



**SmartMove Rules
are your Friends**

Rules

Capture Your Local Knowledge

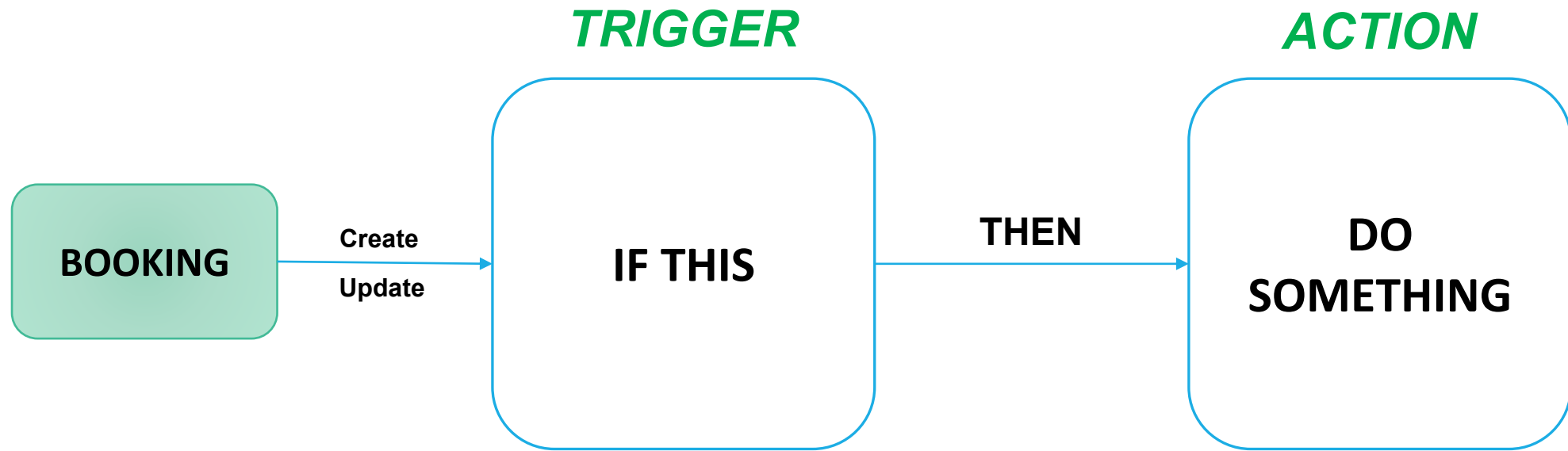
- Let operators know about customer preferences
- Booking options set even for IVR, portal and SmartHail
- Control your accounts, payments and vouchers
- Message customers if load is high or vehicles aren't available
- Remind or reward drivers about specific customers

