

# CIENT PORTAL

#### User handbook





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## **Getting started**

## Introduction

#### The Limos4 client portal – a whole new way to cater to the clients

In order to give our corporate clients an even better user experience, we have created a one-of-a-kind client portal. Its development hasn't been quick and easy, as we wanted it to be comprehensive, yet extremely simple to navigate it and use it. While crafting it, we only had one thing in mind – to streamline the overall Limos4 experience process., i.e. save the client's time as much as possible.

With a secure and private login, you are enabled to manage your company chauffeured ground transportation services in one place and find everything you need in a flash.

Not only would you be able to review the past and upcoming trips and update billing information, as well as download invoices and payment receipts, among many other options, but also to make a booking, change or cancel the service without the need to contact our customer care team. What's more, the Limos4 Client Portal platform offers customization possibilities, so that you can set specific preferences for the passengers, vehicles, chauffeurs and routes.

Made to increase your options for working with us, the Portal provides a secure environment for doing so at your convenience.

Welcome to the Limos4 Client Portal!





## **Profile registration**

You can easily request a new profile registration by clicking the **Register** link in the upper right corner of the Limos4 website and fill out the requested information.

Then click the **Send registration request** button.

As soon as you submit your request, our Support team will set up your account and you will receive a Client's Portal Registration email.



#### LIMOS4 CLIENT PORTAL

REGISTRATION REQUEST

John Doe		
Your email *	Your phone *	
johndoe@example.com	+12345678	
Company name *	Company type *	
Company Ltd.	Select type	Ý
Website (optional)	Street address *	
www.mycompany.com	Street 123	
City *	Country *	
etc. Zurich	Select status	~
I'm not a robot		
Ser	nd registration request	<u></u>
		C
Already have an account?		Sign in a



## **Profile activation**

An email with a link to complete your profile activation is sent to the address you've input into the Your Email field upon submitting Registration request.

Click the Link to activate your profile.

This email contains your login credentials: **USERNAME** and **PASSWORD**.

Once your profile is active, proceed to the **Login page** and input the credentials from the Activation email.







#### **Client's Portal Registration**

Hello John Smith, Thank you for joining Limos4 Client Portal.

Please follow this link to activate your account.

If the button above does not in the provided provided the provided provided

Once your account is active, you will be invited to proceed to the login page and access your Portal.

Please see your login credentials below:

Username: johnsmith0822 Password: 7EiqXmG0

2 You are welcome to change your password at any time, and we warmly recommend it.

Please do not hesitate to contact us if you need further support.

Best regards, Limos4...

#### CONTACT US:



#### Reset a password

We encourage you to change the generic password right away and personalize it as per your preferences.

**SET YOUR PASSWORD** by inputting text into the appropriate form fields.

Your new password must contain at least 8 characters - a combination of upper & lower case letters, and at least one number or symbol.



#### **LIMOS4 CLIENT PORTAL**

**CHANGE PASSWORD** 

#### Password

Use 8 or more characters with a mix of letters, numbers & symbols.

#### **Confirm Password**



## Book a ride

## Adding a passenger

The first step when booking a ride is to add the passenger(s).

You can simply do that by clicking the **Add new passenger** button, filling our required fields and clicking **Save new passenger**.

Each passenger needs to be added only once and they will appear in the **Select passenger(s)** drop down list upon making new bookings.

You can add additional passengers to the ride simply by typing their names next to the lead passenger's and the passenger count will automatically rise with each new entry.

Once all the passengers are added, you may proceed by clicking the **Next step** button.



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w ride for		Ad	dd new passenger
elect a passenger(s)			~
ssengers count *	Luggage count *		
	1		
ed Help? Please Call +41 43 508 01 55			Next step
New ride for		Close form	Save new passenger
Name/Surname *	Phone *		
John Doe	+12345678		
Need Help? Please Call +41 43 508 01 55		(	Next step®



## **Pickup and drop-off locations**

Enter your **Pickup location** and **Drop-off locations** into the appropriate fields.

