Special Features

This manual is about all those features in our system that are not part of every day activities but can be of use depending on your needs.

Please see our other manuals:

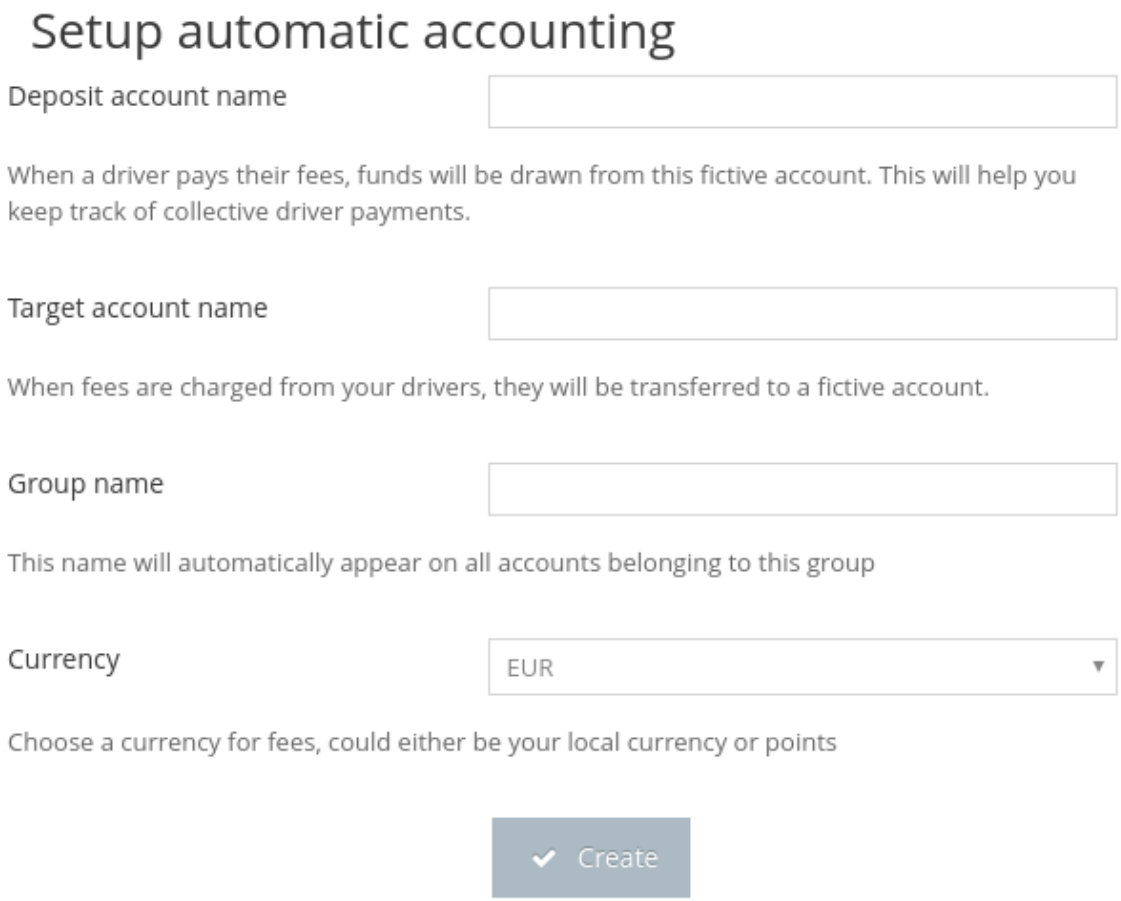
- Admin Panel
- Dispatch Console
- Driver Apps
- Passenger Apps

Automatic Accounting for Drivers

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

1. Set up and Enable the feature

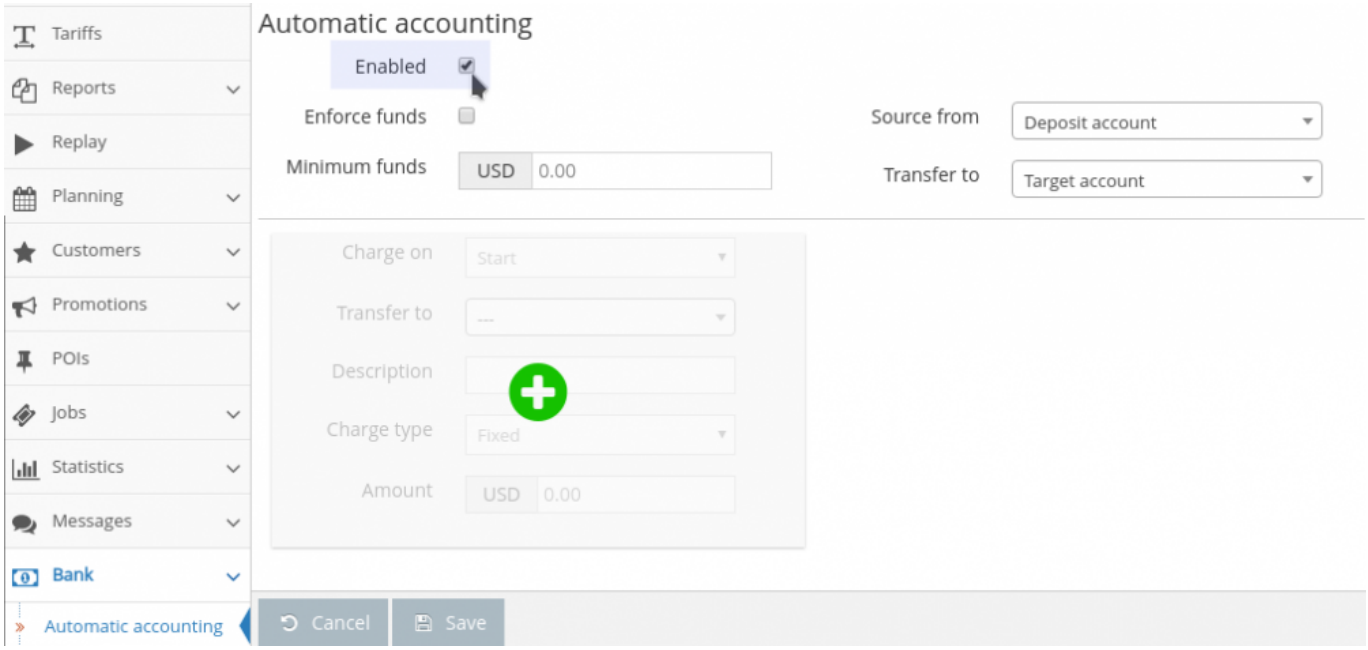
- In the Admin Panel, Go to Bank and Automatic Accounting
- The first time you use this feature, you will be prompted to enter some initial information. **Please make sure to be careful during this initial step, as you won't be able to return to this initial set up after you have created it.**
- Enable the currency that will be used. You can also use Points instead of a currency.
- Click on **Create.**



Make sure that you have previously configured your Tariffs section and that the currency used is the same.

- On the next screen, click on Edit and then check **Enabled**
- If you check **Enforce funds** you can set a minimum amount of money or points that a driver needs for a certain task.

Enforce Funds This will only affect **Auto-assign jobs**. This means that a dispatcher can still force-assign a job to a driver that doesn't have enough balance. The driver would also be able to take street jobs.



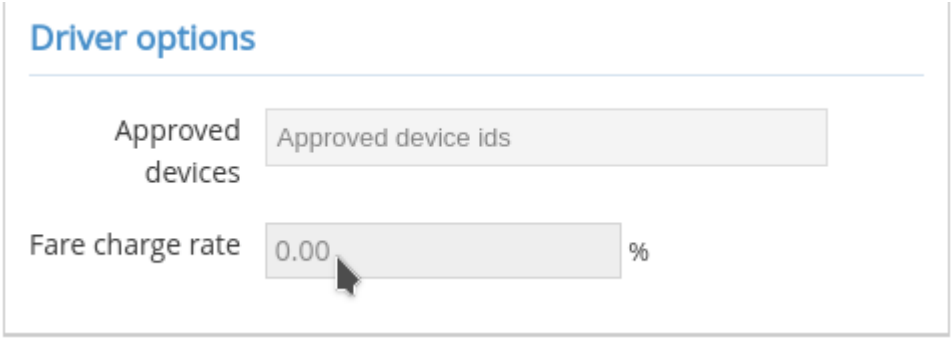
- Click on the green + sign to add a charge. You can add different charges corresponding to each job stage. The 5 different job stages available are: Accept, Start, Reject, Cancel and Deliver.
- Set either a Fixed fare that will apply to all drivers, or a Dynamic fare that can be different for each driver.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

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

2. Set the fare charge rate for each driver.

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

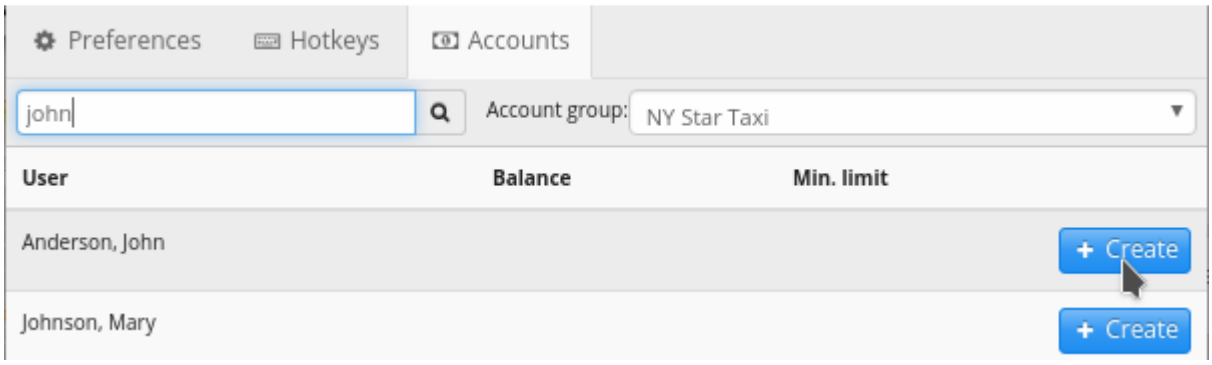
- Go to the Users section in the Admin Panel
- Select a driver and scroll down to the bottom of their profile until you find the **Driver Options**.
- In here you will be able to enter a Fare charge rate in percentage form.



