CabVista
Tutorial

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*A no-obligation demonstration of the **CabVista** Computer System.*

The *CabVista* taxi management computer system is designed for Private Hire & Taxi Operators with anything from **1 to 40** vehicles or more, and for chauffeur, executive, minibus and specialist operators.

It is Windows-based and runs under Windows 95 or later (Win98, XP, Vista, etc).

About this Tutorial ...

This Tutorial Booklet allows you to see how *CabVista* could help your business.

You can look at each of the screens at your own pace, without any time limit, and with no obligation to buy.

Before you begin ...

As well as this booklet, you should have a copy of the Demonstration program (which you can get from our website www.cabvista.com or get from us on CD).

Any questions ...?

If at any stage you have any questions, please telephone or email us; our contact details are on the back cover.

Welcome to *CabVista*

Welcome to **CabVista** – the taxi management computer system designed for Private Hire, Taxi & Chauffeur Operators. **CabVista** helps you to take and keep track of your bookings, and to dispatch them at the right times, to the right cars.

You can also review the history of old jobs, and invoice your account customers.

CabVista's features allow you to:

- **Take bookings quickly** (Pre-booked, "ASAP", etc),

- See a regularly-updated picture of where all your cars and jobs are (*see the pictures on page 6*),

- Easily **dispatch jobs to cars**,

- Set-up your **Account customers** and take account bookings,

- **Invoice** your account customers, (with optional export to Sage), produce statements of each driver's Account Work, etc,

- Review at any time the **detailed history** of all your jobs, which are stored automatically for you, including the driver/vehicle that performed the job, pickup dates, times, customer names, etc,

- Re-dispatch "no-jobs", dump cancelled jobs, etc,

- Keep a list of your **regular repeat bookings**, school runs, etc … set-up once then let the system repeat the booking automatically as required,

- Automatically build-up a list of all **your local streets**, pubs, clubs, airports, hospitals, etc …to make booking new jobs fast and efficient … **or** import a list of all streets in your area from CD-ROM,

- Keep **Driver & Vehicle Databases**, check if a driver is near his MOT or Insurance expiry date, etc,

- Keep track of drivers coming on-duty or going off-duty,

- Export to other Windows programs, if you wish (*Excel*, *Word*, etc),

- **Multi-user** access is an option,

… and much much more, all in the friendly *CabVista* way *!*

Using *CabVista* on your computer

- ♦ **Choosing a computer**

  CabVista will run on any standard PC with Windows 95 or later (Win98, 2000, XP, Vista, etc.).   (Or if you are on an Apple-Mac, you may be able to use 'Virtual-PC').

- ♦ **To install CabVista**

  1) Switch on your computer and wait until the usual Windows 'desktop' appears. Then place the *CabVista* CD into the tray of your CD-drive.
     After a few seconds it will display a Menu.

  2) Click on "**Installing the CabVista Tutorial**".
     (If the CD doesn't run automatically on your machine, just view the contents of the CD and double-click on the .exe file. Or phone us for advice)

  3) Follow the instructions that appear. If you are asked a question that you are unsure how to answer, just accept the default by clicking on "**Next >**".
     CabVista will let you know when the installation is finished.

- ♦ **To un-install CabVista**

  Should you wish to un-install the Tutorial, in Windows follow the route "Start → Settings → Control Panel → Add or Remove Programs" (the exact steps may differ for different version of Windows).

- ♦ **To run CabVista**

  You can run *CabVista* by:
  Either: double-click on the *CabVista Tutorial* icon on your desktop.
  Or: click on "Start", then "Programs", then find and click "CabVista Tutorial"
               in the list of available programs.

  You are then asked to log-on:

  To log-on successfully:

  Pick your user-name from the drop-down list (in the Tutorial your user-name is **Manager**)

  Enter your password here (in the Tutorial, your password is typed for you: **pass**)

  Press <**Enter**> (or click **OK**)

- ♦ **The Tutorial**

  The Tutorial takes you through the main screens of *CabVista*, using some sample jobs and cars. (The sample data you will be using is for a fleet with 6 cars).
  Each step of the Tutorial is numbered, like this: **4**☐

  You might find it useful to tick each step: **4** ☑   as you do it.

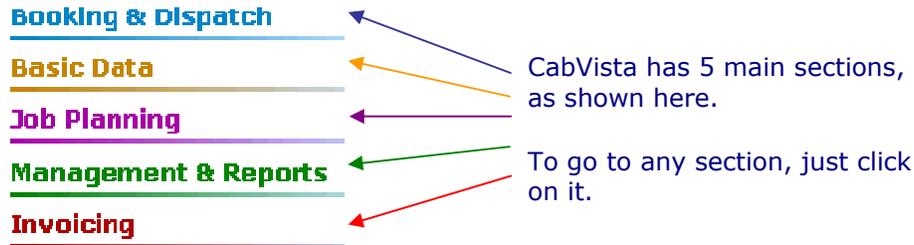 On your *first* run through the Tutorial, it is important that you do *only* what is described after each numbered step. *Please keep carefully to this*, otherwise what you see on screen may be different from the illustrations in this booklet.
  Later, you can "play" with the demo-version, and visit whatever screens you like.

  When you are ready, please turn to the next page and begin the Tutorial.

The *CabVista* Tutorial

1 ☐ To begin the Tutorial, run **CabVista** as described on page 3.
You should see the Main Menu, with this picture:

Main Menu

Booking & Dispatch

Basic Data

Job Planning

Management & Reports

Invoicing

CabVista has 5 main sections, as shown here.

To go to any section, just click on it.

Basic Data

2 ☐ First, we will look at the "Basic Data" section. Click on "Basic Data".

You are shown a list of all the types of "Basic Data" that **CabVista** can record (drivers, vehicles, streets, etc).

3 ☐ Click on "Drivers" to see a list of drivers. The left-hand-side of the screen lists all the drivers (in our sample data). To see the detail of any driver, click on the name in the list. His details then appear on the right-hand-side.

You can edit these details simply by typing in the boxes.

Forename	Surname		Basic	General	Personal	N. of Kin
David	**Artley**		**Driver's Name**			
	Bob Clark		* Forename	**David**		
	Paul Curtis		* Surname	**Artley**		
	Tony Grant		* Initials	**DA**		
	Louise Harris		**Contact Details**			
	Ken Jones		Tel #	**864 2390**		
	Bryan Mills					

Click on a driver here …
(left-hand-side of screen)

… and see his details here
(right-hand-side of screen)

To add a new driver, click on the "Add" button. (In the Tutorial, you are not allowed to add new drivers, but in the full version you can).

4 ☐ Click on the "Close" button to close the Drivers screen. You will see you can also set-up lists of your vehicles, local zones, streets, etc. In fact, all the things that will help you to take bookings and dispatch them.

But for now, just click on "Close". You are back at the Main screen.

Keep as much or little data as you like … quick but comprehensive !

Taking a **Booking**

5 ☐ Now we'll take a booking. Bookings are made by displaying the Booking Screen, entering the details of the job, then pressing F12 to confirm. The job is then stored, and is displayed to the dispatcher on the correct day at the correct time, as follows:

To display the Booking Screen, either press **F5** or click on "Booking & Dispatch" on the Main Menu, then click on "Booking":

Booking (F5) ◄——————————— Click here, or press **F5**

You start in the "Passenger Name" box, and simply add the details as you move down the Booking Screen.

Passenger	
Name:	
Date:	25/02/2005
Time:	16:15

To move on to the next box, you can press <**Tab**> or <**Enter**>.

If you need to move back to an earlier box, press <**Shift-Tab**> or <**up-arrow**>, or click the box with your mouse.

6 ☐ **Let's book an example Job:**
Imagine Mr GREEN has called us to book a car at 10.30am from 6 ASH ROAD, going into TOWN:

Name:	type: "**GREEN**" then press <**Tab**>
Tel#:	we don't want to record his telephone number, so just <**Tab**>
Date:	just <**Tab**> for today (today's date appears automatically)
Time:	**10.30** <**Tab**>
FROM …	
No:	**6** <**Tab**>
Address:	**ASH ROAD** <**Tab**>
TO …	
No:	no number, so just <**Tab**>
Address:	**TOWN** <**Tab**>
Length:	press <**space**> (ie: the space-bar) ***twice*** to increase the length from 10mins to 20mins. (10 minutes is the default for a 'typical' journey).

We've entered enough details, so now just press **F12** (function key F12), or click on the word confirm: **F12 Confirm**
The job is now stored.

Accurate and quick !

The Dispatch Screen

7 ☐ Now you have booked a job, you are taken to the "Dispatch" screen, where you can decide what to do with it. Before we deal with the job, let's look around the screen:

Vehicle Diary

The **top-half** of the screen is the **"Vehicle Diary"** - a constantly-updated picture of all your drivers' commitments:

Time-line for the day

A list of the cars (their call-sign, Vehicle-type and status).

For example, Car **7** can take a Wheelchair (**W**) and is currently **On**-duty

Their jobs today. In this example, Car 6 has a job at 9:00 to pick-up Lucy from the Red Lion, destination: 6 West Close.

The job finishes at 9:30, meaning the car is expected to be free again by then.

Another way of looking at this is to see that the job is 6 boxes wide – meaning the job is expected to take 6 x 5minutes = 30 minutes.

List of Outstanding Jobs

The **bottom-half** of the screen is a list of all your **"Outstanding Jobs"** – jobs queued and waiting to be dispatched:

Time	A/C	Name	From	Zone	To	Car	Type	Dispatch
9:45		JILL	2 BLUEBELL CLOSE	1	BINGO CENTRE		BC	View/Dispatch …
10:00	▣	MR JACKSON	HOSPITAL (SOUTH ENTRANCE)	6	8 SHORT STREET	2		View/Dispatch …
10:05	▣	TONY	3 ALL SAINTS ROAD	5	AIRPORT			View/Dispatch …
10:30		GREEN	6 ASH ROAD	3	TOWN			View/Dispatch …

You have 4 jobs waiting to be dispatched.

The third job is due at **10:05** and is to pick-up **Tony** from **3 All Saints Road**, to take to the **Airport**. The **red** marker says it is a Priority Job.

You can click here to dispatch the job (see the next page).

Dispatching a Job

8 ☐ You will see the job we booked, in the list of outstanding jobs. (It is the one for Mr GREEN from ASH ROAD). To dispatch this job to a car, click on the blue words "View/Dispatch…" on the same row as "Mr GREEN".
You are then shown the detail of this job, in a blue box.

9 ☐ At the same time, you will see that the Diary is highlighting a light-purple area, to show the "**time slot**" where this job would fit in the Diary.

Because Mr Green wants picking-up at 10.30 and we expect the journey to take 20 minutes, the slot starts at 10.30 and ends at 10.50.

Suppose we are going to dispatch to **car 3**.
First, select car 3 by clicking within the purple area, on the row for car 3:

To select car 3,
click here

Then, click on the "Dispatch" button
to dispatch the job: ⟶

10 ☐ The job has been dispatched to car 3. It no longer appears in the list of "outstanding jobs" and instead is in the Vehicle Diary for car 3.

Click "Close" to leave Dispatch and return to the Main screen.

Easy and quick !

This is the end of the Basic Tutorial.

However, there are 2 more Tutorials for you, showing extra aspects of CabVista:

1) A tutorial showing you how to make a *more complicated booking*, starts on the next page (page 8).

2) The "*Management Tutorial*", showing some of the management features of CabVista, starts on the page after that (page 9).

Note: At any time, you can leave the Tutorial - by clicking on "**F10 Exit**" (or pressing function-key F10) on the Main screen – and then return to it later.

A more complicated booking

On page 5 we saw how to take a simple booking. Now we can see how to take a more complicated booking.

11 ☐ As before, open the Booking Screen, by clicking on "Booking" on the Main opening screen, or by pressing **F5** (just as in step 5 on page 5).

12 ☐ Let's imagine Mrs Smith wants a car from 12 ASH ROAD to ASDA. The job is for 22:15 (10.15PM this evening), is an account job, and a priority, requires a Black Cab (Hackney), will take 30 minutes (journey time from pick-up to drop-off), requires the driver to ring the top bell, and has a set fare of £12.

Name:	**SMITH** <**Tab**>
Tel#:	If we enter her number here, *CabVista* will remember Mrs Smith's details for the next time she phones. Eg: **0161 865 2377** <**Tab**>
Date:	<**Tab**>for Today
Time:	**22.15** <**Tab**>
FROM …	
No:	**12** <**Tab**>
Address:	**ASH** … as soon as you have typed three letters of the pickup, *CabVista* will search for any known streets starting "ASH". You should see "**ASH ROAD**" (that we entered for an earlier job) appear in green on the right of the screen. This is labelled "**A**", so just press **Ctrl-A** (ie: hold down the **Ctrl** key and press **A**).
TO …	
No:	no number, so just <**Tab**>
Address:	**ASDA** <**Tab**>

We could just press F12 now to store the job, but in this case, we want to enter more details …

Length:	press <**space**> *4 times* to increase the length from 10mins to 30mins. Then <**Tab**>.
Job Type:	**BC** <**Tab**> for a **B**lack **C**ab (you can use any 'code' here (up to 4 letters) that the dispatcher will recognise as being a 'special' job.
Notes:	**Ring Top Bell** <**Tab**> .. alternatively, if you have set-up a list of "common notes" (this is explained in the full User Guide) you can select from the orange list on the right of the screen. Simply press **Ctrl-A** to select Note A, etc.
Vehicle:	we don't want to assign this job to a specific vehicle, so just <**Tab**>

We also want to make the job an 'Account' and a 'Priority' …

Payment:	By default the job is 'cash' but we want to make it an account job. Click on "Account", use the arrow keys (or mouse) to select the correct account, then press <**Enter**>.
Fare:	**12** <**Tab**> for £12
Priority:	press **F6** to makes the job a priority (or click on 'Priority')

13 ☐ Now that the details have been entered, just press **F12** (function key F12). The job is now stored, and can be dispatched in just the same way as for the simpler job in the main Tutorial.

As a manager, you will occasionally need to look back at a job (or a set of jobs) from yesterday, or last week, or last month, or even last year. *CabVista* makes this easy.

Every completed job is automatically stored in the **History**. At any time, you can look back at this history, either to look at a summary of jobs over a period, or to look at the detail of a specific job.

So if the police ask you about a job from last Tuesday, you can find it. If a lady phones to say she left her purse in one of your cars last Monday, you can locate the driver.

CabVista also helps you to fulfil your obligations to the Council, by keeping complete records. Of course, since *CabVista* is password-protected, whom you show those jobs to, and in what format and detail, is entirely up to you.

For this quick Management Tutorial, we will imagine we want to look back at all the jobs on a specific day, the **6th of August**.

14 ☐ At the Main Screen, click on "Management & Reports" then on "Review a Specific Day".
You are shown the past 12 months in calendar format, with the current month in the bottom-right:

Simply choose the day you wish to review, by clicking on it.

So for our example, **choose 6th August**.

15 ☐ Your chosen day is now loaded. Click on "**View all Jobs**" and you are shown a summary of all the jobs for this day, one-line-per-job, on the left-hand-side of the screen.

If you click on any of these jobs, you are shown its detail on the right-hand-side (*see the next page*).

Simple and accurate !

Summary of all jobs on this day, one-line per job

Detail of the currently-highlighted job

6 Aug (Total Jobs: 11)

Job#	Veh	No.	Street or Building	Name	Zo.	A/C	Mod	Due	Alloc'd
1	2	14	GREEN LANE	JULIE JONES	0			09:15	18:06
2	2		HOSPITAL (SOUTH ENTRANCE)	MR JACKSON	6	GEN01		10:00	00:00
3	3	3	SOUTH ROAD	JOHN SMITH	0			09:30	18:06
4	6		RED LION	LUCY	0			09:00	18:06
5	6		ASDA	STAFF	0			09:45	18:06

Booking
Job No.   1
Booked   31/01/2005 at 17:47
By Operator MAN
Pickup Details
Name   JULIE JONES

Modify

Sort: by Job#   by Driver   by Street/Building   Print Full   Print Summary   *Jobs in Detail*   Close

You can quickly re-order the jobs using the "Sort" options in the bottom-left of the screen.

For example, to see the jobs sorted by driver, click on "by Driver".
Similarly for "by Job#" or "by Street/Building".

You can print a job by clicking on it (to highlight it), then clicking "Print Full" (for full details) or "Print Summary" for summary details.

To highlight 2 or more jobs for printing, hold the "Ctrl" key and click on the jobs one by one.

To highlight a range of jobs, click on the first job, hold the "Shift" key and click on the last job. All jobs in between will be automatically highlighted.

16 ☐   Click **Close** twice to return to the Main screen.

There are two more sections on the Main screen; "Job Planning" and "Invoicing".
These are only covered briefly in the Tutorial (see below), but are explained fully in the **User Guide** that comes when you order the full sale version of *CabVista*.

CabVista **Job Planning**

Job Planning is reached by clicking on "Job Planning" on the Main screen.
It allows you to set-up your regular repeat bookings.
For example, if you do a school-run, *CabVista* can be set-up to present the job to you every Monday to Friday at 8am.
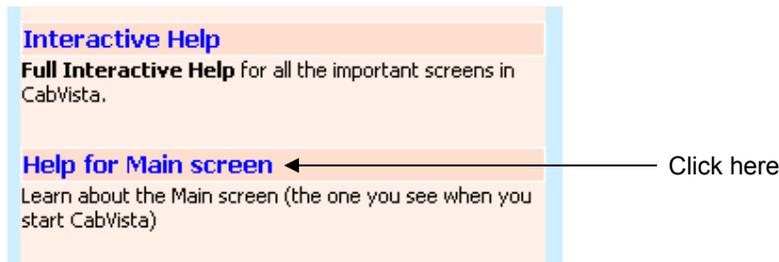
CabVista **Invoicing**

Invoicing is reached by clicking on "Invoicing" on the Main screen.
It prints professional and accurate invoices for each of your Account Customers.
All your account-jobs are collected automatically. You simply price them and then *CabVista* prints them for you.
You can also print **Driver Income Sheets**, and (optionally) export to **Sage**.

Using the *CabVista Help-Screens*

Extra information about all the features and screens in **CabVista**, is available via the comprehensive **Interactive Help-screens**. These help you to get the best out of each screen.

A short Tutorial on how to use them, is described below.

17 ☐ Go back to the Main screen of **CabVista.** In the bottom-left corner you will see an option "**F1 Help**". Click on this option (or press the function key F1).

You are taken to the "CabVista Help Suite". You will see there are several ways you can access the help-screens, but for now we just want to know how to use the Main screen, so click on "Help for Main Screen".

Interactive Help
Full Interactive Help for all the important screens in CabVista.

Help for Main screen ◄──────────── Click here
Learn about the Main screen (the one you see when you start CabVista)

18 ☐ You will see another picture of the same screen. On this image, click with your mouse on any part of the screen. **CabVista** will then explain what that item or part of the screen does.

19 ☐ **From here, you can explore the help-screens.** For example:
- to move to the next page of the help-screens, click on the >> button.
- to search for a specific word or topic, click on "Index" and type the word you are looking for.
- to see the Contents, click on "Contents", then double-click on any chapter you are interested in.

20 ☐ When you have finished, click on "File" then "Exit" to exit the help-screens.

21 ☐ In addition, many screens in **CabVista** have their own specific **Help button**. For example, click on the "Dispatch" picture so you are back in the Dispatch screen. You will see a "Help" button in the bottom-right of the screen. Click on this, and you will be shown help specifically about this screen.

Running the full version of *CabVista*

Now that you have finished the Tutorial, there are 2 possibilities:

1) If you have <u>already</u> purchased the full version of *CabVista*:

then you are ready to run the full version.

Quit out of the Tutorial by clicking on "F10 Exit" (or pressing function-key F10) on the Main screen.

To run the full version , see the instructions in the comprehensive User Guide that is provided when you order **CabVista**.

2) If you have <u>not yet</u> purchased the full version of *CabVista*:

then you can now order it, by completing and returning our Order Form.

You may already have received an Order Form … if not, please phone us for one, or download the Order Form from our website at www.cabvista.com.

The full version of **CabVista** includes a comprehensive **User Guide**, with many more details about how to use the program. In addition, you can register for expert support from our **HelpLine** (by phone, email, or fax).

CabVista
the taxi computer system

❑ For more details of *CabVista*, see our **website** at: **www.cabvista.com**

❑ To order, simply complete and return the **enclosed Order Form**.

❑ **Any questions ?** Contact us at:

Email: **info@cabvista.com**

Or Telephone: **0161 865 2377**.

Ver-4
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