Google is there to help you with the exact addresses. If you need to add a **Stop(s)** between these two destinations, click the **Add stop** button and enter the address(es) in the appropriate field.

You can add as many stops as your itinerary has.



#### Pickup and Dropoff location

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		C.
Α	Zurich Airport	
	Zurich Airport (ZRH) Kloten, Switzerland	
в	Zurich Airport Kloten, Switzerland	
	Hilton Zurich Airport Hohenbühlstrasse, Opfikon, Switzerland	
	Zürich Airport (Haltekante R2) Kloten, Switzerland	
eed	Airport Medical Center Zürich, Switzerland	
		powered by Google
	Pickup and Dropoff location	Add stop
î↓	A Zurich Airport (ZRH), Kloten, Switzerland	

S Insert stop location

B Baur au Lac, Talstrasse, Zürich, Switzerland

Need Help? Please Call +41 43 508 01 55





## Select the service type and schedule your pickup

#### You can choose between 2 types of services:

- **Transfer service** (a simple point-to-point transfer)
- Hourly service (at-your-disposal service for a certain amount of hours)

Select a desired pickup date and time.

In case your service starts/ends at the airport, train station or cruise port, please select the corresponding option and fill out the required fields and click the **Next step** button.







## Choose a vehicle class

Choose your vehicle from the list of options.

Here, you will be able to look through the vehicle classes, see how many passengers and pieces of luggage can fit in each vehicle, **Add a note** with special instructions, and/or add a **Luggage trailer** or a **Child seat**.

Once you have selected your desired vehicle and input all necessary notes, the system will calculate the rate and you are welcome to confirm the booking by clicking **Book a ride**.















## Booking confirmed

Upon confirming the booking, your page will switch to the **Reservation page** which contains all the details of your service.

Your booking is now in the **CONFIRMATION PENDING** status, which means that our Customer Care Team needs to approve it. This is done within 15 minutes.

As soon as we confirm your booking, the reservation status changes to **CONFIRMED**.

If you don't see the status change within a reasonable time, please refresh the page or contact our Customer Care Team.

Simultaneously, you will receive a **Reservation Confirmation** email.



i) Account's info	🚝 Service Details	🚖 Ride Status		💿 Payment info		
ilient id 412	Service Type Airport transfer	Driver Status Not assigned		Payment Type		
company Name CME	Pickup Date 17.8.2022.	Airport Transfer		<ul> <li>Client's Pricing</li> </ul>		
Gooked by	Pickup Time 14:15	Flight Type Commercial flight		Client Currency CHF		
ooked By Name ane Smith	Pickup Location Zurich Airport (ZRH), Kloten, St	witzerland Airline Code		Limos4 Pric	20	
soked By Email 1yamisic@hotmail.com	Destination			- O CHF		
oked By Phone 11693723525	Reservation #121901					
Rassenger						
ad Passenger Name ine Smith	Account's info     Client id	Service Details	Ride Status		Payment Info  Payment Type	
Lead Passenger Email myamisic@hotmail.com	1412 Company Name ACME	Airport transfer	Not ossigned		INVOICE TO LIMOS4	
Lead Passenger Phone 381693723525	C Booked by	Pickup Time     14:15	Flight Type Commercial flight		Client's Pricing	
O Other presengers	Booked By Name Jane Smith	Pickup Location Zurich Aliport (ZRH), Kloten, Switzerland	Altine Code		Contract Price	
me Ine Smith	Booked By Email myamisic@hotmail.com	Destination Baur au Lac, Taistrasse, Zürich, Switzerland	Fight Number 1413			
Email someemail@email.com	Booked By Phone 381653723525	BR Passengers				
Phone +12345678999	Possenger  Lead Passenger Norre					
	Leod Passenger Email					
nos4 All Rights Reserved	Leod Passenger Phone 389993723525					
	RR Other passengers					
_	Name Jane Smith					
	Email     someemail@email.com     Phone					
	*12345678999					



## Changing / canceling a booking

In case you need to amend or update the booking details or cancel the ride, you can do that by clicking the **three dots** in the upper right corner of the Reservation page.