3. Enable the drivers from the Dispatch.

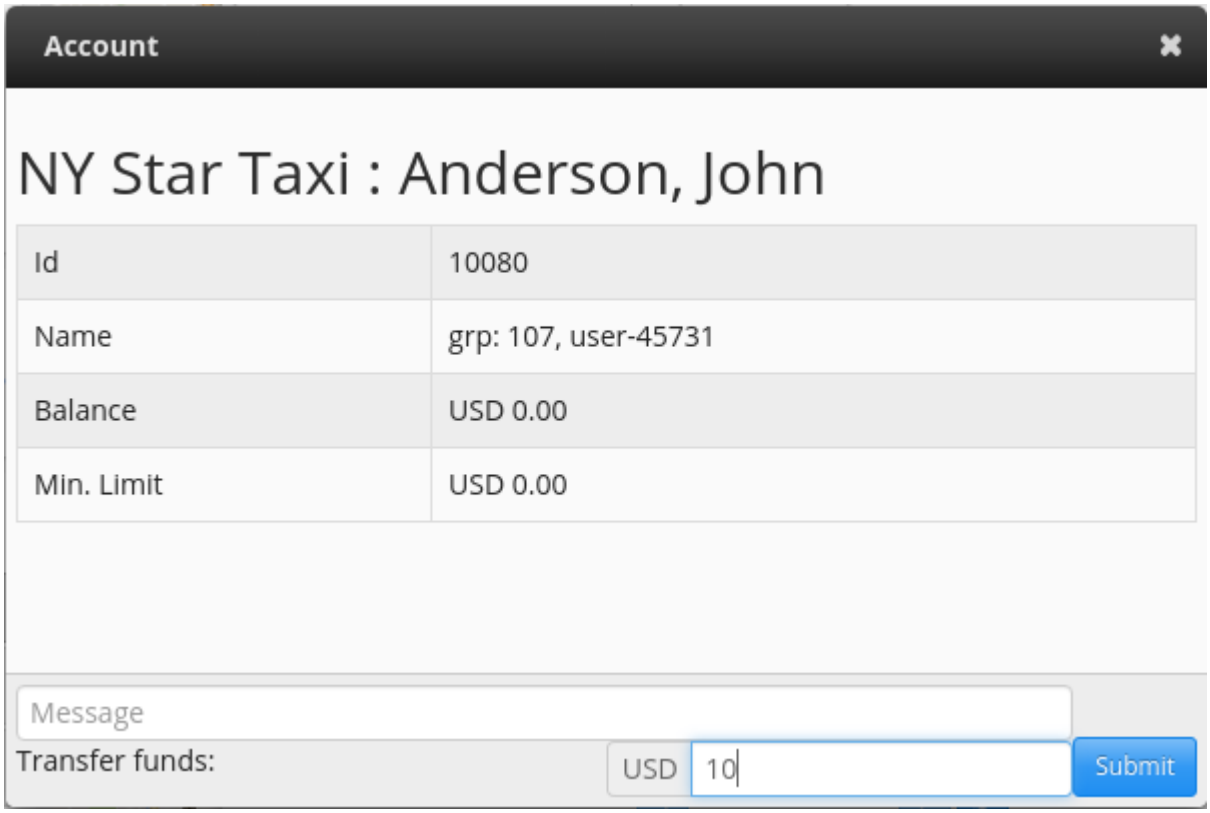
Once you have set up Automatic Accounting in the Admin Panel, it's time to configure this feature in the Dispatch.

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



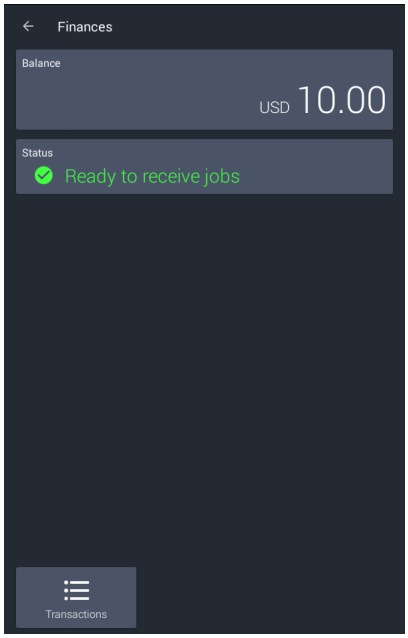
If you don't see an Accounts Tab, you may need to change the permissions from the Admin Panel – Settings – Permissions. Scroll down to **Bank read** and **Bank write** and set the appropriate permission levels.

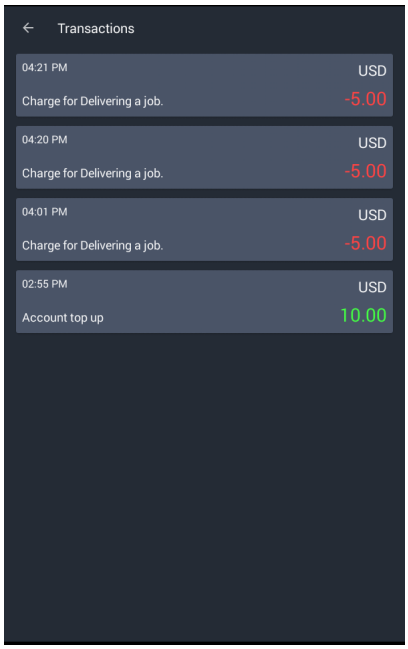
- The Create button will become a Details button. Click on this and you will get a pop up that will allow you to transfer funds to the driver.

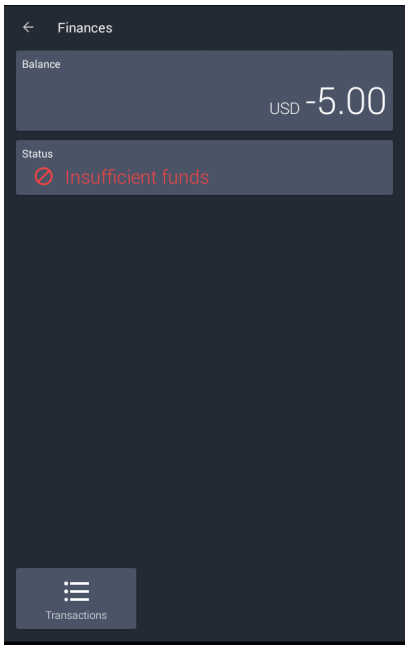


4. How it looks from the Driver App

A driver can access information about automatic accounting by clicking on the Finances button. In this section you can see your balance, check your status and keep track of the transactions that have been made.







In this example, a driver has a balance of USD 10 and they will be charged USD 5 when delivering a passenger. As soon as they complete this action (by taking a job and delivering it), their balance will change and it will be immediately reflected in their **Transactions**. After delivering 3 jobs their balance will turn negative and their Status will change.

Card Payments

Card payments: Stripe

Stripe can be integrated with your TaxiCaller account so that your passengers can choose to pay with card. It will allow them to pre-register a card to their account (or select an already registered one) at the point of booking. At the end of the ride, the driver simply enters the fare which is then charged to the client's card.

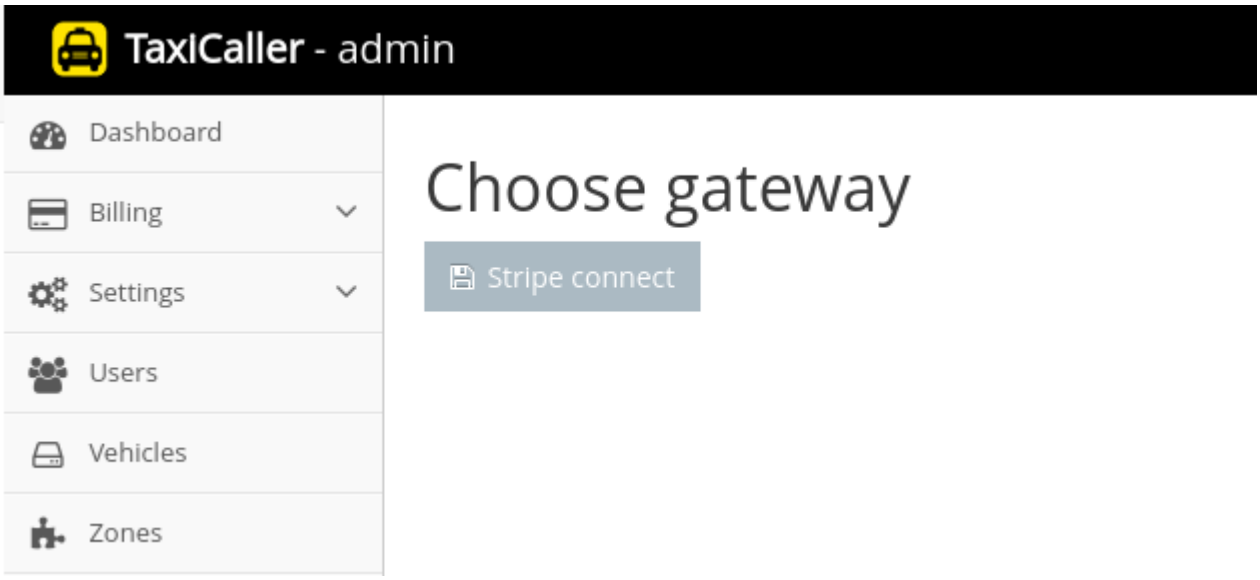
How it works

- Stripe charges a fee per successful transaction. This fee depends on which country you are located on. Please check their website to see which fee applies to you.
- TaxiCaller normally also takes 1% to cover operation costs, but due to a promotion going on at the moment, we don't take any cut the first 3 months of usage. After the promotion, the total fee would be the Stripe fee + the 1% per successful charge.

> You handle and control your account with Stripe fully yourself (their terms and conditions apply), and you simply authorize us to do transactions to your account

Get started today

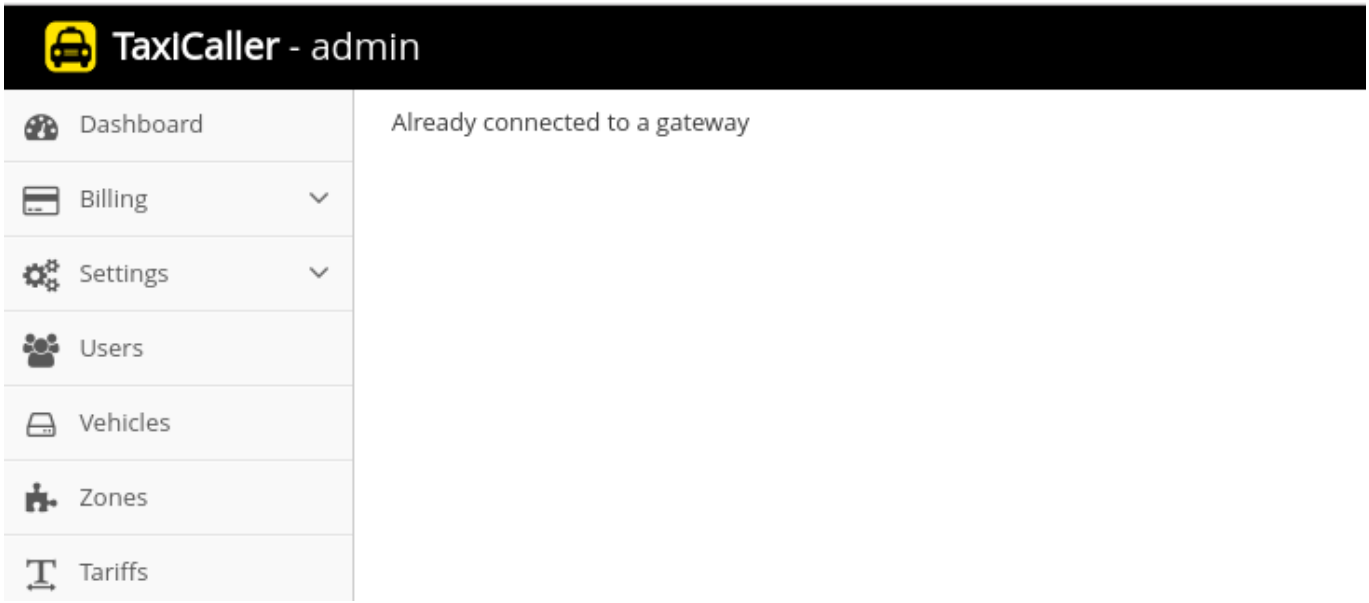
1. Sign up with Stripe through TaxiCaller by clicking here: https://admin.taxicaller.net/admin/cardpay/gateway/connect.php
2. Click on **Stripe connect**



3. Complete the Stripe registration process
4. Once you've registered successfully, click on "Activate account" under **My account** up in the top right corner. In the account activation view, you might be required to enter additional information about your company.

