

CMS Desktop

Manual

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Table of Contents

Tá	able of	f Contents	2	
1	Ove	verview	6	
2	Fea	atures	7	
3	Bas	Basic Operation		
	3.1	Dispatch screen	10	
	3.2	Booking a normal job	10	
	3.3	Using the booking screen with the keyboard only	13	
	3.4	Customer details	14	
	3.5	Date/time	14	
	3.6	Job details	14	
	3.6.	5.1 Account	14	
	3.6.	5.2 Job type	14	
	3.6.	5.3 Vehicle type	15	
	3.6.	No. of vehicles	16	
	3.6.	5.5 Reference	17	
	3.6.	5.6 Tick-boxes	17	
	3.6.	5.7 Driver no	17	
	3.6.	5.8 Authorized	17	
	3.7	Address Search	17	
	3.8	Airport details	17	



	3.9	Reg	ular booking	17
	3.10	Con	nments	18
	3.11	Payı	ment options	18
	3.12	Pric	ing details	18
	3.13	Con	nmands	18
	3.13	3.1	Save / Exit	18
	3.13	3.2	Save & Repeat	18
	3.13	3.3	Save & Dispatch	18
	3.13	3.4	Save & Show Map	19
	3.13	3.5	Save & Print	19
	3.13	.6	Close & Exit	19
	3.14	Воо	sking a regular job	19
	3.14	.1	Date End	19
	3.14	.2	Day Check Boxes :	19
4	Driv	er		20
	4.1	Driv	ver Detail	20
	4.2	Driv	vers List	22
	4.3	Plot	a Driver	23
	4.4	Un-	plot a Driver	24
	4.5	Disp	oatch a Driver	25
5	Jobs	·		27
	5.1	Rec	ent Jobs	27



	5.1.1	Searching Recent Jobs	27
	5.1.2	Printing Jobs	28
	5.1.3	Edit this Job	29
	5.1.4	No Pick-up	29
	5.1.5	Delete this Job	29
	5.1.6	Delete Jobs For Ever	30
	5.1.7	Map and Directions	30
5	5.2 Job	History/ Archive Jobs/ Cancelled Jobs/ Deleted Jobs	30
6	Maps		31
7	Address	Book	33
7	7.1 Cus	tomer Search	33
8	Colour Se	etting	35
9	Define Zo	ones	36
10	Mileag	ge Discounts	37
11	Receiv	ve Payments	38
12	User R	Rights	40
13	Clean	Database	41
14	Live H	elp	41
15	Driver	s Productivity	42
16	Driver	s Job History	43
17	Agent	Commission	44
18	Custor	mer Account	45



19	С	lient Productivity	46
20	Ir	nvoice	47
21	D	Privers Payments	48
22	S	end Message	49
23	С	Customer Account	50
24	Fi	ixed Prices	51
25	S	pecial Places	52
26	P	eak Times	53
27	С	Company Info	54
28	Tı	rack Drivers	55
29	D	Priver Status Colours	56
30	Z	ones Order	57
31	С	redit Card Configuration	58
32	С	'LI Config	58
33	V	'IP Configuration	58
34	0	Options	59
34	.1	CLI	59
34	.2	System Settings	59
34	.3	Booking & Pricing	60
34	.4	Dispatch Screen	60
34	.5	Validation	61



1 Overview

CMS Desktop is a windows based application that is developed to automate, accelerate and streamline the running of the cab offices to meet their requirements. CMS is fast and easy to use, efficient, robust and logical. This system will make cab bookings efficient, reliable and accurate. It will transform the booking handling system by eliminating many repetitive tasks saving hours of unnecessary work.

The heart of the CMS is the control centre software. This includes our CMS Desktop dispatcher software which allows each call-taker to book jobs, track Vehicles on a live map display, view the activity in the system, and resolve problems.

The CMS desktop also has advanced features such as pricing for Jobs, route mileage and time estimation based on street maps, load calculation to warn about overbooking,

pre-booking and pricing. In addition, CMS desktop provides administrator support for performing the housekeeping and data entry tasks. CMS Desktop also includes invoicing functionality for handling Account Jobs and creating invoices and statements for your account customers and Drivers. It also generates management reports and statistics. CMS Desktop contains a powerful dispatching engine which handles communication with Vehicles and allocates Jobs to Drivers.

CMS is a proven and reliable system that has been developed through customer feedback, practical experience and knowledge of many Cab operators. A lot of other value added functionalities are implemented to empower the booking handling process along with customizable management reports and statistics.

- Comprehensive accounts/billing system the best in the business
- The most reliable and intelligent booking and manual Dispatch system on the market.
- Built in maps for Manual Dispatch, route estimation, and pricing support for running multiple fleets from a single office
- Automatic tracking and management of Street Jobs
- Driver/Vehicle Document tracking and expiry enforcement, for insurance, MOT, Payments, etc.
- Detailed audit trail of Drivers and Call takers activities
- Built-in nationwide address database
- First class customer care and back-up package



2 Features

· Job Booking:

This is the most frequently used feature of the application; here you will be able to take the booking from the customer either through the call or from the reception of the base cab office. It is the major entry form of the application that will ask you for the personal details, pick-up point, destinations, vehicle type, job type and the timings of the service.

Job Dispatch:

After the booking the job will go to a database and will come to the job queue before the specified time, provided in the configuration. From there each job can be dispatched to the desired driver with the desired type of vehicle. This will also maintain the auto un-plot of the driver as that of on-board drivers.

Caller ID

The application will pop up the main booking form on the reception of a call if the line is capable of providing the caller id. This will also make the booking process more efficient because it will automatically pick the customer details and even the expected (Last) pick-up and destination points.

User Management and Application Security:

It will facilitate the creation of user profiles with specific rights for the application usage. The application will be initiated after valid login information is provided and will allow using the facilities associated with the login ID.

Search Previous Jobs:

The application will allow you to get the history of bookings / jobs through a very user-friendly search mechanism. Users can perform searches based on any criteria contained in the booking details such as customer name, date, time, post code etc.

Display Recent Jobs:

The application will keep track of the recent jobs within the time period provided in the configuration options.

• Display Booked Jobs:

The application will allow you do find all the booked jobs through the common user-friendly search mechanism.



• Job Queue:

This will display all the jobs before the specified pick-up time. This will be displayed on the main screen of the application to keep track of the recurring jobs and to avoid any delay in the dispatch and pick-up of the customers. This will also display the on-line bookings.

Vehicle Types:

The application will allow defining different vehicle types and prices associated with them as well as setting cost and discount factors that will be associated with the drivers.

• Drivers Management:

The application will allow you to maintain detailed records of drivers including all of their personal, contact, legal and vehicle information. The application also provides a facility to block the driver if his MOT is expired or office rent is not paid.

• Driver Status Tracking:

You will be able to keep up to the minute track of the position of all drivers through the plotting and unplotting of the drivers in the pre-defined waiting zones.

Pick-Up and Drop-Off Points:

The application will facilitate maintaining the pre-defined pick-up points that will automatically be fetched on the booking form through a short key.

Zone Setup:

Here you will be able to create any number of zones where drivers are supposed to be waiting or parked during waiting time. This will help you locate the quickest pick-up for the customers on every booking.

• Colour Coding:

Through this feature the application will enable you to associate colours with the job types, vehicle types, pick-up points and the destinations. This will enable you to identify the nature of job for its proper treatment at a glance.

Route Map:

This option will calculate the shortest route to the destination and display it with a map and full description. This can be given to driver by printing it off or can be explained if the driver needs help.

Distance Calculation:



This will enable the application to calculate the distance between pick-up and destination points with the help of a database of all the existing geographical locations in UK. This distance will be the air miles so that the original distance might have the error of +30% to -30%.