For any booking modifications and/or updates, click the **Request a change** in the drop-down menu. A dialog box will pop up and you will be asked to describe a change you wish to implement (e.g. a new flight number or pickup address).

Our team will process your request and inform you if it affects the price of the service.

For a booking cancelation, click **Cancel (a) booking**. A pop up window will appear asking you to confirm the cancelation.



vation #122100				
Account's info	5 Service Details	🚔 Ride Status	Payment info	ACTION Request a change Concel tooking
era	Sarvice Type Airport txonsfer	Criver Status Not assigned	Popment Type INVOICE TO LIMOSE	
ngoany Name ME	Pickup Date 19.8.2022			
	Protup Time     Itols	Right Type	Client's Pricing	
Booked by Red by Name	Pickup location Zurich Airport (28H), Klaten, Switzerland	Arline Code	CHP	
e Smith Ned by Small	Destination Bour ou List, Telebrosee, Zürich, Seitzerland	LX Right Number	0 CHF	
amieic@hotmoil.com	Dispot time	14/3	A Comments	
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sessi Possenger (moli myamisic@hatmail.com	🔗 Send us vour	request for change	×	
Lead Passenger Phone +389887729525	,	1		
Other passengers				
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tinal someenalgemail.com	Add a descript	ion		
Phone +(2345678999	Aud d descript	1011		
		Close	and a request	





## Dashboard

**Dashboard** is your Portal's home page.

It provides a quick overview of your latest rides and some interesting data, such as Frequent passengers, Recent expenditure and rides, Frequent booker (if you have more than one user on your account).

If you wish to quickly check the details of a recent ride, without changing the page, you can simply click on the drop-down Arrow and the most relevant booking details will be expanded.

The **Portal's Main Menu** is displayed on the left for quick access, regardless of the page you are on.







## Rides

The **Rides tab** allows you to monitor your upcoming, completed and canceled bookings.

You can filter the rides per several parameters to create the view you need:

- Travel arranger (portal user)
- Booking status
- Date (upcoming and past rides or per month)
- Passenger
- Keyword

Each ride can be expanded by clicking the drop-down Arrow, like in the Dashboard tab.



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8	DASHBOARD	
	RIDES	
я	PASSENGERS	
R	USERS	
£	RIDE POLICIES	
•	PAYMENTS	
B	INVOICES	
ա	ANALYTICS	
0	COMPANY ACCOUNT	
8	MY PROFILE	



#### Passengers

In the **Passengers tab**, you can view, edit, add or delete your frequent passengers.

You can add as many passengers as you wish.

Furthermore, you can set specific preferences and ride policies for each passenger, such as:

- Vehicle class;
- Communication channel;
- Ride status notifications (which ones are to be sent and via which channel);
- Cost center (in case your company has multiple cost centers);



## PORTAL Image: Constraint of the second of

PORTAL 🔤	Home - Passengers	Passengerinfo
		russengerinio
RIDES	Add Passenger	Avatar
R PASSENGERS	10	
A. USERS	IMAGE NAME	рн
I RIDE POLICIES	Mr. Jane Smith	41
PAYMENTS	someemail@email.com	Title
B <sub>5</sub> INVOICES	Showing 1 to 1 of 1 records	
		Name/Surname *
COMPANY ACCOUNT		Email

Add Passenger   D   D   MAGE   NAME   Mr. Jane Smith someemail@email.com   Showing 1 to 1 of 1 records   Title Name/Sumame* Email	Alowed file types: png. jpg. jpg. Mr. Ms. John Doe example@gmail.com	COMMUNICATION	NUMBER OF JOBS	Search: Actions	ACTIONS	
Mr. Jane Smith someemail@email.com +1 Showing 1 to 1 of 1 records Name/Surname * Email	Allowed file types: png, [pg, [peg. Mr. Ms. John Doe example@gmail.com	Whatsapp	•	Actions	~	
someemail@email.com +1 Showing 1 to 1 of 1 records Name/Surname * Email	Mr.     Ms.       John Doe       example@gmail.com	Whatsapp	•	Actions	~	
Showing 1 to 1 of 1 records Name/Surname *	John Doe example@gmail.com				_	
Emoil	example@gmail.com					
Phone	+12345678					
Company name	(optional)					
Position	etc. Executive assistant					
Cost Center						
Vehicle preferences	Select a class					
Communication Which ride statuses user want to receive? Ride status notification	All Email SMS Whatsapp Chat Phone Select status Email SMS					
2022 © Limosil All Rights Reserved	Close Save passenger info		Ein Heil	nos4 Support Iol Is there anything we ca	n help	