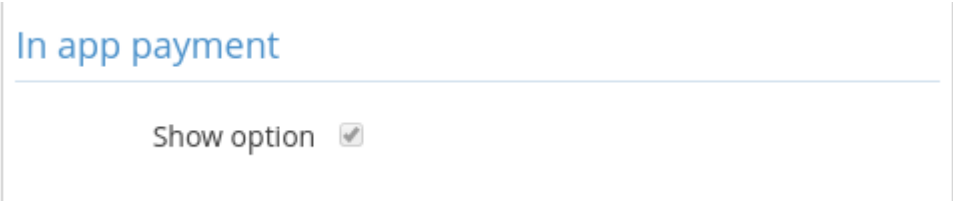
> If you already have a Stripe account, you can follow the steps 1 and 2, and then click on **I already have an account** instead of registering.

Note: If you see the following when you click on the connect link https://admin.taxicaller.net/admin/cardpay/gateway/connect.php, it means that your account is already connected to stripe.



Enable In-App Payments in the Admin Panel

- Make sure that In-App Payments are enabled in the Admin Panel – Settings – Dispatch.



- Make sure that you have set up your Tariffs in the Admin Panel.

After this is set up, your passengers will be able to add a card and use it to pay for their ride as can be seen in the following guide: http://www.manula.com/manuals/taxicaller-nordic-ab/passenger-app/1/en/topic/in-app-payment

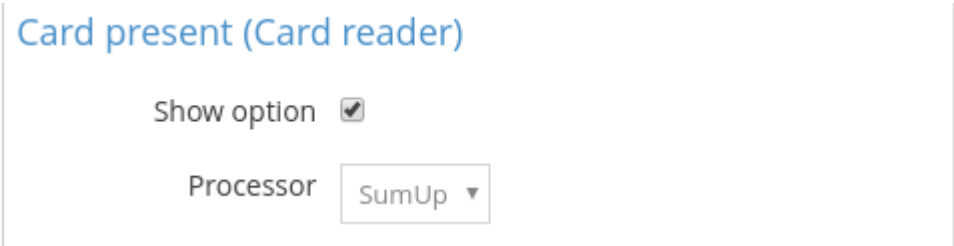
If you have any questions about card payments, please email us at **sales@taxicaller.com**

Card payments: SumUp

To be able to use SumUp with your TaxiCaller account, you just need to register for an account with SumUp and get a card reader from them. After this, you need to configure card present payments in your TaxiCaller account as explained below. SumUp charges by transaction and their pricing depends on which country you are located on. To see which fees apply to you, please check their website.

How to set it up

- Start by going to the Payment options settings in the Admin Panel.
- Check the box for **Show option** under Card present (Card reader).
- Select the processor SumUp from the drop down list.



- Go to your vehicle profile, in the Vehicles section of the Admin Panel.

- Edit your vehicle profile and check the box for **Card reader** under Equipment installed.

Equipment	Installed
Card reader	☑

After having done the above, you will have **Card present** come up as a selectable payment option when closing a job in the driver app. Once you have entered an amount and proceeded from this step, you will be prompted to log in to your SumUp account. Do this and then follow the instructions on the screen to complete the payment.

You can find more information about SumUp on the link to their website here.

> If you have any questions about card payments, please email us at **sales@taxicaller.com**

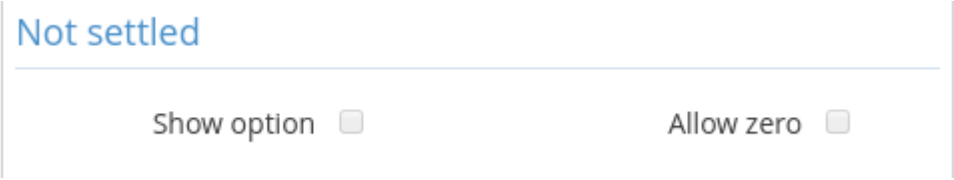
Other card payment solutions

Right now, TaxiCaller offers support for Stripe and SumUp as the main payment options. If these options are not available to you or if you already use a different system, you're welcome to do so and use it alongside TaxiCaller.

While other payment options will not be integrated in our system *per se*, you would be able to use them in **parallel** with TaxiCaller throught he use of the **Not Settled** payment option in the driver app.

How to use:

- In the admin panel, enable the option **Not Settled**. You can find this option in Settings > Dispatch > 1. General > Payment Options.



- Once a ride ends, the driver can choose this payment method **Not Settled** int he driver app.
- They will be prompted to enter the price of the ride and confirm.

By doing this, the ride and its price will automatically show up in the reports you generate in TaxiCaller without having to enter the information manually.

> Please keep in mind that the payment is done entirely through your bank's payment gateway service (outside of TaxiCaller). This is also true of Stripe and SumUp. TaxiCaller only *registers* the value that was paid in order to incorporate it in the reports and job history.

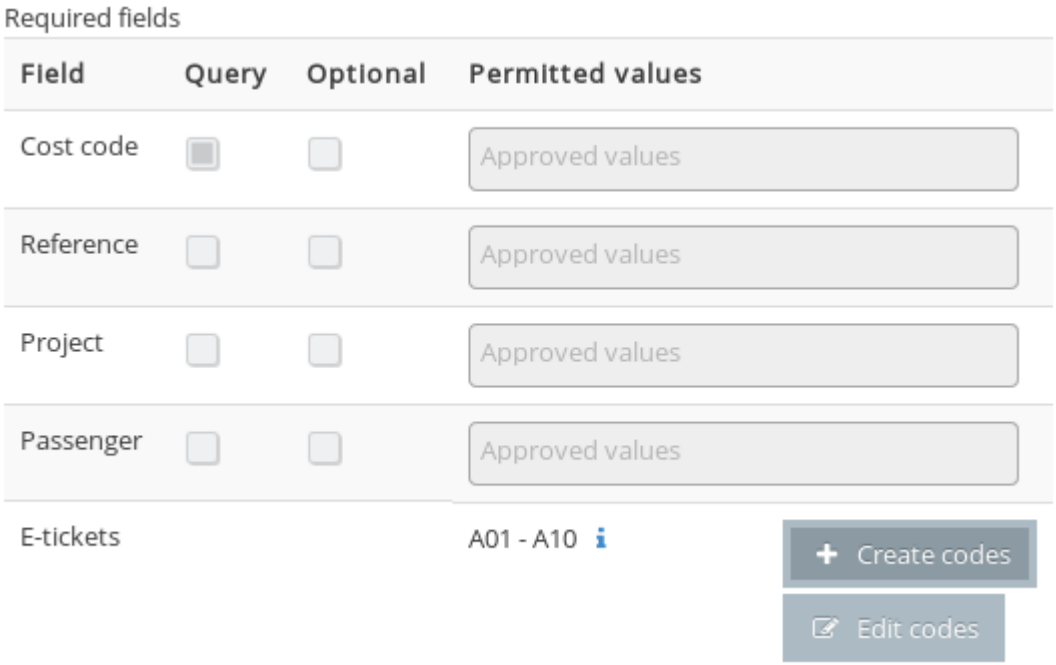
> If you have any questions about card payments, please email us at **sales@taxicaller.com**

e-tickets

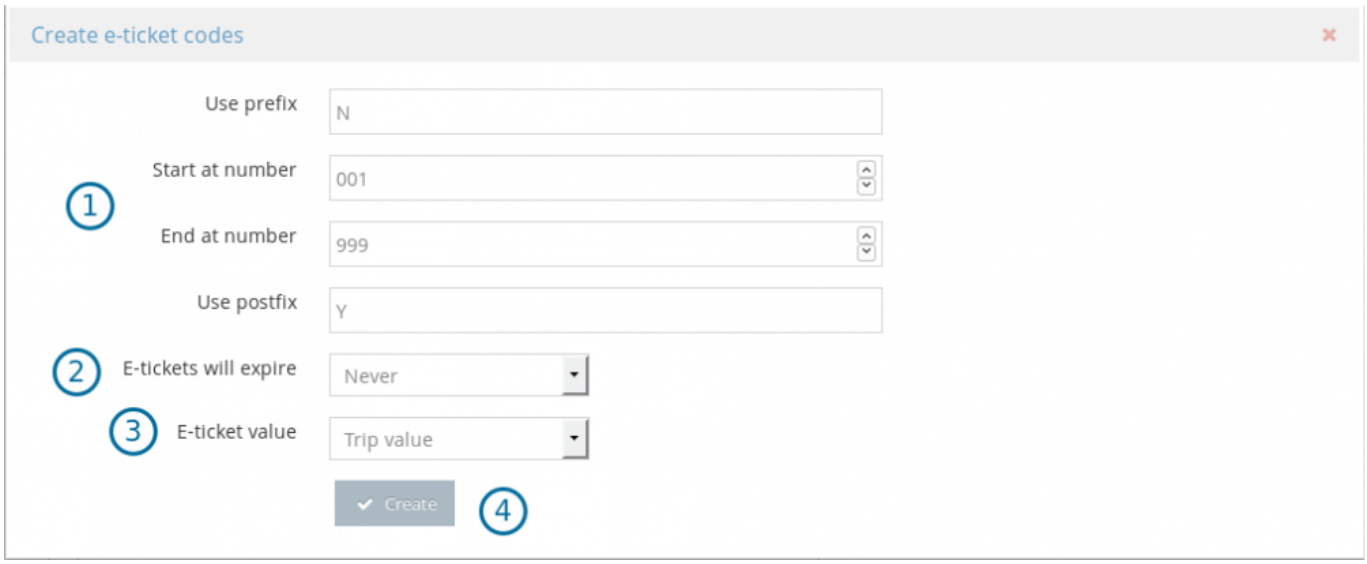
You can create and give away batches of taxi vouchers (e-tickets) for cheaper or free taxi rides to your corporate customers.

