvei	ray	raie	uiscouii	Settieu	payable
Cost co 2017/0	ode: none 6/28									
08:34	Smith, Peter	to: 2-8 Nathan D Perlmar	PI, New York, NY 10007, PI, New York, NY 10003,		John, Anderson	Α	22.00	•		22.00
08:39	Smith, Peter	CO2: 0.33 Kg, NO: 0.03 Park #5175726 from: 196 Park	kg, trees: 0 cPl, New York, NY 10007,	USA 1	John, Anderson	Α	22.00			22.00
00.00		to: 2-8 Nathan D Perlmar CO2: 0.33 Kg, NO: 0.03 l	PI, New York, NY 10003, Kg, trees: 0	USA						
		C - A	44.00	Discoun	re (Including VAT: 6.07) t			44.00		
				Collect				-		
				Payable Credit H	andling Fee/Adjustments	e		44.00		
				Costcod		5		44.00		
		C - /	44.00	Total Fa	re (Including VAT: 6.07	7)		44.00		
				Total Co	하는데 하다면 이번 의견에 가는 사람들이					
		Environmental info CO2: 0.65 Kg, NO: 0.06 Kg, trees: 0		Total Pa		nts:		44.00		
				Invoice				44.00		
	3/30 10:35			iCaller					page 1 of 1	

Promotions

This feature is available for Rebranded apps only.



After configuring your promotions, make sure you enable them in the Advanced Payment options of the admin panel under <u>Dispach > Settings > General</u>.

Configuring the promotions

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.



- 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.

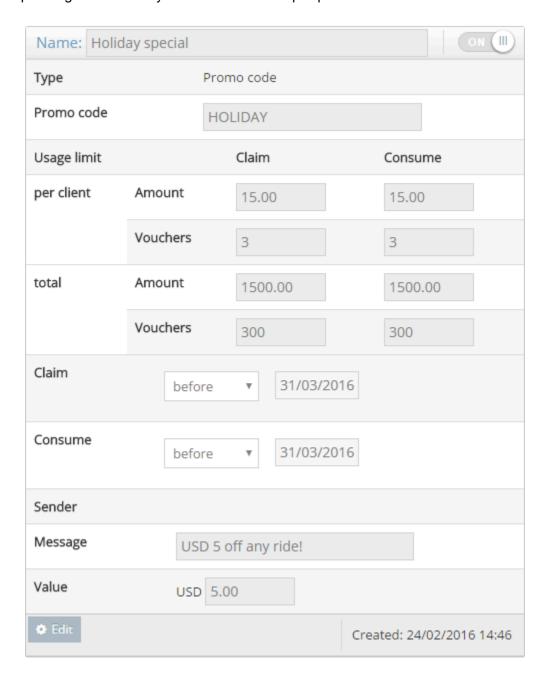


When you're done configuring, hit "OK" to save the promo code.

- 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.



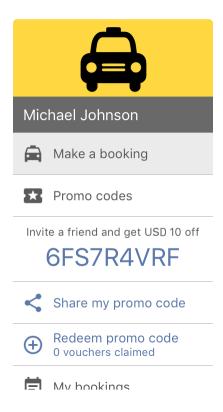


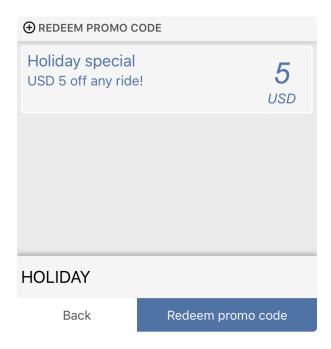
You can see data about promotions usage in the <u>History section of the admin panel</u>.

Redeeming and using promotions

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.

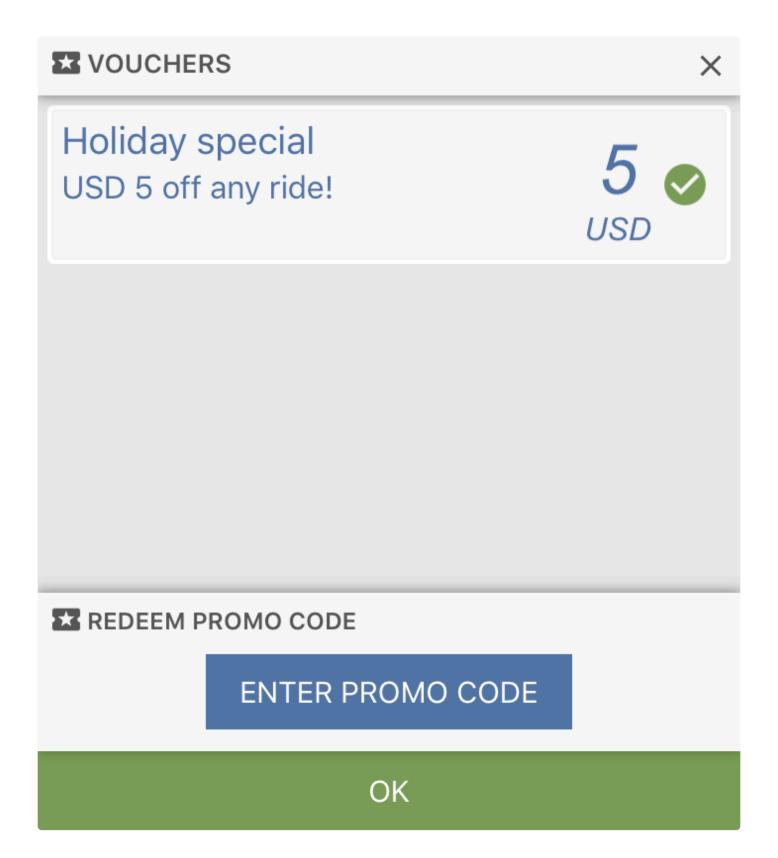




You can also add a promo code in the Payment Method section on the booking details screen after the passenger has chosen a pick up location for their trip.

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.



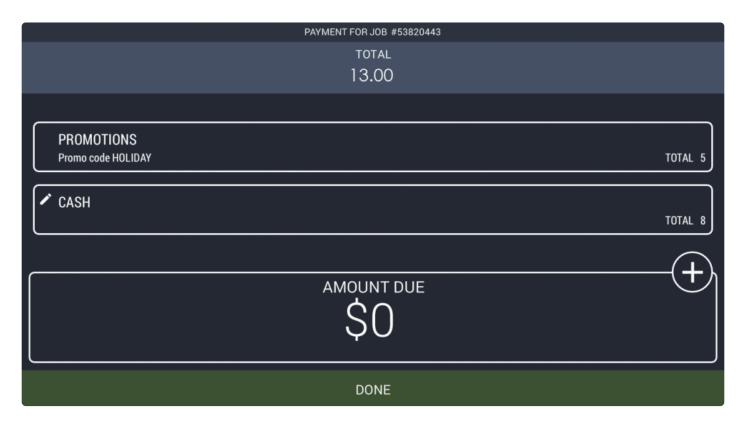
Consuming promo codes in the driver app

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.

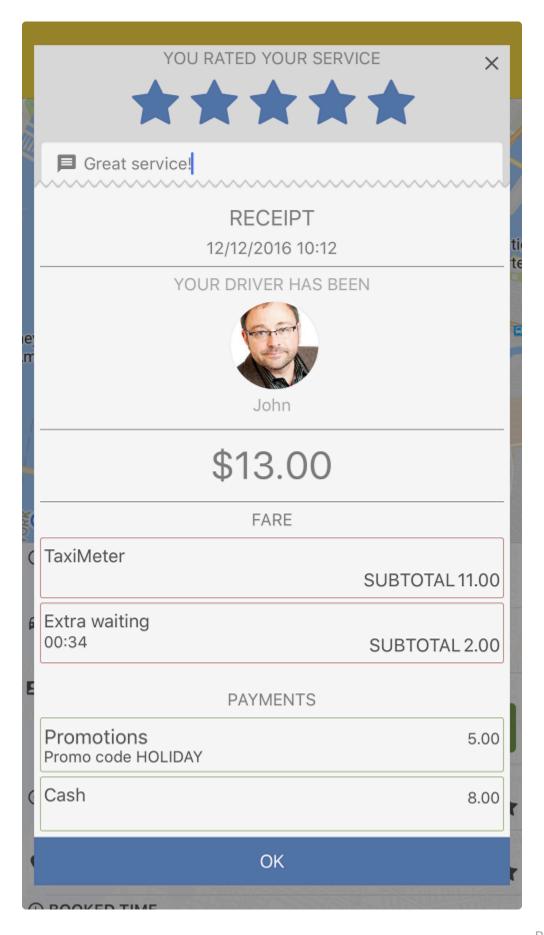


If the passenger did not book from the app but knows the promo code, or simply forgot to add it, the driver can also add it by pressing the Promotions tab and entering the code.

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.)



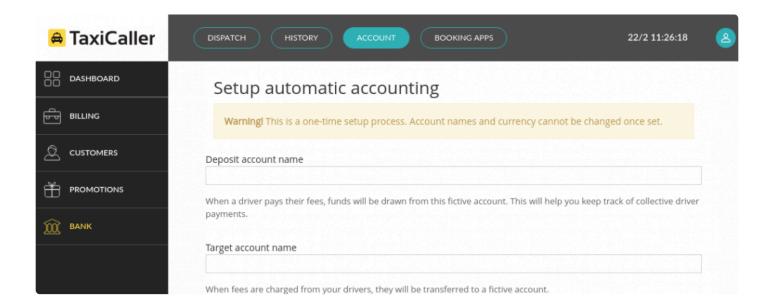
Bank

Set up automatic accounting

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.



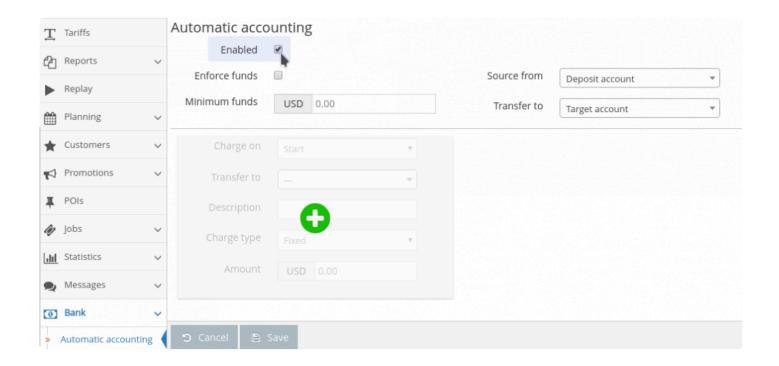
If you are new to Automatic Accounting please check the following article first with step-by-step instructions: http://www.manula.com/manuals/taxicaller-nordic-ab/special- features/1/en/topic/automatic-accounting-for-drivers



Enable the feature

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

Admin Panel - Unified Admin TaxiCaller Nordic AB



- 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.

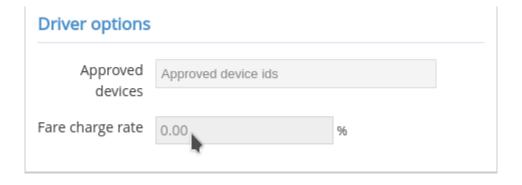


You can only set a Dynamic fare when the "Charge on" is set to "Deliver".

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:

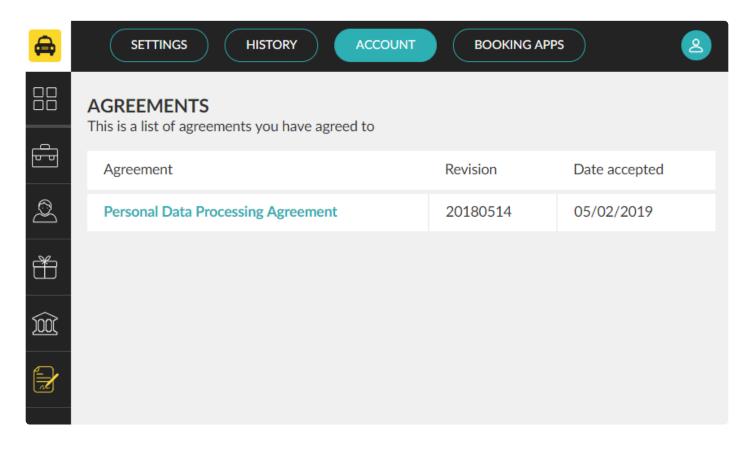
- Go to the <u>Users section in the Admin Panel</u>
- Select a driver and scroll down to the bottom of their profile until you find the **Driver Options**.
- In here you will be able to enter a Fare charge rate in percentage form.



