Driver

Driver Status:

- If a Driver’s license (DL) expires, a notification is sent to decide whether to deactivate or continue. If there is no response, the system deactivates the driver automatically. The driver can be made active manually if the user wants to.

Driver App Login Criteria/ How can a driver login in the mobile app:

- Drivers receive an OTP when entering their phone number for validation, enabling login across all companies where the number was used. They can switch between accounts easily.

Required Fields for Driver Creation:

- First Name and Phone Number are required to create a driver via the web.

Driver Search:

- Search for a driver by name, email, or phone number.

How to Set Up Driver Payout Pricing

- Open the Driver profile and navigate to the Pricing Tab
- You have 2 Pricing Options
    - Hourly
    - % of Base Rate
- For Hourly Rate, please provide the hourly wage for drivers which applies when the trip type is Hourly.
- For a percentage of the Base Rate, the Driver's payout will be that specific percentage of the Base price for the trip.

Client

Create a Client:

- Required fields: First Name, Mobile Phone, and Email Address.

Add Cards to a Client:

- Credit cards for individual or corporate use can be securely stored if the company has a payment processor setup like Stripe.

Why I am unable to Store the Credit Card:

- To store the credit cards for the client, the pre-requisite is to set up a payment processor like Stripe. If you haven't set it up, you can't store credit cards for the clients.

Can we block Driver for a client:

- If a client is unsatisfied with a particular driver, they can block that driver so that future reservations do not include that driver in the list of available options.

How we block Driver for a client:

- Open the client profile.
- Navigate to the Preferences section.
- Search for the driver and add it to the list of blocked drivers.

Can we block a Vehicle for a client:

- If a client is unsatisfied with a particular vehicle, they can block it so that future reservations do not include that vehicle in the list of available options.

How we block Driver for a client:

- Open the client profile.
- Navigate to the Preferences section.
- Search for the vehicle and add it to the list of blocked vehicles.

Can we store the Home Address or work address for a client:

- To enhance convenience, customers can save their home address and work address in their profile, saving time for future reservations.

Vehicle

Create a Vehicle:

- Required fields: Vehicle Type and Name

Vehicle Status:

- If the Tags expiration, Inspection expiration, or Insurance expiration date is passed, a notification is sent to decide whether to deactivate or continue. If there is no response, the system deactivates the vehicle automatically. The vehicle can be made active manually if the user wants to.

Fleet vs Affiliate Vehicle:

- A vehicle is part of the fleet until assigned to an affiliate, at which point it moves to the Affiliate tab.

GNet Vehicle mapping:

Why GNet Vehicle is important/ What is GNet Vehicle Mapping

- The GNet Vehicle mapping is crucial as it simplifies the farm-out process for GNet affiliates. It ensures that the vehicle types of Xtreim align with G-net vehicle types, making farm-out and farm-in through GNet possible.

How to do the GNet Vehicle Mapping/ How to map the Xtreim Vehicles with GNet:

Mapping the Vehicle Types of Xtreim with GNet is extremely simple.

- The screen is divided into 2 sections. On the left side, all the Vehicle Types in Xtreim are available. On the right side, all the Vehicle Types of G-Net are available
- Simply drag the Vehicle Type of Xtreim to the GNET Vehicle Type which is

Reservation

Reservation Tabs:

- **Open**: A reservation stays in the open tab if at least one trip is not in completed status.
- **Closed**: A reservation stays in the closed tab if all the trips are in completed status.
- **All**: Displays all reservations regardless of status.
- **Draft**: Saved as Draft and not sent to the customer.

Charge Individual Trips:

- Trips can be charged via Cash or Card, with custom amounts or percentages of the total due.

Refunding Payments:

- Payments made by cash or card can be refunded fully or partially, with the option to refund the remaining amounts later if needed.

Can there be more than 1 trip in a reservation:

- Yes, there can be more than 1 trip in a reservation

How to farm out a trip:

- Open the trip you want to farm out
- Choose the Farm-out option from the available selections.
- You can search for a vehicle directly or choose a preferred affiliate's vehicle.
- After selecting the vehicle, enter your notes and specify your desired price.
- If it’s a GNet affiliate, please select the appropriate Vehicle Type as well

Can we cancel a trip:

- Open the trip you want to cancel
- Choose the Cancel Trip option from the available selections
- You will receive a confirmation prompt. Please respond with "yes"
- The trip status will change to Cancelled

Can we delete a trip:

- Open the trip you want to delete
- Choose the Delete Trip option from the available selections
- You will receive a confirmation prompt. Please respond with "yes"
- The trip will be deleted

How to accept the farm-in trip:

In the Open tab of Reservations, you will see a new trip. Open it and accept it if you agree with the price.

Can we cancel the farm-out request for a trip:

Yes, you can cancel the farm-out request for a trip

Can we negotiate the trip for a farm-in trip:

- The rates will be decided based on the mutual agreement of both parties.

While we farm-out can we search for a particular affiliate:

- Yes, you can look up a specific affiliate to view all its vehicles when planning to farm out

While we farm out can we look for only GNet affiliates:

- Yes, you can look up a specific GNet affiliate when planning to farm out

Can we ask for a quote from a GNet affiliate:

- Yes, you can look up a specific GNet affiliate and ask for a quote.

How to ask for a quote from a GNet affiliate:

- Open the trip for which you want to get a quote
- Choose the Farm-out option from the available selections.
- Go to the Affiliate Profiles tab and select GNet from the dropdown menu.
- Click the “Get a Quote” button for the affiliate of your choice.
- Select the appropriate Vehicle Type and press the Submit button

While we farm-out can we look for only Xtreim affiliate partners:

- Yes, you can look up a specific Xtreim affiliate to view all its vehicles when planning to farm out

Invoice

Invoice Tabs:

- **Paid**: Completely paid invoices.
- **Unpaid**: Invoices not fully paid but sent to the customer.
- **Save**: Saved invoices still need to be sent to the customer.

Create an Invoice:

1. Select the Customer (Individual or Corporate).
2. Choose the reservations to include.
3. Add a memo and select the due date.
4. Either Save or Send the invoice.

Can we send invoice via the email to the customer

- Yes, an invoice can be emailed to the customer at any time.

Can we send an invoice via the phone to the customer

- As of this point, Invoice can be sent to the customer via email only

Zone

What is a Zone?

- A zone is a high-traffic area where automated pricing can be applied, increasing the likelihood of customer reservations.

Create a Zone:

1. Name the zone.
2. Enter the zone address (zipcode auto-fills).
3. Link zip codes manually or from a map

Vehicle Pricing

Steps to set up Flate Rate Pricing automation:

- Go to the Vehicle Pricing Page and navigate to the Vehicle Rates tab
- For each Vehicle Type, Flat Rate Pricing automation needs to be set up separately
- Select the Flate Rate option for the Vehicle Type you want to set up automation for.
- At this point, Zone is a pre-requisite for the pricing automation
- From the drop-down menu, Select the correct Zone
- Enter the Base Price for all the associated zip codes with the zone
- Enter the other charges on the left half of the screen
- After validating all the correct prices, press the Save button and you are all set.

Steps to set up Hourly Pricing automation:

- Go to the Vehicle Pricing Page and navigate to the Vehicle Rates tab
- For each Vehicle Type, Hourly Pricing automation needs to be set up separately
- Select the Hourly Rate option for the vehicle type you want to set up automation.
- Enter the hourly rate, starting from 1 up to 24.
- Enter the other charges on the left half of the screen
- After validating all the correct prices, press the Save button and you are all set.

Affiliate

Types of Affiliates:

There are 3 types of Affiliates

- Xtreim: All the affiliates who are using Xtriem and have enrolled in the Affiliate network
- My Affiliates: All the affiliates who don't have an online presence but you want to track them
- G-net: All the affiliates from the G-net platform

How to connect G-net with Xtreim:

- Go to the Affiliates Page
- Select the G-net Tab
- Click on the Connect GNet
- Enter the GNet ID and it will be connected

For more information, please refer to the guide: https://xtreim.com/gnet-integration/

How to add a new affiliate from GNet:

- Go to the Affiliates Page
- Select the G-net Tab
- Press the Sync Partners button and all the new affiliates from the GNet will be added

How to add an Affiliate in My Affiliate tab:

- Go to the Affiliates Page
- Navigate to the My Affiliates tab
- Enter the Affiliate Details. The required fields are:
    - Affiliate Name
    - Contact
    - Phone
    - Email
    - Company Address
- Go to the Vehicles Tab and link the Available Vehicles in the Available Vehicles Section.
- After validating all the information, press “Create Affiliate Account” Button

Members:

Default Role:

- Owner is the default role.
- The initial user who signed up becomes the primary owner, and this role cannot be changed.

Can there be 2 owners:

- Yes, there can be 2 owners
- The primary owner’s role can’t be changed.
- The newly added member can have an Owner role and it can be modified

How to Create a Role:

- Enter the name of the Role
- Enable the permissions for the modules you wish to allow

How to Create a Member:

- Enter the name, email address, phone number, and assign a role to create the member
- An email will be sent to the requested member’s email address for confirmation
- When a member accepts the request, Xtreim will prompt them to create a new password for future use.

Pricing

For any pricing-related queries, visit https://xtreim.com/pricing

Promo code

How to create a promo code

- Enter the name of the promo
- Enter the Start and End Date
- Enter the maximum number of users who can utilize it. If you want unlimited users to utilize it, leave this field blank.
- Enter the minimum amount on which the promo code should apply
- Enter the amount or percentage you wish to apply as a discount.

Payables

When does a trip become eligible for payment to the driver:

- When a trip is completed, only then the amount decided for the driver becomes payable