Advance Reporting:

Here you will be able to prepare all kinds of printable reports for the hard copy keeping of the system. This will also help you with the analysis and the planning of the on-going business.

Call logging:

Here you will be able to see the logs of incoming calls if the caller id feature is enabled.

• SMS Notification:

All booking and dispatch details can be sent via SMS to both clients and drivers

• Live chat assistance

Help at your fingertips available for within the application whenever you need it.

Card payments

Integrated card payment gateway

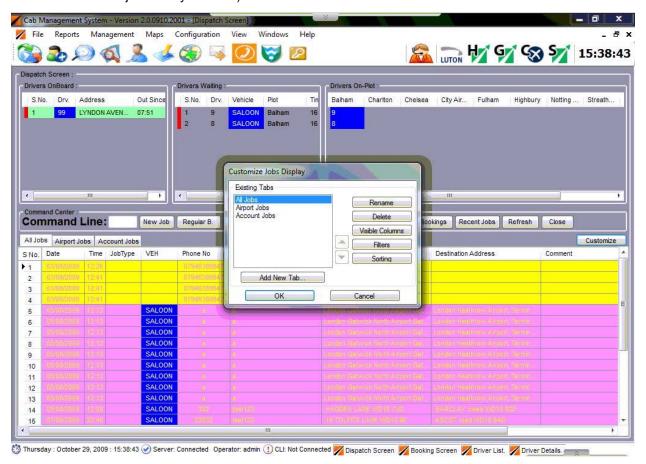


3 Basic Operation

3.1 Dispatch screen

The dispatch screen is the starting point for all your interaction with the CMS system. It gives an overview of all the available drivers as well as jobs pending for dispatch it is also the gateway to all other function.

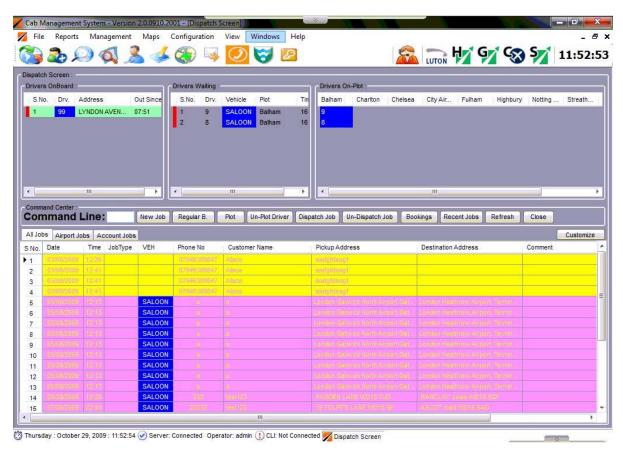
With the innovative tabbed interface the user can select what information is showed in all tabs for example filter out all the airport jobs etc. to do this press the customize button (this function is also available for all the job history screens)



3.2 Booking a normal job

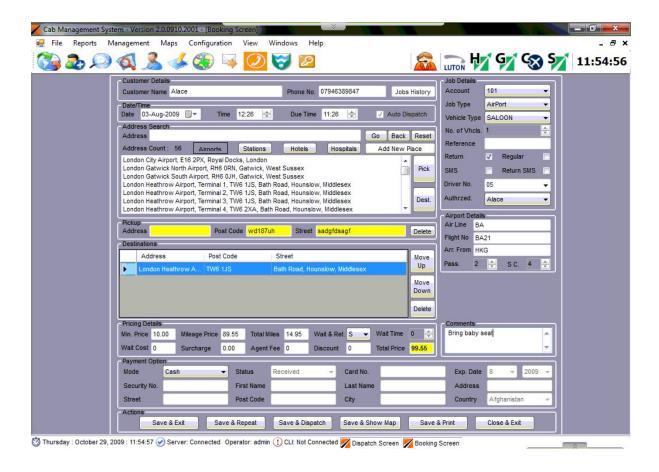


Booking a normal with CMS job is very easy. You start at the dispatch screen when a new call comes in the system will show a pop-up window displaying the caller's number and giving the option to either create a new booking or discard the job. Alternatively you can simply press the New Job button.





Once then new job is accepted the Booking screen will come up giving a number of fields



The phone number field will be filled with the information from the caller ID and if you are dealing with a returning customer the system will pull all the available data from the data base requiring you only to confirm whether the customer is being picked up and delivered to the same or different locations and setting the date and time. In the case of a new customer you will be required to gather some data.

The booking screen allows for quick access to common destinations such as Airports, Train Stations etc. as well as receiving card payments storing flight and passenger details and comments.



3.3 Using the booking screen with the keyboard only

Navigation without Mouse i.e. you can use new Booking Screen completely without mouse by using

- Tab Keys
- Enter Key (for tabbing)
- O Hot Keys (to quickly jump to required field. E.g. Alt + J focuses Job Type no matter wherever you are on new booking screen)
- Following is complete list of available Hot Keys on new booking screen for quick navigation
- Alt + A (Address Search text-box)
- Alt + B (Back button to go back to previous Address Search), Also you can use Backspace key
- Alt + C (Customer Name text-box)
- Alt + D (Destination button)
- Alt + E (Return Booking check box)
- Alt + F (Agent fee text-box)
- Alt + G (Regular Booking)
- Alt + H (Phone Number text-box)
- Alt + I (Wait & Return drop-down)
- Alt + J (Job Type text-box)
- Alt + K
- Alt + L (Delete selected Destination address from grid)
- Alt + M (Payment Mode drop-down)
- Alt + N (Account drop-down)
- Alt + O
- Alt + P (Pickup button)
- Alt + Q
- Alt + R (Save & Repeat button)
- Alt + S (Save & Exit button)
- Alt + T (Save and Dispatch button)
- Alt + U (Move Up button)
- Alt + V (Vehicle Type drop-down)
- Alt + W (Save & Show Map button)
- Alt + X (Cancel & Exit button)
- Alt + Y
- Alt + Z
- Backspace (Go back to previous address search list)
- F2 (Focus Destinations Grid)
- F3 (Focus Address List Box)
- F4 (Reset address search)
- F5 (Load Airports)
- F6 (Load Railway Stations)
- F7 (Load Hotels)



F8 (Load Hospitals)

3.4 Customer details

Store the customers name and telephone details you can also access the job history from here this will bring up a list of all the clients previous jobs from the last month in order of relevance for quick booking.

3.5 Date/time

The date and time details of the job also in this field the auto dispatch tick-box which will set the job to be automatically dispatched to the first available driver meeting the job criteria.

3.6 Job details

3.6.1 Account

If dealing with an account customer the account number should be selected in this field this will in turn open the authorized dialogue so the user may check if the client is authorised to book the account job.

3.6.2 Job type





The job types are a set of pre-sets that serve to streamline dispatching jobs to the most common locations. The pre-sets can be modified in the Management menu.

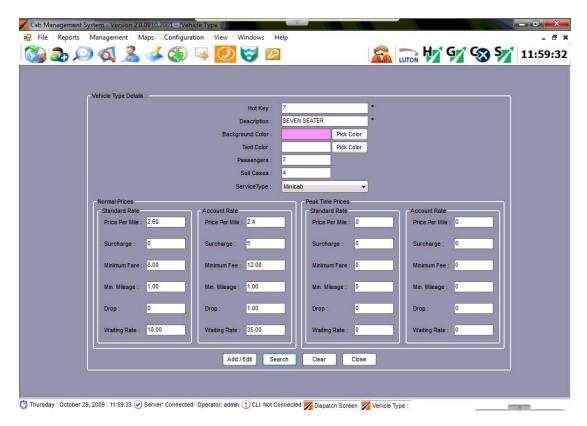
You can set locations based on postcode and pre-set standard waiting times and agent fees to enhance the clarity of your job list you can colour-code them.