Agreements

In this section, you will find a list of bilateral agreements between Your Company and Taxicaller.

As for example, the General Data Protection Regulation (GDPR).

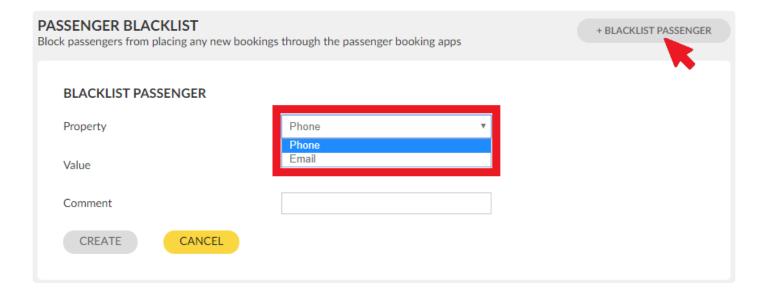


Passenger Blacklist

It is possible to block a passenger either from the dispatch console or the admin panel.

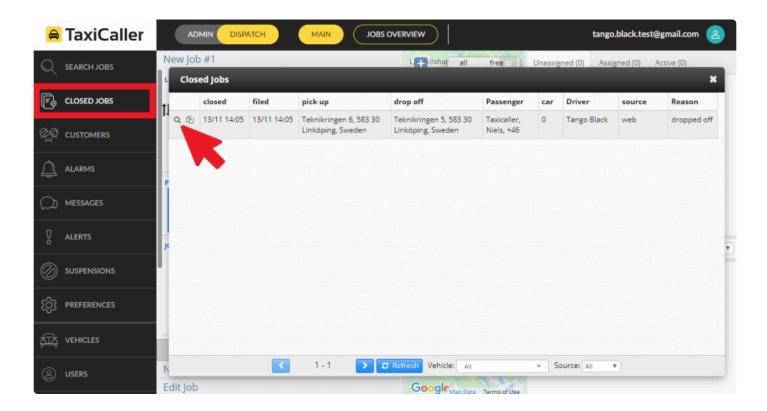
To block a passenger in the admin panel:

- 1. Click on "Blacklist Passenger",
- 2. Select if you want to block a specific email or phone and,
- 3. In value add the phone number or email that you want to block.
- 4. Click on create.

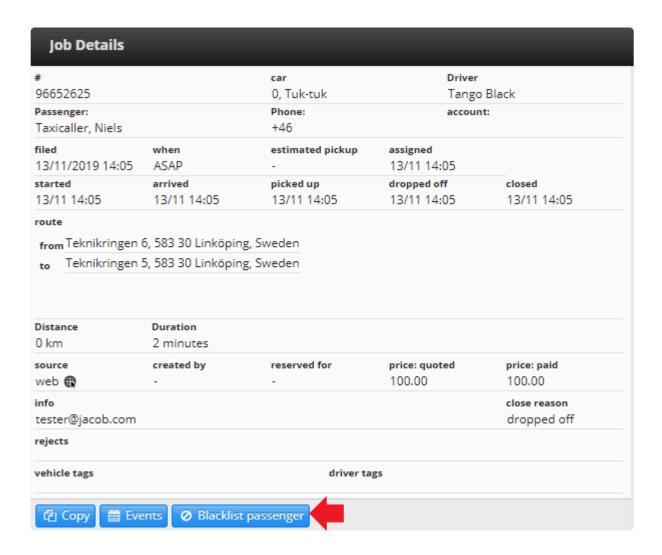


You can also block passengers from the Dispatch console:

- 1. Click on closed jobs,
- 2. Once you found the closed job, that contains the passenger you want to block, click on the search icon.

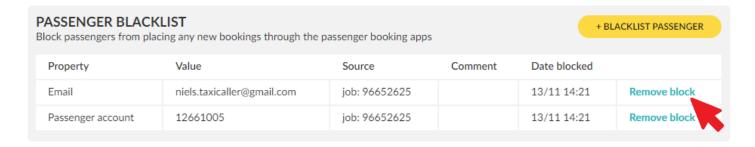


1. Finally, click on Blacklist Passenger.



The blacklisted passenger will be shown in the admin panel under Account>Blacklist.

If you would like to unblock anyone from that list click on Unblock.



Booking apps

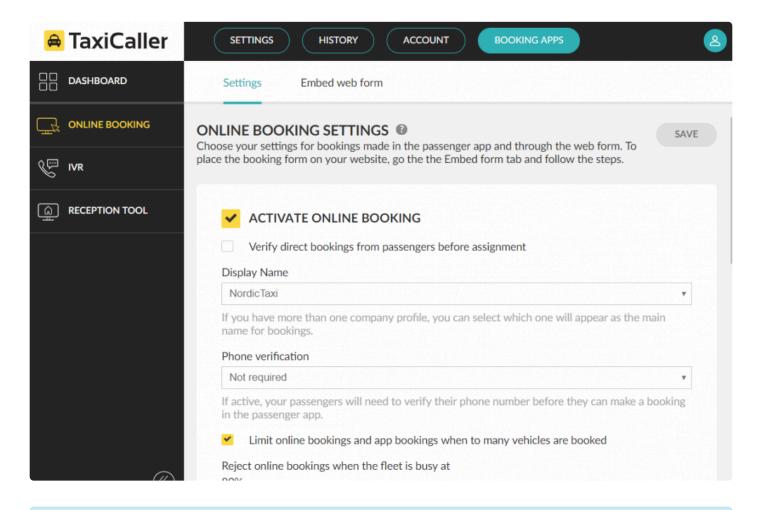
- Online booking
- <u>IVR</u>
- Reception tool

Online Booking

Online Booking Settings
Embed Web Form

Online Booking Settings

In the online bookings section you can configure everything you need to make sure your passengers can book rides from different sources, like the <u>passenger app</u> or the <u>web form</u> that you can add to your own website.



The first thing you need is to verify your license by sending us an email to legal@taxicaller.com. In this email you can attach a copy of a licence that shows that you can transport passengers in your area. This is done to comply to local regulations. Please remember it might take up to 24 hours for our staff to review and verify your license.

To activate Online Bookings, we need to verify your license.

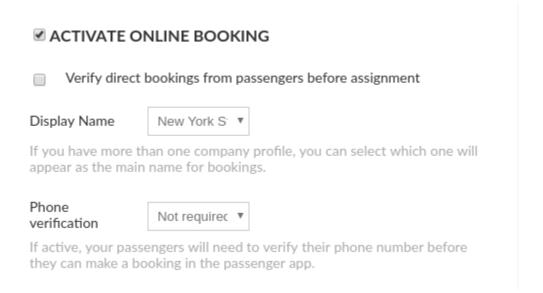
Please send a copy of the operations license of your company to legal@taxicaller.com.

Company: New York Stars Taxi Status: Approved

Once we have approved your account for online bookings, you will see the status as Approved. Then you can proceed with the rest of the configuration.



You can always deactivate online bookings yourself by unchecking "Activate online booking".



Verify direct bookings from passengers before assignment

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 Assignment settings. If you don't have dispatch operators or want to allow a more direct booking system

between passengers and drivers, you can leave this unchecked.

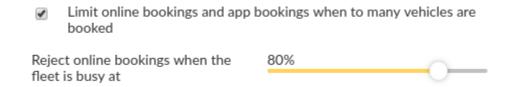
Display Name

Show which company name will appear in your online bookings. This name will be chosen from your current <u>company profiles</u>. If you only have one company profile, you don't need to change this option.

Phone verification.

A passenger needs to verify that their phone number is authentic before they are able to make any bookings. A four digit code will be sent as a text message to the number they enter. You can choose this if you have experienced any problems with fake bookings, for example.

Limit online bookings and app bookings when to many vehicles are booked



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.

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.

Requirements for online bookings

Requirements for online bookings								
Minimum notice allowed for a prebooked job	0 hours 15 minutes							
Maximum notice allowed for a prebooked job	60 days 0 hours							
Maximum ride length	124 mi							

Here you can determine which minimum and maximum notice is needed to schedule a pre booked job. This can be overridden from the Dispatch console where a dispatcher can make a prebooking up to 6 months in advance.

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 always be overridden from the Dispatch console.

Information visible to passenger

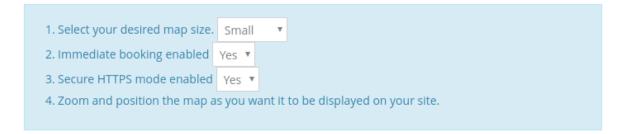
Information visible to passenger									
Driver:		✓ First name✓ Phone numl	Last name initial	Last name					
	Make	vehicles invisib	le on map						

Determines what information about the drivers is visible from the passenger app. You can, for example, allow the passengers to see your driver's phone number so that they can call them directly if they need to.

Embed Web Form

Go to the second tab under <u>Booking Apps > Online booking > Embed web form</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.

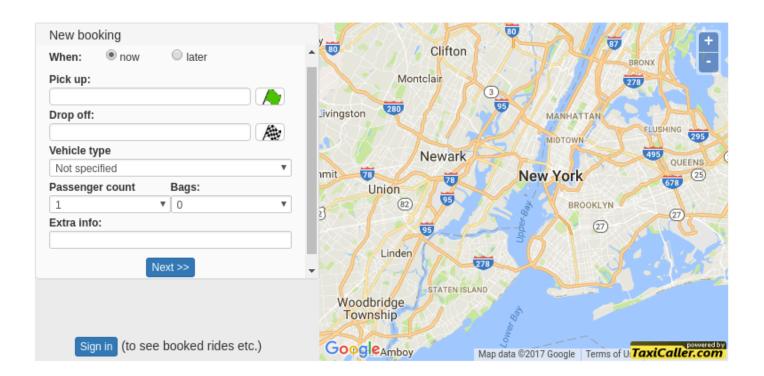




4. Finally copy and paste the HTML code below into your website.

<iframe style="width:780px;height:380px;border:0px"
src="https://live2.taxicaller.net/liveview.php?
cid=5221&ll=-73.9233756845009,40.67590165494508&z=9"></iframe>

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



IVR

IVR Actions
IVR Menus

IVR Actions

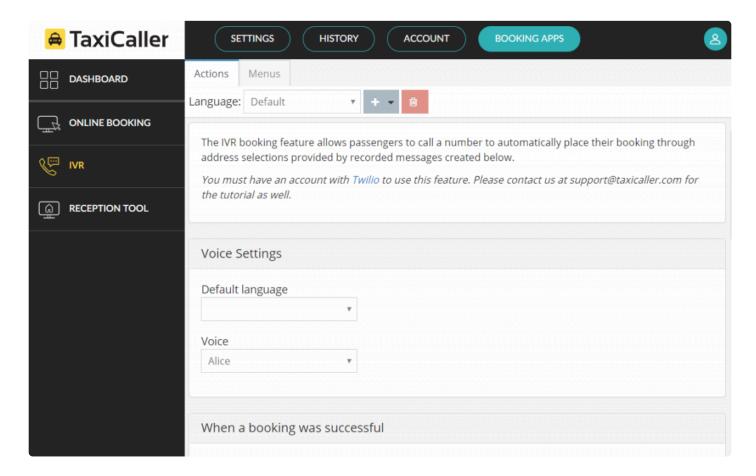
IVR stands for Interactive Voice Response. The IVR booking feature allows passengers to call a number to automatically place their booking without the intervention of a human dispatcher.



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: Set up your Twilio account.

Configure the Language

Go to <u>Booking apps > IVR</u> to configure this feature.

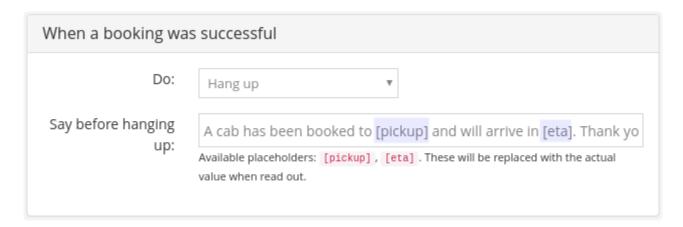


- The first thing to configure is the **Language** of the voice response. You can either select it at the top, or leave it as Default and select that Default language below under Voice Settings
- Select the voice between Alice, or a generic Man and Woman.

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.





You could use the Forward call action to any desired phone number, such as the phone number to your dispatch central.

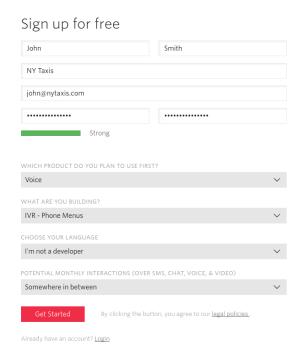
• Don't forget to click on **Save** once you're done.

Set up your Twilio account

Signing up with Twilio

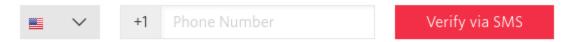
If you don't yet have a Twilio account, please follow these steps, otherwise go to the next section below to configure your Twilio account with TaxiCaller.

- 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.



• 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 <u>Programmable voice section</u>.
- 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 configure the IVR, and copy the link that they provide at

the bottom of the screen.

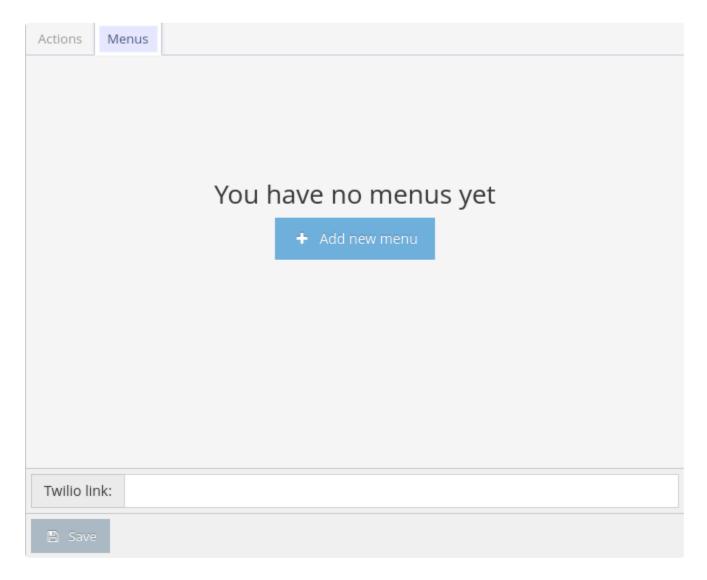
• Paste the Twilio link from TaxiCaller into the Twilio console in the top Webhook field

• When you're done, click **Save** and continue configuring your IVR settings.

IVR Menus

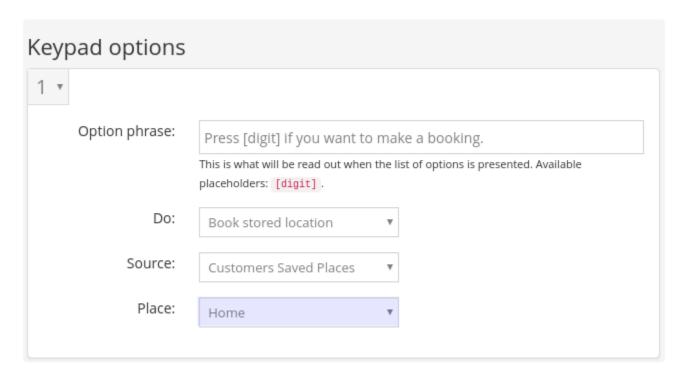
Configure the Menus

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



- 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.



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: Store preset locations for your customers.

Verify your settings

Once you have these instructions, including the set up of the Twilio account, 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.



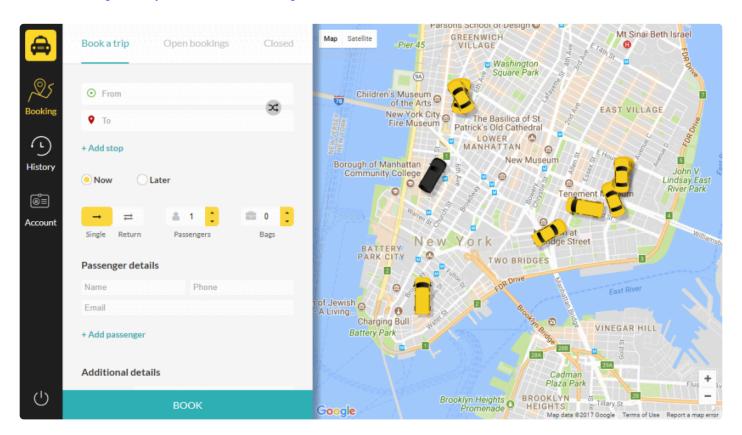
To get rid of the Twilio-demo message at the start of the call, you will have to upgrade your Twilio account to a full version.



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

Reception Tool

- Link an Account for the Reception Tool
- Use the Reception Tool
- Booking History and Account Settings



Link an Account for the Reception Tool

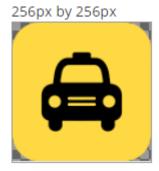
Customize with company details

Customize your reception tool with your company logo and colors.

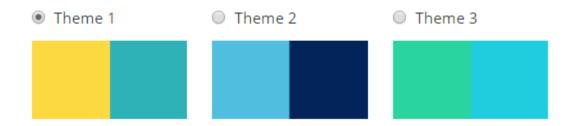
- Go to Booking Apps > Reception tool to choose your unique setting or use the following link: <u>Reception tool</u>
- 2. Choose a custom URL for your reception tool. Simply type in the name of your company for example.

https://reception.taxicaller.net/app/ nystartaxi

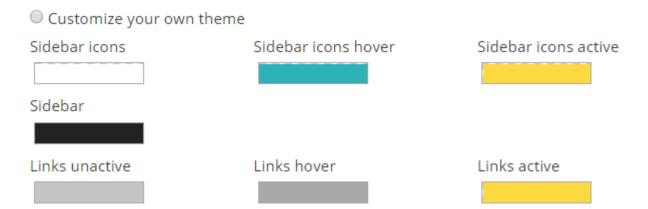
3. Add your company logo in the next section. This will show up in the side menu of the reception tool. Logo artwork must be 256 × 256 px in size.



Choose one of our predefined themes for your reception tool colors or customize your own. You will have a preview on the right side of the screen to test different options.



To choose your own colors, click the **Customize your own theme** check box and then click on each option to input your color codes or use the color selector option. You will get a preview on the right side of the screen to see how your colors will look.



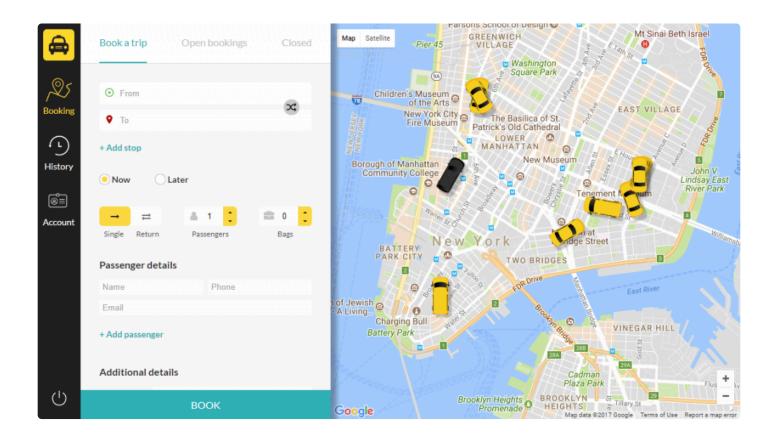
Inviting and linking accounts

In order for your clients to use the reception tool, you'll need to invite them to use it:

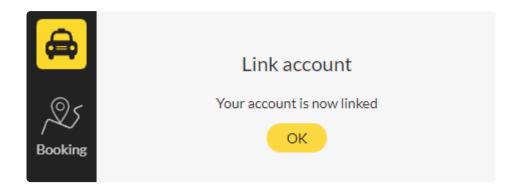
- 1. Go to <u>Accounts > Customers</u> to link a specific account by emailing them an invite. To see more about how a customer account is created, <u>please click here</u>
- 2. Your client will then receive an invite email where they will need to click the "Join now" button.

To see more about how email addresses can be linked to customer accounts, please click here

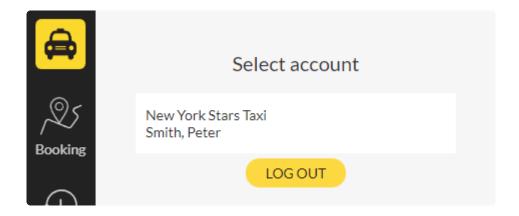
The admin role is to allow the invited user to be able to link users themselves.



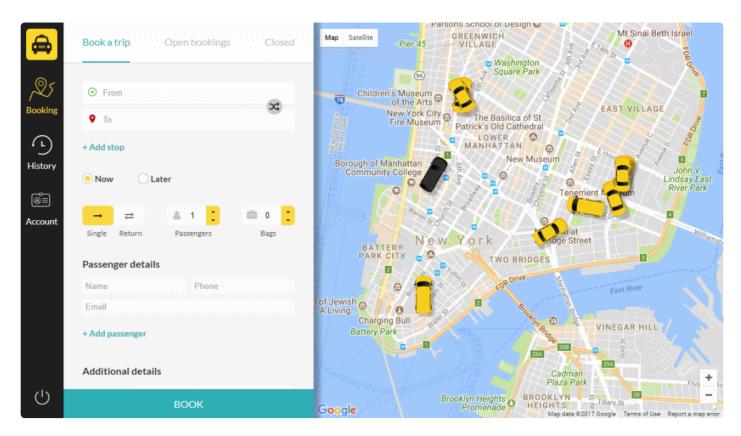
After clicking the button in the invite email, your clients will get to the reception tool to finish their sign up process.



Once logged in, they will choose their account and get to the booking screen.



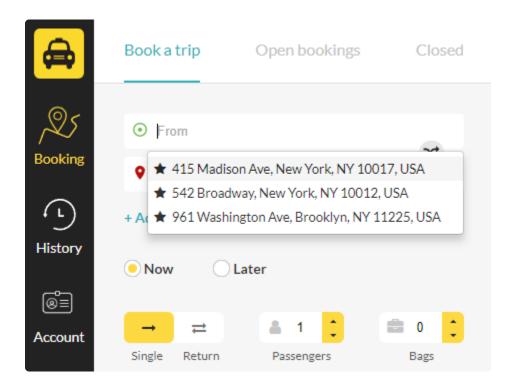
After choosing the account, the client will then be able to make bookings in the Booking section.



Use the Reception Tool

Book favorite locations

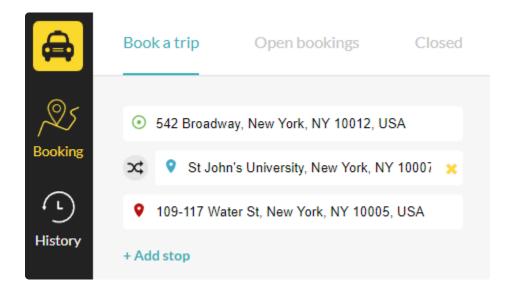
If the client already has favorite locations set up from their passenger app account, they will already show up in the address fields as options. If they have not set up favorite locations, they will go to the Account tab to do this.



Please see Account Settings section for more information on adding these.

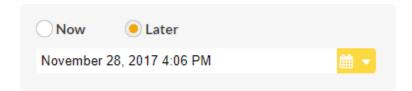
Add stops to the trip

Clients can also add stops to their booking by pressing + Add stop under the destination field. This will show on the map like the destination icon but blue instead of red. The driver will be able to see these stops in the job information.



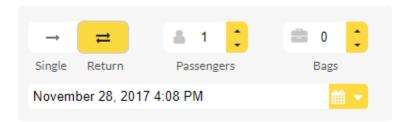
ASAP trip or prebook

Clients will then be able to book their trip for now or choose Later to book in advance. If they press on the button to the right, a calendar will pop up for them to choose a date and time.



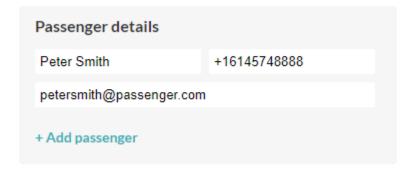
Create return bookings

In the cases that a client would need to book a return trip, they will simply click Return instead of the default Single. This will bring up another field underneath where they can choose the date and time of the return trip.

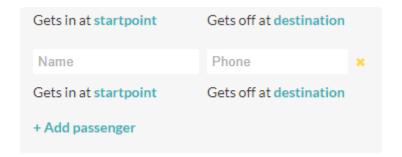


Add more passengers

If there is only one passenger, the client can enter the name, phone number and email so they can get any Notifications and receipts associated with their booking.



Press the + Add passenger if there are multiple passengers that need to be recorded for the booking. (Otherwise, the client can simply choose the number of passengers in the section above between Single/Return and Bags). They can then choose where the extra passenger will join the trip and when they will get off (start point, first stop, destination etc).



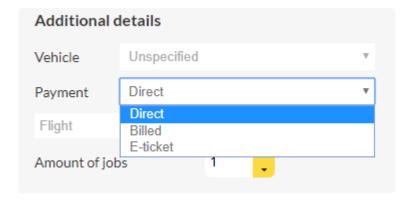
Choose vehicle type

Under Additional details, clients will be able to specify if they have a particular vehicle preference. This will show all of your vehicle types that are available. If no vehicle type is chosen, the booking will go to the right vehicle depending on your tariff rules and assignment settings.



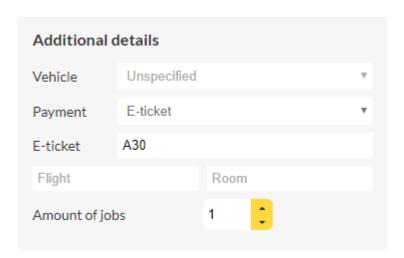
Pay directly or be billed

In the same section, clients can also choose their payment method (direct, billed or e-ticket). If they choose direct, they will have to settle their payment with the driver, but if they choose billed, they will be charged later by your company through invoice.



E-tickets for payment

If you have created E-tickets for a particular client, they will be able to enter their code once they choose Eticket under Payment. The driver will see this in the cashiering flow, and it will also show up on reports and receipts.

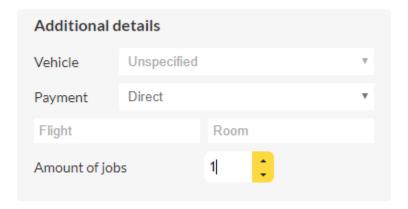




The setting "Amount of jobs" can be used to request a different number of vehicles. For example if they have 10 people needing a ride and the company only has 5 person vehicles, they'd need 2 vehicles for this.

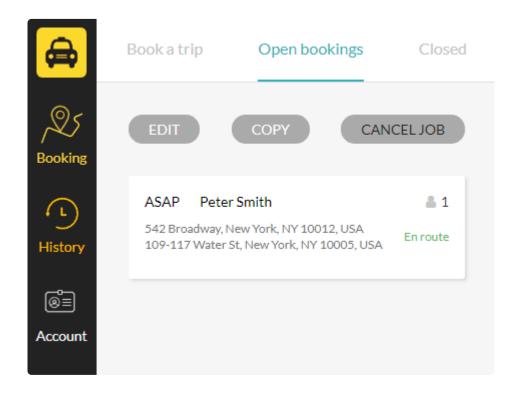
Easily book multiple trips

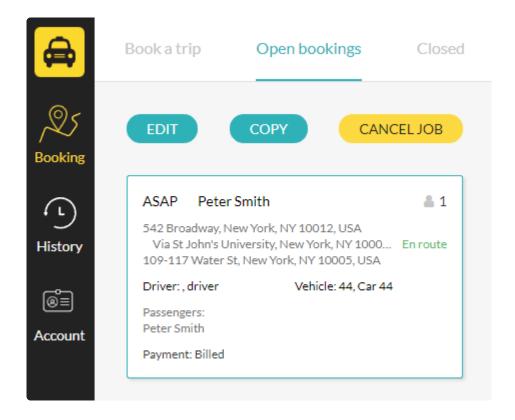
Under Amount of jobs, clients can easily book multiple trips (copies of the current booking) by increasing the number count. They can then review these jobs in the Open bookings tab.



Edit or copy bookings

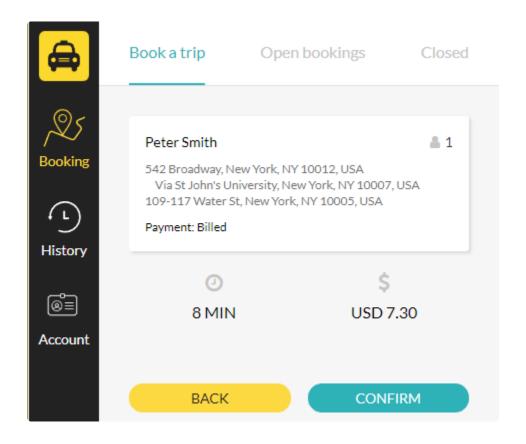
Under Open Bookings, clients will be able to see all of their booked trips that haven't been finished. Here, they can click on a booking to enable the Edit and Copy buttons to be used.





Clients can also do the same under the Closed tab, but this will only allow them to copy the booking since the trip has already been finished.

To complete the booking, the client will click on Confirm after making all of their trip choices. Here, they will also see an ETA on their pickup and also an estimated price of their trip.



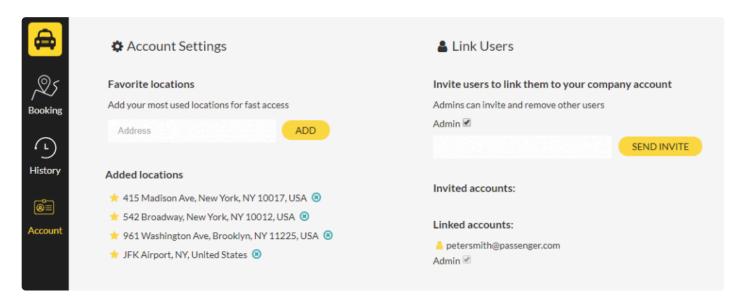
Booking History and Account Settings

Booking history

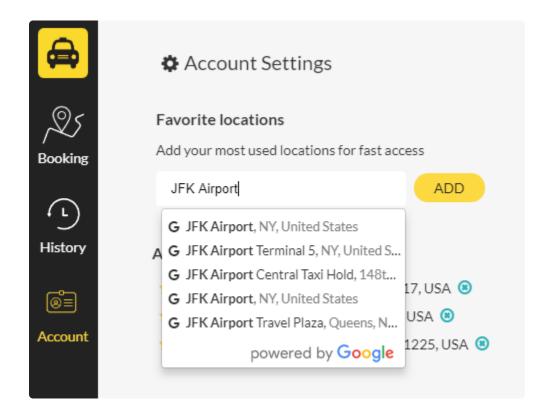
Passengers can see their trip history and download their reports in the History section. In order to keep track of payments and important trip information, clients can go to the History section to see and download their trip history reports in PDF, XLS, CSV and JSON formats. They will simply select dates for the report, and then it will automatically generate for them.

Account settings

Passengers can add favorite locations and link other users in the Account section.



 Under Account Settings, clients can add their most used locations for fast access. They will simply start typing the address in the field to get options to choose from, and then press the Add button.



• Under **Link Users**, clients will be able to invite users by email to link them to their account.



They will also have the option to decide whether the invited user should also be able to invite other users by enabling the **Admin role check box**.

Once the client has sent the invite, they will receive the email below. The invited user will click on the **Join now button** to get to the reception tool where they will finish creating their account.

Peter Smith has invited you to join their account

You have been invited to join as a user for the Peter Smith account in our booking tool.

Follow the button below to login or create your user.

Join now

Best regards, New York Stars Taxi

This booking software is provided by TaxiCaller Nordic AB
Visit www.taxicaller.com

Rebranded Apps

Dispatch

This section is about all the functions you can find in the Dispatch Console

Please see our other manuals:

- Driver Apps
- Passenger Apps
- Special Features

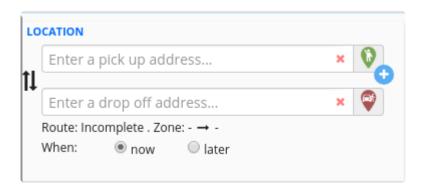
Main

After slecting the dispatch console you will be taken to the main view where you will see the following screen:



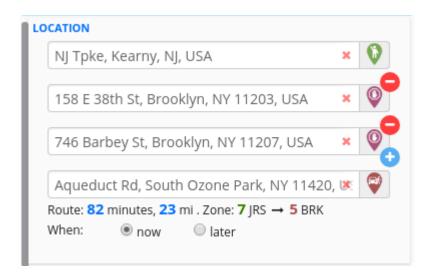
- 1. Pick up and drop off
- 2. Entering job details
- 3. The map
- 4. Unassigned, assigned and active jobs
- 5. The menu bar
- 6. The vehicle list
- 7. The zone queues

Adding a new job

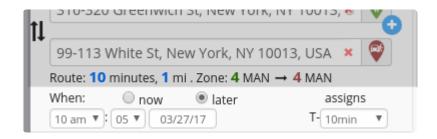


1. Enter the Location and Time

- Enter the pick up address in the "pick-up" field and the destination address in the "Drop-off" field. You can also drag the pick up and drop off flags into the map at the center of the screen.
- If the job contains more stops in the way you can add these by clicking on the blue + sign between he pick up and drop off flags. You can add up to 5 additional stops. If you want to remove a stop, click on the red minus sign button next to it.



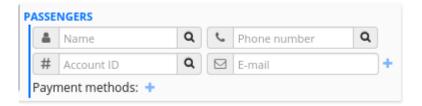
• Select **now**, if you would like the job to start immediately. This will become an ASAP job in the job list on the right side of the screen. Otherwise, choose **later** and select the desired time and date.



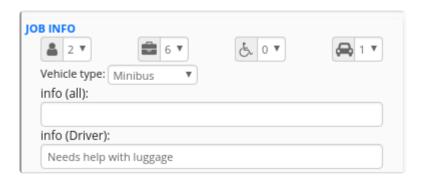
Below the label "assigns" is a list from which you can select a "Tminus" time. This will determine the time when a job will be assigned to a vehicle before the job is set to start. For example if your customer would like a taxi at 8:00 AM you could choose a Tminus time of 15 minutes so that the driver has the job assigned to them at 7:45 and thus has time to get to the right location.

2. Enter information about the passenger

Enter the name of the passenger and their phone number in the input fields under PASSENGERS



- Set the number of passengers, bags, wheelchair availability and how many vehicles may be needed for this job. If you need to specify a certain vehicle type, for example "Minibus", you can also do it in this section.
- You also have the option to enter information about the job that may be useful for the driver to know, for example "Needs help with luggage".



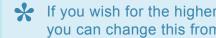
3. Enter extra information

 You have the option to hard-assign the job to a certain vehicle or company, apply a specific tariff, specify a custom duration (as opposed to the one calculated by the system), or force a priority level.

- Additionally, you can select tags to further customize the job to your passenger's needs. For example if the passenger is non-smoking, you may choose a vehicle with this tag. You are able to create and apply any tag to both vehicles and drivers from the Admin Panel.
- If the passenger is going from or to an airport or hotel, you can specify the flight and room number.



• Using priorities: You can give priorities to your jobs, from 1 being the lowest and 5 being the highest. The higher priority jobs will be auto-assigned first compared to the lower priority ones. This will allow you to give preferences to jobs marked with higher priority levels, you can use this if you have VIP customers, for example.



If you wish for the higher priority jobs to also block other jobs until they have been assigned, you can change this from the admin panel in: Settings > Dispatch > 2. Assignment > **Priorities**



If you want to read more about using priorities, please click here.

4. Check and Book the job you just created.



• Click on *check* in order to get a preview pop up for the job with an estimated price and estimated time for pickup.

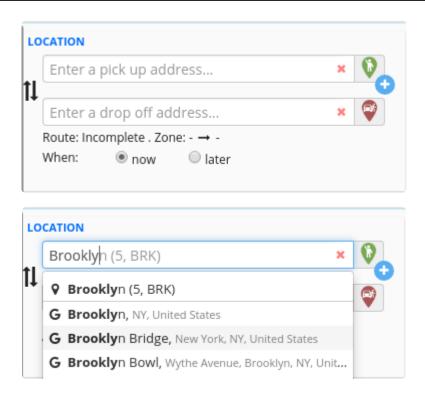


• Click on **book** either in the check pop-up or the main button in order to create the job. In the latter case you will receive a pop up confirmation.



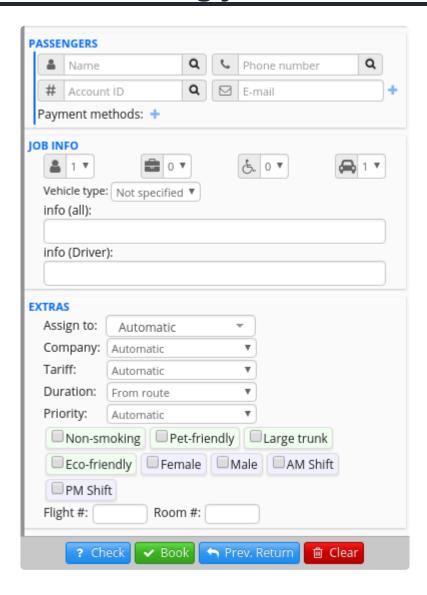
- The *Prev. Return* button can be used if you want a return ride for a previously entered ride. You can learn more about this in the next section <u>Modifying an existing job</u>
- Use the *Clear* button to clear the form entirely and start over.

1. Pick up and drop off



Here you can type in the pick up and drop off addresses for a new job. The address lookup will give you suggestions as soon as you start typing an address in these fields. You can also drag the pick up and drop off flags into the map at the center of the screen. The system will then create an estimate time for the route.

2. Entering job details

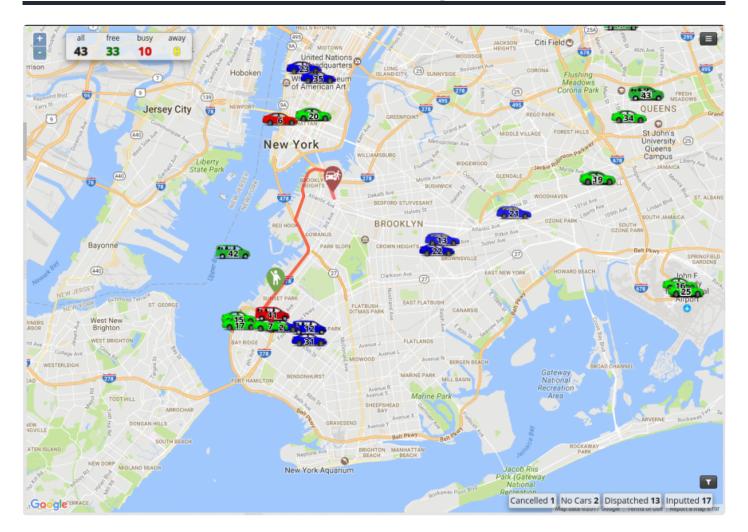


The rest of the left-hand section will allow you to specify information about a new job, or edit a job that has already been created. The buttons at the bottom of this section will also allow you to check or book a job.



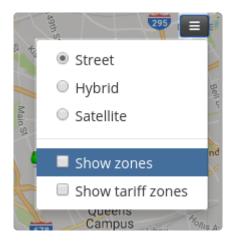
Please refer to the next section Adding a new job to see more details about this process.

3. The map



In the center of the window you will see a map showing all the vehicles in their real-time positions. At the top left you can also see how many vehicles are currently active, and which are free, busy or away.

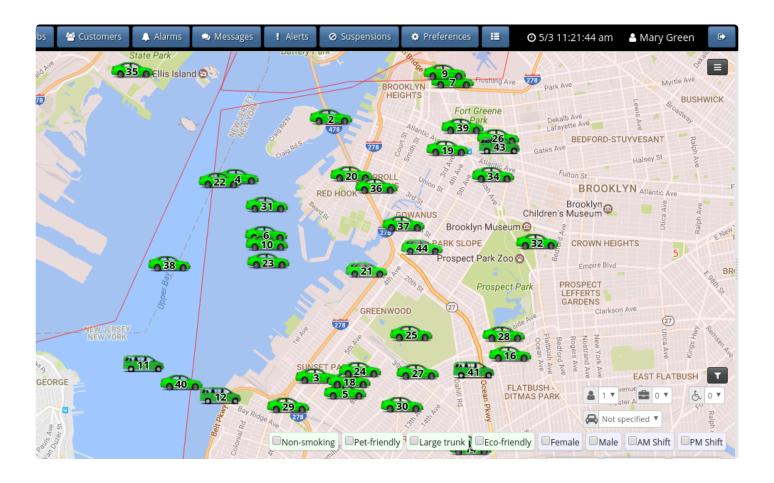
You can zoom in and out of the map by using the mouse scroll wheel or by clicking on the + and – signs at the top left of the map.



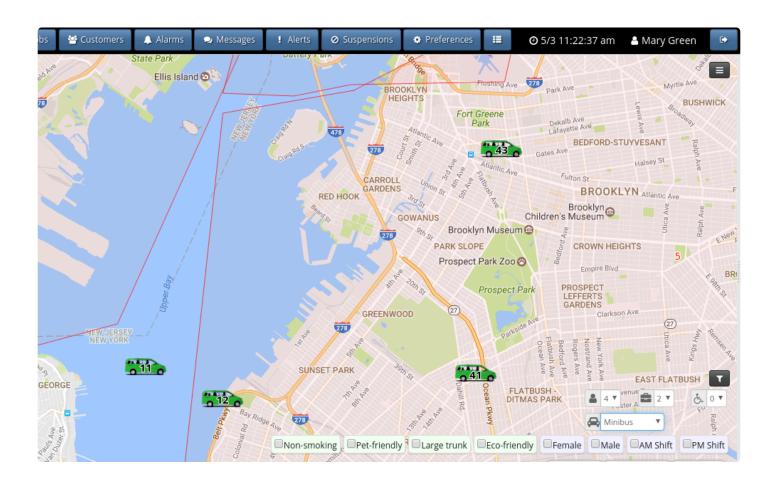
If you click on the hamburger button at the top right, you will be able to select from three different map views. If your company has zones already set up, you will also be able to show them or hide them from this menu.

Filtering vehicles

If you have many vehicles it can be difficult to find a specific type. For this you can use filters, which you will be able to see if you press on the Filter button. For example, the image below shows a large number of vehicles, unfiltered.

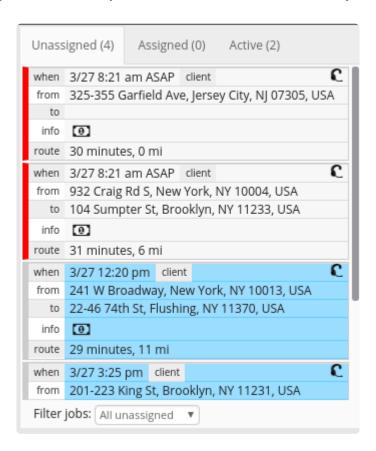


You can then select to show only Minibus as in the image below.



4. Unassigned, assigned and active jobs

On the right-hand section you will see the jobs which have been entered to the system. By clicking on the tabs "Unassigned", "Assigned" or "Active" you will see information about these jobs.



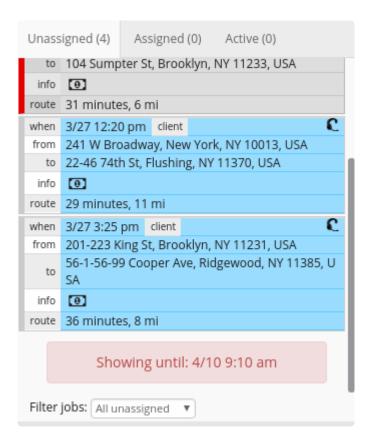


The blue color means this job has been set to start at a later date, and won't be assigned to a vehicle until a certain (Tminus) time before the pickup time.

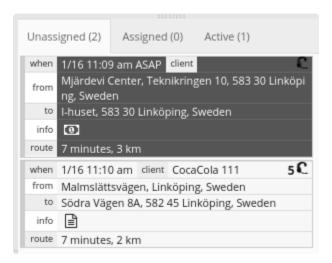
In the Unassigned tab you will only see later jobs up to a specific time as set in the admin panel (<u>Dispatch shows</u>). You can see this time by scrolling down the Unassigned tab until you find a red sign that reads "Showing until".

V

Jobs scheduled after this time are still in the system but will not show up in the Unassigned tab.



The black color in the background means that this job is being blocked by a job with a high priority.



For additional explanations about the color codes in the Dispach console please refer to the following article in our Knowledge Base:



What do the colors and borders in the dispatch console mean?

5. The menu bar



At the top of the screen you will see a black bar with blue menu buttons. From here you can:

- Search jobs
- view. edit and <u>reuse information from Closed jobs</u>
- create and manage <u>Customers</u>
- view <u>Alarms</u>
- Send and receive <u>Messages</u>
- · view Alerts a job is cancelled or flashed
- view and manage driver <u>Suspensions</u>
- Change your <u>Preferences</u>
- Change the view from Main, <u>Jobs Overview</u>, and the <u>Permits</u> view.

Additionally from this section you can see the date, the name of your dispatcher and the log out button.

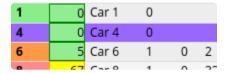
6. The vehicle list

At the bottom of the page you will see all active vehicles along with its status, driver and current job.



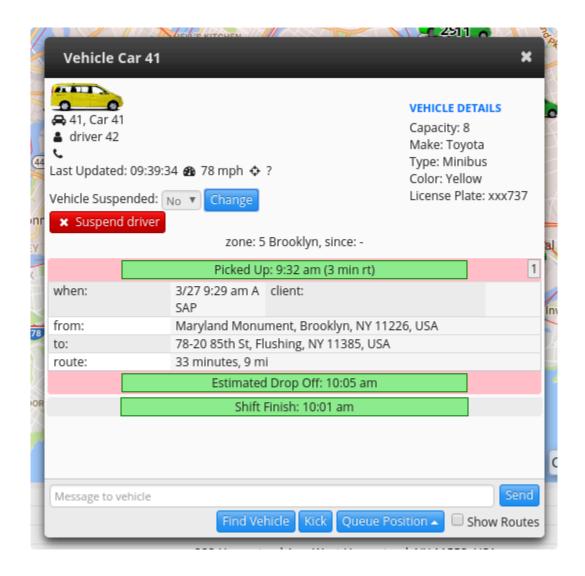
At the bottom right you will see three tabs, namely Vehicle List, Future Jobs and Late job List each with a different view and additional information.

If there's a purple background for a vehicle in the vehicle list, it means they don't have enough driver balance. Please check the section <u>Automatic accounting and driver balance</u> for more information about this.



The vehicle information panel

You can get additional information about each vehicle on the list by clicking on the respective line. The information will appear in a pop up window at the center of the screen.

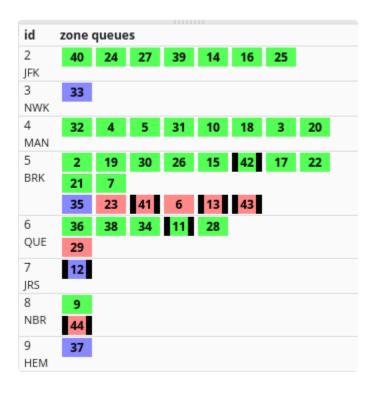


This panel will contain all he current information about a vehicle. What you can do from this panel:

- See who is driving the vehicle, their name and phone number if they have been added.
- See all the details about a vehicle, such as how many passengers they can carry and the type of vehicle.
- Suspend a driver or a vehicle (If you have the right permissions).
- · See their current job and their coming jobs.
- · Send a message to the driver.

7. The zone queues

At the bottom right side you will see the position of the vehicles in their respective zone queues. Click on a vehicle's number in order to get additional information about it.



The vehicle closest to the left in the top row of each zone will be considered first on the queue in this zone.

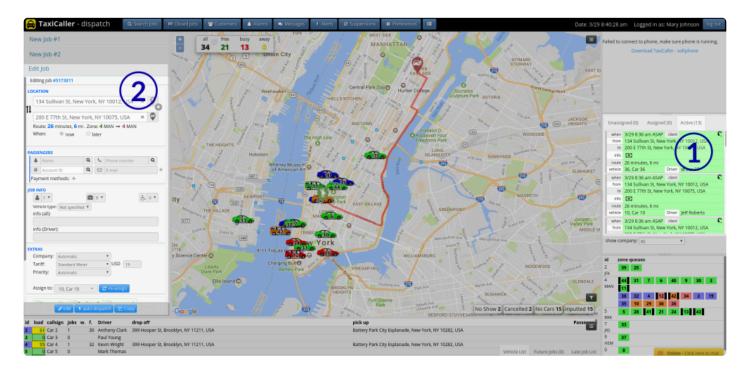
If a vehicle icon has black bars 411 on the sides, it means that the vehicle can transport more than 4 passengers at the time. It easily lets you identify vehicles with higher carrying capacity.

Admin Panel - Unified Admin TaxiCaller Nordic AB

Modifying an existing job

1. Select a job from the right side of the screen, be it an unassigned, assigned or active job that you want to modify.

2. When you click on this job, the details for it will show on the left side of the screen.



- 3. Press on the Edit button
- 4. Modify the job as necessary
- 5. Press on the Submit button



From this screen you can also cancel or re-assign a job, or assign an unassigned job.

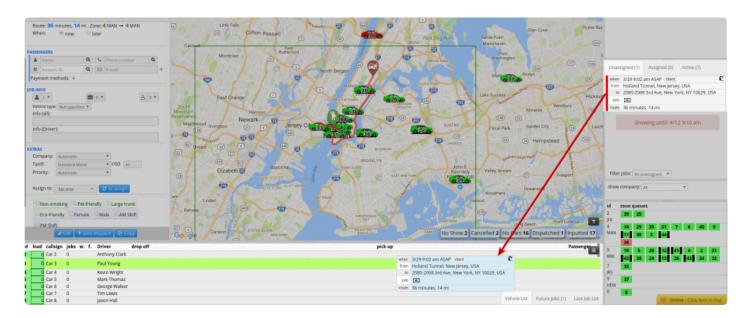
Drag a job to the vehicle list to force-assign it.

If you have created a job that is now unassigned and you wish to force-assign it specifically to one vehicle, you can drag it directly into that vehicle as it appears in the Vehicle List at the bottom of the Dispatch. While you can also use the method above, and press the Edit button to change the Assign to field, being able to drag it may make the process faster which is an advantage if you are dealing with multiple jobs.

To do this:

1. Click on the job on the right side of the screen and hold the left mouse button while dragging the job onto one of the vehicles at the bottom of the screen. You will see a green highlighting which will tell you if you have the right vehicle in the list.

2. Release the mouse buttons to drop the job. Now the job has been assigned to the vehicle you selected.



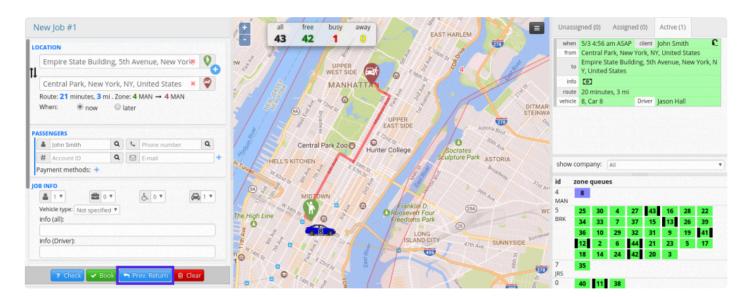
Using previous jobs to speed up dispatching

You can quickly copy and reuse previously created jobs in order to speed up the work as a dispatcher.

Return rides

If you have created a ride for a passenger, and then wish to create a ride in the opposite direction, you can use the "Prev. Return" function to accomplish this. For example if you have just created a job from Central Park to the Empire State Building, you can then:

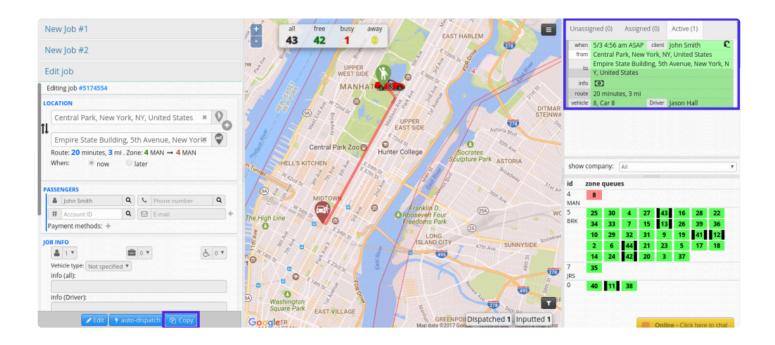
- Create a "New Job" on the left side of the screen.
- · Click on the "Prev. Return" button.



The addresses will now be copied into the new job, with the exception that it will go from the Empire State Building to Central Park instead.

Copy an active job

If you wish to create an identical job to one that is currently in the Unassigned/Assigned/Active list, you are able to click on the job, which will open the "Edit job" panel on the left side of the screen. After this, you can click on the "Copy" button which will copy all the job details into the "New Job" panel, so you can then book it without having to type the same settings manually.

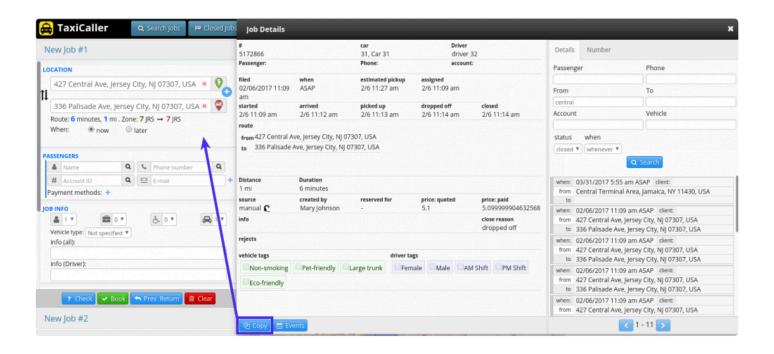


Copy a closed job

Similarly, you can open the **Closed jobs** panel and click on the "copy" icon on the leftmost column to copy the job details into the "New Job" panel.

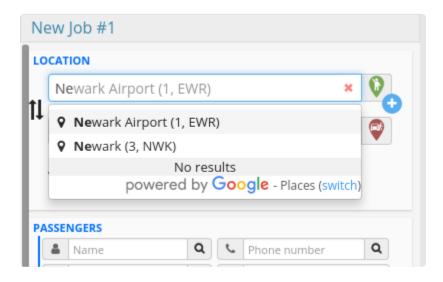


You can even **Search Jobs** to look for an old job and then click on the **Copy** button on the bottom of the panel for the same effect. The job will now be copied as a new job that can be edited or simply dispatched.



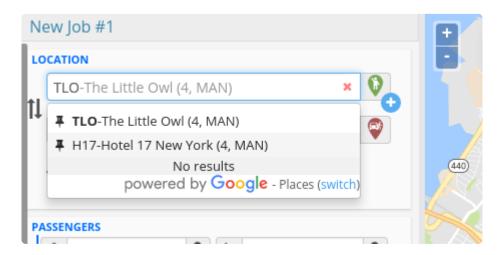
Using Points of Interest (POIs)

When booking from dispatch, you are usually able to look for places that are indexed in Google Maps, such as airports or famous buildings, just by typing the beginning of the name, for example **Newark Airport**.

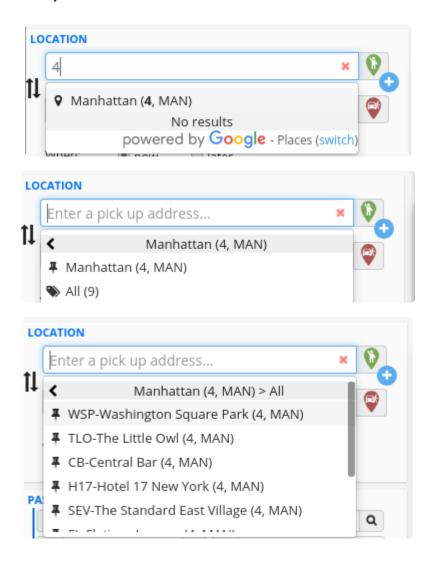


But you may have certain places that are popular pick up or drop off locations that might not be indexed in Google Maps, such as local restaurants or businesses. Adding POIs can solve this and simplify the booking process for dispatchers. This feature allows you to use these POIs just like you would search for an indexed place by just typing the beginning of the name in the pick up or drop off fields.

For example, we have created a POI called **TLO – The Little OwI**, which will appear when starting to write **TLO**.



If you want to see all of your POIs in a given zone in the dispatch central, just enter the zone number or the zone name in the address field. For example if we have zone 4 for Manhattan (MAN), we can begin typing either 4 (the zone number) or MAN (the zone ID). If you then click on **Manhattan (4, MAN)** you will be able to select **AII** which will show you all the POIs for that zone.



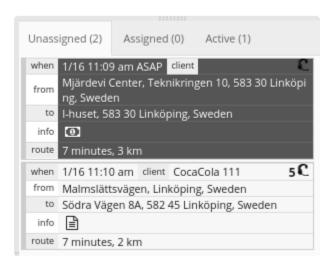
To see how you can create POIs, please check the following article: POIs - Points of Interest

Jobs with special priorities

You can set special priorities for certain jobs if you want them to get assigned first.

To do this you can use the Dispatch Console directly when you are creating a new job. Scroll down to the Extras section and under Priority select a level. It will go from 1 to 5, 5 being the highest priority (jobs with priority 5 will get assigned before all others).

When a job with high priority is booked, it will get assigned before the other ones and you can even choose to have it block other jobs until it gets assigned (the other jobs will appear with dark grey background in the Dispatch console).





The jobs with higher priority will only block other jobs if you enable this in the Admin Panel > Settings > Dispatch or as explained in the <u>Priority section of this article</u>. If you don't wish for jobs to be blocked this way, please disable this function.

To learn how to assign a priority level to a specific customer account, please click here.

Using the external softphone (SIP)

To use this feature, you will need the following:

- 1. A VoIP service that is available in your area.
- 2. A dispatcher user enabled for the use of the SIP phone.
- 3. The Softphone software installed in your computer.

1. A VolP service that is available in your area.

To see a list of our recommended options, please check the next page Supported providers, or click here.

2. Enable a dispatcher to use the SIP phone.

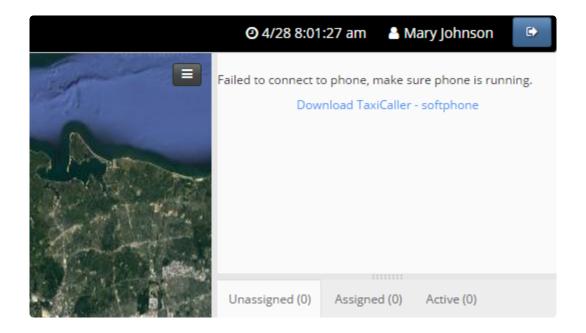
This needs to be done from the Admin Panel – Users. Select your dispatch user and make sure "Enable phone" is checked. At this point you might also want to add other information provided by your VoIP such as User, Domain, Port and others. This information will be automatically transferred to the Softphone settings in the Dispatch.



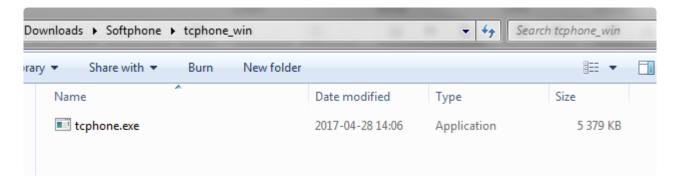
For more information about the SIP Phone options that you can configure from the Admin Panel, please click here.

3. Download and install the Softphone

Log in into Dispatch. If Softphone is enabled for your user, you will now see a new section at the top right of the screen.

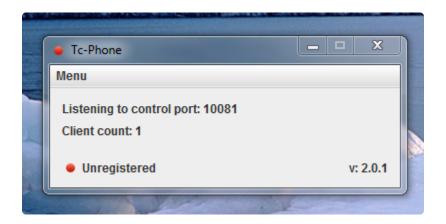


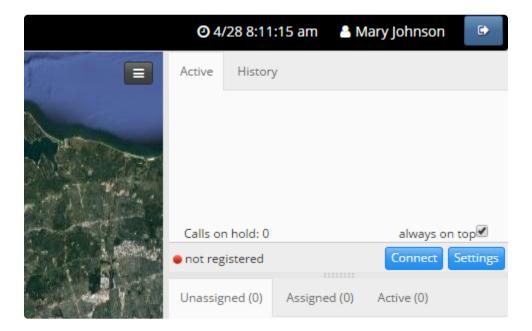
Click on **Download TaxiCaller – softphone**. A new page will open which has the program that you need to install. Select the Windows version and wait until it's downloaded. The file will be compressed in .zip format, so you must extract it to an accessible location. To do this, you can simply right-click on it and choose "Extract", then select an easy to access location such as **Documents** or **Downloads**.



At the moment Linux and iOS systems are not supported.

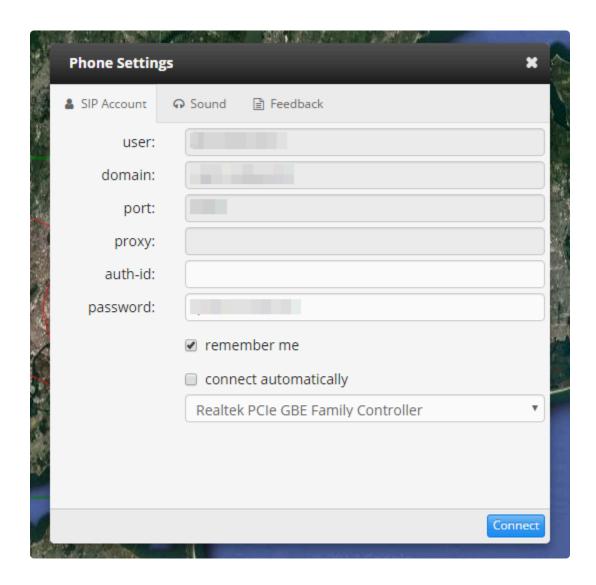
Double click on the file that you have just extracted (tcphone.exe) to run the Softphone. You might be prompted with a popup asking you to allow access for the Java application to run it. Click on "Allow Access" if this happens. If the Softphone starts running sucessfully, it will reflect this in the Dispatch console as well.



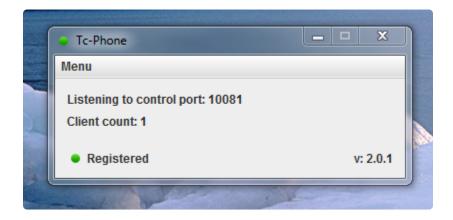


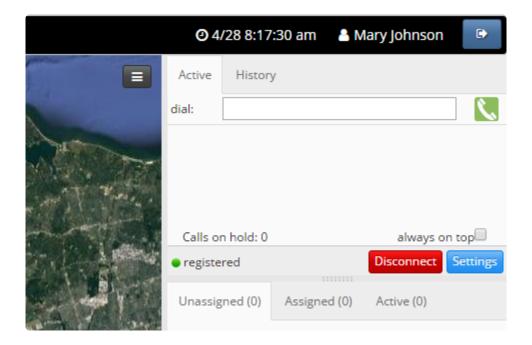
Set up the Softphone

Press **Settings**. If you configured the user/domain/port/proxy fields in the Admin panel, the information should be already here. If you need an auth-id and password, this is where you are able to enter them. Once you have added the right settings, click on **Connect**.



If the softphone is successfully running and connected, you will see something like this. This means you are ready to receive and make calls.





The Tc-Phone program must always be open in the background in order to be able to make and receive calls.

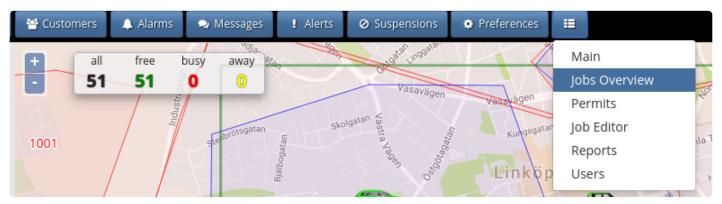
Supported providers

While you can choose any provider that suits your needs, we can recommend those providers that we have already worked with. Please remember that some of these providers are only supported in some countries, if the one you're interested in is not listed, you'll need to contact a provider in your area and make sure they have the required options.

Company	Countries supported	Website
VolPstudio	USA, UK, others	http://voipstudio.com/en/
Comcast Business	USA	http://business.comcast.com/phone/voip
2talk	New Zealand	http://www.2talk.co.nz/index.html
Cellip	Sweden	https://www.cellip.com/

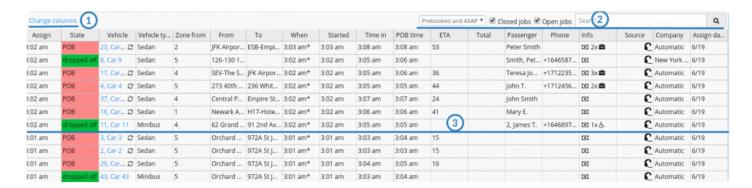
Jobs Overview

If you click on the rightmost button on the menu bar, you can access the Jobs Overview.



Entering the Jobs Overview

This part of the system can help you keep track of all the jobs that are active or have been completed for the last 4 hours.



- 1. Change Columns: You can decide which columns to show in this view.
- 2. Search and select jobs: View open or closed jobs, or search for specific jobs.
- 3. Click on a job in the list to be taken to the job editor(for open jobs) or the job details (for closed jobs)
- To return to the <u>main view</u>, simply click on the rightmost button of the menu bar again and select **Main**

Search Jobs

Closed Jobs

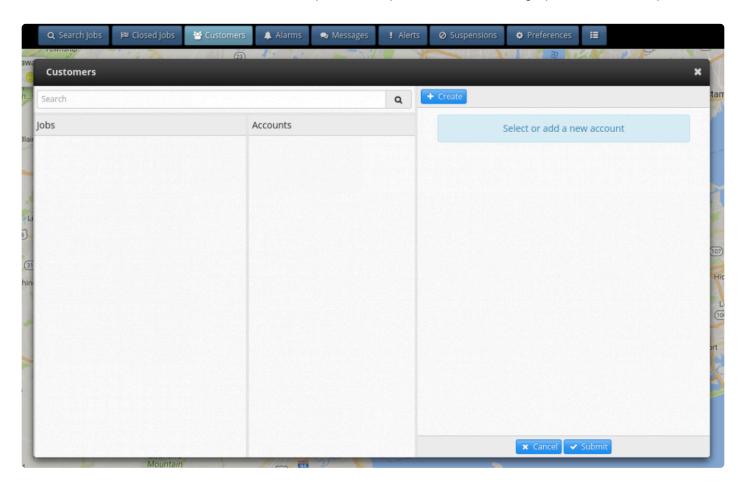
Customer Accounts in Dispatch

For regular customers, you are able to use customer accounts that save their information so that it can be used quickly when booking, and to handle invoicing if the account is meant to be billed. These accounts can be created both <u>from the Admin Panel</u> and from the Dispatch.

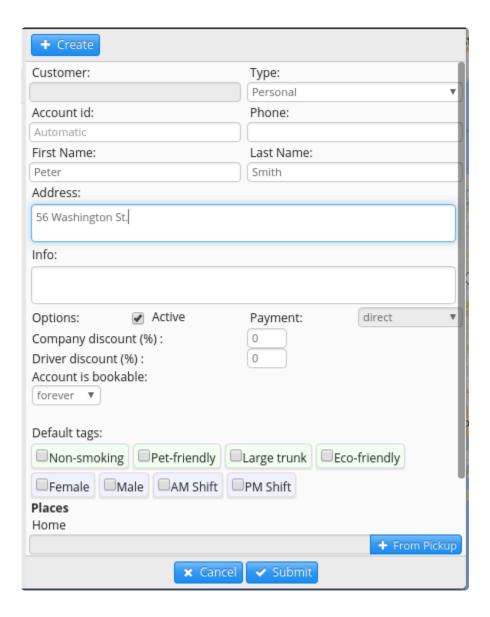
- Create a customer account from Dispatch
- Edit a customer account from Dispatch
- · Adding and using preset jobs

Create a customer account from Dispatch

1. Click on the Customers button at the top of the Dispatch, which will bring up the Customers panel.



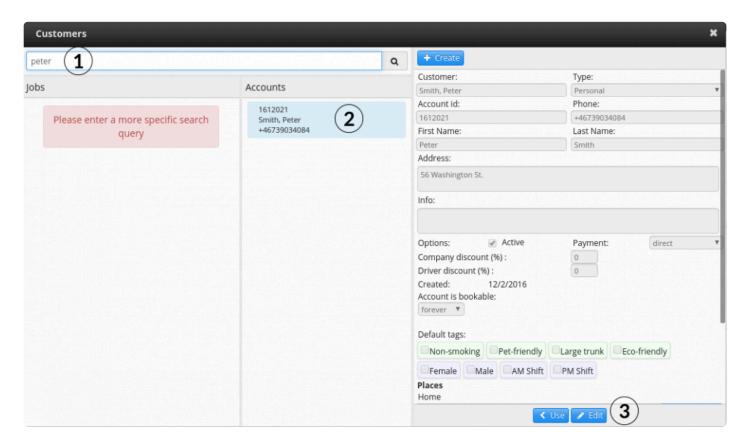
- 2. On the right half of the panel, click on the **Create** button.
- 3. Enter the details of your customer in the form. This includes their phone number, name, address and any extra info that may be useful to you or other dispatchers about this customer. You can choose an account ID if you wish, otherwise this ID will be generated automatically, as well as the customer name at the top.



4. Click on the **Submit** button.

Edit a customer account from Dispatch

- 1. Click on the **Customers** button at the top of the Dispatch, and use the search bar at the top left of the panel to search for a customer.
- 2. You will see the results under the Accounts column, select the customer you want to edit.
- 3. Click on the Edit button. This will allow you to modify the account information.



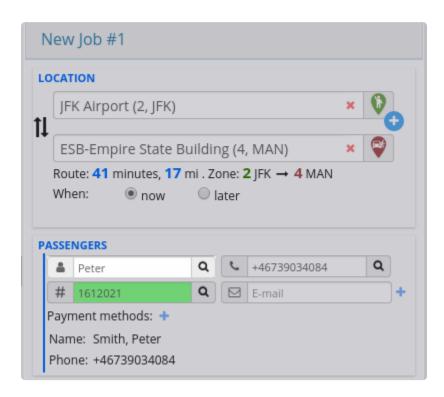
4. Once you are done, click on the button to save your changes.

Adding and using preset jobs

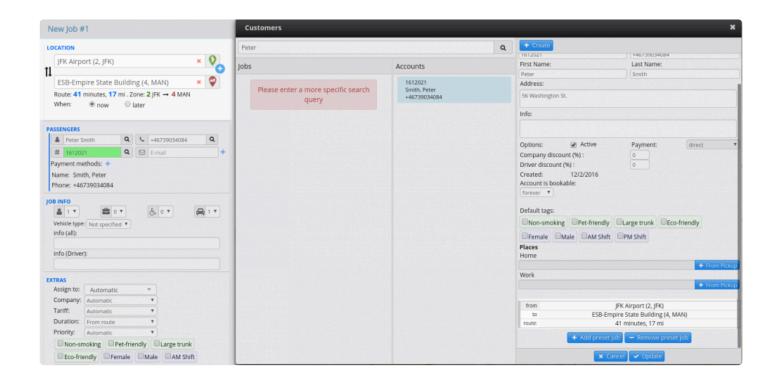
Saving a ride (preset job) to a customer account

This is useful if the customer requests the same rides on a regular basis. This way you will "save the ride", and you won't have to type the same addresses and information over and over. You will also be able to see and offer the customer their regular rides, which may be appreciated by them. You can add up to 4 preset jobs to any customer.

- 1. Start <u>creating a new job</u> in the system for this customer, choosing the pick up and drop off addresses as usual.
- Type the passenger's first name, and press enter in your keyboard to bring up the Customers panel.
 For a new customer you may also bring up the Customers panel by clicking on the button at the top of the Dispatch.



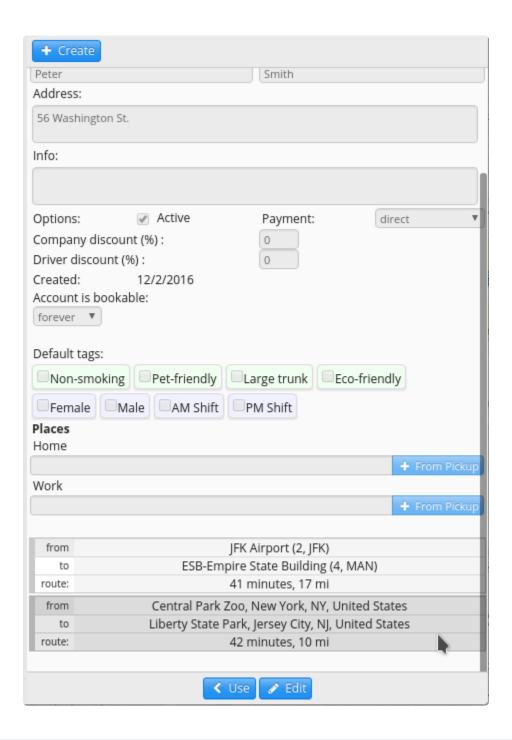
- 3. Proceed to Edit the account as explained in the <u>previous section</u>.
- 4. Click on the **Add preset job** button. The information from the new job will be added automatically as a Preset Job.



Using a preset job

If your regular customer requests a ride that you have previously saved, you will be able to quickly enter it into the system to create a job for them.

- 1. When creating a new job, start typing their name and pressing Enter to bring up the Customer panel.
- 2. Click on the preset job that you wish to use. It will auto-fill the location fields in your new job.



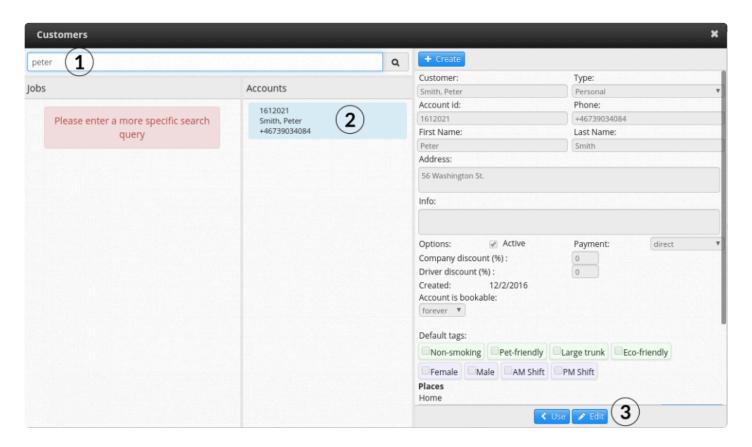


You can also use the customer's telephone number to look for their account in the same way as we used the customer's name in the previous example.

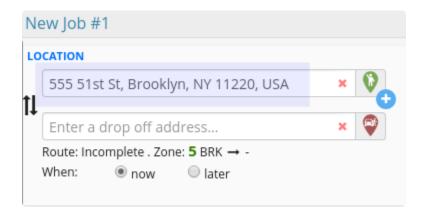
Store preset locations

Predefine the customer's home and work place.

 Click on the Customers button at the top of the Dispatch, and either Create a customer or Search for one, in order to edit their information.



• Start creating a new "Job", but instead of a normal ride, enter the **Home** address of this customer.



• Back in the **Customers** panel, click on **+ From Pickup**, which will copy whatever is in the **Pick up** field. Do this for either **Home** or **Work** as needed.



This setting is especially useful if you use our IVR system. For more information about this please check the following article: Configure the IVR

Alarms

This feature exists for the safety of the driver and allows them to discreetly and silently send a signal to the dispatcher. When they press the alarm button on the Driver App

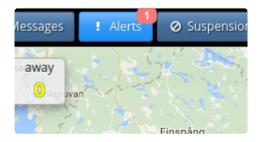
You will receive a sound alert and the **Alarms** panel will pop up in your dispatch screen.

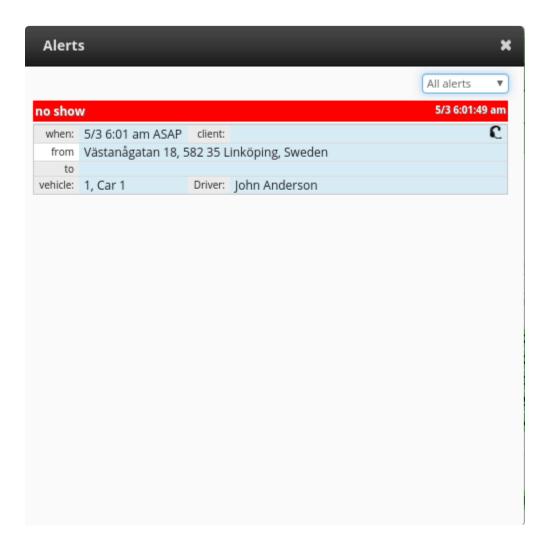


Messages in Dispatch

Alerts

You will get an alert in certain situations, for example if a ride is canceled or was flashed (too short). You will be able to see these by clicking on the **Alerts** button at the top of the Dispatch screen.





Suspensions

Preferences

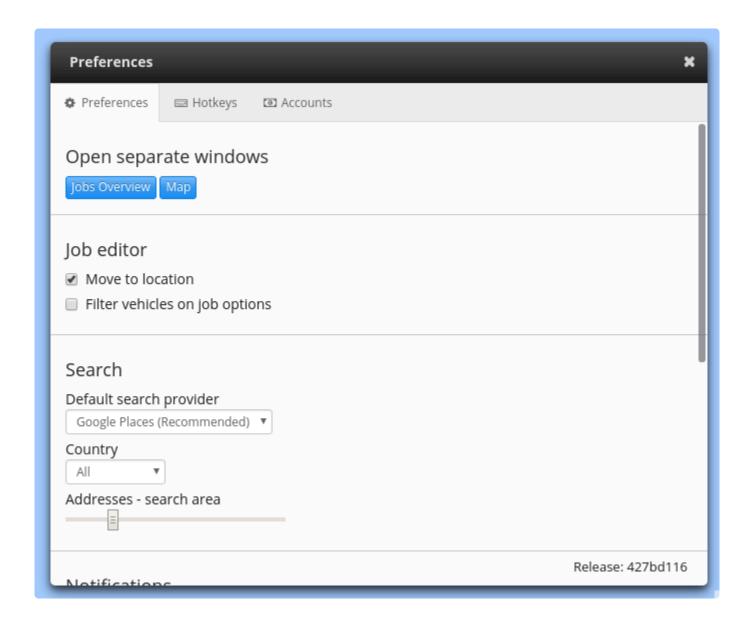
You can customize some aspects of the dispatch by going to the **Preferences** tab.

View Settings

From the Preferences tab you can open the Jobs Overview and the Map in separate windows
instead of the embedded form that is the default.

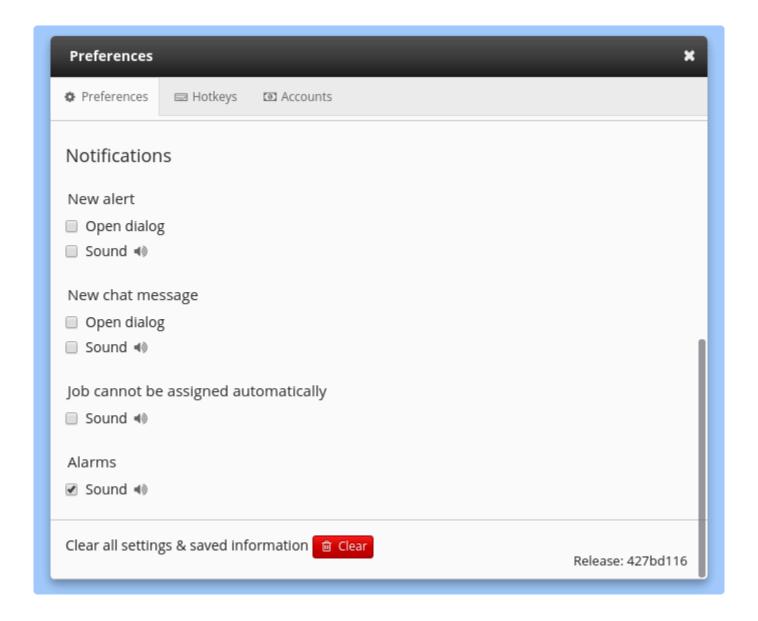
Job Editor and Search

- If **Move to location** is active, the map is going to automatically center the location entered in the **pick-up** location when you create a job.
- If **Filter vehicles on job options is active**, the map will only display the vehicles that have the tags you have selected in the job options. Otherwise you can control these filters <u>from the map itself</u>.
- Some of the search options include to switch your default search provider between Google Places and Google Geocode. The former is best for landmarks like monuments, restaurants or museums. The latter is best for address searching.



Notifications

Select how you would like your notifications delivered, a dialog can open (pop-up) and a sound can play. You can preview the sounds by clicking on the speaker icon.

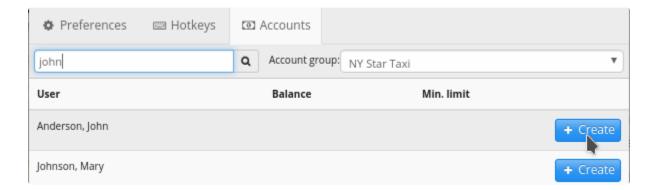


Automatic accounting and driver balance

If you are new to Automatic Accounting please check the following article first with step-bystep instructions: http://www.manula.com/manuals/taxicaller-nordic-ab/special-features/1/ en/topic/automatic-accounting-for-drivers

Once you have set up Automatic Accounting in the Admin Panel, it's time to configure this feature in the Dispatch.

- · Choose Preferences
- · Select the Accounts tab.
- · Search for the driver and click on Create.





If you don't see an Accounts Tab, you may need to change the permissions from the Admin Panel - Settings - Permissions. Scroll down to Bank read and Bank write and set the appropriate permission levels.

 The Create button will become a Details button. Click on this and you will get a pop up that will allow you to transfer funds to the driver.

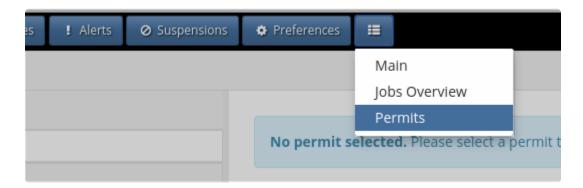


Permits in Dispatch

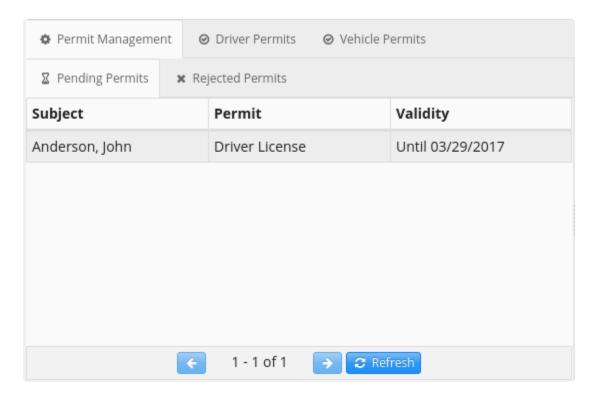
- Approve a driver permit
- Driver and vehicle Suspensions
- Alarms and Alerts

Approve a driver permit

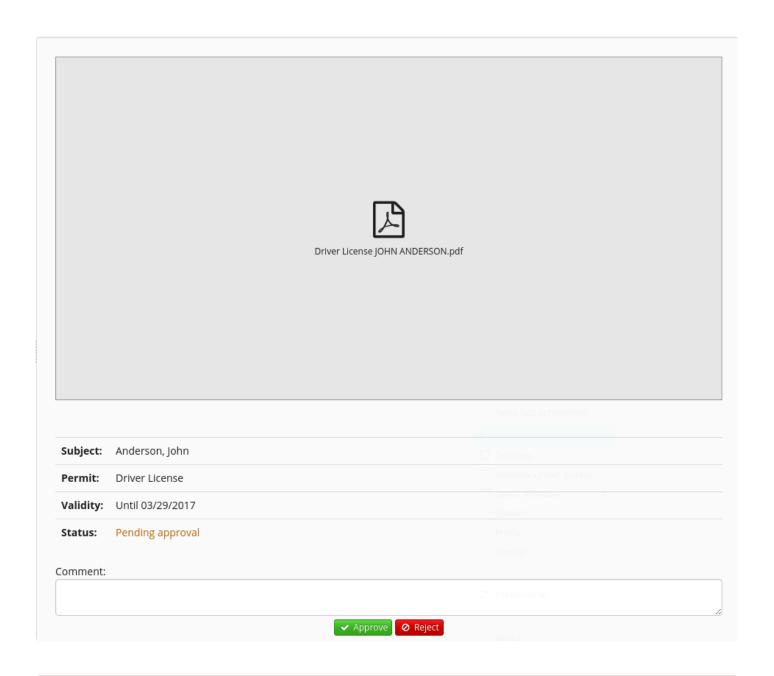
Click on the hamburger button at the top of the dispatch screen and choose Permits.



If a driver has submitted a new permit to be approved, it will appear under the tab *Pending Permits*.



You will be able to save the permit by clicking on the file name – if it's an image, you will be able to see the preview in the screen. Once you have verified that the permit is valid, you can then click on the Approve button. Otherwise, click on the Reject button.



If you reject a permit by accident, simply navigate to the Rejected Permits tab and press on the Approve button.