## Users

In the **Users tab**, you can view, edit, add or delete users. If you need to add a new user to your account, click the **Add User button** at the top of the page.

#### Enter the new user's information and choose a role:

• A **Travel arranger** can book for themselves and others and have no access to billing information.

• A **Billing** user can only work in the Invoices and Payments section of the account.

• A user who has **Both** checked can manage both bookings and billing sections.

#### You can also choose access allowances / limitations:

• An **Admin** has full access to all information in the Portal and can add or delete other users.

• A User who is not an Admin can only access their profile, rides booked by them and cannot change any Company details.

To edit an existing user's information, click on the user's name in the list to open the details and you are free to edit the data.

Additionally, you can click the **Actions button** and edit the profile or delete the user from the account.



 Image: Second second







## **Ride policies**

In the **Ride policies tab**, you can set rules that apply to all Users and Passengers.

Currently, the only available option is Car restriction policy which allows you to restrict certain classes of vehicles.

This policy will be applied to all passengers on the account.

You can customize it for each passenger in their profile view.





PRRTAL 🔤	Home - Ride Policies
RIDES	Ride policies
R PASSENGERS	Car Restriction Policy:
A USERS	Select an option 🗠
KIDE FOLICIES	Business class
PAYMENTS	
	First class
	Rusiness Ven
	Business von
	SUV
COMPANY ACCOUNT	
	SUV Luxury
Horne - Ride Policies	141 43 508 01 55 BOOK A RIDE ACCOUNT D

Ride policies	This policy will be applied to all passengers on the account. You can customize it for individual passengers in their profile view
Car Restriction Policy:	
Select an option	
Business class	
First class	
Business Van	
SUV Luxury	
Minivan Luggage	
Green business class	
Green SUV	







### Payments

In the **Payments tab**, you can view, add or remove your payment methods for the selected account in the header.

Depending on the payment terms you have agreed with Limos4, this tab can appear in two forms:

• Credit Card prepayment - you will be asked to enter your credit card details.

• **Invoice Post-Service payment** - no edit is required from your side, as the Limos4 team has already set this payment option for your account.

In case you are adding multiple payment methods (credit cards), you will be asked to set one as the **Primary Payment Method**.

This card will be offered as a default one upon making a new booking. Other cards will have a Backup status and can also be chosen upon booking a new ride.





Portal 🔤	Home - Payments
<ul> <li>DASHBOARD</li> <li>RIDES</li> </ul>	Payment Methods
A passengers A users	Primary payment method Bank transfer - Invoice payment
RIDE POLICIES	
	Invoice Post payment enabled           Invoice Post payment         enabled           Image: Bank transfer         Bank transfer
COMPANY ACCOUNT	

	Add New Card	×		# 1279 LOGO 5		
Payment Methods		Billing information				
rimary payment method	Nome and Surname *	Company name 0				
Bank transfer - Invoice payment	John Doe	(optional) etc. undefined				
	Phone * 0	Email * 0				
Bank transfer	• +12345678	john@doe.com	re adding your new payment card			
	Street address * 0	Apt, suite, PO box, etc. 🛛				
	Address line 1 (required)	Address line 2 (optional)				
	City • 0	State/County/Region ()				
	Zurich	State				
	Postcode * @	Country * D				
	8000	Select a country 👻				
	_	Card information				
	Nome On Card * @	Cord Number *				
	John Doe					
	Expiration Date *	cvv • @				
	Save Card as GLOBAL for further billing	omer Support				
Limos4 All Rights Reserved	Close	Reset Save new card		Limos4 Support     Heliol Is there anything we can help     with?		