Rules

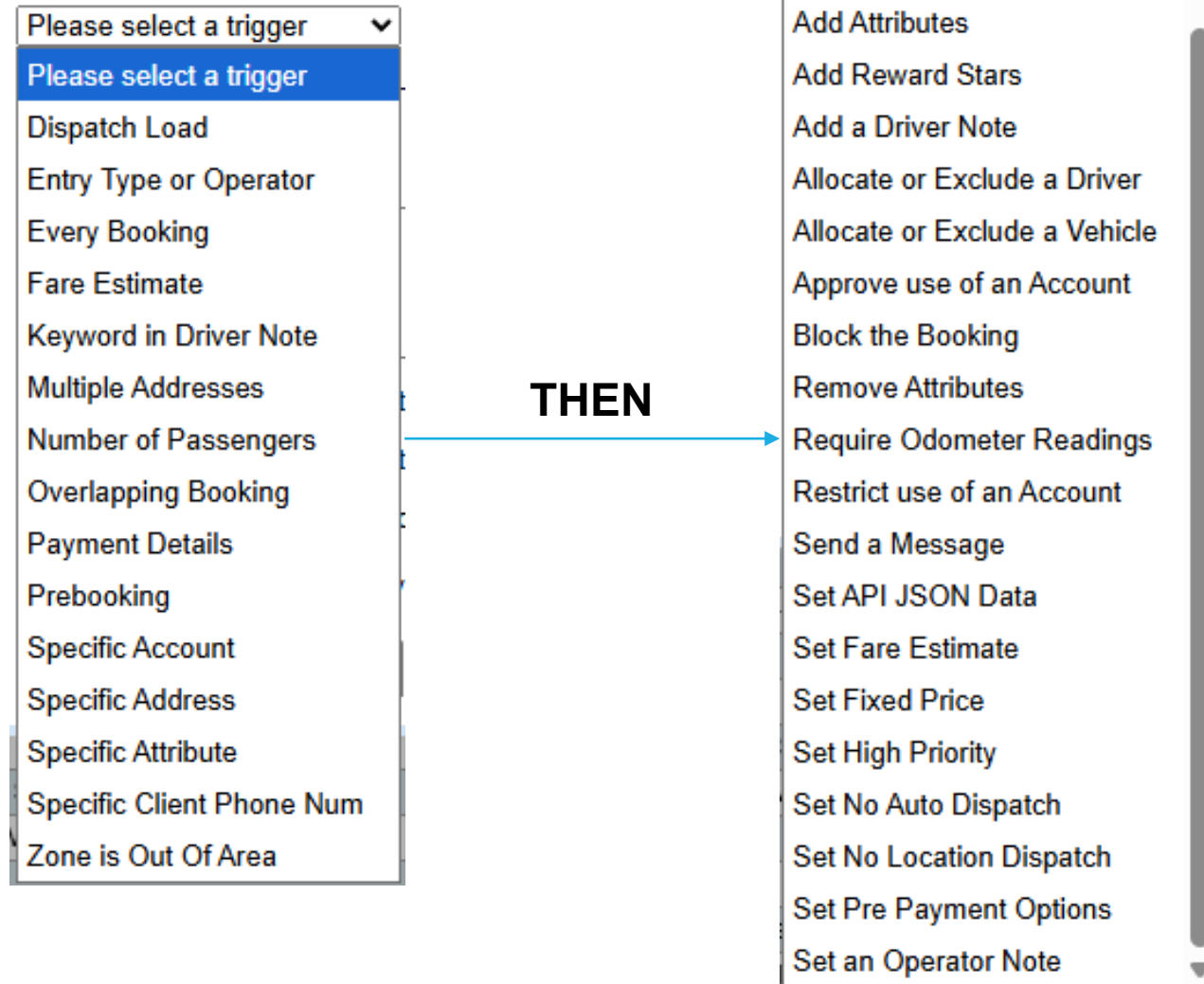
Examples

- Add an extra fee for booking estimates at the airport
- Add some driver notes for a particular customer
- Trigger an SMS to drivers if there are many WAT bookings
- Block app bookings at certain times of the day (advise to call)
- Required prepaid deposits for outer region bookings
- Control spending for an NDIS customer

Rules



Rules



Rules



































Manage Rules

Select the Fleet : Jason Dev (SA) [147]

Rule Category : Any Category

Text Search :

Search Rules

| Results : 15 | | | | | | | <input checked="" type="checkbox"/> Show Active Only | | Create New Rule |  |  |  | <input type="text" value="search"/> |  |
|---|-----------|--|---|---------------------------------------|----------------------|--|--|--|-----------------|---|---|---|-------------------------------------|---|
| Rule # | Prompt | Rule Trigger | Action Description | Schedule | Filter By Attributes | | | | | | | | | |
|  1 | Automatic | Every Booking | Block Booking: Block out hours are in effect | include all days of the week (00:00-0 | | | | | | | | | |  |
|  3 | Automatic | Entry Type: Interactive Voice Response (IVR) | Block Booking: IVR not allowed from 2 to 8 pm | | | | | | | | | | |  |
|  7 | Automatic | | Approve use of an Account for Jason 12 (1112) | | | | | | | | | | |  |
|  10 | Automatic | Client: +61882383021 (Jason) | Approve use of an Account for Jason (123) | | | | | | | | | | |  |
|  358 | Automatic | Prebooking over 10 minutes | Reward Stars: 1 | | | | | | | | | | |  |
|  360 | Automatic | Prebooking under 15 minutes | Reward Stars: 1 | | | | | | | | | | |  |
|  562 | Automatic | Overlap Booking - 1 Bookings for Attribute WAT | Block Booking: WAT BOOKINGS TO BE MADE STRICTLY 1/2 APA | | | | | | | | | | |  |
|  566 | Automatic | Every Booking | Set API JSON: test | | | | | | | | | | |  |
|  568 | Automatic | Attribute: Maxi | Driver Note: Addresses: {{{[ALL_NAME] - [ALL_ADDR] }} | | | | | | | | | | |  |
|  573 | Automatic | Fare Estimate >= \$4 and < 7 | Fare Estimate: \$23 | | | | | | | | | | |  |
|  578 | Automatic | Payment Details Match | Reward Stars: 1 | | | | | | | | | | |  |
|  588 | Automatic | Keyword: WWW | \$23 payment to Subsidy | | | | | | | | | | |  |
|  591 | Automatic | Every Booking | Pre Payment: \$22 Deposit Required | | | | | | | | | | |  |
|  592 | Automatic | Dispatch Load over 22 | Reward Stars: 1 | | | | | | | | | | |  |
|  A1 | Automatic | Address - 147 HENLEY BEACH ROAD, MILE END () | Reward Stars: 1 | | | | | | | | | | |  |