Creating e-tickets

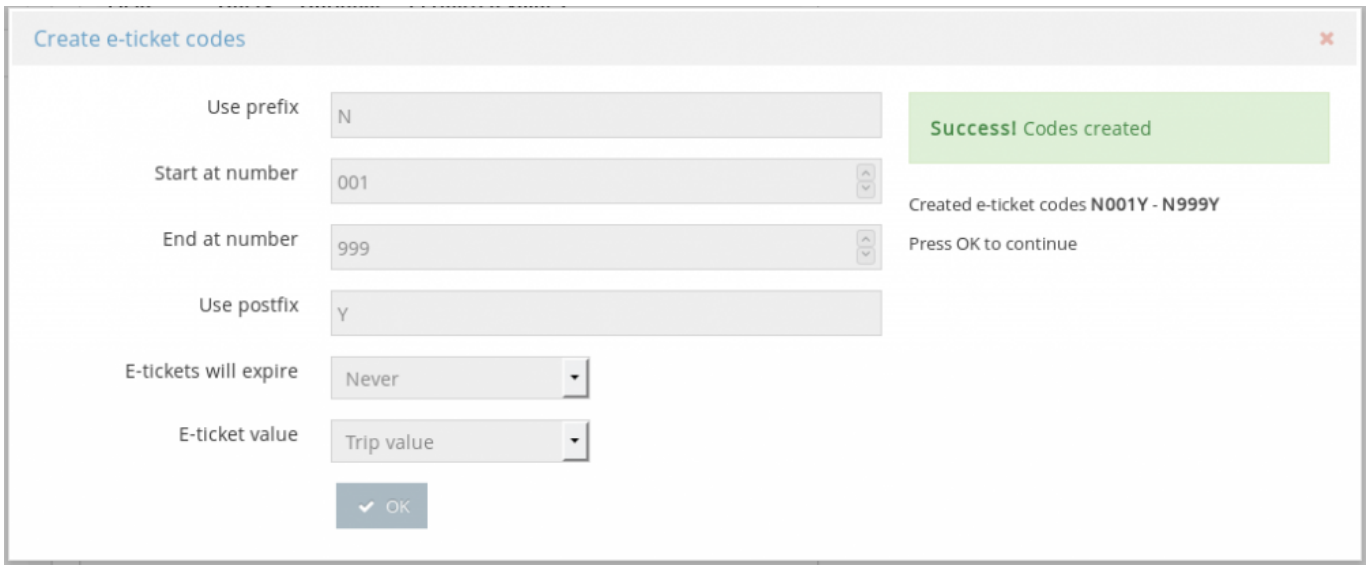
- Go to Customers > Accounts
- Select the account where you wish to enable e-tickets.
- Scroll down until you find the **Required fields** section.



- 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

> ! Make sure the option is valid in Settings > Dispatch under Payment Options.

Using e-tickets from the passenger app

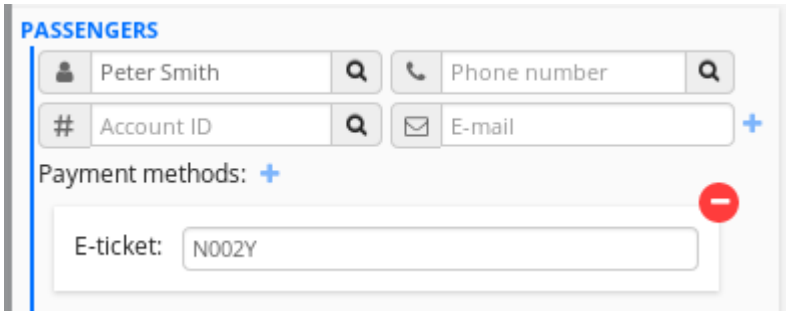
When you book a ride, select **Payment methods** and then **E-tickets**. You can then enter the e-ticket code.

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.

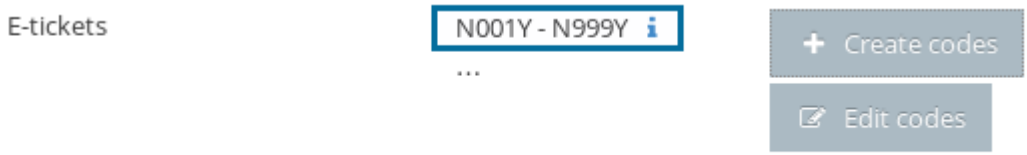
Using e-tickets from dispatch

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.

TaxiCaller Express

Add a kiosk booking channel for businesses to book rides with your company quickly and easily, with no need to call to confirm. One tap on the app and the customer receives a ticket number in receipt of their booking, and the driver receives the job immediately.

Ideal for locations that need fast multiple bookings such as hotels and restaurants.

To use TaxiCaller Express:

Create a company account for your customer.

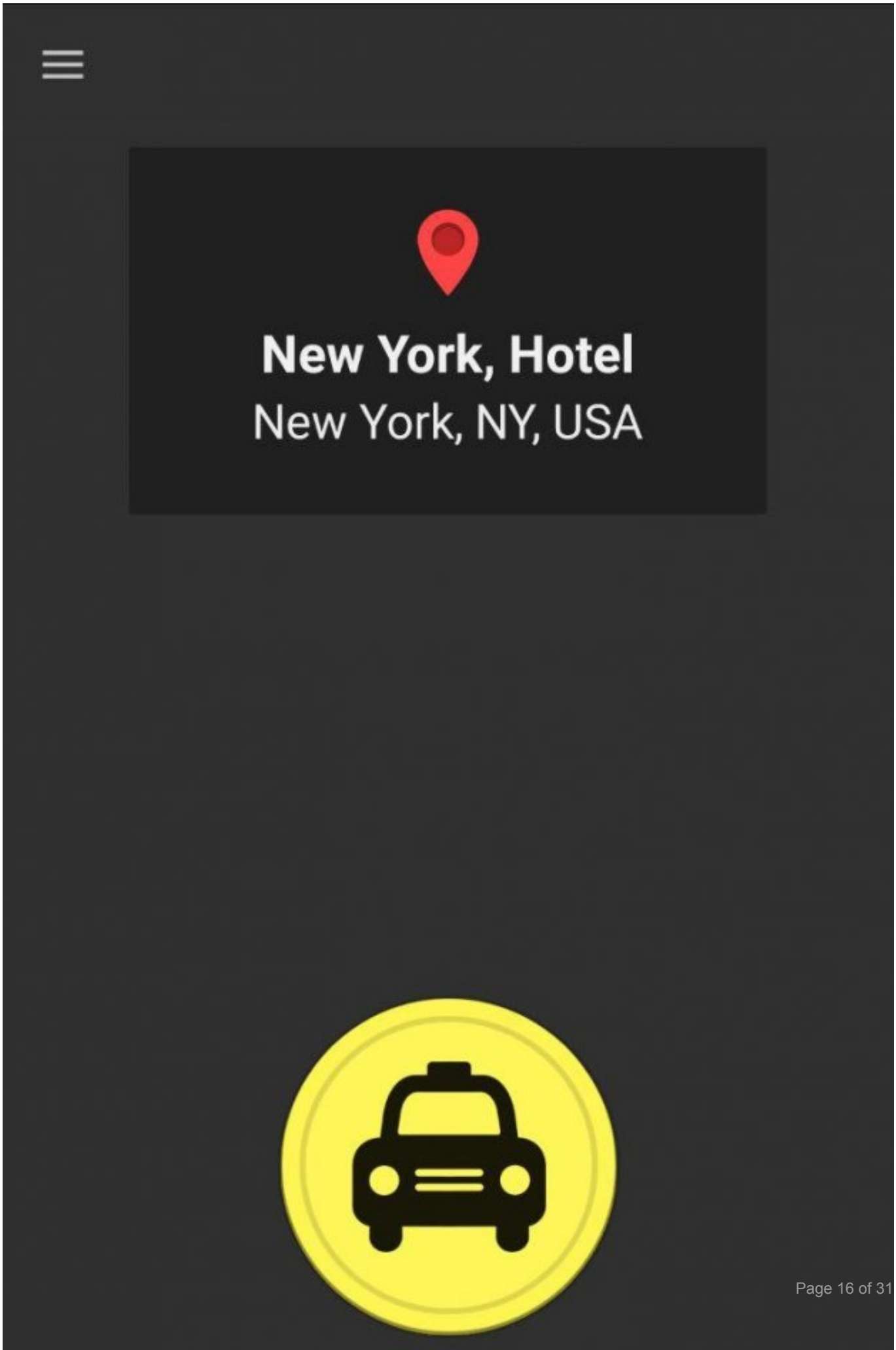
To see how a customer account is created, please click here.

Create and link an email address from your company that will act as a “receptionist”.

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

TaxiCaller Express

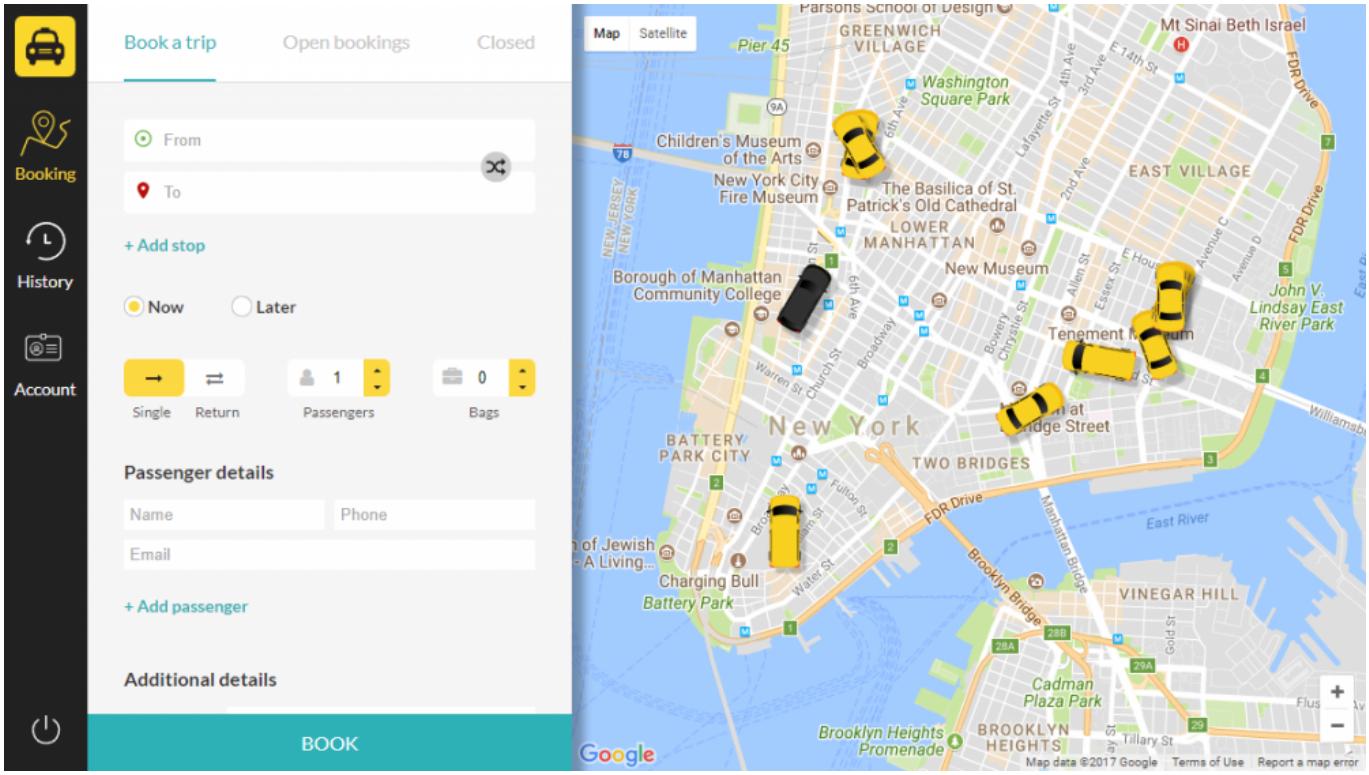
1. Download the TaxiCaller Express app
2. Log in to the passenger account you created in the TaxiCaller Express app
3. Set up the location by clicking on the menu button in the top left corner and choosing **Location**.
4. Success! – The app is now ready to be used, and pressing the yellow car-icon will send a reception-booking with the favorite location specified above.


New York, Hotel
New York, NY, USA

This tool is meant to be installed in a device that will be available for kiosk booking, so you can make it your devices **Launcher**. This means it will stay at the top and it will appear when you press the Home button.

Don’t panic! This doesn’t mean something bad has happened, the “lock-down” is intentional. You can always change the Launcher back by going to your phone’s Settings > Apps > Configure Apps > Home App and then choose another one (Process may vary depending on your Android version).

Reception tool



- Customize from the admin panel and link an account
- Use the reception tool
- Booking history and account settings

Customize from the admin panel and link an account

Customize with company details

Customize your reception tool with your company logo and colors.

1. Go to Customers > Reception tool under Invoicing to choose your unique setting or use the following link: https://admin.taxicaller.net/admin/customers/reception-tool.php

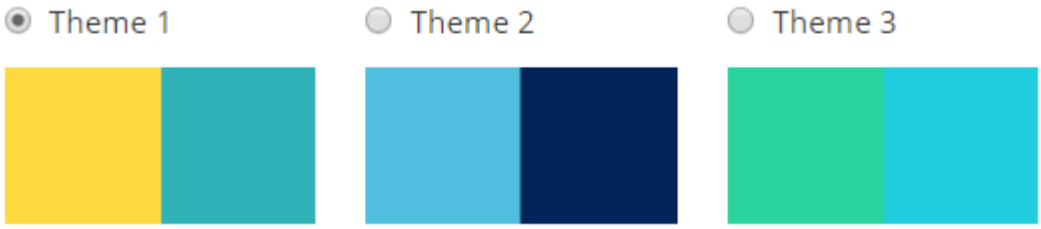
2. Choose a custom URL for your reception tool. Simply type in the name of your company for example.

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

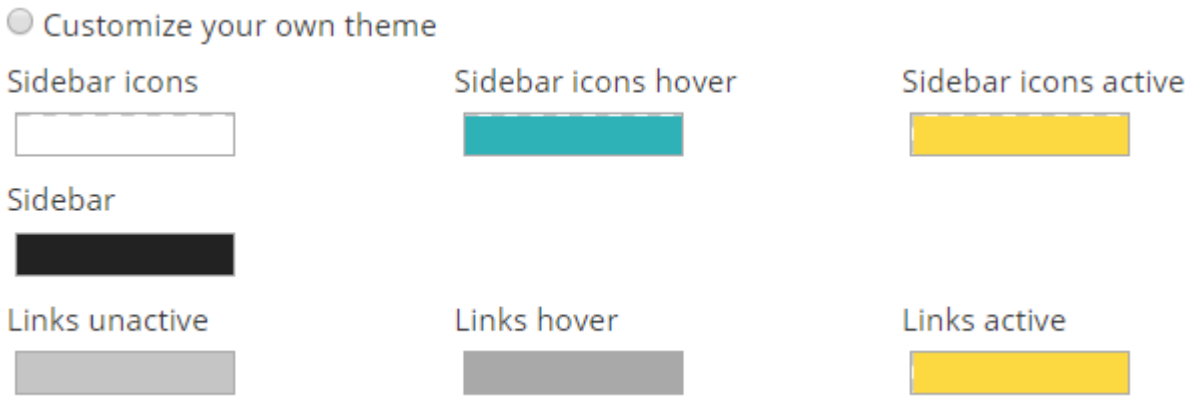
3. Add your company logo in the next section. This will show up in the side menu of the reception tool. Logo artwork must be 256 × 256 px in size.

256px by 256px

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 user 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

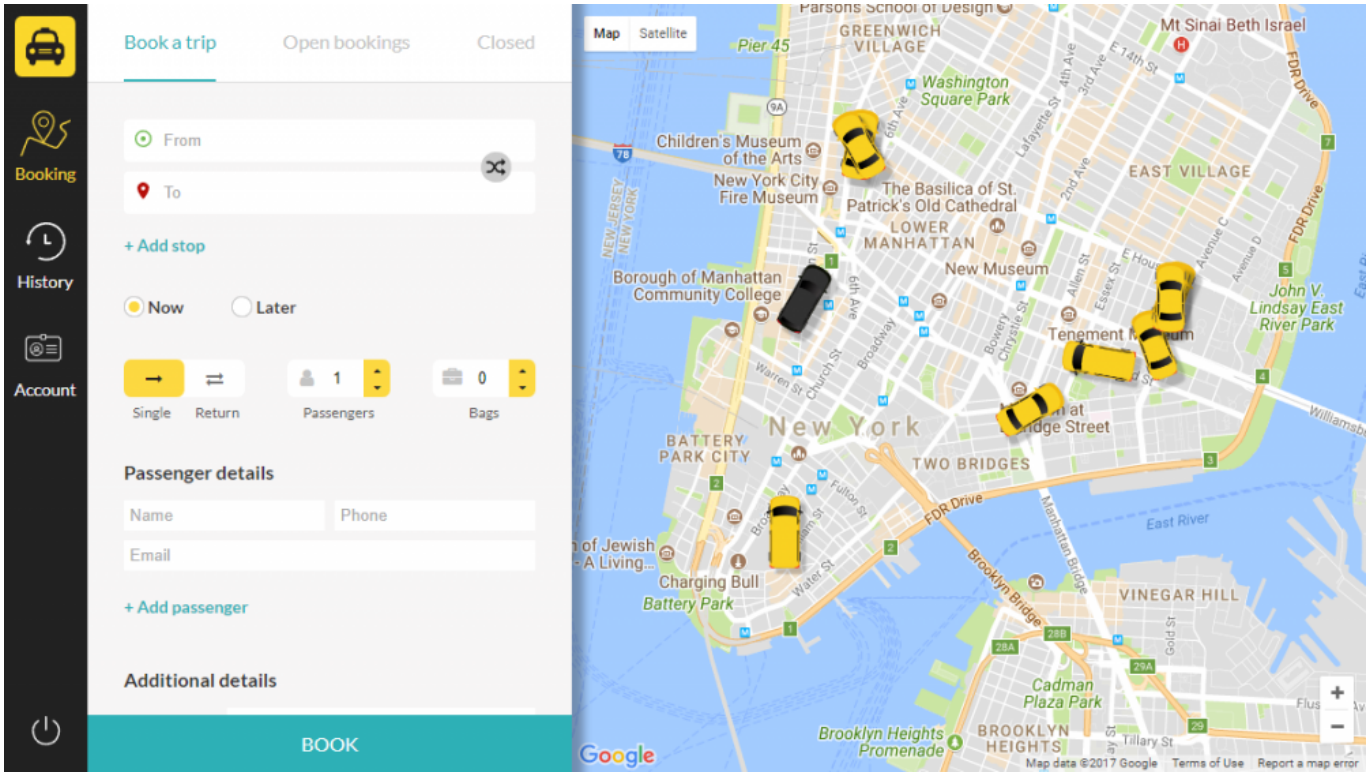
In order for your clients to use the reception tool, you'll need to invite them to use it:

1. Go to Customers > Accounts to link a specific account by emailing them an invite. To see more about how a customer account is created, please click here.

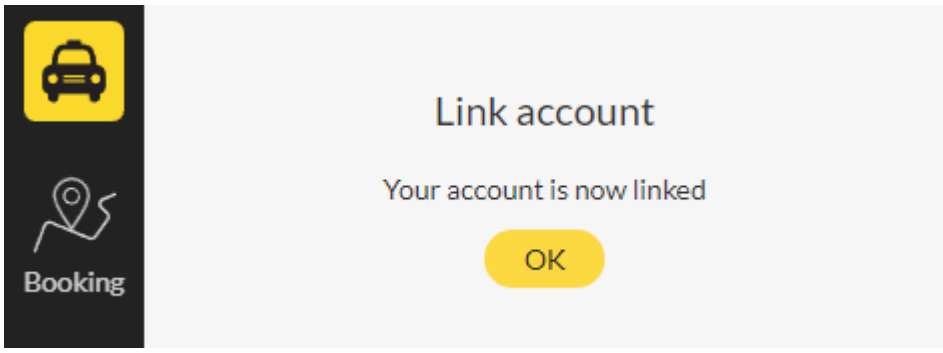
2. Your client will then receive an invite email where they will need to click the "Join now" button.

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

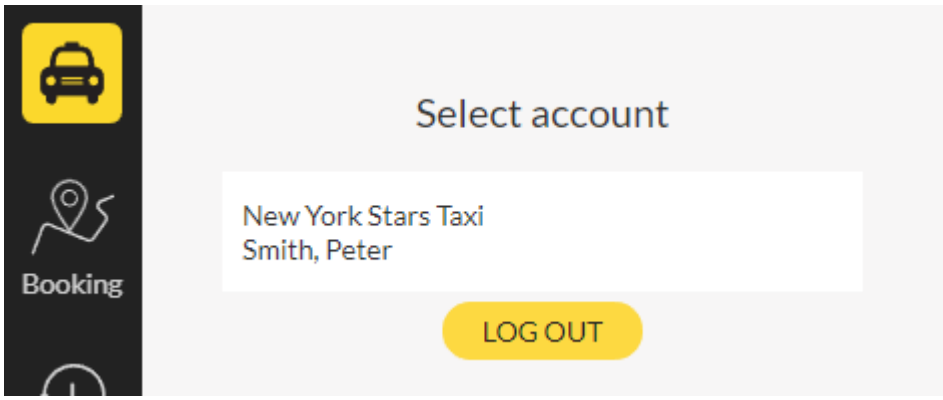
> ! The admin role is to allow the invited user to be able to link users themselves.



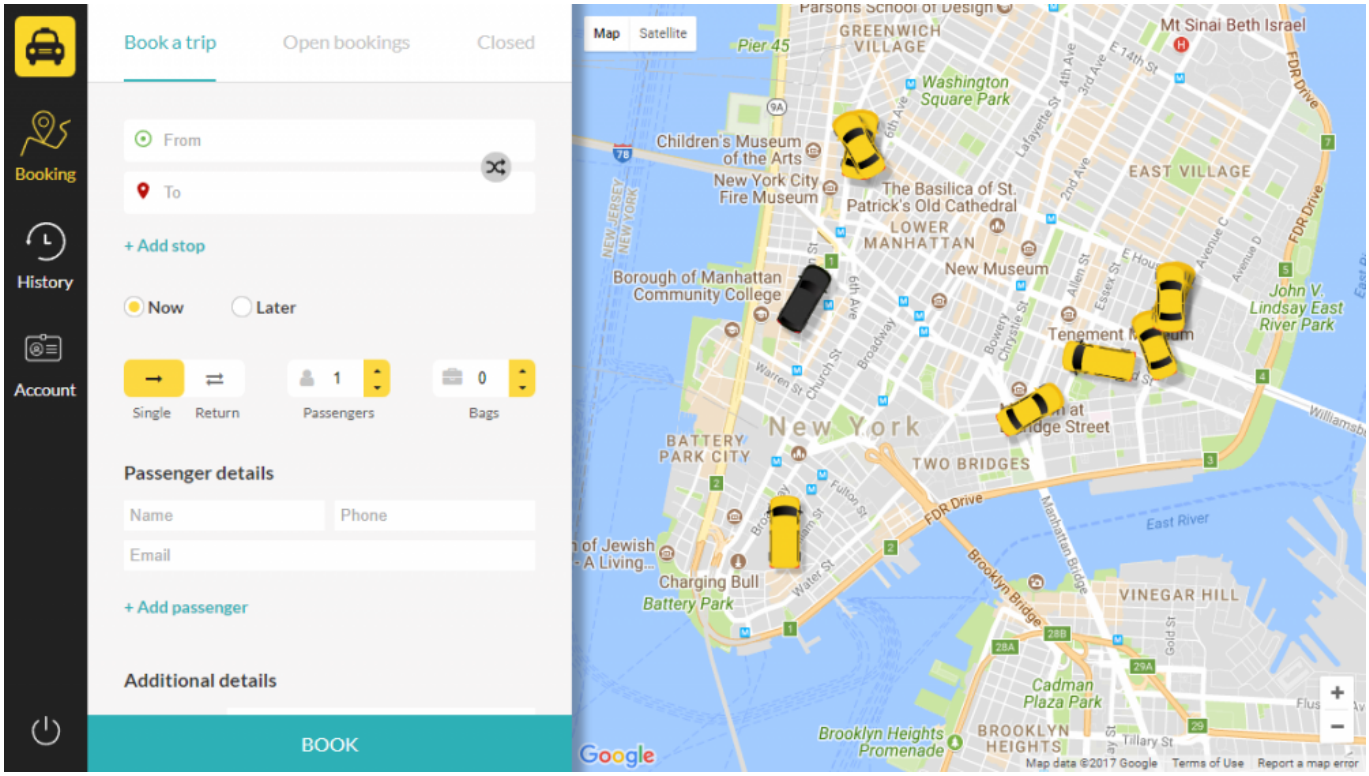
After clicking the button in the invite email, your clients will get to the reception tool to finish their sign up process.



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



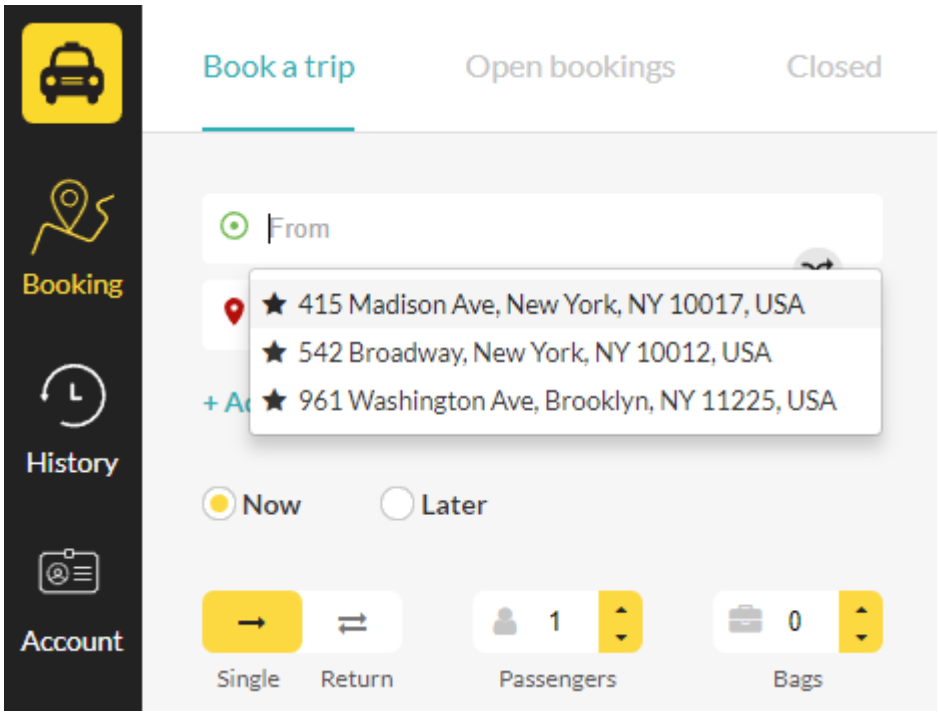
After choosing the account, the client will then be able to make bookings in the Booking section.



Use the reception tool

Book favorite locations

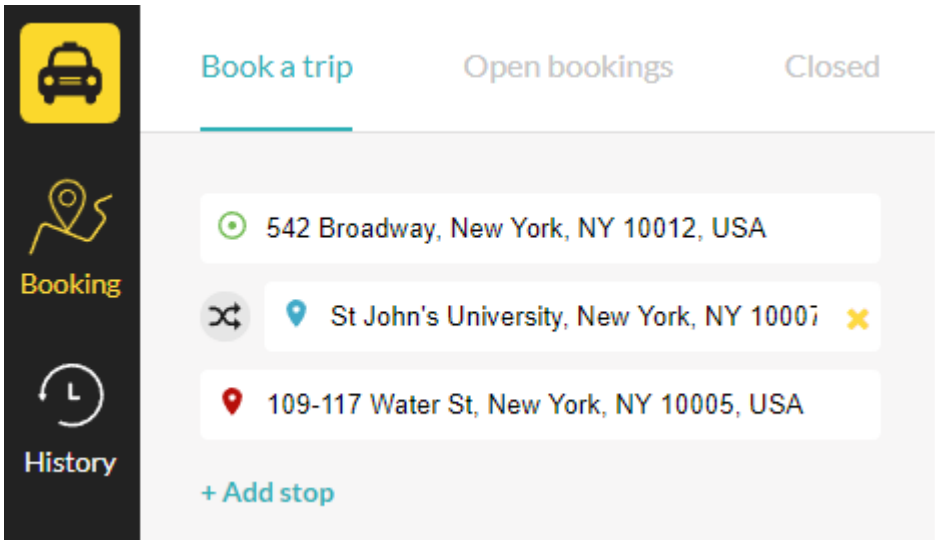
If the client already has favorite locations set up from their passenger app account, they will already show up in the address fields as options. If they have not set up favorite locations, they will go to the Account tab to do this.



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

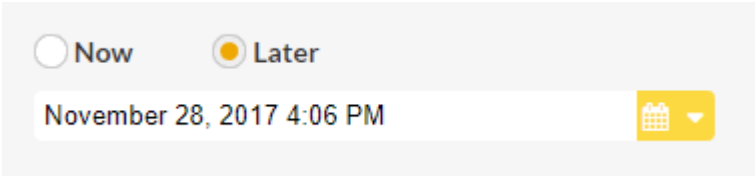
Add stops to the trip

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.



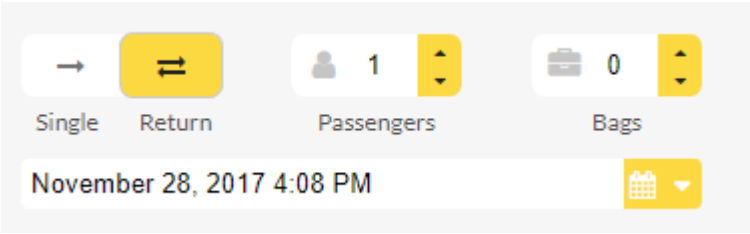
ASAP trip or prebook

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.



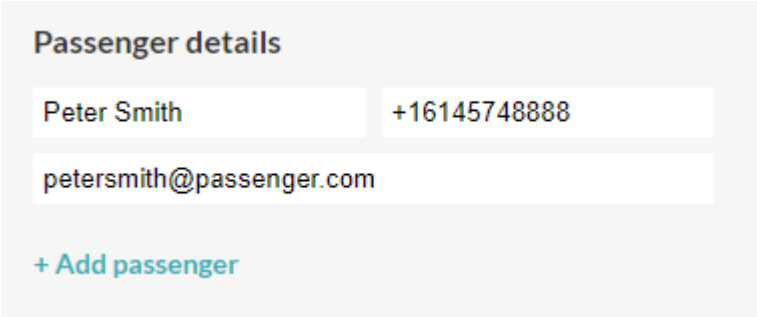
Create return bookings

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.

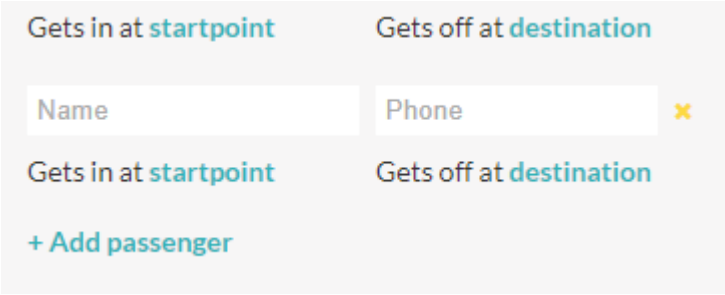


Add more passengers

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.

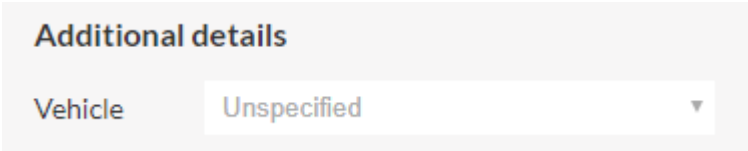


Press the + Add passenger if there are multiple passengers that need to be recorded for the booking. (Otherwise, the client can simply choose the number of passengers in the section above between Single/ Return and Bags). They can then choose where the extra passenger will join the trip and when they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



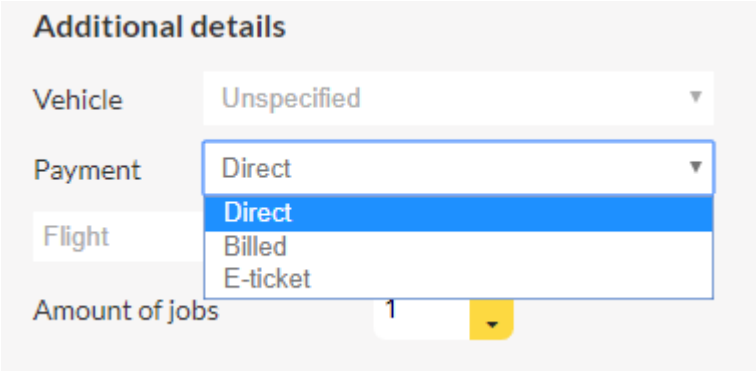
Choose vehicle type

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.



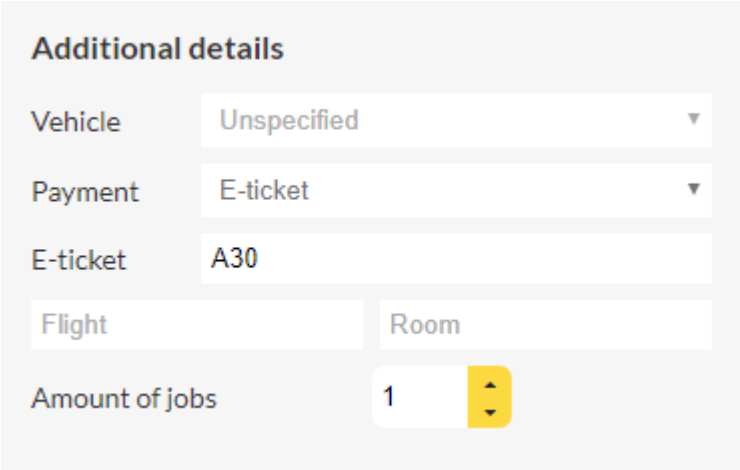
Pay directly or be billed

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.



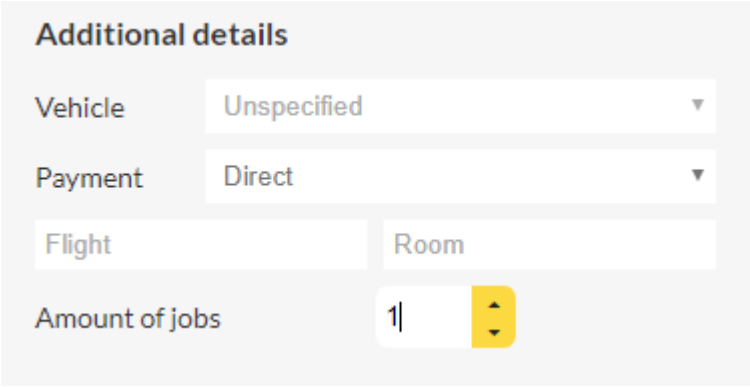
E-tickets for payment

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



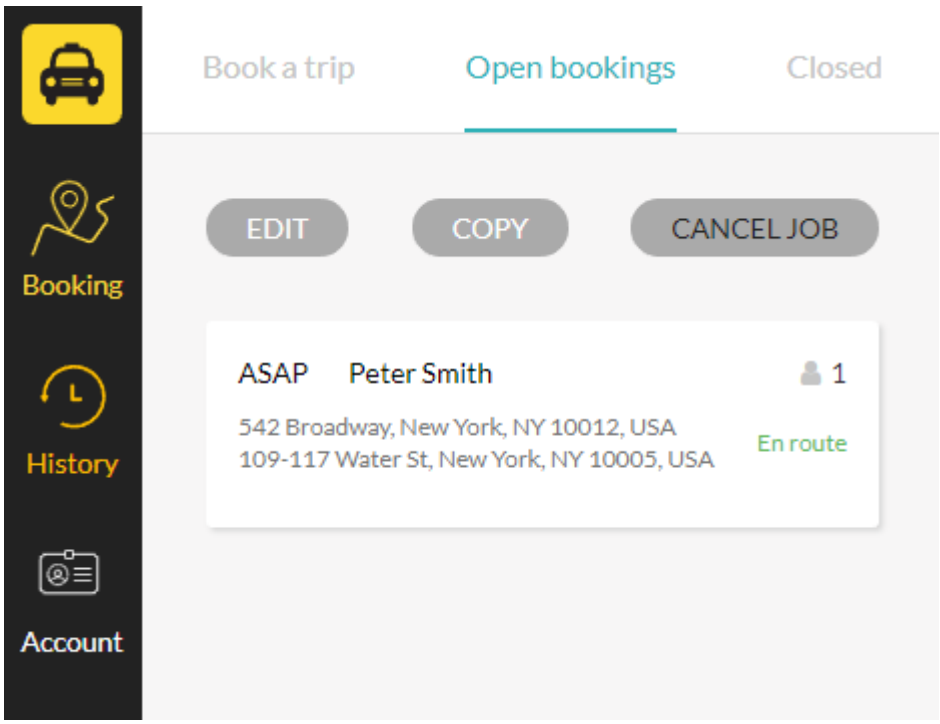
Easily book multiple trips

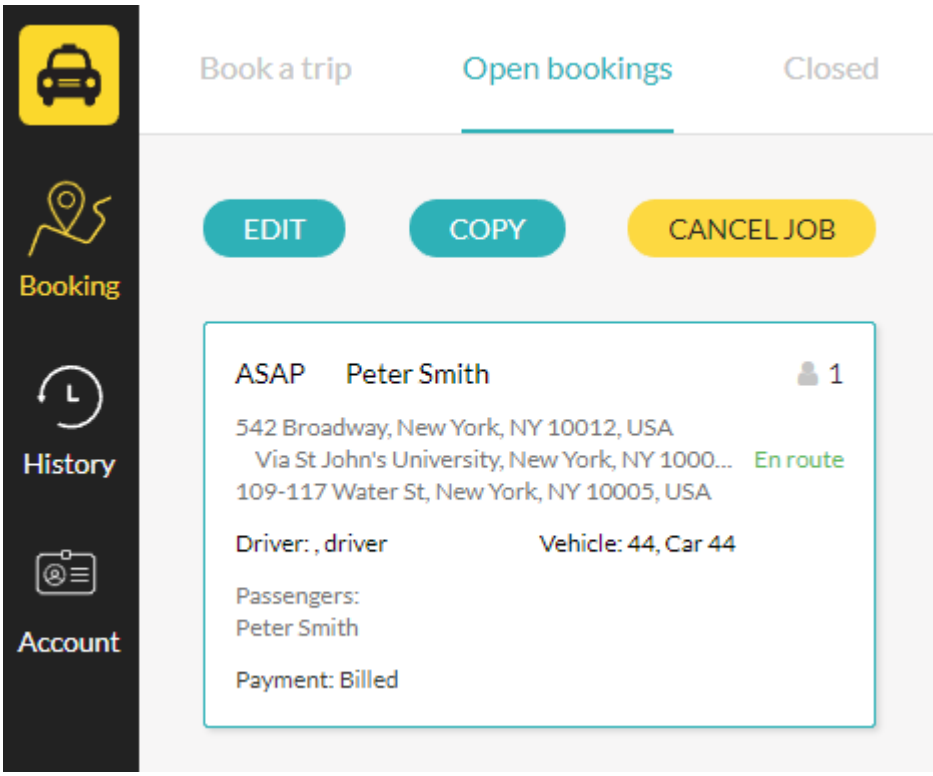
Under Amount of jobs, clients can easily book multiple trips (copies of the current booking) by increasing the number count. They can then review these jobs in the Open bookings tab.



Edit or copy bookings

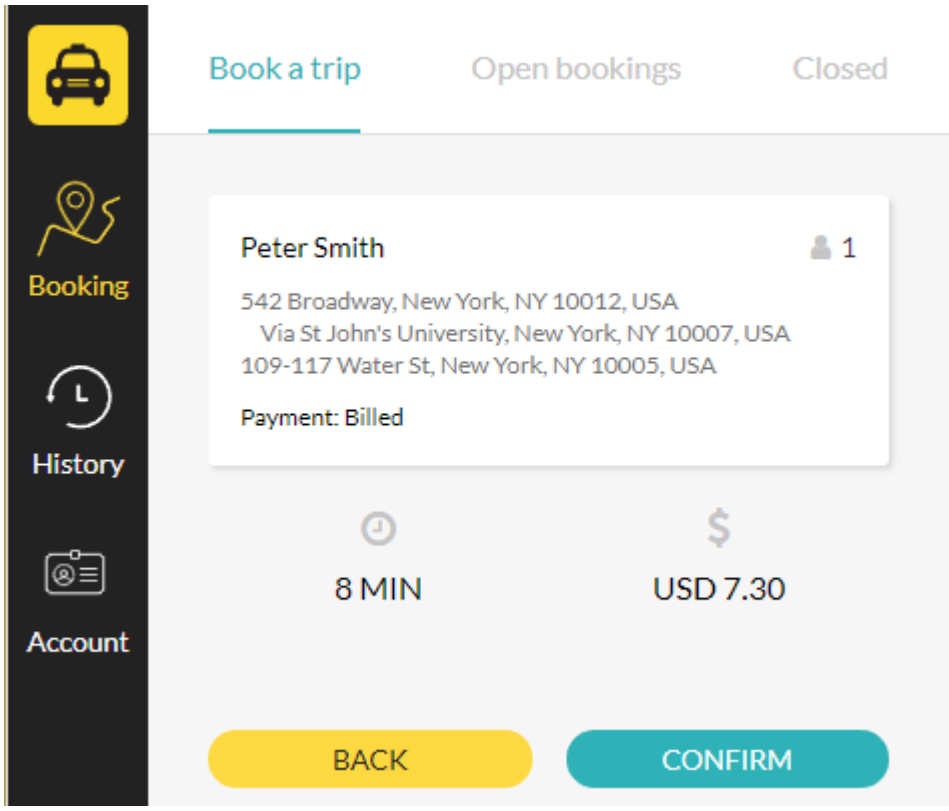
Under Open Bookings, clients will be able to see all of their booked trips that haven't been finished. Here, they can click on a booking to enable the Edit and Copy buttons to be used.