There are two pre-sets that should not or may not be modified -

- Base which should be set at the time of installation (this denotes the location of the base as well as allows to create on the door base bookings without providing a telephone number)
- Airport which opens the flight details dialogue as well as the list of airports in the address search area.

3.6.3 Vehicle type





Vehicle type is another set of fully customizable pre-sets that allow you to provide the best customer experience and streamline the business by assigning the right type of car for the job. The pre-sets can be modified in the Management menu.

Here you can pre-set a hot key and a vehicle description and most importantly adjust the pricing for a variety of vehicle and job types.

There are two types of vehicles the standard pre-sets and Auto which is used in conjunction with the PDA to calculate the fare based on distance travelled.

You can also set the pricing based on type of job i.e. account or normal as well as different pricing for peak and off-peak travel.

The setting also record the maximum number of passengers and items and luggage that can be carried in a vehicle

3.6.4 No. of vehicles

Simply the number of cars required for the job.



3.6.5 Reference

A reference code.

3.6.6 Tick-boxes

Indicate the status of the job as:

- return in which case once this dialogue is closed a new one will be opened for the details of the return job
- regular opens the regular booking field allows to book cabs at recurring intervals
- SMS a notification will be sent by text
- return SMS a message will be sent offering the companies services for the return journey

3.6.7 Driver no.

The job will be automatically allocated to a specific driver for example if requested by the passenger.

3.6.8 Authorized

For account job this will present a list of authorized users of the account.

3.7 Address Search

The pick-up or destination locations house number or name. An integrated search bar used for pick-up as well as destination addresses once an address has been entered the field will clear allowing for the next address to be entered at the same time the price of the journey will be automatically updated as the addresses are added.

Both postcodes and street addresses can be entered in this field.

The field also contains the quick access buttons for common destinations : airports, train stations, hospitals, hotels.

The pick-up address is stored in the pick-up field bellow the search result area and the destinations in the destinations box bellow. All the addresses can be moved swapped or deleted at any point during the booking process.

3.8 Airport details

In case of an airport pick-up the following flight details can be recorded: airline name, flight number and place of origin as well as number of passengers and items of language.

3.9 Regular booking



A set of tick-boxes allowing the selection of days on which the job will recur and the date of the last booking the date of the current booking is treated as the first of the series.

3.10 Comments

Any additional info about the job

3.11 Payment options

Here you can choose if the job is paid as cash/account payment/credit card in case of credit card it is possible to process the payment via the provided fields.

3.12 Pricing details

Here you will find the details of the price and its components

- Min price basic price set in the vehicle type
- Mileage price the total price for the miles driven
- Total miles the total distance driven
- Wait time waiting time
- Waiting cost the charge fro the waiting time
- Surcharge additional charge
- Agent fee if using an external referrer the amount due to that organization or individual defined in job type
- Discount a discount if applicable for account jobs
- Total price the complete price for the journey

3.13 Commands

3.13.1 Save / Exit

Save the job and exit the booking screen.

3.13.2 Save & Repeat

Save the job but remain on the same booking screen.

3.13.3 Save & Dispatch

Save the job and allocate the job directly to a driver.



3.13.4 Save & Show Map

Save the job and show the directions on a map.

3.13.5 Save & Print

Save the job and print the details.

3.13.6 Close & Exit

Close booking screen and return to the dispatch screen.

3.14 Booking a regular job

The booking process follows the same patter as in the case of the normal booking, you start by pressing the Regular B. button on the dispatch screen, alternatively you can proceed like with a normal job and tick the Regular booking tick-box at the end of the booking form to show the scheduling options.

3.14.1 Date End

The final date of the regular booking series. The start date is assumed as the pick-up date from the Pick-Up Date section.

3.14.2 Day Check Boxes:

The date check Boxes show the days of the week the customer has requested the car for.



4 Driver

4.1 Driver Detail

Located in the File menu the Driver Detail screen allows you to add, edit, search the drivers contact



details and vital information such as phone numbers, vehicle details insurance and MOT expiry dates etc.

To add or edit a driver details simply fill in the fields and click the Save button.

The details are grouped based on the type of data stored:

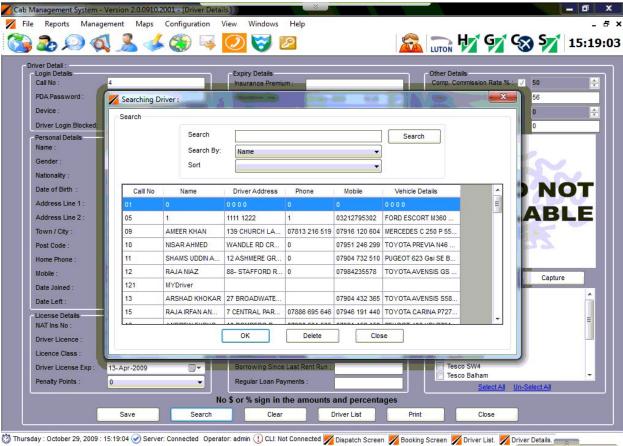
Login details – the driver number, means of communication and PDA application login



- Personal details address, contact details and personal information
- License details driver licence details
- Expiry details relevant minicab legal requirement details PCO licence/ MOT expiry
- Vehicle details vehicle registration and identification details
- Rent details payment details concerning rent
- Other details commission rate and amounts/ account job commission and payments/ photograph and allowed job types



You can also search the driver database by pressing the search button and then choosing a search

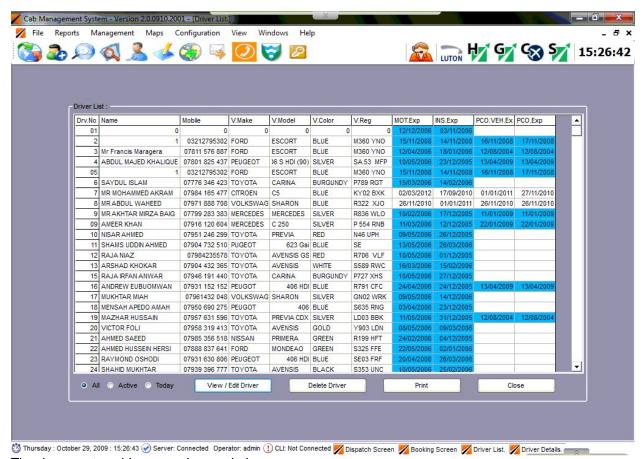


criterion (Call no. name, address, phone, mobile or vehicle details).

4.2 Drivers List

A quick overview of the relevant documents expiries can be accessed via the driver details screen or the reports menu





The document expiries are colour coded:

- white up to date
- blue soon to expire
- dark blue expired

4.3 Plot a Driver

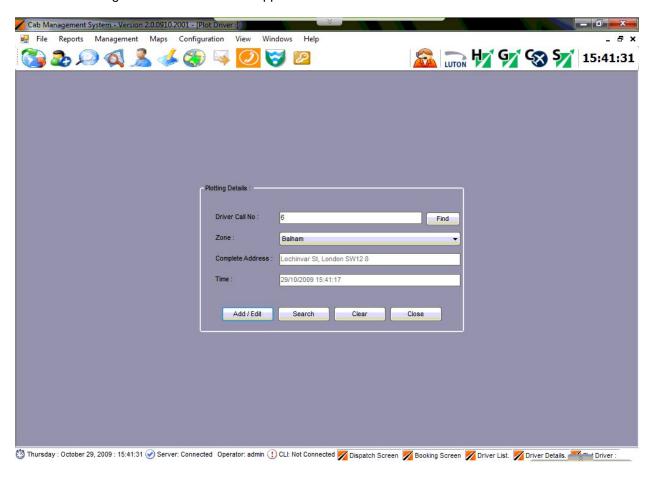
This function is accessible either from the dispatch screen of from the File menu.

Plotting a driver means that he is now cleared from the job, has entered a predefined area and is waiting for a dispatch. The plots are usually defined as an area around the office base but can be added and adjusted at will. The drivers on plots can be seen on the Dispatch Screen.

To plot a driver click the Plot button on the Dispatch screen the plot screen will open on witch you have to choose the drivers call number and the desired plot.



If a driver is using the CMS Mobile PDA application this will be automatic once the driver enters a zone.

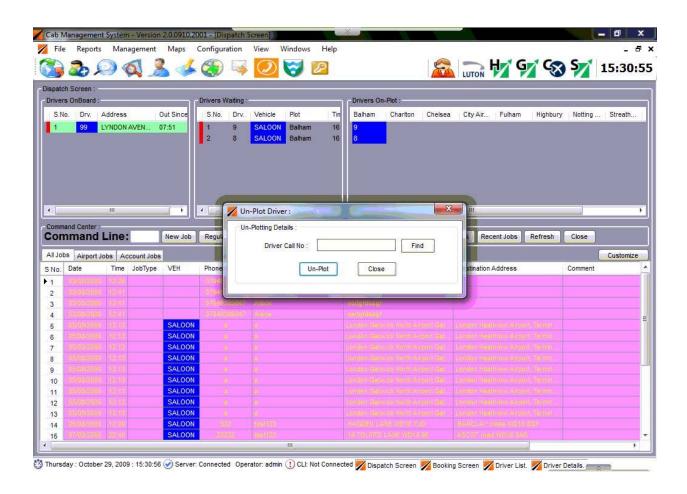


4.4 Un-plot a Driver

Un-plotting a driver means that the driver is no longer available to do the job. To un-plot a driver, press Un-plot driver on the Dispatch Screen. Then input the number of the driver number that has to be unplotted and click Un-Plot

If a driver is using the CMS Mobile PDA application this will be automatic.



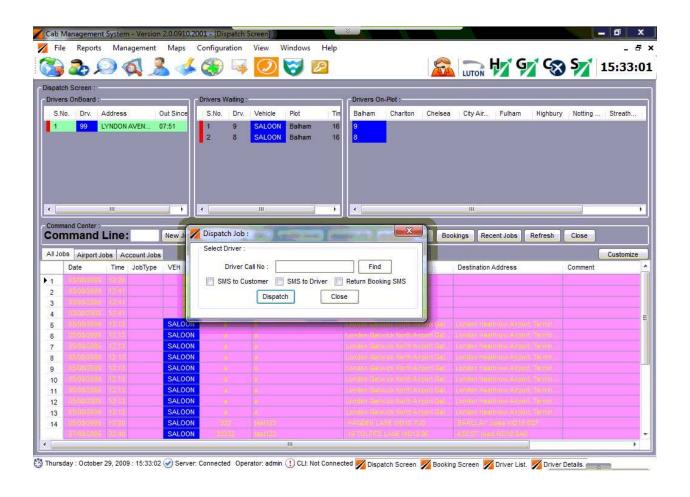


4.5 Dispatch a Driver

To dispatch a driver simply choose a job from the Job Queue and press the Dispatch Job button. The system will automatically check if there are any issues with the driver (insurance and MOT in date etc.)

When the job is being dispatched the user can also choose to send text messages with the job details to the driver and customer as well as a marketing message to invite the client to use the service for the return journey.





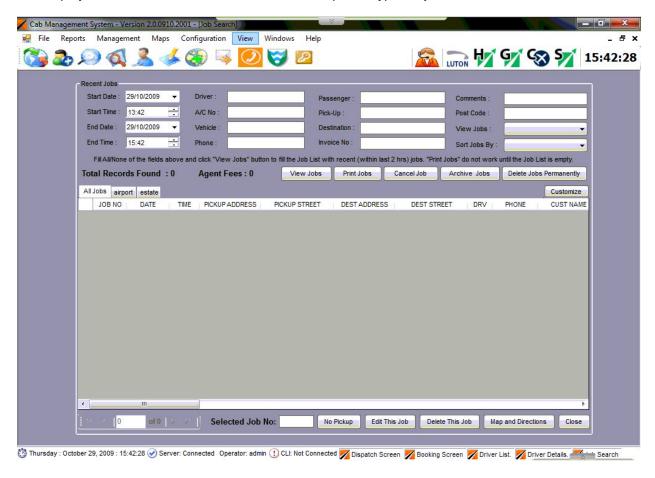


5 Jobs

5.1 Recent Jobs

To go to the recent jobs press the Recent Jobs button on the Dispatch Screen. The recent jobs screen will display completed jobs from the last two hours.

The display can be customized with tabs to filter out specific types of jobs.



5.1.1 Searching Recent Jobs

The Recent Jobs are fully searchable by entering one bellow criteria and pressing the View Jobs button:



Driver: Driver call number.

A/C no: Account number.

Vehicle: Type of vehicle used for the job.

Phone: The customers phone number.

Passenger: Name of the passenger.

Pick-up: The number or name of the pick-up location.

Destination: The destination location.

Invoice Number: Invoice Number.

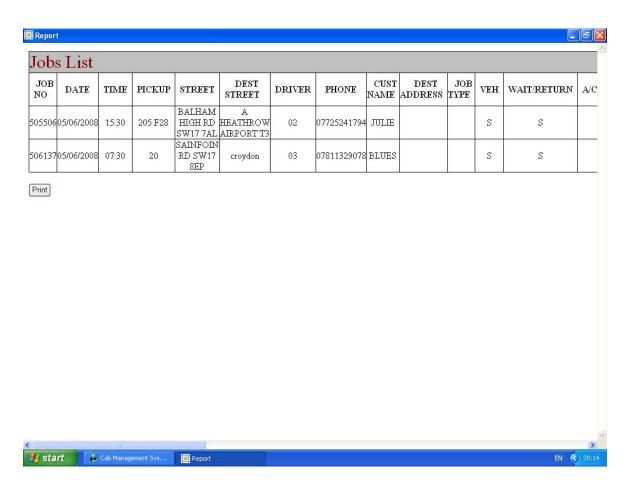
Comments: The comments which were entered when the job was being booked.

Postcode: The post code from where the customer was picked up.

5.1.2 Printing Jobs

If the Button Print Jobs in pressed, a report of the jobs fitting the current search criteria will be printed.





5.1.3 Edit this Job

Selecting a job and pressing this button will take you back to the job booking screen and enable you to edit the job details as necessary

5.1.4 No Pick-up

Selecting a job and pressing this button will mark the job as one where the customer has not been picked up despite the driver arriving at the pick-up location. The Job will be marked with an "N".

5.1.5 Delete this Job

Selecting a job and pressing this button will delete the job but it will remain viewable in the deleted jobs screen.



5.1.6 Delete Jobs For Ever

If this button is pressed, then all of the recent jobs will be permanently deleted. These jobs will no longer be available in the deleted jobs menu!

5.1.7 Map and Directions

Pressing this button when a job is selected will show the mapping screen with the route and distance marked.