Create a New Rule

Action to Take : Add Reward Stars Select an action to perform on certain bookings

Booking Trigger : Specific Account Select a booking criteria to trigger the action

Prompt Type : ☒ Automatically Applied ☐ The Operator gets a Prompt ☐ Force the Operator to Decide

Account Selection : ☒ Specific Account (select below) ☐ Any Account

Account for Rule :

Number of Stars to Add : 1

Operator Note :

Filter by Entry Type : ☐ This Rule Should Apply Only to the Selected Entry Types

Filter by Attribute : ☐ This Rule Should Apply Only to the Selected Attributes

Rule Active : ☒ Rule is active permanently (no future start or end date applicable)

When to Apply : ☒ Always Applicable ☐ Only at These Times ☐ Exclude These Times

Save Cancel

Common Filters

Create a New Rule

Action to Take : Select an action to perform on certain bookings

Booking Trigger : Select a booking criteria to trigger the action

Prompt Type : ☒ Automatically Applied ☐ The Operator gets a Prompt ☐ Force the Operator to Decide

Number of Stars to Add :

Operator Note :

Filter by Entry Type : ☒ This Rule Should Apply Only to the Selected Entry Types

Entry Type Filter :

| | |
|---|---|
| <input type="checkbox"/> Dispatch Client | <input type="checkbox"/> Hail |
| <input type="checkbox"/> Website Booking | <input type="checkbox"/> Interactive Voice Response (IVR) |
| <input type="checkbox"/> Mobile Application | <input type="checkbox"/> SMS from Mobile |
| <input type="checkbox"/> Dispatch Client Public | <input type="checkbox"/> Other |
| <input type="checkbox"/> Recurring Booking | <input type="checkbox"/> Driver GPS |
| <input type="checkbox"/> Coin Operated Device | <input type="checkbox"/> QR code SMS from Mobile |
| <input type="checkbox"/> Tablet (QuickCab) | <input type="checkbox"/> Driver Entry |
| <input type="checkbox"/> 131008 Smartphone App | <input type="checkbox"/> General API |
| <input type="checkbox"/> BTTN Device | <input type="checkbox"/> BTTN Device Cancel |
| <input type="checkbox"/> OFFLOAD via API | <input type="checkbox"/> Booking.com API |

Filter by Attribute : ☒ This Rule Should Apply Only to the Selected Attributes

Attributes Filter :

| | | | |
|---------------------------------------|----------------------------------|---|--------------------------------------|
| <input type="checkbox"/> Booking Only | <input type="checkbox"/> Capsule | <input type="checkbox"/> NOT Booking Only | <input type="checkbox"/> NOT Capsule |
| <input type="checkbox"/> Maxi | <input type="checkbox"/> Sedan | <input type="checkbox"/> NOT Maxi | <input type="checkbox"/> NOT Sedan |
| <input type="checkbox"/> Wagon | <input type="checkbox"/> WAT | <input type="checkbox"/> NOT Wagon | <input type="checkbox"/> NOT WAT |

Rule Active : ☐ Rule is active permanently (no future start or end date applicable)

Rule Start Time : HH:MM

Rule End Time : ☐ No End Time ☒ End Time HH:MM

When to Apply : ☐ Always Applicable ☒ Only at These Times ☐ Exclude These Times

Days of the Week : ☐ All Days

☒ MON ☐ All Times ☒ Times:

☐ TUE

☐ WED

☐ THU

☐ FRI

☐ SAT

☐ SUN

Public Holidays : ☒ Have No Effect ☐ Only Holidays ☐ Exclude Holidays

Diary :

☒ Only Diary Days ☐ Exclude Diary Days

Add an operator note

Only trigger if the booking was created a certain way (e.g. App)

Only trigger for certain attributes

Start and end times

Only trigger at certain times of the day or days of the week

Include or exclude diaries or public holidays

Triggers

Dispatch Load

NOTE: Dispatch load rules only apply to new ASAP bookings and current load

Dispatch Load % : Greater Than or Equal To ▼ 1

Entry Type

Entry Type : Dispatch Client ▼

Operator Filter : Select another operator if required
✕ Jason L (jason)

Every Booking

Fare Estimate

Trigger on Fare Estimate : Between \$ 0 and \$ 0

Keyword in Driver Note

Notes Search Term : ?

Number of Passengers

Passenger Count : Greater Than or Equal To ▼ 1

Prebooking

Prebooking Threshold : Greater Than or Equal To ▼ 5 minutes

Triggers

Multiple Addresses

Multiple Address Type : ☒ One from a set of addresses ☐ One each from TWO sets of addresses (e.g. from [A] to [B])

Please note that if a radius is used then those addresses will not be available for Client side notifications

Address List :

| Type | Radius | Address | | |
|-------|--------|------------------------------------|---|--|
| Place | 200 | ADELAIDE AIRPORT, Adelaide Airport | ✖ | |
| | | | | |

Overlapping Booking

Overlap Type :

Overlap Attribute :

Booking Threshold : ?

Window Before (mins) : ?

Window After (mins) : ?

Payment Details

Selected Payment Type :

☒ Use advanced payment trigger options?

Payment Type Account :

☐ Only payments that have a lift fee specified?

Trigger on Payment : Between \$ and \$

Text in Payment Reference : ?

Triggers

Specific Account

Account Selection : ☒ Specific Account (select below) ☐ Any Account

Account for Rule : Jason (123)

Specific Address

Address Type : ☒ Address ☐ Street ☐ Place ☐ Area

Address :

☐ Apply to Pickup Addresses ☐ Apply to Destination Addresses

Specific Attribute

Attribute for Rule :

WAT

Client Phone Num

Client for Rule : +61882383021 - Jason, Jason Test

Zone is Out of Area

Out Of Area Type : Pickup OR a Destination

Actions

Add Account/Subsidy Payment

Payment Type : ☒ Account ☐ Subsidy

Payment Account :

Payment Reference : ?

☐ Payment Reference is Required

Payment Amount Type : ☒ Percentage ☐ Fixed Amount

Payment Percentage (%) : ?

☒ Restrict Payment to a Maximum Amount

Maximum Payment (\$) : ?

☒ Payment Includes a Lift Fee

Add Attributes

Attributes to Add :

| | | | |
|---------------------------------------|----------------------------------|---|--------------------------------------|
| <input type="checkbox"/> Booking Only | <input type="checkbox"/> Capsule | <input type="checkbox"/> NOT Booking Only | <input type="checkbox"/> NOT Capsule |
| <input type="checkbox"/> Maxi | <input type="checkbox"/> Sedan | <input type="checkbox"/> NOT Maxi | <input type="checkbox"/> NOT Sedan |
| <input type="checkbox"/> Wagon | <input type="checkbox"/> WAT | <input type="checkbox"/> NOT Wagon | <input type="checkbox"/> NOT WAT |

Block the Booking

Please note this message may be shown or read out to an end customer

Returned Message :

Add Reward Stars

Number of Stars to Add :

Actions

Remove Attributes

Attributes to Remove : ☐ Booking Only ☐ Capsule ☐ NOT Booking Only ☐ NOT Capsule
☐ Maxi ☐ Sedan ☐ NOT Maxi ☐ NOT Sedan
☐ Wagon ☐ WAT ☐ NOT Wagon ☐ NOT WAT

Add a Driver Note

Driver Notes :

Allocate or Exclude a Driver

Included Driver(s) :
✕ Jason Test 4 (9999)

Excluded Driver(s) :


Allocate or Exclude a Driver

Included Vehicle(s) : ☐ show retired
✕ J01

Excluded Vehicle(s) : ☐ show retired

Require Odometer Readings

Set Fare Estimate

Fare Estimate (\$) : 

Set Fixed Price

Fixed Price (\$) : if 0 then any estimated amount will become fixed price

Actions

Set an Operator Note

Operator Note :

Set Prepayment Options

Pre-Payment Type :

Pre-Payment Deposit Required



Pre-Payment Deposit (\$) :

0



APP ONLY: Fixed Fare Option Available (from fare estimate)

Pre-Payment Deposit Required

Pre-Payment Fixed Fare Required (from fare estimate)

Set API JSON Data

Set High Priority

Set No Auto Dispatch

Set No Location Dispatch

Actions

Send a Message

Message Type : ?

Include Updates : ☐ Check and send message on updates too? (Otherwise only check and send on booking create)

☐ Use customers email address for email destination

Email Address(es) :

Email Subject :

Email Message Body : ?

Approve Use of an Account

Restrict Use of an Account

If an account does not show up here ensure it is set to A or Y for property "Account Restricted to Users or Vouchers"

Approved Account :

Percentage of Fare (%) : ?

Max Trip Fare (\$) : ☒ No Individual Trip Limit

Overall Limits : ☒ No Overall Limits ☐ Set Overall Limits




Monthly Limits : ☐ No Monthly Limits ☒ Set Monthly Limits

Monthly Fare Limit : ? Monthly Trip Limit : ?

Rollover Date : ? Initial Fare Limit : ? Initial Trip Limit : ?

Weekly Limits : ☒ No Weekly Limits ☐ Set Weekly Limits

Address Restrictions : ☐ No Address Restrictions ☒ One Address Must be in the List ☐ All Addresses Must be in the List

| Type | Radius | Address |
|--|--------|---------|
| <div>Add Address    <input type="text" value="search"/></div> | | |



***smart*MOVE**

QUESTIONS?

www.smartmovesystems.com