## Invoices

In the **Invoices tab**, you can view and download your invoices.

The invoices are listed in descending order, from the latest one, but you can search them based on the invoice number or keyword in the **Search** field.

In the invoices preview, you can also see how many bookings were paid by that invoice.

If you click the arrow in the **Expand** column, you will see the exact rides on that invoice and their shortened details.

If you wish to download a **PDF file** of a certain invoice, simply click the **Invoice number**. This action will open the document in a separate tab. Then simply download it from your browser.







Home - Involces					La +41 43 508 01 55 BOOK A RIDE Account ID # 1349			
Invoices								
10 ~					Search			
EXPAND	INVOICE	DUE DATE	NUMBER OF JOBS	INVOICE STATUS	AMOUNT			
~	17873	01.11.2021	1	PAID	76.00 / 76.00 EUR			
~	17858	26.10.2021	1	PAID	228.00 / 228.00 EUR			
~	17438	06.09.2021	1	PAID	126.00 / 126.00 EUR			
~	17402	02.09.2021	1	PAID	60.00 / 60.00 EUR			
~	17399	02.09.2021	1	PAID	453.00 / 453.00 EUR			
~	17357	26.08.2021	2	PAID	1005.00 / 1005.00 EUR			
~	16781	16.06.2021	1	PAID	715.00 / 715.00 EUR			
~	16585	12.05.2021	1	PAID	118.00 / 118.00 EUR			
~	16552	07.05.2021	3	PAID	1196.00 / 1196.00 EUR			
~	15432	07.09.2020	1	PAID	650.00 / 650.00 EUR			

Showing 1 to 10 of 10 records (filtered from 2,242 total entries)





The **Analytics tab** provides you with an overview of the analytical data of your account:

- Top 5 vehicle classes booked
- Top 5 users (bookers)
- Top 5 passengers
- Top 5 cities
- Top 5 routes
- Top service types



DASHBOARD

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#### **Company account**

The Company account tab enables you to view and edit your company data, such as the company legal name and address, the industry your company is in, the overall preferred communication channel(s) with the Limos4 team, the financial and billing address (in case it is different from the company main address), the preferred currency you wish to be billed in, etc.

Some of the data will already be there when you activate your account, having been previously added by the Limos4 team upon creating your account. However, you are free to change or update all fields.

Simply click the **Edit profile** button in the upper right corner and amend or add data as per your preference.







On this page, you can view and edit your **Profile info**:

- Set your personal information
- Reset your password
- Set your communication preferences
- Set ride status notification preferences

You are also able to add Notes/Instructions that will be sent with each booking you make.



## PORTAL DASHBOARD DASHBOARD RIDES RIDES RIDES RIDES RIDERS RIDE POLICIES RIDE POLICIES PAYMENTS NNVOICES

MY PROFILE



Home - Profile						C+41 43 508 01 55	BOOK A RIDE	Account ID LOGO	b details
	Profile info			© 1	dit account settings	🔁 Save My Info			d Passen
	Name/Surname	Jane Smith		Type of user	Travel Arranger     Biling				
	Email	someemail@email.com	•		O Both (TA / Billing)				
	Phone	• +12345678999	✓ ⊙	Title	🔿 Mr. 🔵 Ms.				
	Position	CEO		Is admin? Communication	Ves No				
	Cost Center				Email SMS				
	Which ride statuses I want to receive?	C Driver confirmed job details      C Driver on the way     Passenger on board      Passenger dropped off     NO SHOW	× Driver on location On stop		Chat Chat				
	Ride status notification?	C Email SMS							
	Email Address myamisic@hotmail.com					Change Email			
	Password					Reset Password			
	Secure Your Acce Please enter a pass	ount word strong enough to improve your account securit	ty.						
2022 © Limos4 All Rights Reserved						Helot With?	s4 Support Is there anything we	can help	



#### **Contact us**













- info@limos4.com
- ø sales@limos4.com
- www.limos4.com









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LIMOS4 GmbH Bahnhofstrasse 7 9470 Buchs Switzerland

A proud member of:



