

Dispatch Console

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TaxiCaller Nordic AB

Dispatch Console Manual	1
Getting Started	2
Main view of the dispatch console	3
1. Pick up and drop off	3
2. Entering job details	4
3. The map	5
4. Unassigned, assigned and active jobs	8
5. The menu bar	11
6. The vehicle list	11
7. The zone queues	13
Working with jobs	14
Adding a new job	14
Modifying an existing job	18
Using previous jobs to speed up dispatching	19
The Jobs Overview	22
Jobs with special priorities	24
Using customer accounts	26
Create a customer account from Dispatch	26
Edit a customer account from Dispatch	27
Adding and using preset jobs	28
Store preset locations for your customers: Home, work	31
Managing Drivers: Permits, Suspensions	33
Approve a driver permit	33
Driver and vehicle Suspensions	35
Alarms and Alerts	39
Using the external softphone (SIP)	41
Supported providers	45
Send and receive messages	46
Automatic accounting and driver balance	52
Change your Preferences	54

Dispatch Console Manual

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

Please see our other manuals:

- [Admin Panel](#)
- [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 or clicking on the **Getting Started** link below.

Getting Started

How to sign in

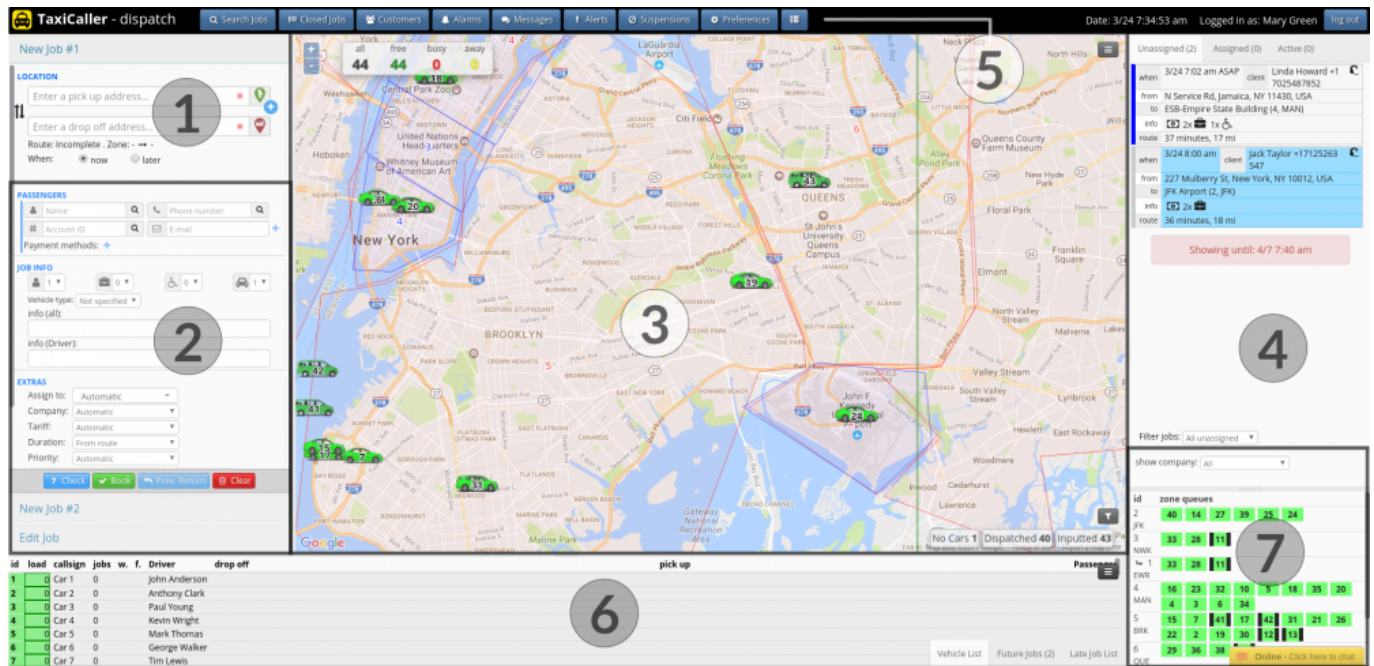
Before you sign in, you must have a dispatch user already set up from the Admin Panel. Remember that you can create a dispatcher user in the [Users section of the Admin Panel](#).

Please sign in to the
Dispatch Console

To find out what your user ID is, please check the [Dashboard in the Admin Panel](#).

Main view of the dispatch console

After having signed in into 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](#)

1. Pick up and drop off

LOCATION

↑↓

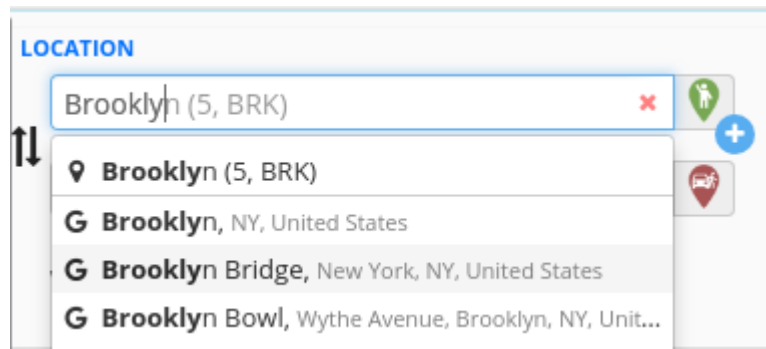
✕



📍

✕

📍

Route: Incomplete . Zone: - → -
When: ☒ now ☐ later



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

PASSENGERS

Payment methods:

JOB INFO

Vehicle type:

info (all):

info (Driver):

EXTRAS

Assign to:

Company:

Tariff:

Duration:

Priority:

☐ Non-smoking ☐ Pet-friendly ☐ Large trunk

☐ Eco-friendly ☐ Female ☐ Male ☐ AM Shift

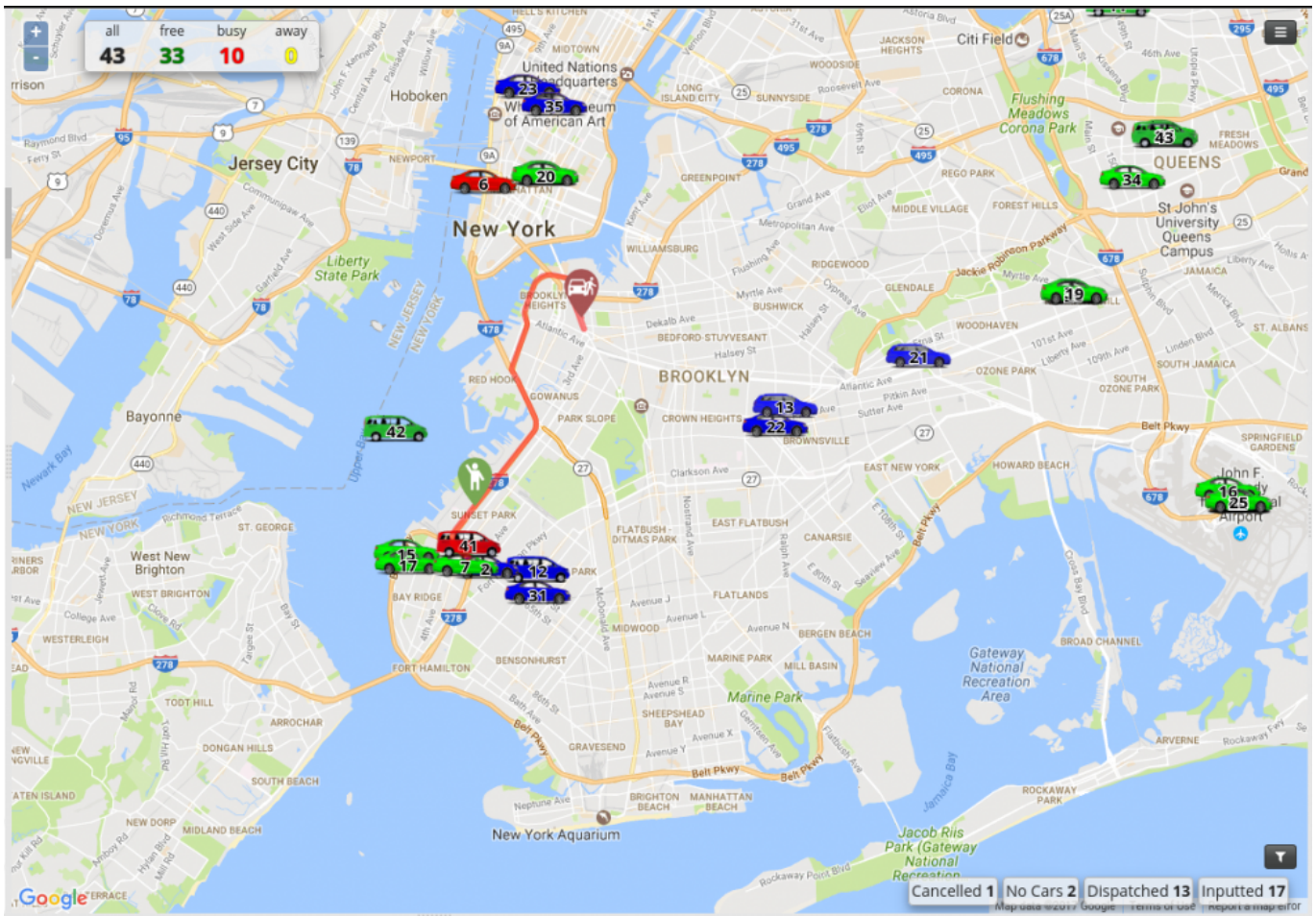
☐ PM Shift

Flight #: Room #:

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.

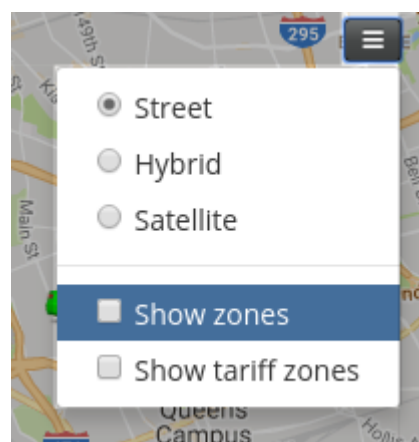
✿ Please refer to the next section [Adding a new job](#) to see more details about this process.

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.



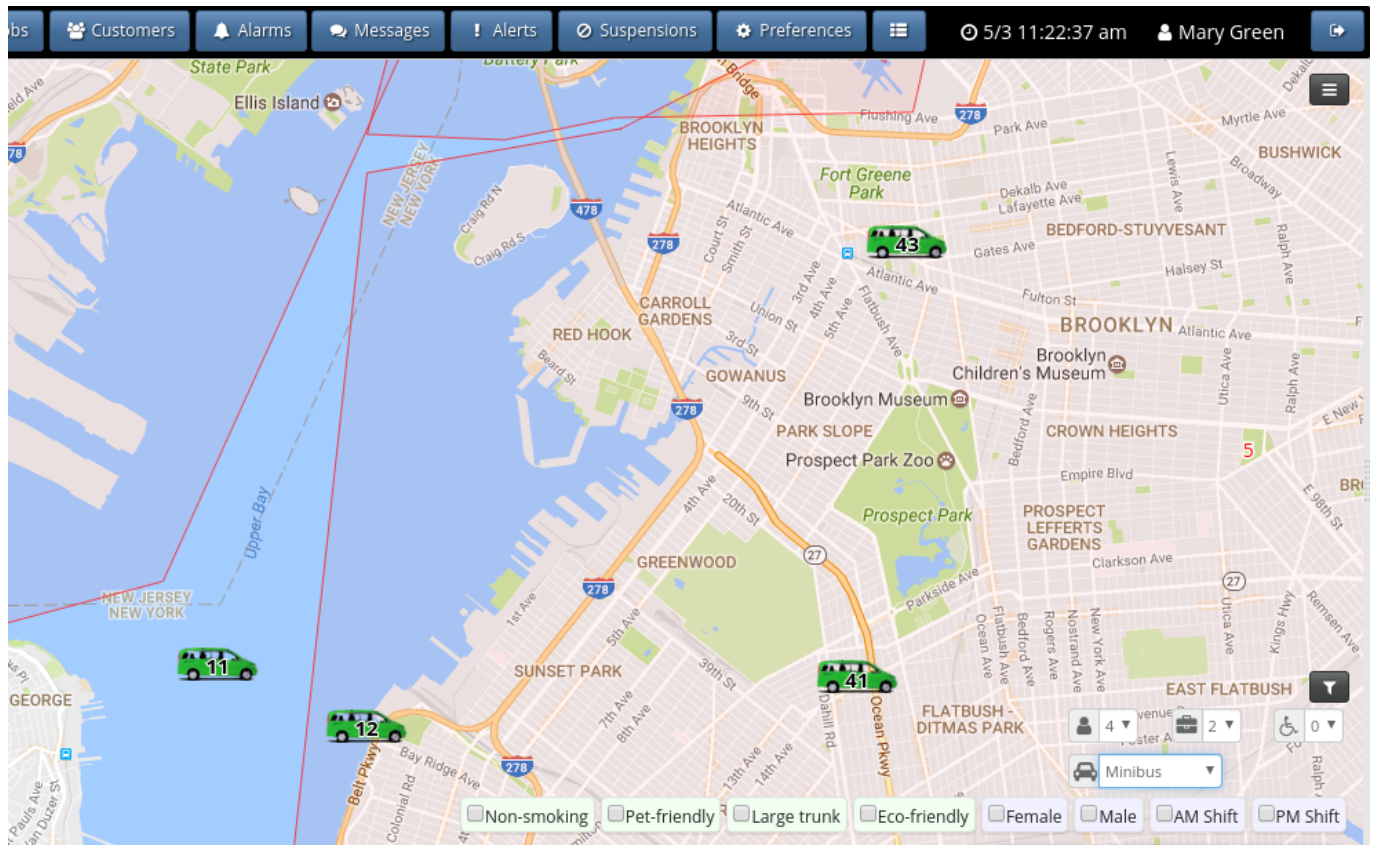
If you click on the hamburger button at the top right, you will be able to select from three different map views. If your company has zones already set up, you will also be able to show them or hide them from this menu.

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.

Unassigned (4)Assigned (0)Active (2)

when3/27 8:21 am ASAPclient

from325-355 Garfield Ave, Jersey City, NJ 07305, USA

to

info

route30 minutes, 0 mi

when3/27 8:21 am ASAPclient

from932 Craig Rd S, New York, NY 10004, USA

to104 Sumpter St, Brooklyn, NY 11233, USA

info

route31 minutes, 6 mi

when3/27 12:20 pmclient

from241 W Broadway, New York, NY 10013, USA

to22-46 74th St, Flushing, NY 11370, USA

info

route29 minutes, 11 mi

when3/27 3:25 pmclient

from201-223 King St, Brooklyn, NY 11231, USA

Filter jobs: All unassigned



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 ([Dispatch shows](#)). You can see this time by scrolling down the Unassigned tab until you find a red sign that reads "Showing until".



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

Unassigned (4)

Assigned (0)

Active (0)

to

104 Sumpter St, Brooklyn, NY 11233, USA

info

route

31 minutes, 6 mi

when

3/27 12:20 pm

client

from

241 W Broadway, New York, NY 10013, USA

to

22-46 74th St, Flushing, NY 11370, USA

info

route

29 minutes, 11 mi

when

3/27 3:25 pm

client

from

201-223 King St, Brooklyn, NY 11231, USA

to

56-1-56-99 Cooper Ave, Ridgewood, NY 11385, U SA

info

route

36 minutes, 8 mi

Showing until: 4/10 9:10 am

Filter jobs:

All unassigned

▼

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

Unassigned (2)		Assigned (0)	Active (1)
when	1/16 11:09 am ASAP	client	
from	Mjärdevi Center, Teknikringen 10, 583 30 Linköping, Sweden		
to	I-huset, 583 30 Linköping, Sweden		
info			
route	7 minutes, 3 km		
when	1/16 11:10 am	client	CocaCola 111
from	Malmslättsvägen, Linköping, Sweden		
to	Södra Vägen 8A, 582 45 Linköping, Sweden		
info			
route	7 minutes, 2 km		

For additional explanations about the color codes in the Dispatch 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 [reuse information from Closed jobs](#)
- create and manage [Customers](#)
- view [Alarms](#)
- Send and receive [Messages](#)
- view [Alerts](#) a job is cancelled or flashed
- view and manage driver [Suspensions](#)
- Change your [Preferences](#)
- Change the view from **Main**, [Jobs Overview](#), and the [Permits](#) 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.

id	load	callsign	jobs	w.	f.	Driver	drop off	pick up	Passenger
2	0	Car 2	0			Anthony Clark			
3	0	Car 3	0			Paul Young			
4	0	Car 4	0			Kevin Wright			
5	0	Car 5	0			Mark Thomas			
6	49	Car 6	1	0	23	George Walker	80-01 Metropolitan Ave, Flushing, NY 11379, USA	221 Congress St, Brooklyn, NY 11201, USA	
7	0	Car 7	0			Tim Lewis			
8	0	Car 8	0			Jason Hall			
9	0	Car 9	0			Daniel Lopez			
10	0	Car 10	0			Jeff Roberts			
11	0	Car 11	0			Allan Lee			
12	24	Car 12	1	0	12	Brian Jackson	43 Dwight St, Jersey City, NJ 07305, USA	53 US-1 Truck, Jersey City, NJ 07306, USA	
13	0	Car 13	0			Dave Garcia			

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 [Automatic accounting and driver balance](#) for more information about this.

1	0	Car 1	0		
4	0	Car 4	0		
6	5	Car 6	1	0	2
8	67	Car 8	1	0	23

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.

Vehicle Car 41

41, Car 41
driver 42
Last Updated: 09:39:34 78 mph ?

Vehicle Suspended: [Change](#)

[Suspend driver](#)

zone: 5 Brooklyn, since: -

Picked Up: 9:32 am (3 min rt)

when:	3/27 9:29 am A	client:	
	SAP		
from:	Maryland Monument, Brooklyn, NY 11226, USA		
to:	78-20 85th St, Flushing, NY 11385, USA		
route:	33 minutes, 9 mi		

Estimated Drop Off: 10:05 am

Shift Finish: 10:01 am

Message to vehicle [Send](#)

[Find Vehicle](#) [Kick](#) [Queue Position](#) ☐ Show Routes

This panel will contain all the 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.

id	zone queues							
2	40	24	27	39	14	16	25	
JFK								
3	33							
NWK								
4	32	4	5	31	10	18	3	20
MAN								
5	2	19	30	26	15	42	17	22
BRK	21	7						
	35	23	41	6	13	43		
6	36	38	34	11	28			
QUE	29							
7	12							
JRS								
8	9							
NBR	44							
9	37							
HEM								

✿ 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 **41** 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.



Working with jobs

- [Adding a new job](#)
- [Modifying an existing job](#)
- [Using previous jobs to speed up dispatching](#)
- [The Jobs Overview](#)
- [Using Points of Interest](#)



Adding a new job

 now ☐ later'."/>

LOCATION

Enter a pick up address...  

↕



Enter a drop off address...  

+

Route: Incomplete . Zone: - -> -

When: ☒ now ☐ later

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 the 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.

LOCATION

NJ Tpke, Kearny, NJ, USA

158 E 38th St, Brooklyn, NY 11203, USA

746 Barbey St, Brooklyn, NY 11207, USA

Aqueduct Rd, South Ozone Park, NY 11420, USA

Route: 82 minutes, 23 mi . Zone: 7 JRS → 5 BRK

When: ☒ now ☐ later

- 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.

99-113 White St, New York, NY 10013, USA

Route: 10 minutes, 1 mi . Zone: 4 MAN → 4 MAN

When: ☐ now ☒ later

10 am : 05 03/27/17

assigns T- 10min

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**

PASSENGERS

Name Phone number

Account ID E-mail

Payment methods: +

- 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”.

JOB INFO

Vehicle type:

info (all):

info (Driver):

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.

EXTRAS

Assign to:

Company:

Tariff:

Duration:

Priority:

☒ Non-smoking
 ☐ Pet-friendly
 ☐ Large trunk
 ☐ Eco-friendly
 ☐ Female
 ☐ Male
 ☒ AM Shift
 ☐ PM Shift

Flight #: Room #:

☐ Repeat

- 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.

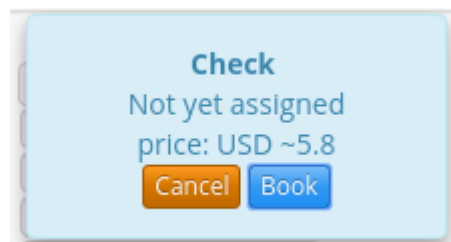
- * If you wish for the higher priority jobs to also block other jobs until they have been assigned, you can change this from the admin panel in: [Settings > Dispatch > 2. Assignment > Priorities](#)

- * If you want to read more about using priorities, [please click here](#).

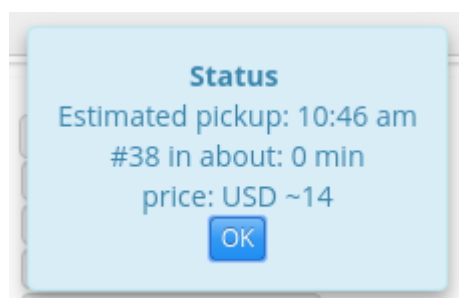
4. Check and Book the job you just created.



- 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 [Modifying an existing job](#)
- Use the **Clear** button to clear the form entirely and start over.

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.

The screenshot shows the TaxiCallr dispatch console. On the left, the 'Edit Job' form is visible, with a blue circle '2' highlighting the 'LOCATION' field. The main area displays a map of New York City with various taxi icons. On the right, a list of jobs is shown, with a blue circle '1' highlighting a specific job entry. The bottom of the screen shows a table of vehicle status and a list of drivers.

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

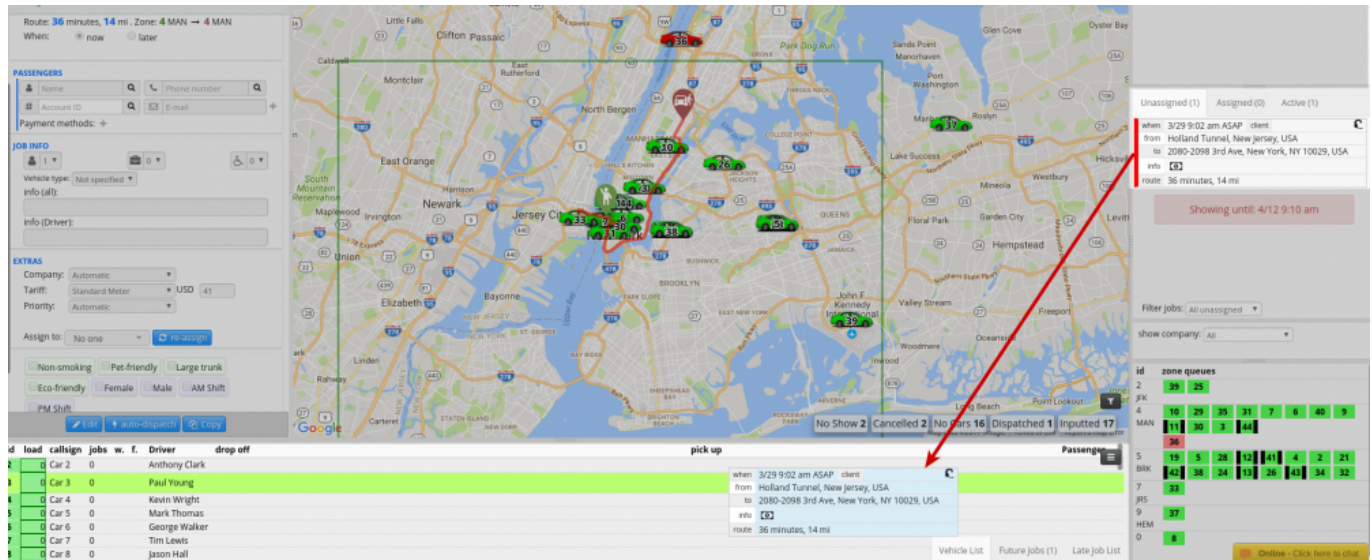
✿ From this screen you can also cancel or re-assign a job, or assign an unassigned job.

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.



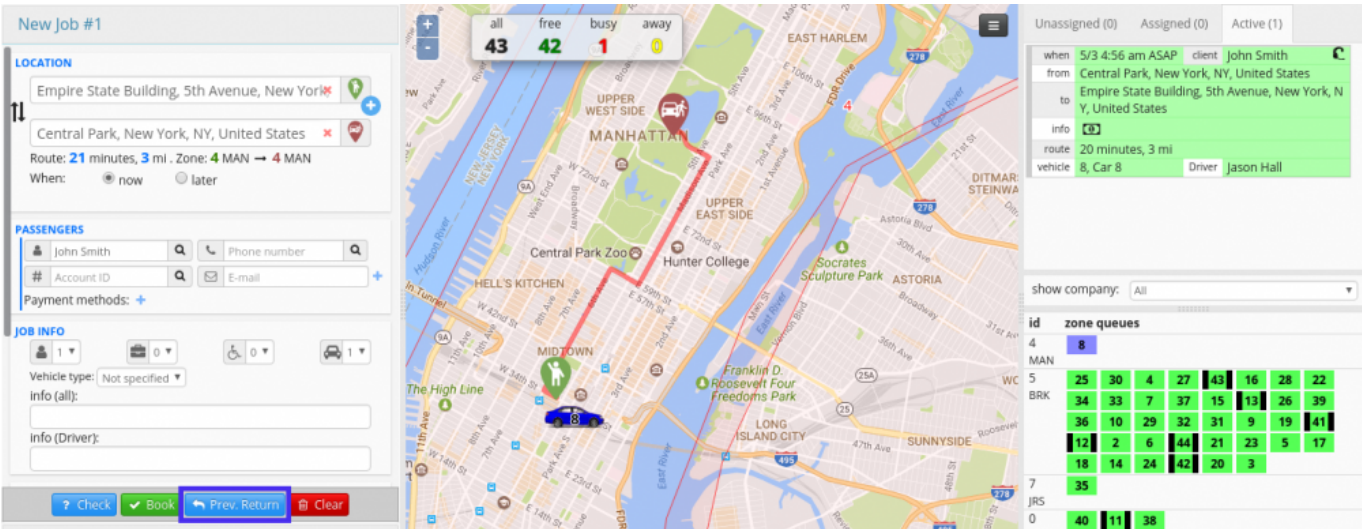
Using previous jobs to speed up dispatching

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:

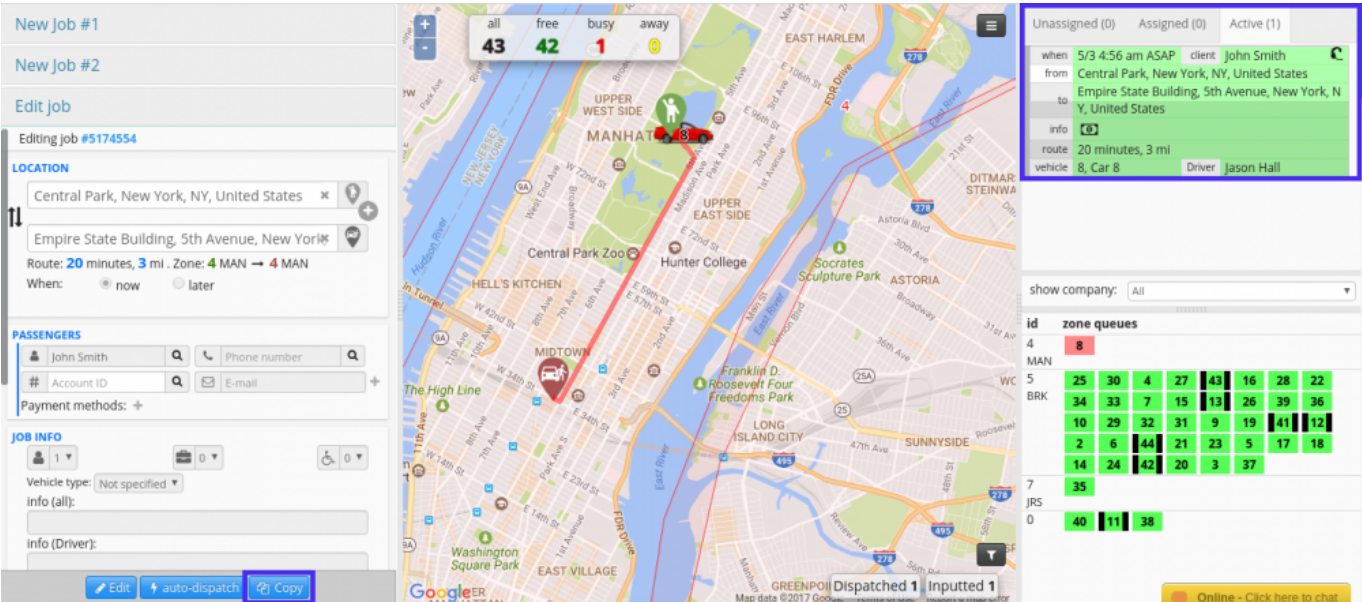
- Create a “New Job” on the left side of the screen.
- Click on the “Prev. Return” button.



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.

The screenshot shows the TaxiCaller Dispatch Console interface. The top navigation bar includes links for Search Jobs, Closed Jobs, Customers, Alarms, Messages, Alerts, Suspensions, and Preferences. The 'Closed Jobs' panel is open, displaying a table of closed jobs. The first row is highlighted, and a blue box indicates the 'copy' icon in the first column. The 'New Job #1' panel on the left shows fields for location, passengers, and job info.

closed	filed	pick up	drop off	Passenger	car	Driver	source	reason
4/26 8:07 am	4/26 7:57 am	126-130 12th St, Brooklyn, NY 11215, USA		Smith, Peter, +16465876952	37	driver 38	mobile	dropped off
4/25 10:09 am	4/25 10:05 am	I-278, Brooklyn, NY, USA	I-278, Brooklyn, NY, USA	Smith, Peter, +16465876952	13	Dave Garcia	mobile	dropped off
4/24 8:06 am	4/24 7:54 am	400 Kingsland Ave, Brooklyn, NY 11222, USA	20 Mellow Ln, Westbury, NY 11590, USA		20	driver 21	manual	dropped off
4/24 7:49 am	4/24 7:42 am	298 Conover St, Brooklyn, NY 11231, USA	181 President St, Hempstead, NY 11550, USA		12	Brian Jackson	manual	canceled

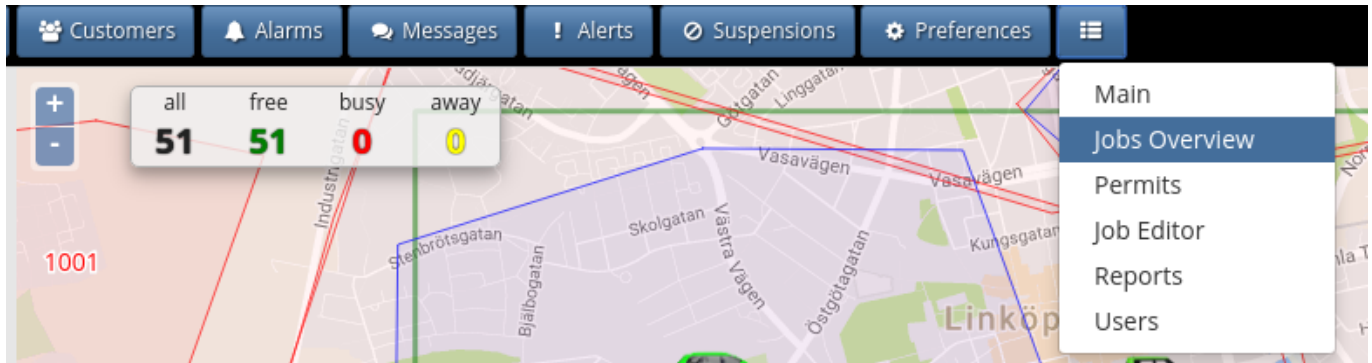
You can even **Search Jobs** to look for an old job and then click on the **Copy** button on the bottom of the panel for the same effect. The job will now be copied as a new job that can be edited or simply dispatched.

The screenshot shows the TaxiCaller Dispatch Console interface. The 'Job Details' panel is open, displaying detailed information about a specific job. A blue arrow points from the 'Copy' button in the 'Job Details' panel to the 'New Job #2' panel on the left.

closed	filed	when	estimated pickup	assigned
02/06/2017 11:09 am	ASAP	2/6 11:27 am	2/6 11:09 am	

The 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 24 hours](#).

Change columns 1																
Prebooked and ASAP <input type="checkbox"/> Closed jobs <input checked="" type="checkbox"/> Open jobs <input checked="" type="checkbox"/> Search 2																
Assign	State	Vehicle	Vehicle ty...	Zone from	From	To	When	Started	Time in	POB time	ETA	Total	Passenger	Phone	Info	Source
3:02 am	POB	23, Car...	Sedan	2	JFK Airpor...	ESB-Emp...	3:03 am*	3:03 am	3:08 am	3:08 am	53		Peter Smith		2x	Automatic
3:02 am	Dropped off	8, Car 8	Sedan	5	126-130 1...		3:02 am*	3:02 am	3:05 am	3:06 am			Smith, Pet...	+1646587...	3x	New York ...
3:02 am	POB	17, Car...	Sedan	4	SEV-The S...	JFK Airpor...	3:02 am*	3:02 am	3:05 am	3:06 am	36		Teresa Jo...	+1712235...	3x	Automatic
3:02 am	POB	4, Car 4	Sedan	5	273 40th ...	236 Whit...	3:02 am*	3:02 am	3:05 am	3:05 am	44		John T.	+1712456...	2x	Automatic
3:02 am	POB	37, Car...	Sedan	4	Central P...	Empire St...	3:02 am*	3:02 am	3:07 am	3:07 am	24		John Smith			Automatic
3:02 am	POB	16, Car...	Sedan	1	Newark A...	H17-Hote...	3:02 am*	3:02 am	3:06 am	3:06 am	41		Mary E.			Automatic
3:02 am	Dropped off	11, Car 11	Minibus	4	62 Grand ...	91 2nd Av...	3:02 am*	3:02 am	3:05 am	3:05 am			2, James T.	+1646897...	1x	Automatic
3:01 am	POB	3, Car 3	Sedan	5	Orchard ...	972A St J...	3:01 am*	3:01 am	3:03 am	3:04 am	15					Automatic
3:01 am	POB	2, Car 2	Sedan	5	Orchard ...	972A St J...	3:01 am*	3:01 am	3:03 am	3:03 am	15					Automatic
3:01 am	POB	29, Car...	Sedan	5	Orchard ...	972A St J...	3:01 am*	3:01 am	3:04 am	3:05 am	16					Automatic
3:01 am	Dropped off	43, Car 43	Minibus	5	Orchard ...	972A St J...	3:01 am*	3:01 am	3:03 am	3:04 am						Automatic

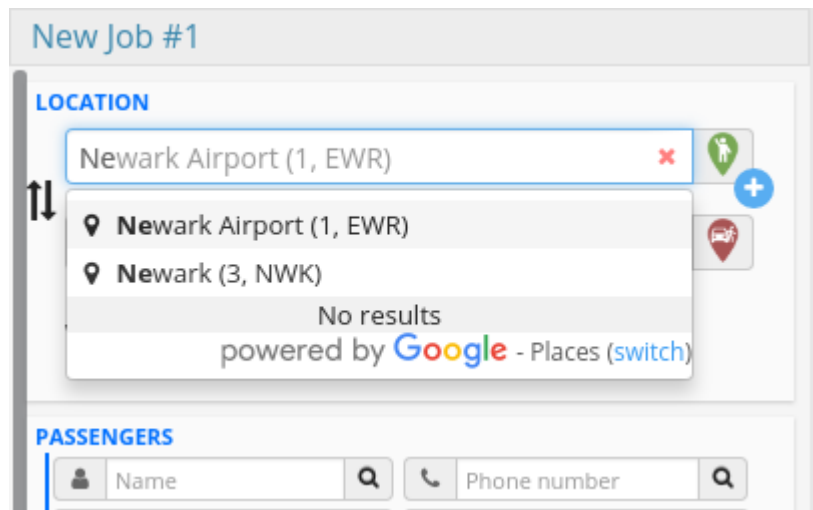
1. **Change Columns:** You can decide which columns to show in this view.
2. **Search and select jobs:** View open or closed jobs, or search for specific jobs.
3. **Click** on a job in the list to be taken to the job editor(for open jobs) or the job details (for closed jobs)



To return to the [main view](#), simply click on the rightmost button of the menu bar again and select **Main**

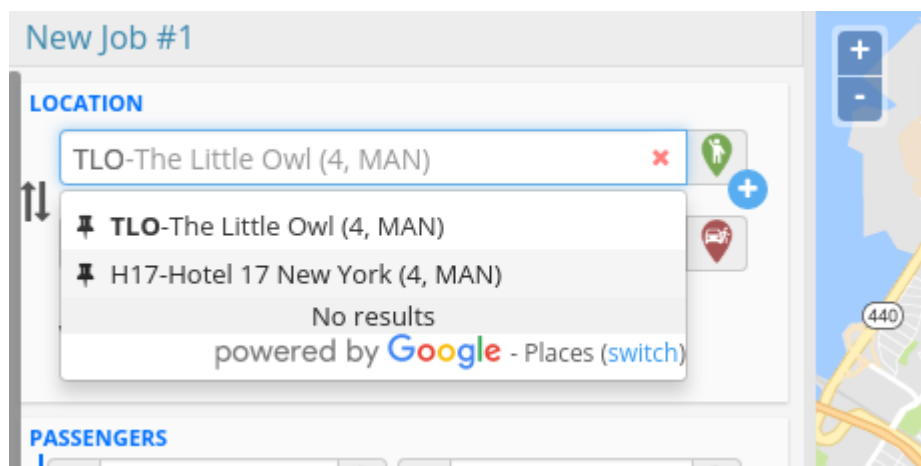
Using Points of Interest (POIs)

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**.

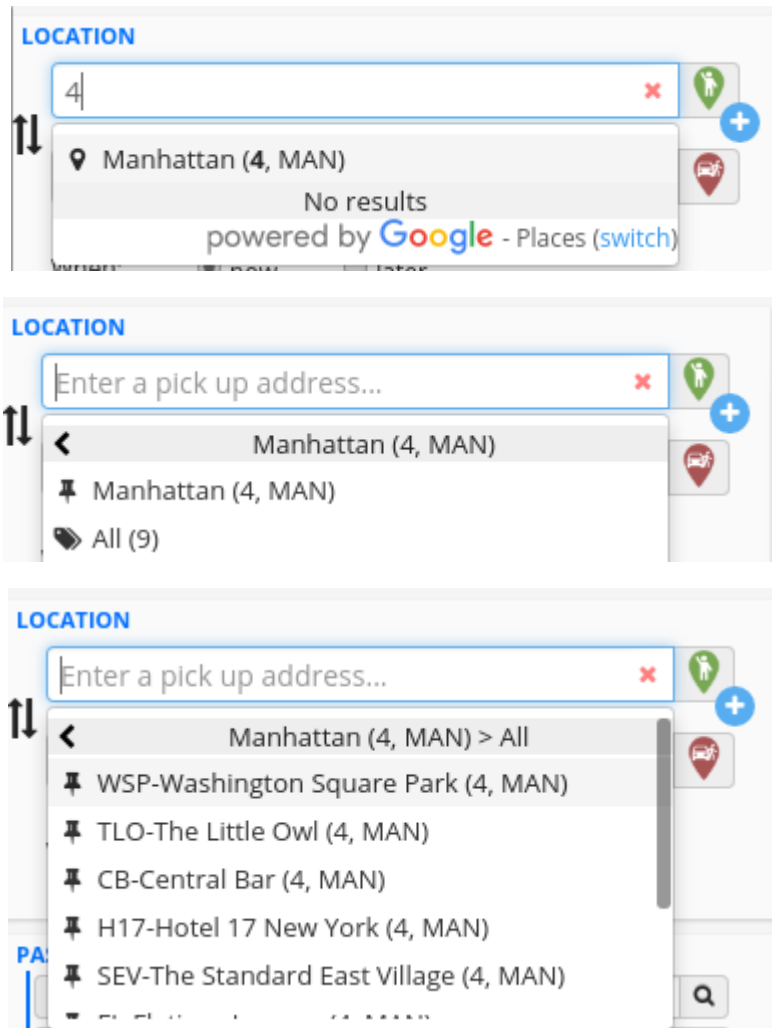


But you may have certain places that are popular pick up or drop off locations that might not be indexed in Google Maps, such as local restaurants or businesses. Adding POIs can solve this and simplify the booking process for dispatchers. This feature allows you to use these POIs just like you would 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 Owl**, 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 **All** 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).

Unassigned (2)			Assigned (0)			Active (1)		
when	1/16 11:09 am	ASAP	client					
from	Mjärdevi Center, Teknikringen 10, 583 30 Linköping, Sweden							
to	I-huset, 583 30 Linköping, Sweden							
info								
route	7 minutes, 3 km							
when	1/16 11:10 am		client	CocaCola 111				5€
from	Malmslättsvägen, Linköping, Sweden							
to	Södra Vägen 8A, 582 45 Linköping, Sweden							
info								
route	7 minutes, 2 km							

* 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 [Priority section of this article](#). 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.

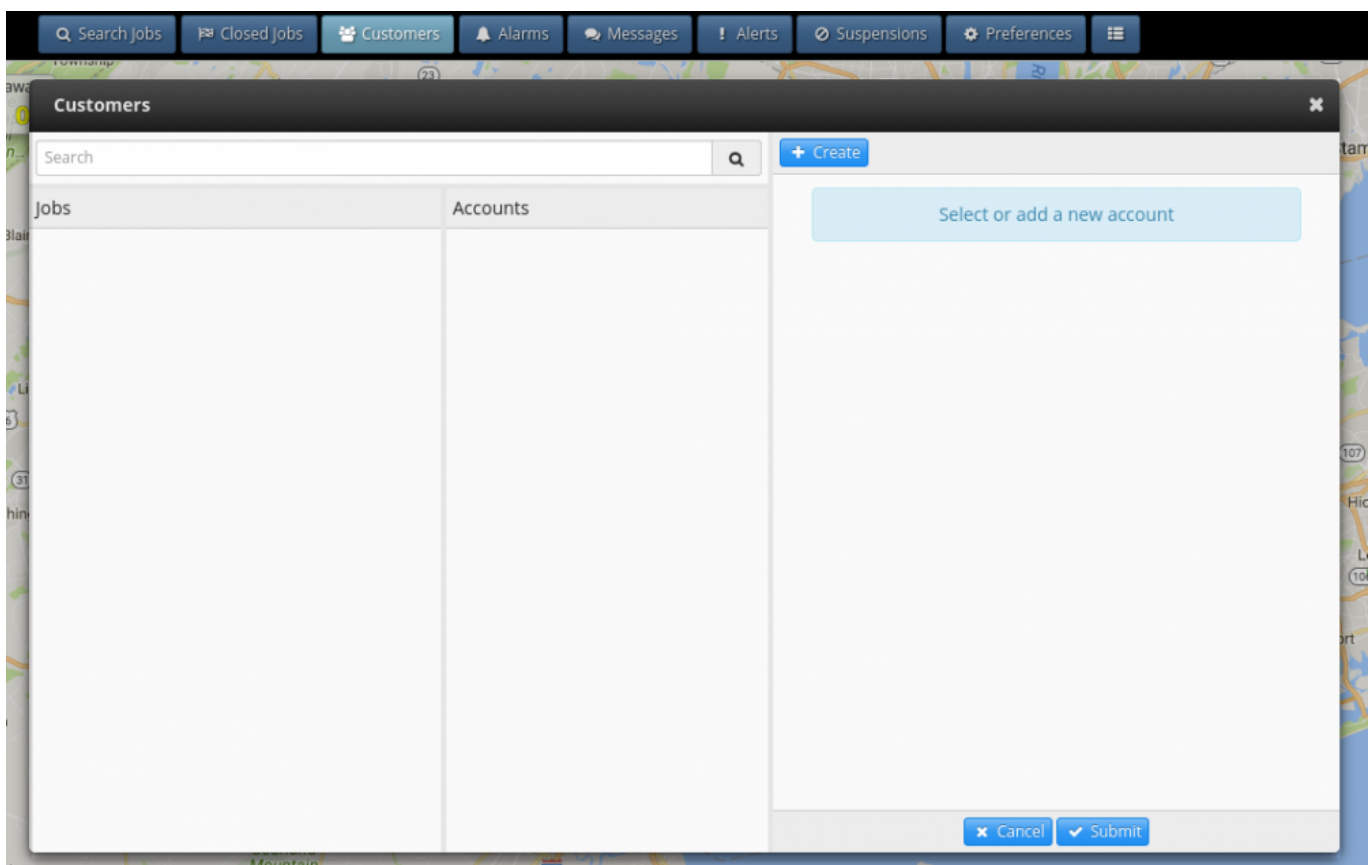
Using customer accounts

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 [from the Admin Panel](#) 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.

The screenshot shows a 'Create' form for a customer account. At the top left is a blue '+ Create' button. The form is organized into several sections: 'Customer:' with a text input; 'Type:' with a dropdown menu showing 'Personal'; 'Account id:' with a text input showing 'Automatic'; 'Phone:' with a text input; 'First Name:' with a text input showing 'Peter'; 'Last Name:' with a text input showing 'Smith'; 'Address:' with a text input showing '56 Washington St.'; 'Info:' with a large text area; 'Options:' with a checked 'Active' checkbox; 'Payment:' with a dropdown menu showing 'direct'; 'Company discount (%)' and 'Driver discount (%)' with text inputs both showing '0'; 'Account is bookable:' with a dropdown menu showing 'forever'; 'Default tags:' with checkboxes for 'Non-smoking', 'Pet-friendly', 'Large trunk', 'Eco-friendly', 'Female', 'Male', 'AM Shift', and 'PM Shift'; and 'Places' with a section titled 'Home' and a text input. At the bottom right of the form is a blue '+ From Pickup' button. At the very bottom are two buttons: a blue 'x Cancel' button and a blue '✓ Submit' button.

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 [creating a new job](#) in the system for this customer, choosing the pick up and drop off addresses as usual.
2. 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.

New Job #1

LOCATION

JFK Airport (2, JFK)   





↕





ESB-Empire State Building (4, MAN)  


Route: **41** minutes, **17** mi . Zone: **2** JFK → **4** MAN

When: ☒ now ☐ later

PASSENGERS

 Peter   +46739034084 

 # 1612021   E-mail 

Payment methods: 




Name: Smith, Peter

Phone: +46739034084



3. Proceed to Edit the account as explained in the [previous section](#).
4. Click on the **Add preset job** button. The information from the new job will be added automatically as a Preset Job.

New Job #1

LOCATION

JFK Airport (2, JFK)   





↕





ESB-Empire State Building (4, MAN)  


Route: **41** minutes, **17** mi . Zone: **2** JFK → **4** MAN

When: ☒ now ☐ later

PASSENGERS

 Peter Smith   +46739034084 





 # 1612021   E-mail 

Payment methods: 

Name: Smith, Peter

Phone: +46739034084

JOB INFO

 1  0  0  1

Vehicle type: Not specified ▼

Info (all):

Info (Driver):

EXTRAS

Assign to: Automatic ▼

Company: Automatic ▼

Tariff: Automatic ▼


Duration: From route ▼

Priority: Automatic ▼

☒ Non-smoking ☒ Pet-friendly ☒ Large trunk

☒ Eco-friendly ☐ Female ☐ Male ☐ AM Shift

Customers

Peter 


Jobs

Please enter a more specific search query

Accounts

1612021
Smith, Peter
+46739034084

Create

1612021  +46739034084

First Name: Peter Last Name: Smith

Address: 56 Washington St.

Info:

Options: ☒ Active Payment: direct ▼

Company discount (%): 0

Driver discount (%): 0

Created: 12/2/2016


Account is bookable: forever ▼


Default tags:

☒ Non-smoking ☒ Pet-friendly ☒ Large trunk ☒ Eco-friendly

☐ Female ☐ Male ☐ AM Shift ☐ PM Shift

Places



Home  From Pickup



Work  From Pickup

from JFK Airport (2, JFK)

to ESB-Empire State Building (4, MAN)

route: 41 minutes, 17 mi

 Add preset job  Remove preset job

 Cancel  Update

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.

The screenshot displays the 'Create' job form in the TaxiCaller Dispatch Console. At the top, a blue '+ Create' button is visible. The form contains several input fields and sections:

- Customer Information:** Name 'Peter' and 'Smith' in separate fields.
- Address:** A text field containing '56 Washington St.'
- Info:** A large empty text area.
- Options:** Includes a checked 'Active' checkbox.
- Payment:** A dropdown menu set to 'direct'.
- Discounts:** Input fields for 'Company discount (%)' and 'Driver discount (%)', both set to '0'.
- Created:** A date field showing '12/2/2016'.
- Account is bookable:** A dropdown menu set to 'forever'.
- Default tags:** A collection of checkboxes for 'Non-smoking', 'Pet-friendly', 'Large trunk', 'Eco-friendly', 'Female', 'Male', 'AM Shift', and 'PM Shift'.
- Places:** A section with two rows. The first row is for 'Home' and the second for 'Work'. Each row has a text input field and a blue '+ From Pickup' button.
- Preset Job Selection:** A table showing two saved preset jobs. The second job is highlighted with a mouse cursor.

from	JFK Airport (2, JFK)
to	ESB-Empire State Building (4, MAN)
route:	41 minutes, 17 mi
from	Central Park Zoo, New York, NY, United States
to	Liberty State Park, Jersey City, NJ, United States
route:	42 minutes, 10 mi

At the bottom of the form, there are two blue buttons: '< Use' and 'Edit'.

- * 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 for your customers: Home, work

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.

The screenshot shows the 'Customers' management interface. On the left, there's a search bar (1) with 'peter' entered. Below it, a list of accounts (2) shows 'Smith, Peter' with ID '1612021' and phone '+46739034084'. On the right, the customer's profile is displayed, including personal details, address, and various options. At the bottom of the profile, under the 'Places' section, the 'Home' address is listed, and a circled '3' highlights the 'Edit' button.



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

New Job #1

LOCATION

555 51st St, Brooklyn, NY 11220, USA   

↕

Enter a drop off address...  

Route: Incomplete . Zone: **5** BRK → -

When: ☒ now ☐ later


- 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.

Places

Home

555 51st St, Brooklyn, NY 11220, USA 

Work



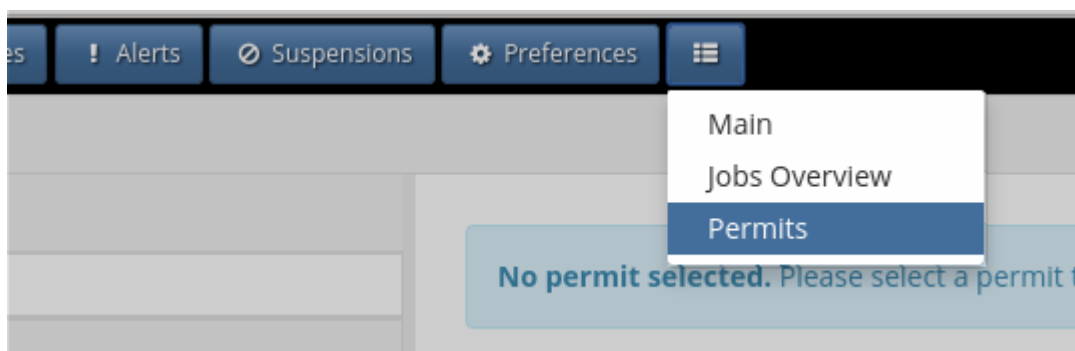
* This setting is especially useful if you use our IVR system. For more information about this please check the following article: [Configure the IVR](#)

Managing Drivers: Permits, Suspensions

- [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**.

⚙ Permit Management

👍 Driver Permits

👍 Vehicle Permits

⌚ Pending Permits

✖ Rejected Permits

Subject	Permit	Validity
Anderson, John	Driver License	Until 03/29/2017


⬅

➡

🔄 Refresh

1 - 1 of 1

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.


Driver License JOHN ANDERSON.pdf

Subject: Anderson, John

Permit: Driver License

Validity: Until 03/29/2017

Status: Pending approval

Comment:



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

Driver and vehicle Suspensions

Check if any drivers are suspended

To do this simply click on the **Suspensions** button at the top of the screen. You will see a panel that lists the suspensions, the start and end date/time, the reason for the suspension and which vehicle was involved. A suspended driver will not be able to start a shift.

Driver Suspensions				
Driver	Start	End	Reason	Vehicle
Jason Hall	5/3 5:28 am	5/3 6:28 am	Exceeded time o...	8, Car 8

- ✿ To remove a suspension, simply click on the x in the row corresponding to the driver.

Suspend a driver

- Bring up the **vehicle details** panel by clicking on the vehicle number in the vehicle list or the zone queues section.

- You will see a red button **Suspend driver**. When you click on it you will be able to determine the duration of the suspension and write a comment if an explanation is necessary.
- Click on the **Suspend** button to make this effective.

The screenshot shows a web interface for managing a vehicle. At the top, a dark header bar contains the text "Vehicle Car 26" and a close button (X). Below the header, on the left, is a yellow car icon, followed by the text "26, Car 26" and "driver 27". Below this, it says "Last Updated: 05:29:11" and "0 mph". To the right of this information is a "VEHICLE DETAILS" section with the following text: "Capacity: 4", "Make: Ford", "Type: Sedan", "Color: Yellow", and "License Plate: xxx986". Below the vehicle details, there is a "Vehicle Suspended:" section with a dropdown menu set to "Yes", and "Cancel" and "Apply" buttons. Below this is a "Suspend driver" section with a "Duration:" dropdown menu set to "4 hours" and a "Reason:" text input field containing the text "Exceeded shift time yesterday.". Below the text input field are "Suspend" and "Cancel" buttons. At the bottom of the interface, there is a "Message to vehicle" text input field with a "Send" button to its right. Below the message field are four buttons: "Find Vehicle", "Kick", "Queue Position" (with a small upward arrow), and "Show Routes" (with a checkbox).

Suspend a vehicle

- Bring up the **vehicle details** panel by clicking on the vehicle number in the vehicle list or the zone queues section.
- Find the text "Vehicle Suspended" and click on **Change**.
- Change it to a **Yes** and click on **Apply**.

Vehicle Car 13



13, Car 13
Dave Garcia
Last Updated: 05:29:52 🌐 2 mph 📍 ?

Vehicle Suspended:

zone: 5 Brooklyn, since: 1:03:42 am (4h 26min)

Shift Finish: 8:35 am


Message to vehicle

☐ Show Routes

VEHICLE DETAILS

Capacity: 6
Make: Lincoln
Type: Limousine
Color: Black
License Plate: xxx000

Vehicle Car 13 (Suspended)


13, Car 13
nobody
Last Updated: - -
Vehicle Suspended: Yes Change
zone: - -, since: -

VEHICLE DETAILS
Capacity: 6
Make: Lincoln
Type: Limousine
Color: Black
License Plate: xxx000

Message to vehicle Send

Find Vehicle Kick Queue Position ☐ Show Routes

“Kick” a driver out

If you wish to have a driver out of a certain vehicle profile (for example if you wish to have a different user in it instead), you can simply **kick** a driver out without needing to suspend them. The driver will be signed out of their current shift. They are still able to start a new shift with a different vehicle.

You can find the Kick button at the bottom of the **vehicle details** panel.

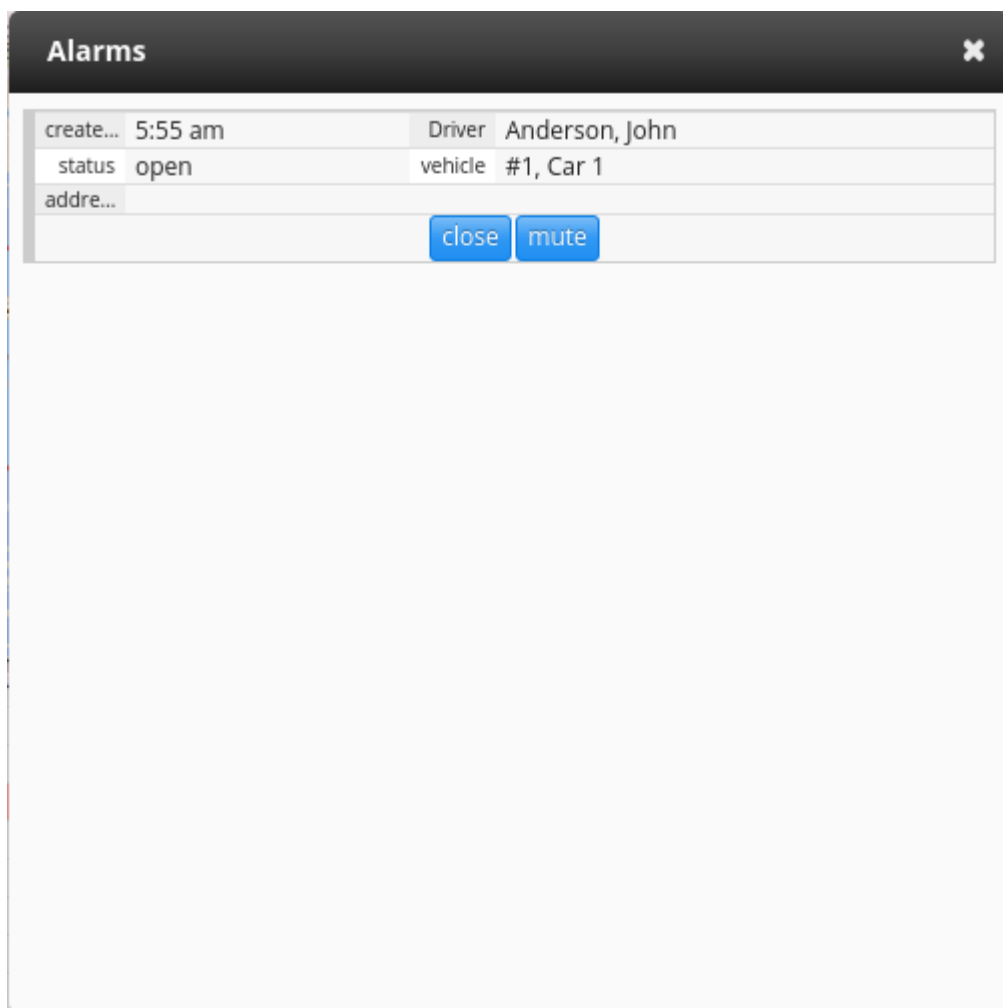
* If you don't see a **kick** button, it means this option was disabled from the Admin Panel.

Alarms and Alerts

Alarms

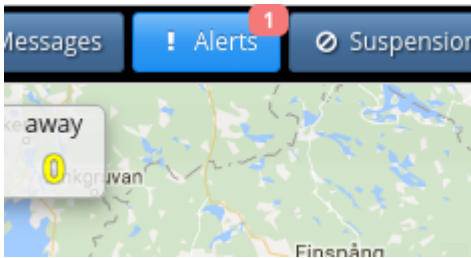
This feature exists for the safety of the driver and allows them to discreetly and silently send a signal to the dispatcher. [When they press the alarm button on the Driver App](#)

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



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.



Alerts

All alerts

no show

5/3 6:01:49 am

when:	5/3 6:01 am ASAP	client:	
from	Västanågatan 18, 582 35 Linköping, Sweden		
to			
vehicle:	1, Car 1	Driver:	John Anderson

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 VoIP 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.

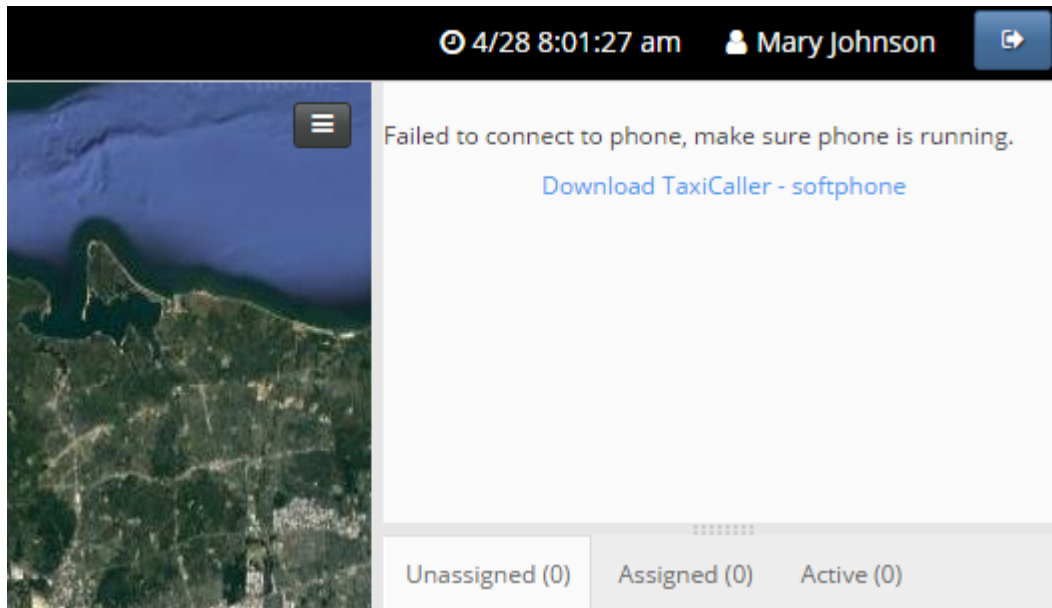
This needs to be done from the Admin Panel – Users. Select your dispatch user and make sure “Enable phone” is checked. At this point you might also want to add other information provided by your VoIP such as User, Domain, Port and others. This information will be automatically transferred to the Softphone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



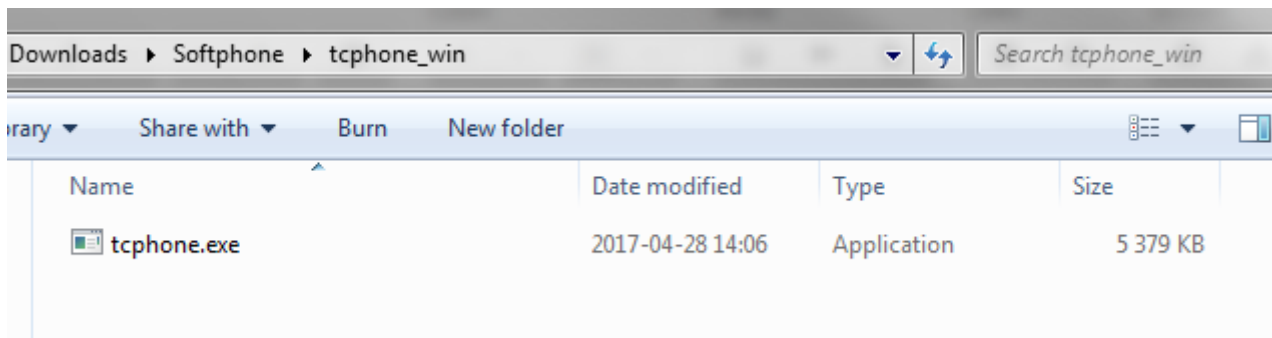
For more information about the [SIP Phone options that you can configure from the Admin Panel](#), please [click here](#).

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.

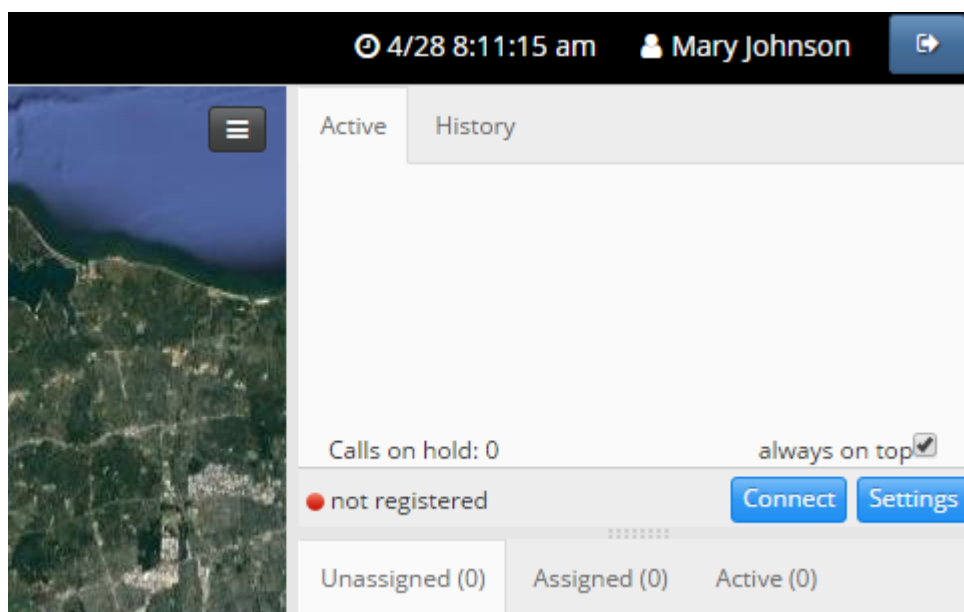
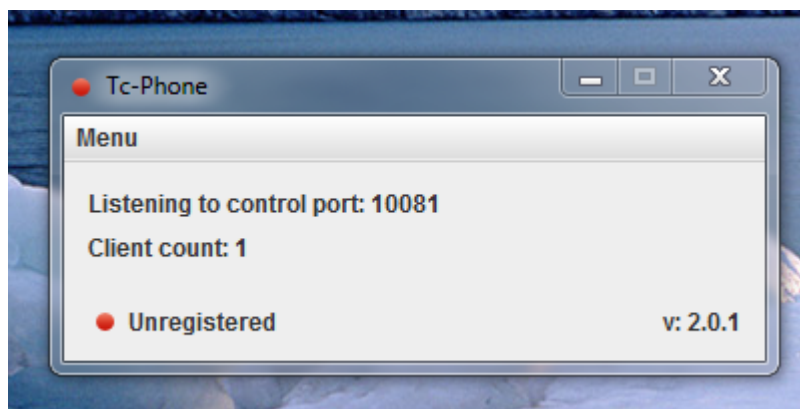


Click on **Download TaxiCaller – softphone**. A new page will open which has the program that you need to install. Select the Windows version and wait until it's downloaded. The file will be compressed in .zip format, so you must extract it to an accessible location. To do this, you can simply right-click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



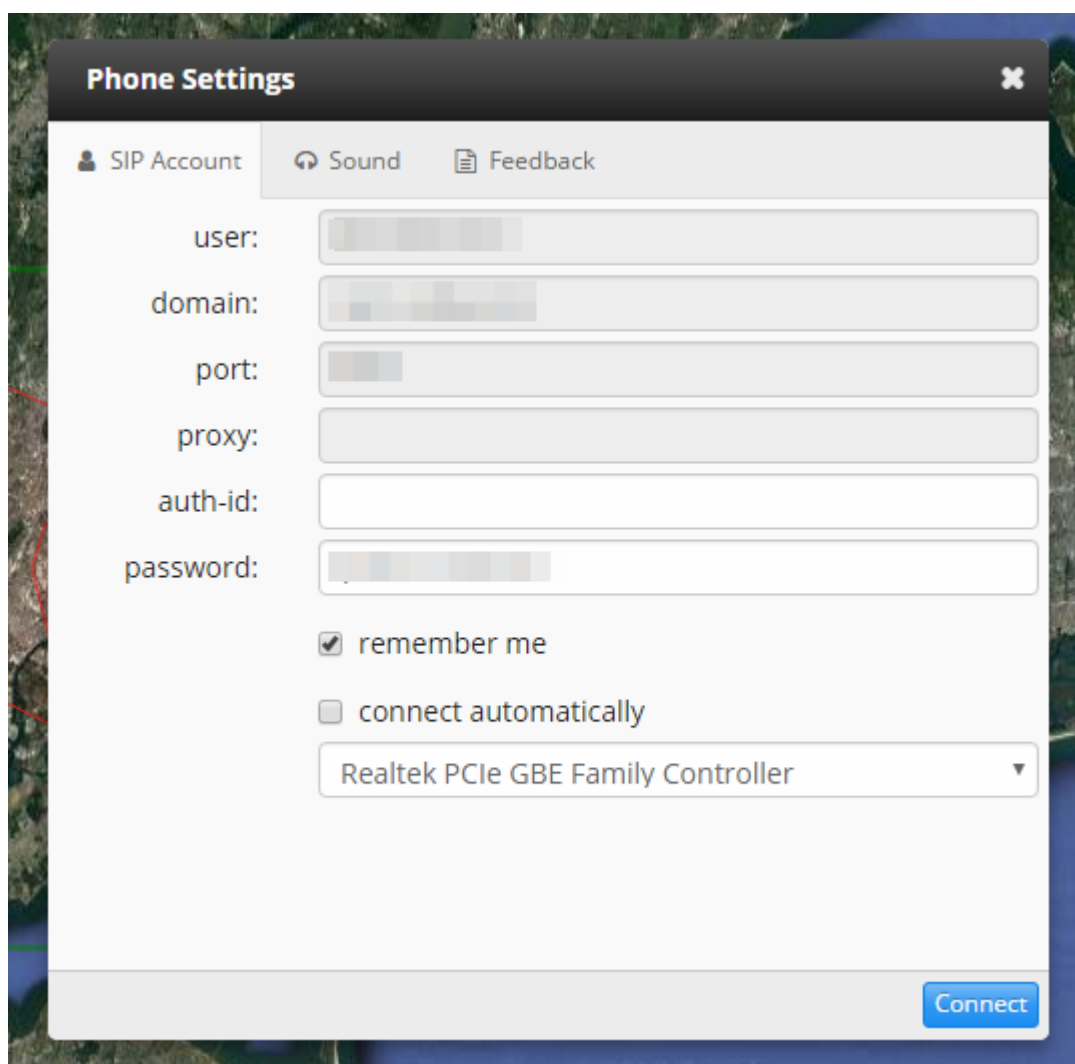
! At the moment Linux and iOS systems are not supported.

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 successfully, it will reflect this in the Dispatch console as well.

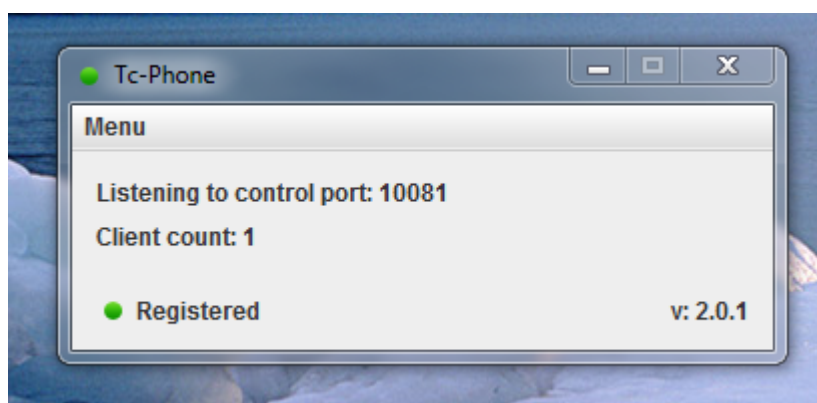


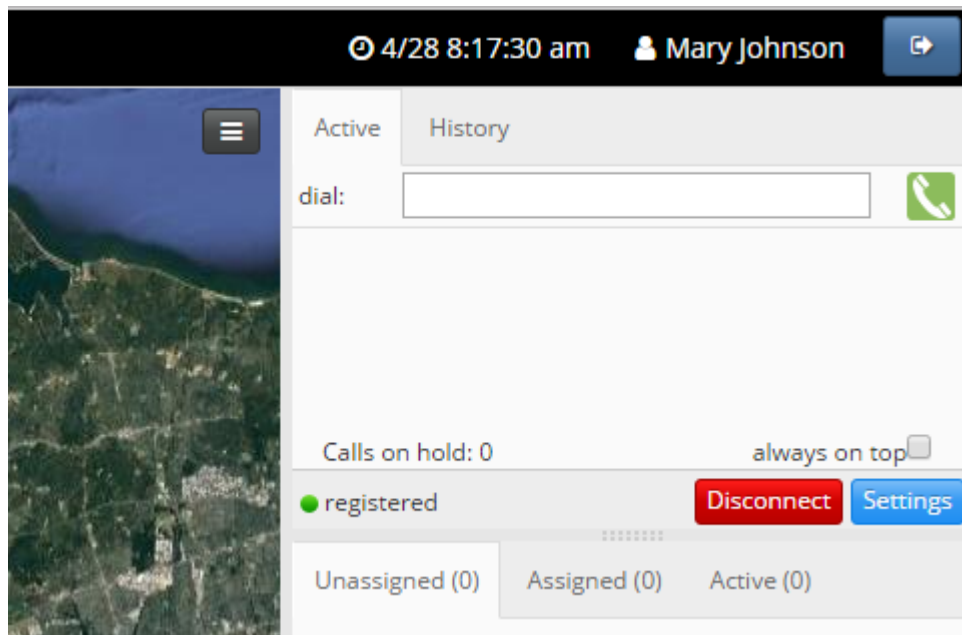
Set up the Softphone

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

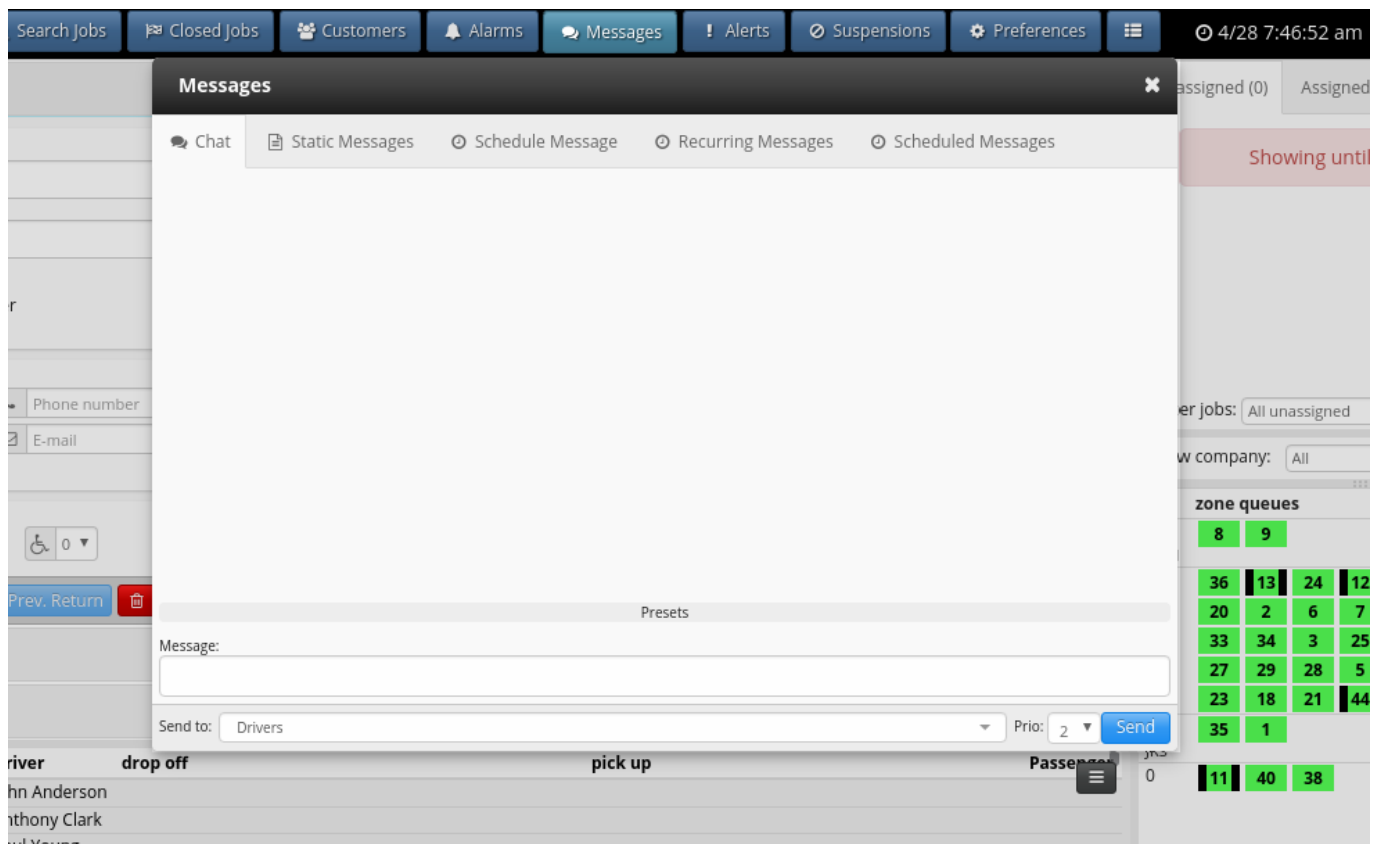
While you can choose any provider that suits your needs, we can recommend those providers that we have already worked with. Please remember that some of these providers are only supported in some countries, if the one you're interested in is not listed, you'll need to contact a provider in your area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

Company	Countries supported	Website
VoIPstudio	USA, UK, others	http://voipstudio.com/en/
RingCentral	USA, UK, Canada	http://www.ringcentral.com/
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/

Send and receive messages

Chat

You can exchange instant messages between Dispatch and the drivers. To do this, click on the **Messages** button at the top of the Dispatch screen, which will bring up the **Messages** window. In the first tab, **Chat**, you can send two types of messages, namely Preset messages (instantly send with one click) and Custom messages (writing your own message).



* Preset messages can be configured from the [Admin panel – Messages – Settings](#).

The messages can be sent to:

- **Drivers:** All drivers but not other dispatchers.
- **Dispatch:** All dispatchers but not drivers.
- **All:** Both drivers and dispatchers.
- Individual drivers.

Using the priority system.

On the bottom right of the message window you will see the Prio setting. This will determine the importance of the messages that are sent out.

Prio 0: Is the lowest priority. Will send the message and generate a small visual notification in the Driver App but will not make any sound or create any pop ups.

Prio 1: Will generate a small visual notification and make an alert sound upon receiving the message in the Driver app.

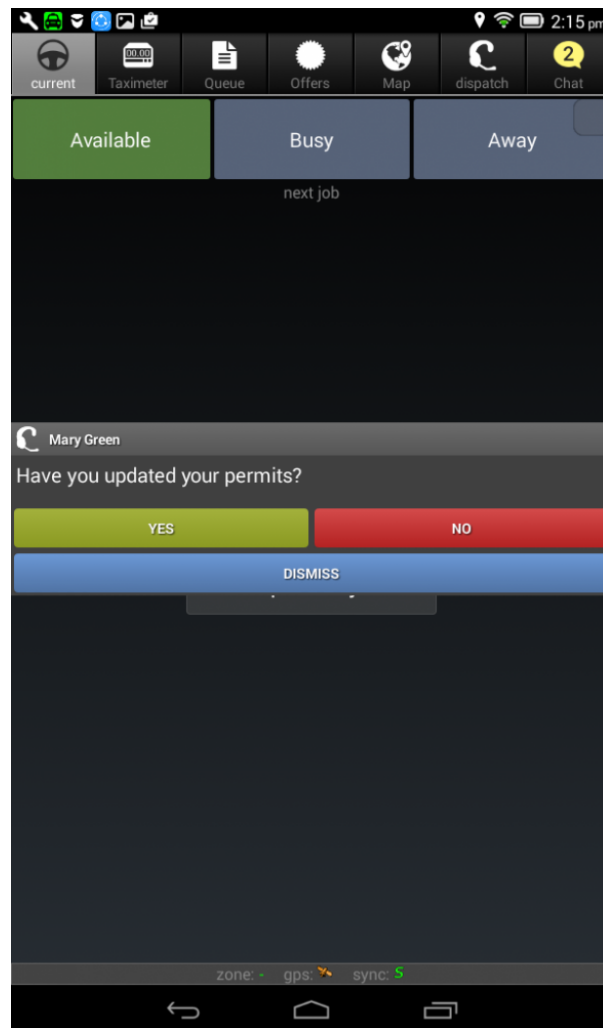
Prio 2, 3, 4: Highest priority. It will generate a pop up in the Driver app along with an alert sound.

Sending Yes/No questions.

The system will interpret any message that ends with a question mark (?) as a Yes/No question upon reception. You will be able to see who answered Yes or No.

Mary Green		4/28 8:15:23 am
Have you updated your permits?		
(0)	(1)	
John Anderson [1]		4/28 8:20:11 am

Once the question is sent, the driver will see the following:



Set a log in message for drivers

You can set a message that the drivers will see as soon as they log in. To do this, click on the **Static Messages** tab, and the **Edit** button at the bottom of the panel.

Messages

Chat

Static Messages

Schedule Message

Recurring Messages

Scheduled Messages

login message

Make sure to renew your permits for this year.

update

Cancel

Write your login message and click on **Update**.

Schedule a message

Use the third tab “Schedule Message” to set a message to be sent at a specific date. You can even have it repeating and configure how often (recurring message). As usual, you can determine which users to send it to (drivers, dispatchers or both), and select the priority level.

Messages

Chat Static Messages Schedule Message Recurring Messages Scheduled Messages

Message:

Happy Monday!

From:

Mary Green

Duration (minutes):

15

Send to:

Drivers

When:

15 45 04/28/17

Priority:

2

☐ Non-smoking ☐ Pet-friendly ☐ Large trunk ☐ Eco-friendly

☐ Female ☐ Male ☐ AM Shift ☐ PM Shift

☒ Repeat

until:

26/06/2017

weeks:

All

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

Send

The **Duration** determines how long the message will be visible for any driver that logs in during that time.

You will be able to see the messages you have Scheduled in the **Scheduled Messages** tab. Any messages that are set to Repeat can be found in the **Recurring Messages** tab.

Page 50 of 56

Messages

Chat

Static Messages

Schedule Message

Recurring Messages

Scheduled Messages

04/28/2017 3:45 pm	06/26/2017 3:45 pm	10	15min	
Mary Green	Happy Monday!			

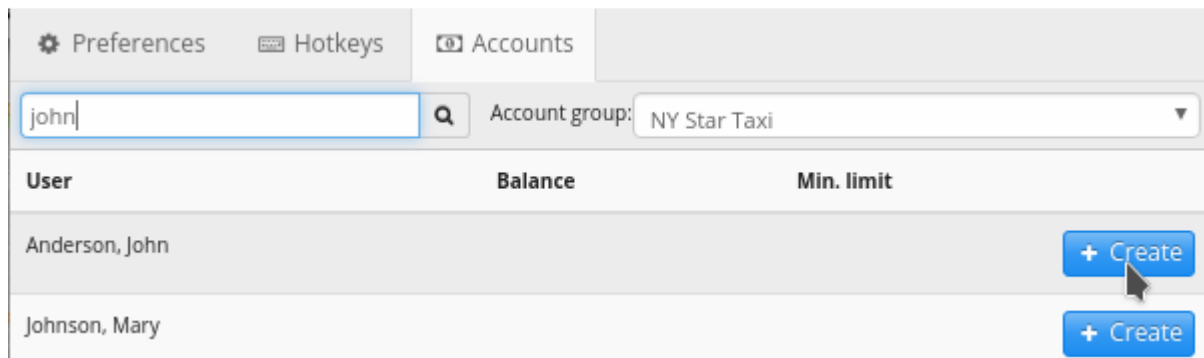
Refresh

Automatic accounting and driver balance

- * 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>

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**.



User	Balance	Min. limit
Anderson, John		
Johnson, Mary		

- * 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.

Account ✕

NY Star Taxi : Anderson, John

Id	10080
Name	grp: 107, user-45731
Balance	USD 0.00
Min. Limit	USD 0.00

Message

Transfer funds: USD Submit

Change your Preferences

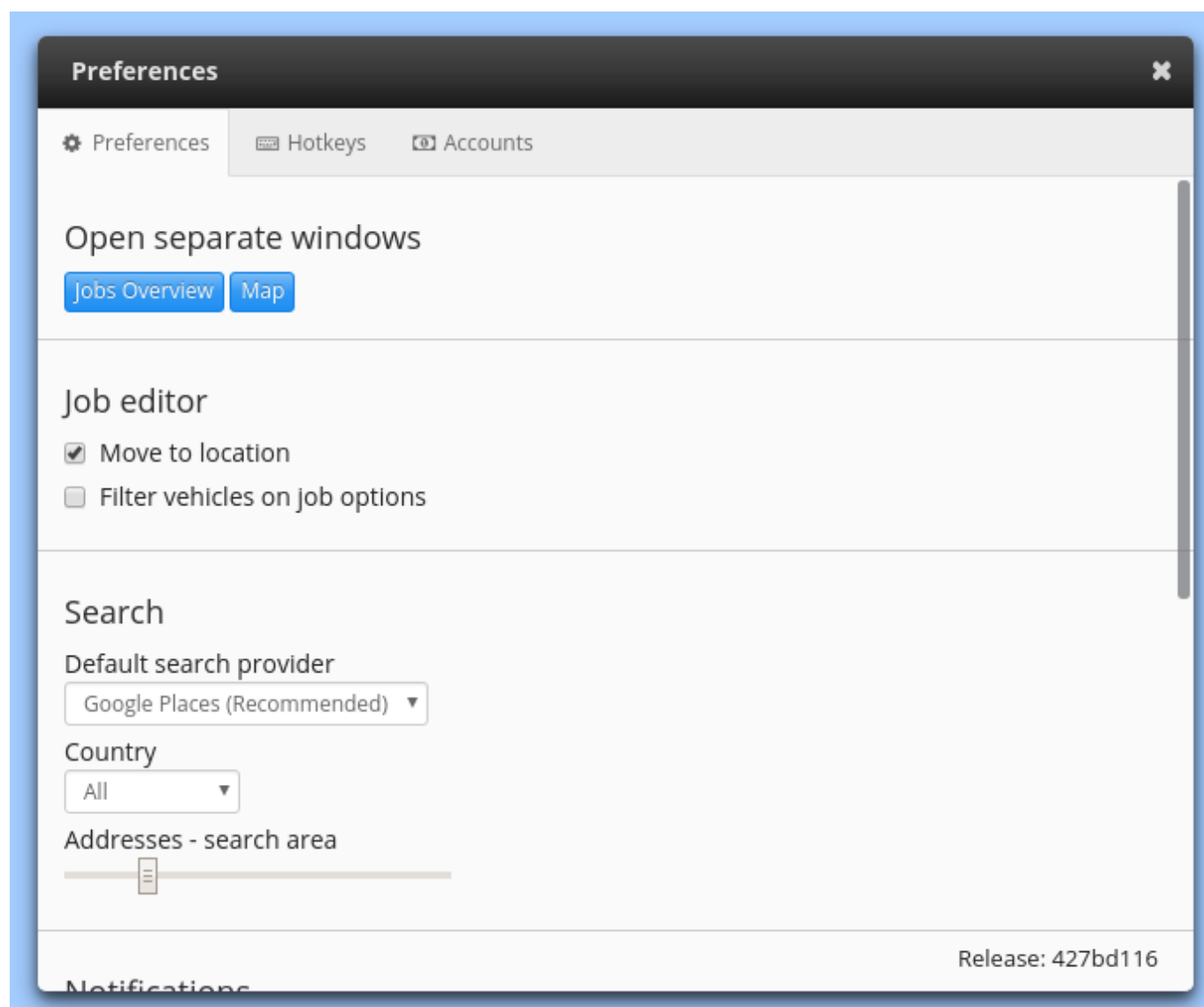
You can customize some aspects of the dispatch by going to the **Preferences** tab.

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 [from the map itself](#).
- 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.