5.2 Job History/ Archive Jobs/ Cancelled Jobs/ Deleted Jobs

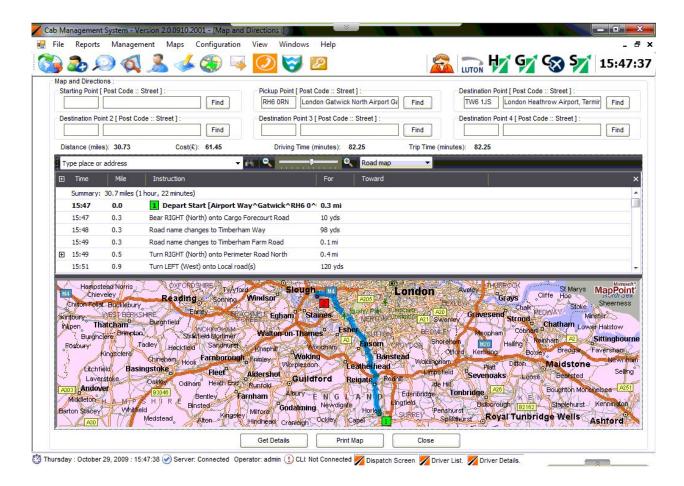
All of the additional job management functionalities are operated via the same interface as the recent jobs.



6 Maps

The mapping window can be accessed via the Maps menu or by pressing the Map and Directions button available on the following three screens:

- Recent Jobs
- Bookings.
- Job History.



The plot points represent:



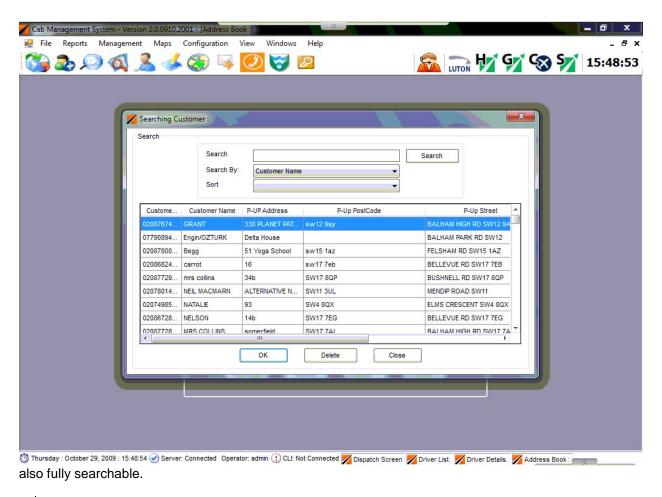
- Base location
- Pick-up location
- Destination location

Beside the map the screen will also show the distance, estimated drive time, cost and directions. The map can be zoomed and panned for a closer view and used to provide directions.



7 Address Book

To access address book, either press the Icon on the top bar or select it from the Management Menu. The Address Book keeps a record of all your customers which can be viewed and amended as needed. It is



7.1 Customer Search

A search utility for the Address Book it is the default view when the address book is opened

The Address Book can be searched and sorted according to the following criteria:

- Customer Name
- Customer Phone



- Pick-up Address
- Pick-up Postcode
- Pick-Up Street
- Destination Address
- Destination Postcode
- Destination Street.



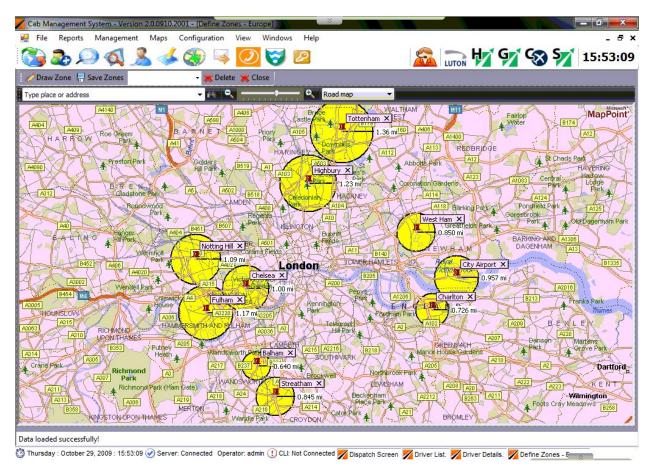
8 Colour Setting

Accessed through the Configuration Menu the colour configuration option which will allow you to customise the applications colour scheme to your preference





9 Define Zones



Accessed from the Configuration Menu plot zone which is closely connected with Define Zone

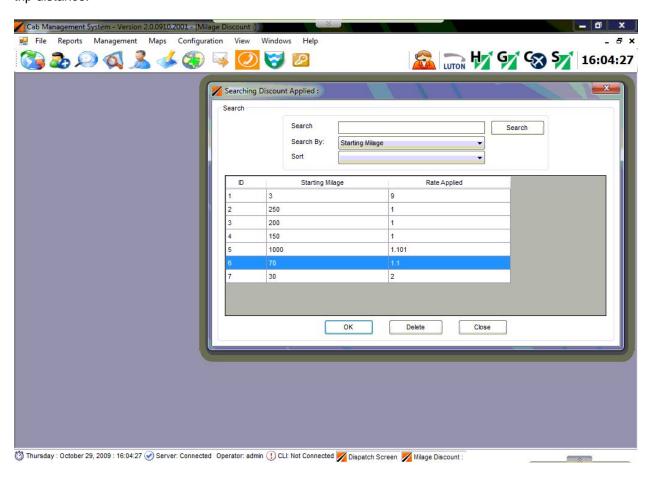
This is used to define zones which the drivers wait in for easy overview. Note that the areas not covered by the user defined zones will be cover by the postcode zones they are defined as the first half of the postcode for example TW1

Zones are defined simply by drawing the zone circles on the map and than naming them.



10 Mileage Discounts

Located in the management menu Mileage Discounts allow you to define a set of discounts based on the trip distance.

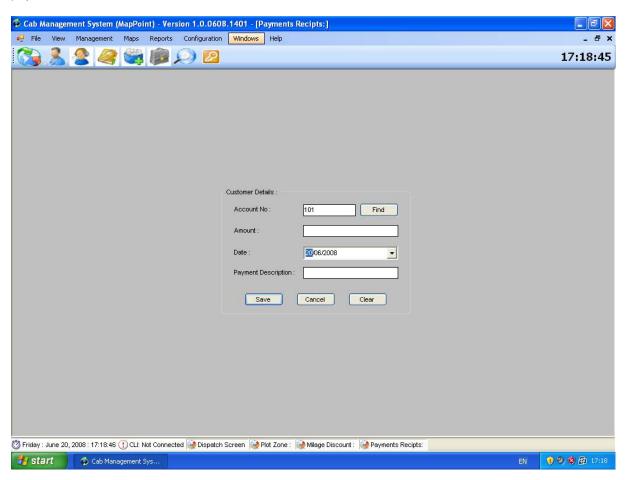


Just like most functions the Mileage Discounts can be searched and modified as needed.



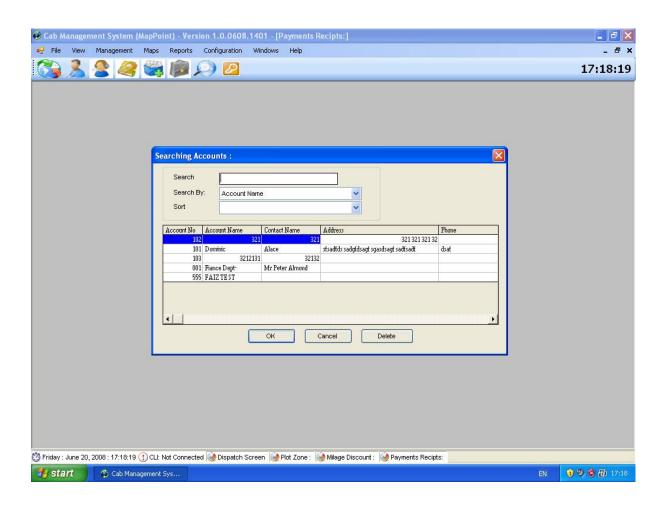
11 Receive Payments

Located in the management menu Receive Payments allow you to keep track of the account customers payments.



- Account number The number of the account either entered by typing or searched for in the database.
- Amount The total amount paid.
- Date The date of payment.
- Payment Description Additional information about a specific payment.

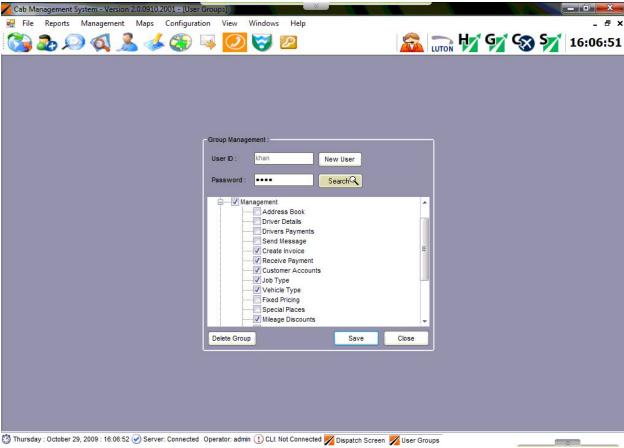






12 User Rights

Located in the management menu User Rights allow the master user to limit or grant access to certain functions for the other operators.



- New User Create a new user.
- Search Search existing users, once chosen the users can be edited or deleted.
- Check-list A complete list of user privileges all of the functionalities of the system can be defined as either accessible or unavailable to any user.
- Save Saves the User details.
- Cancel Cancels the unsaved changes and returns to the dispatch screen.

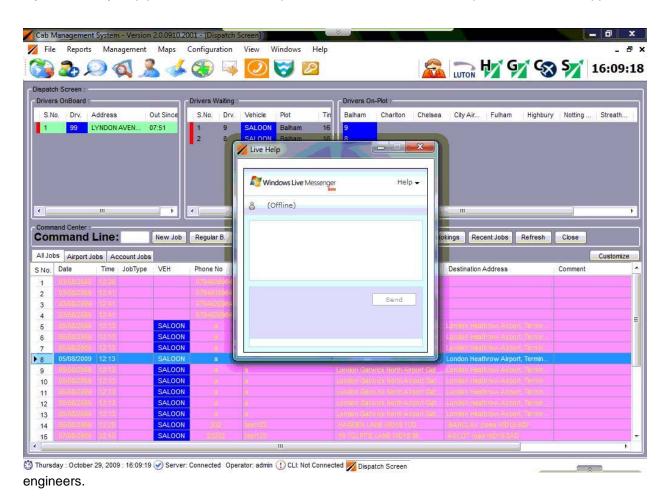


13 Clean Database

Located in the management menu Clean Database removes records of jobs older than six months. Under the current United Kingdom legislation job records need to be kept only for six months. So these jobs can be deleted if necessary.

14 Live Help

If you need any help press the icon in the top menu and a chat window will open to one of our support





15 Drivers Productivity

An overview report of all the drivers earnings as well as money owed from and to the office

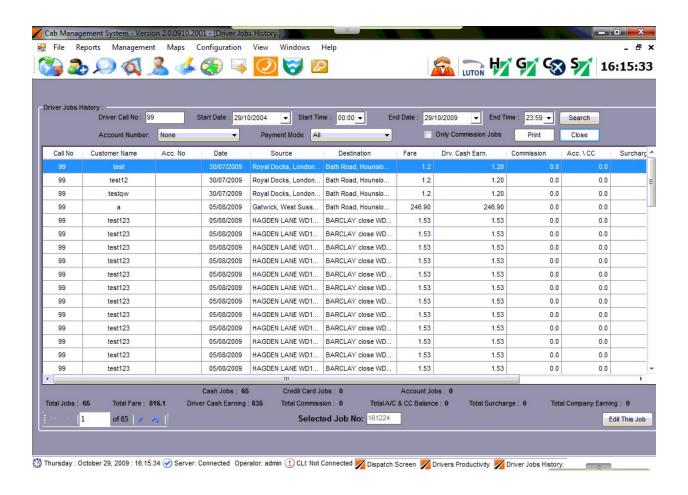


The tool also allows to see the complete detail of all the jobs done by the driver by opening the drivers job history.



16 Drivers Job History

A detailed record of all the jobs performed by a given driver for a given period of time.





17 Agent Commission

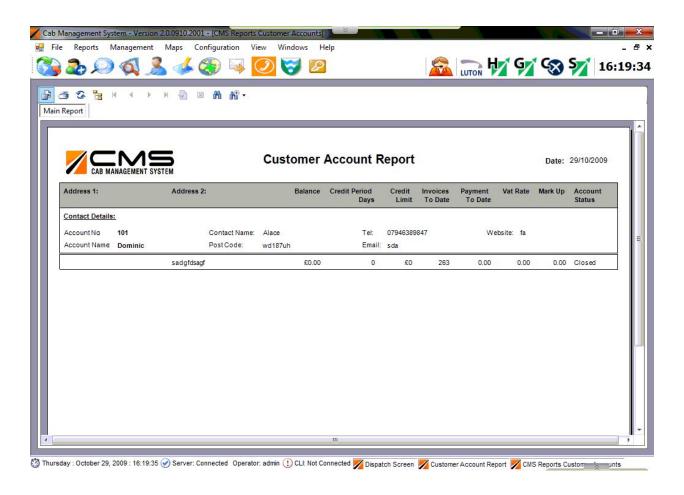
A quick report detailing jobs done for a referring agents





18 Customer Account

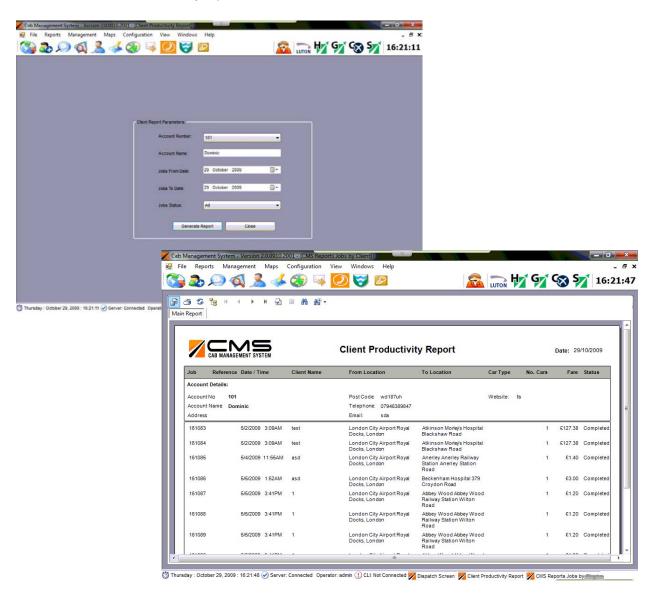
Displays a report of all the activity of a given account client for a given period of time.





19 Client Productivity

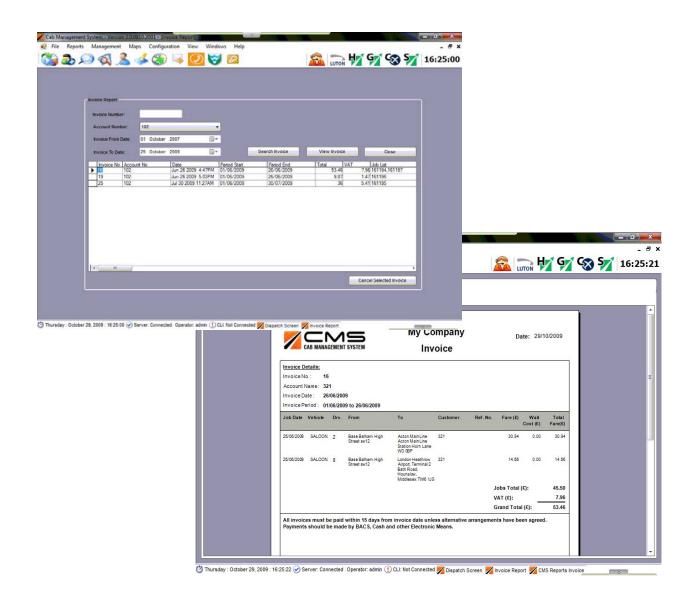
A more detailed account activity report.





20 Invoice

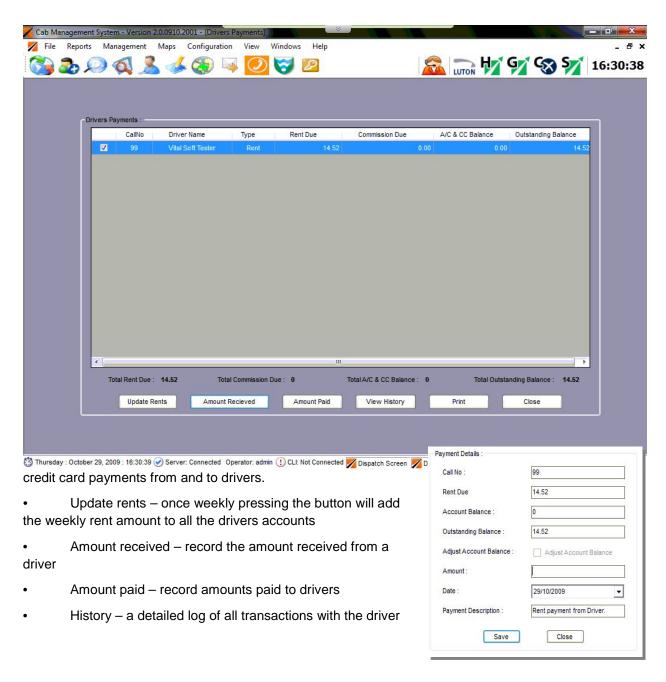
An invoice generation and review tool.



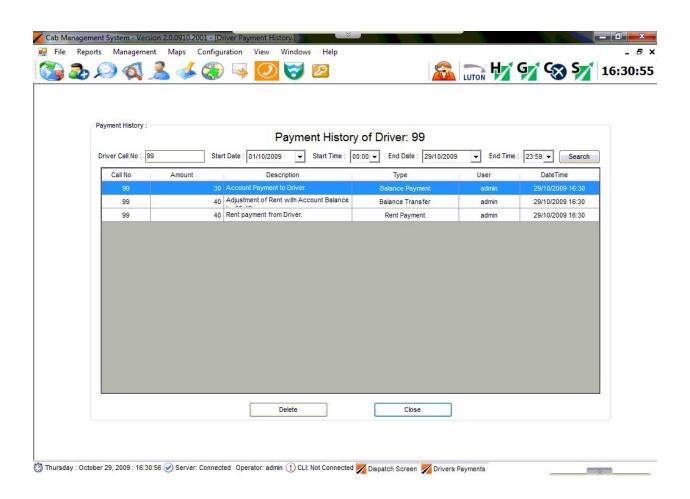


21 Drivers Payments

Track all the drivers payments in a centralized location keep up to date with all the rent, commission and







22 Send Message

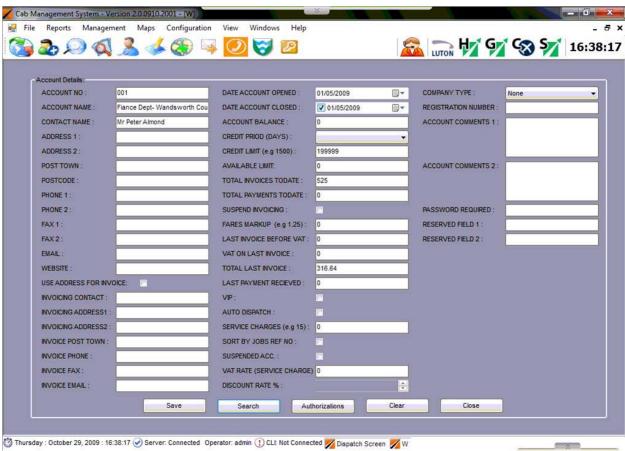
A chat tool for use with CMS Mobile devices



23 Customer Account

Used to sore the details of the account customers used by simply filling the form important points of note are the

Service charges – a booking fee

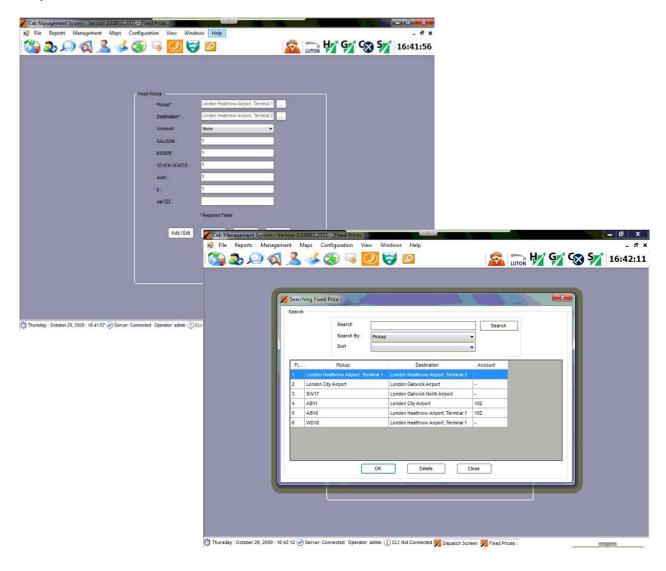


- VAT rate
- Discount rate a discount on the account price set for a given vehicle in the vehicle type



24 Fixed Prices

Some locations such as the airports require special treatment a fixed price this tool will allow you to define the prices between locations there is no limit of the number of locations.

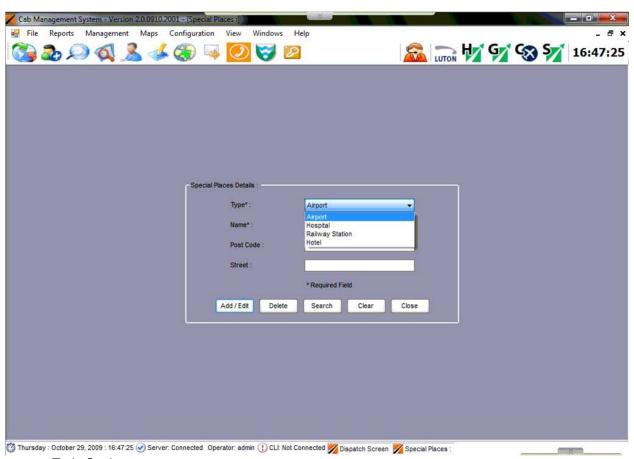




25 Special Places

A tool for adding additional locations to the quick search links in the address search you can add four types