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.



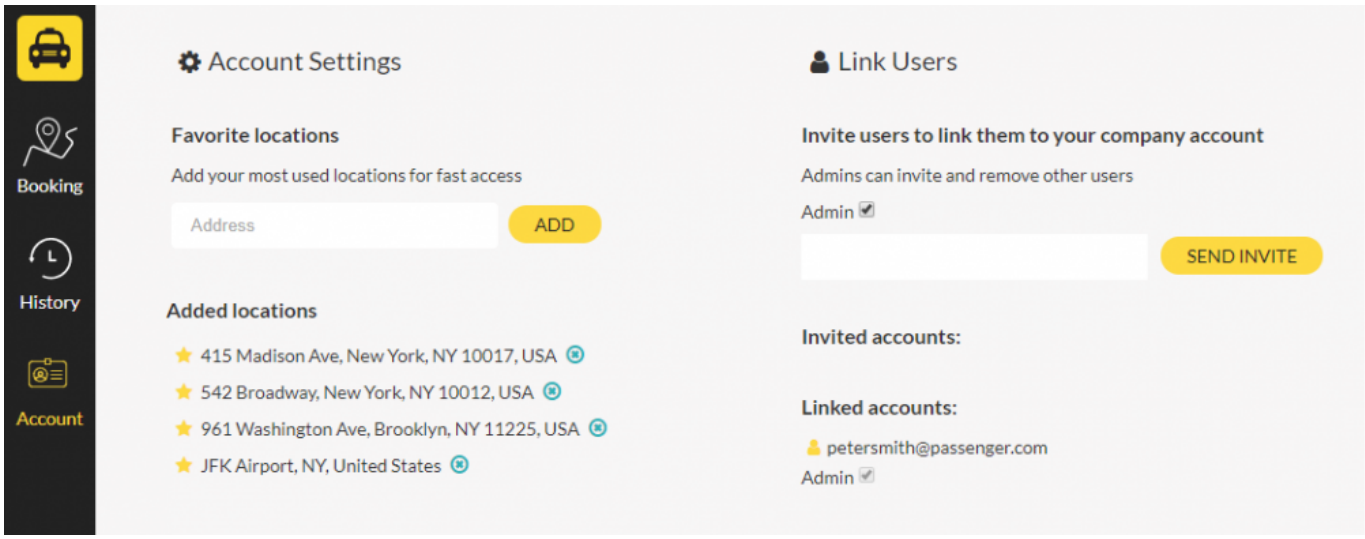
Booking history and account settings

Booking history

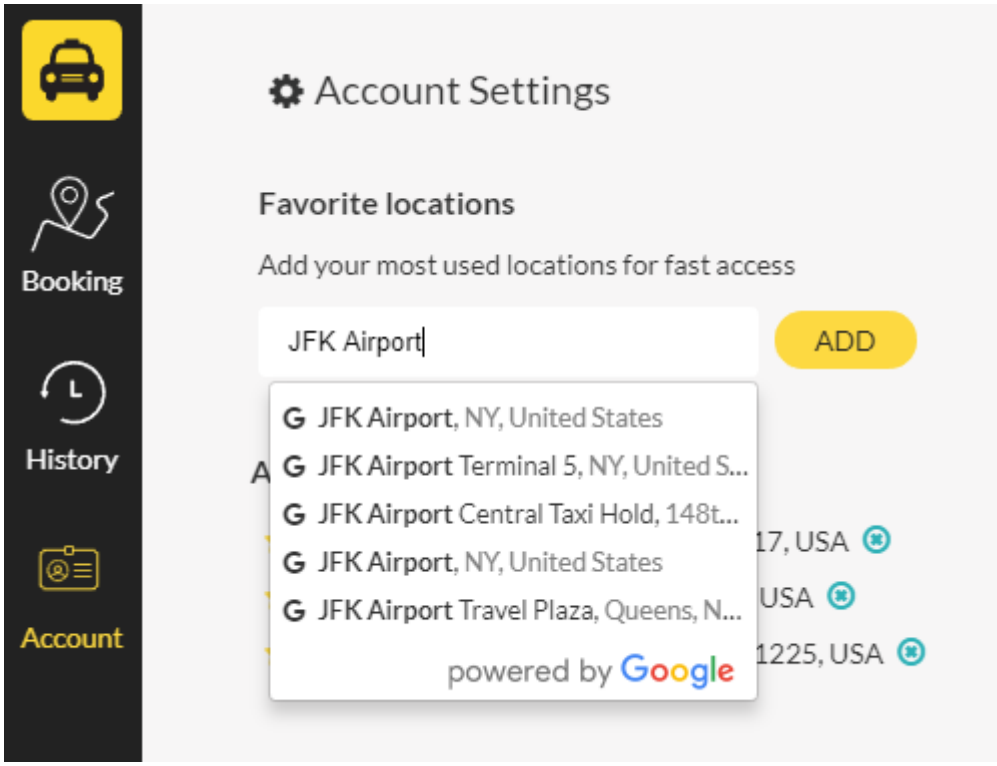
Passengers can see their trip history and download their reports in the History section. In order to keep track of payments and important trip information, clients can go to the History section to see and download their trip history reports in PDF, XLS, CSV and JSON formats. They will simply select dates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

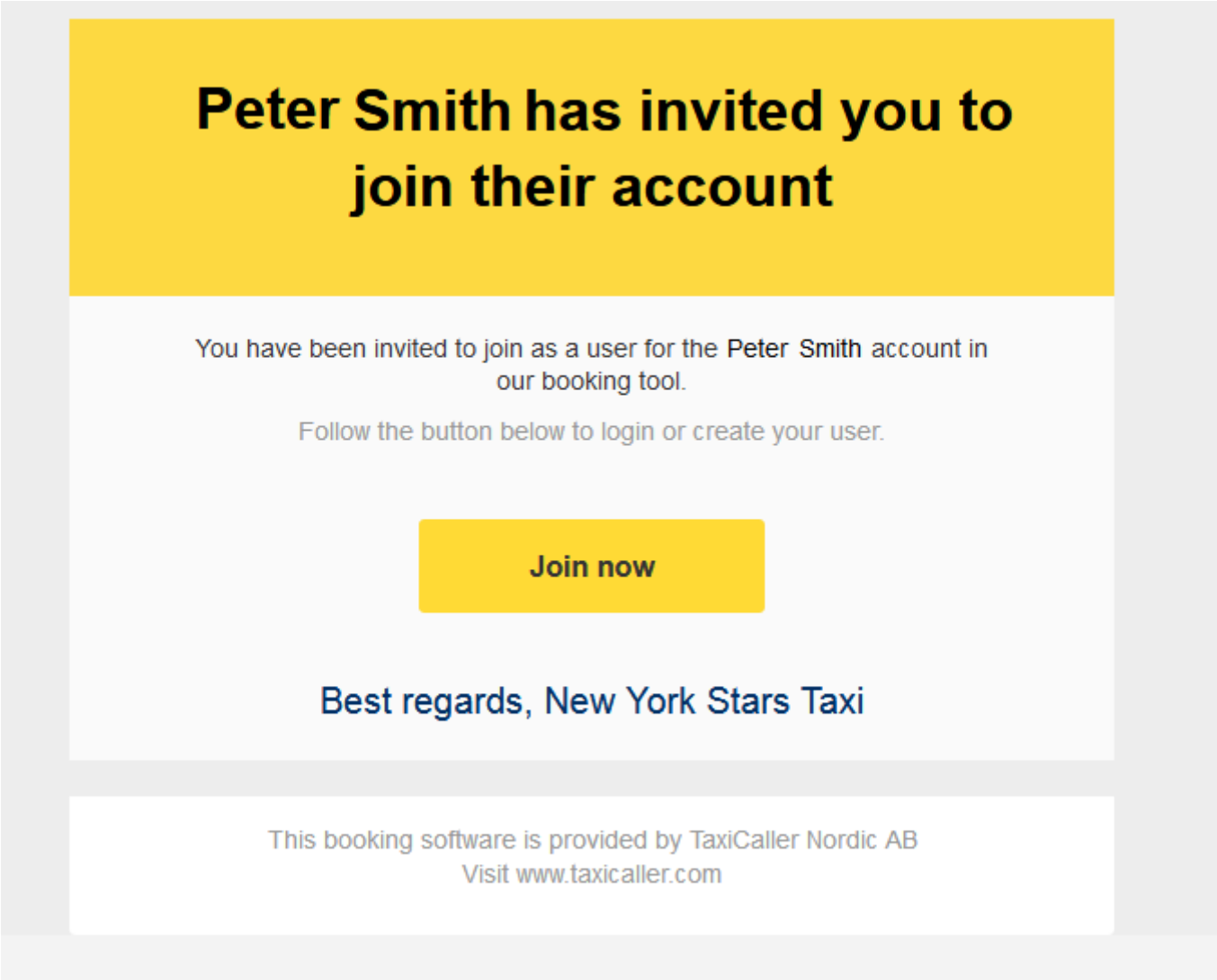


- Under **Link Users**, clients will be able to invite users by email to link them to their account.

> This is only possible if they have the Admin role enabled (Refer to the section Inviting and linking accounts).

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.



Rebrand your passenger app with your company name and logo!

You can have the Rebranded Passenger App with your company name, logo and colors, instead of using the generic TaxiCaller Passenger app.

> Send us an email to sales@taxicaller.com so we can send you the latest version of the Order Form, the price for the one time payment per platform and additional instructions.

Rebranding your passenger app will require the following:

- Fill out the Order Form that we'll provide you with when you email us.
- You'll need to provide us with the Artwork (logos) with the specification of sizing in the order form.
- A minimum monthly requirement of 15 vehicles connected to the TaxiCaller system (or at least pay for 15 vehicles each month) to order the rebranded apps. This is the minimum vehicle requirement for covering our costs to update and maintain rebranded apps (every time the passenger app needs to be updated, we need to update the rebranded apps as well).
- Pay a one time fee per platform. Android is one platform and iPhone is another platform in this sense.

> The rebranded passenger apps will have the exact same functionality and work exactly like the TaxiCaller passenger app. The only changes that are included in the customization of the app are for rebranding purposes.

> Rebranded apps are always subject to approval by Google and/or Apple, and if Google and/or Apple for whatever reason at a later stage choose to disqualify a rebranded app and remove it from Google Play/App Store, no refund of the rebranding fee will be made.