- Airport
- Hospital
- Hotel

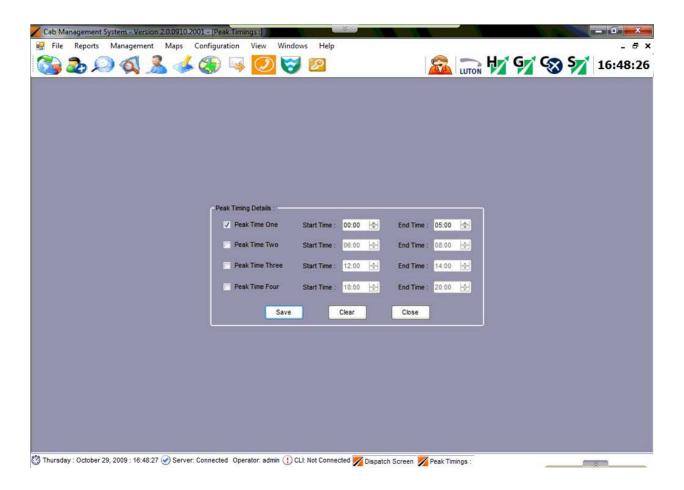


Train Station



26 Peak Times

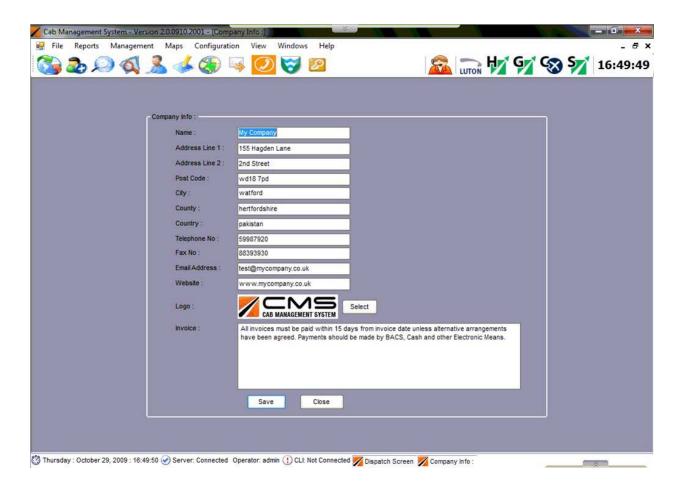
Define the times when the peak and off-peak pricing is used (prices defined in the vehicle type)





27 Company Info

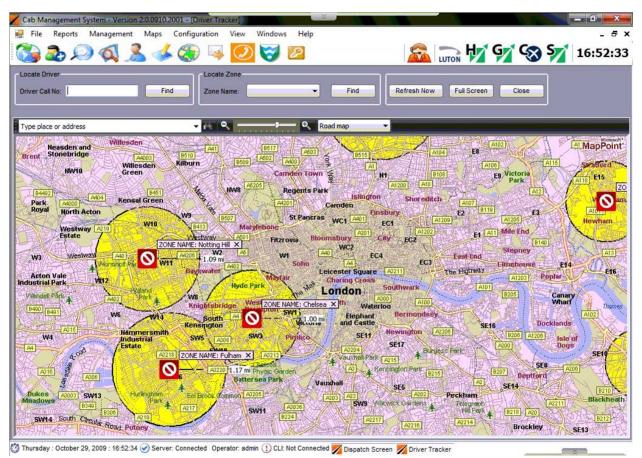
Store your company information for use in the invoices. You can define the company details, include a logo as well as a message to be included in the invoices.





28 Track Drivers

Keep track of all your drivers at all times visualize them on a map thanks to the close integration with the



Microsoft Map Point (also available in full screen mode).



29 Driver Status Colours

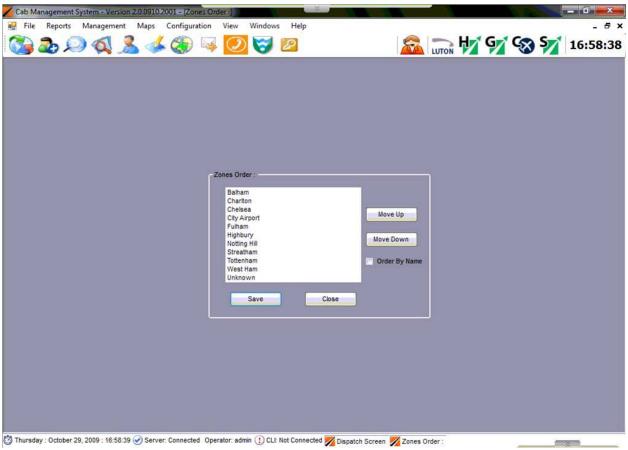
Further customize the CMS to your needs adjust the driver status colours displayed in the dispatch screen to your liking





30 Zones Order

Adjust the way zones are displayed in the dispatch screen simply by pressing the move up or move down





31 Credit Card Configuration

Settings for the payment gateway integration.

32 CLI Config

Settings for the Caller ID integration

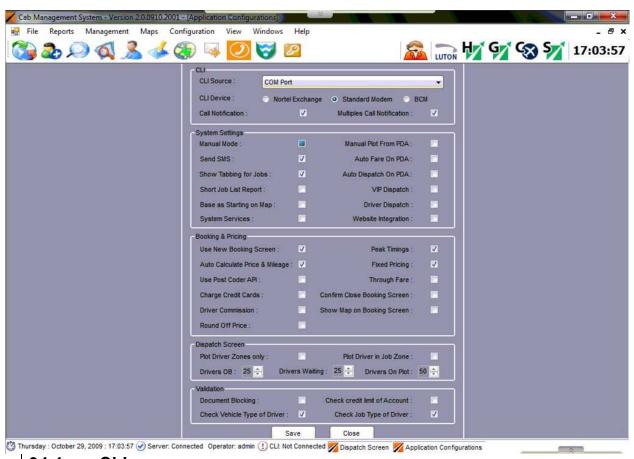
33 VIP Configuration

Advanced settings for the Caller ID integration



34 Options

Global configuration for the CMS Desktop



34.1 CLI

General settings for the Caller ID interface

34.2 System Settings

- Manual Mode enable manual dispatch
- Send SMS enable SMS notifications



- Show tabbing for jobs enable advanced tabbing interface in the dispatch screen as well as all history screens
- Short job list report enable an abbreviated report format (less detail but more convenient for printing)
- Base as Starting on map use the base location as the starting point for all mapping
- System services
- Manual plot from PDA enable plotting manual on PDA in case of lack of GPS signal
- Auto fare on PDA use the GPS based pricing
- Auto Dispatch on PDA dispatch jobs automatically to the first available driver fulfilling the job requirements
- VIP dispatch
- Driver dispatch
- Website integration enable website bookings

34.3 Booking & Pricing

- Use new booking screen use the current iteration of the booking screen
- Auto calculate price & mileage automatic calculation of price
- Use PostCoder API use the Royal Mail address database
- Charge credit cards enable credit card integration
- Driver commission enable drivers working on commission in stead of rent
- Round off price round the prices up or down to the nearest pound
- Peak timings enable the peak and off-peak timings to affect prices
- Fixed pricing enable fixed pricing
- Through fare PostCoder API through fare level
- Confirm close booking screen enable a confirmation dialog every time you close the booking screen
- Show map on booking screen enable an overview map integrated in the booking screen

34.4 Dispatch Screen



- Plot driver zones only show only zones currently occupied by drivers
- Plot drivers in job zone if drivers are are not using the PDA application this will plot them in the zone in which the job drop-off was located once the job is set to complete in the booking screen
- Set the width of the Drivers on board, Drivers waiting and Drives on plot fields

34.5 Validation

- Document blocking block drivers with invalid documents from receiving jobs
- Check vehicle type of driver check if the driver the job is being dispatched to has the same type of vehicle as the one the job was booked for
- Check credit limit of account disallow booking of the account jobs if the account has reached the credit limit
- Check job type of driver check if the driver the job is being dispatched to is allowed to perform jobs of the same type as the one that is being dispatched