

User's Manual

v1.0

CEM Shuttle



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DISCLAIMER

Information on this training manual is provided AS IS. While the author of this document made sure to correct mistakes. Author is not responsible for any damage incurred resulting from use of this document. Author is a human being. Human beings have a tendency of making mistakes. Please report all errors and mistakes to the author of this document for corrections.

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REVISIONS

Author Name	Changes Made	Date	Version
Thomas Madia	Document created	27 April 2017	1.0

GENERAL INFORMATION

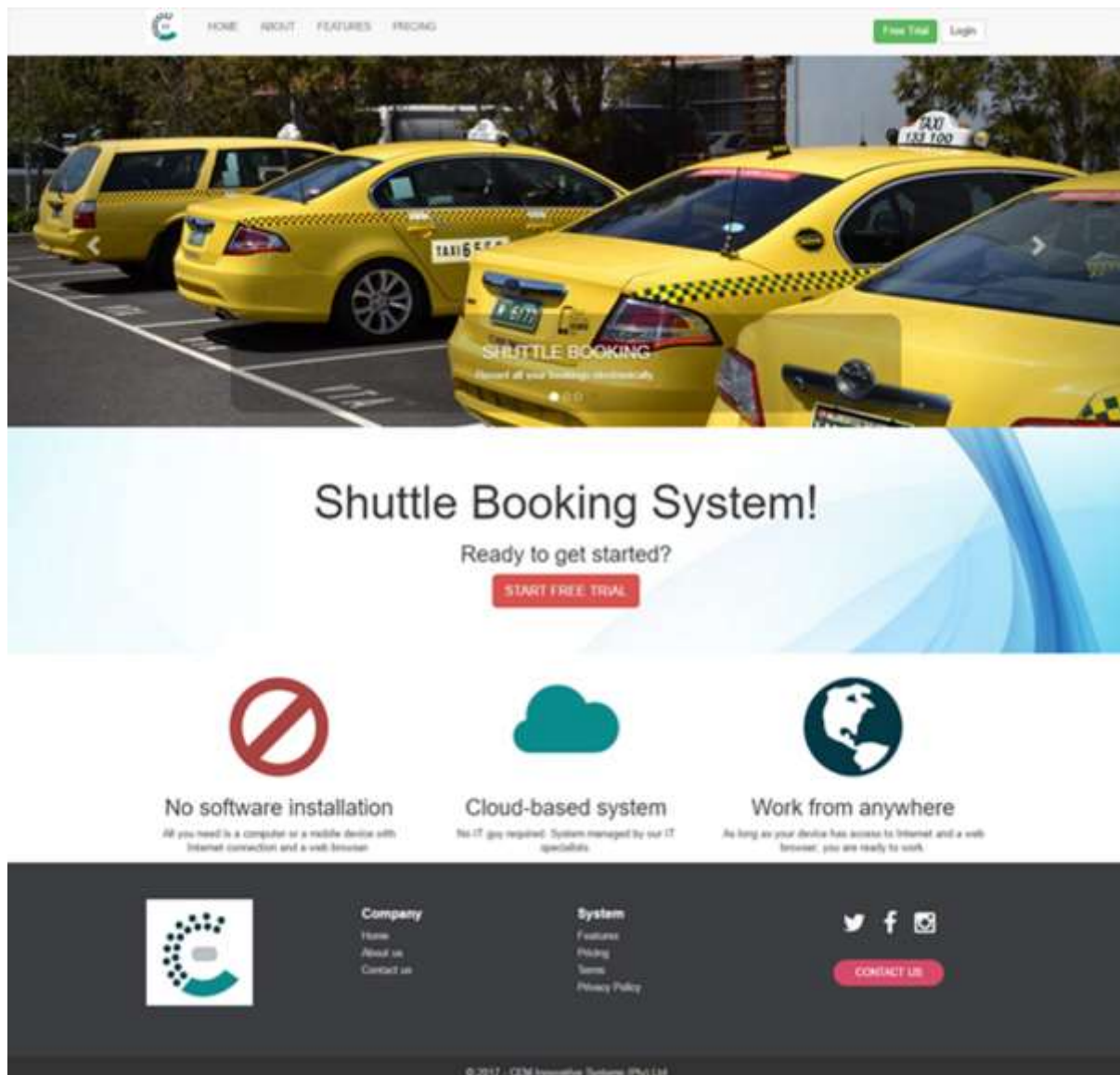
SYSTEM OVERVIEW

CEM Shuttle is an online subscription based system that is used by Shuttle companies to manage their bookings and billing.

GETTING STARTED

Accessing the system

To access the system, you simply go to <https://www.cemshuttle.co.za> using your favourite browser. It works on both computer and handheld devices. You will be presented with a screen below:



Registering your company

To register as a new company, you click on [free trial link](#) on the top hand corner of the screen. You will be presented with a form shown below:



The registration form consists of three input fields: 'Company name', 'Email address', and 'Password'. Each field has a red asterisk icon to its right, indicating it is a required field. Below the 'Password' field, there is a note: '[Auto generated and emailed to admin email above]'. A blue button labeled 'Start Free Trial' is positioned below the password field. At the bottom of the form, a line of text states: 'No credit card required. No-obligation free trial. Cancel anytime.'

Fill in the details and an account will be created for you. Password will also be generated and sent to you via email. Change it as soon as you receive it. Below is a list of rules for the form input:

Field Name	Description	Validation
Company Name	Name of your shuttle company	Required
Email address	Email address of the administrator of the company	Required
Password	Password you will use to login to the system	Not required. It is auto-generated by the system.

Logon to the system

To login to the system, you click on [login link](#) on the top right corner of the page. You will be presented with login screen shown below:

Login

Required field

Email Address
madiathomas@gmail.com

Password

☒ Remember me

Login

[Forgot Password?](#)

Field Name	Description	Validation
Email address	Email address you use to login to the system	Required
Password	Password you use to login to the system	Required

Forgot Password

In case you have forgotten your password, you can click on [forgot password link](#) on the login page. You will be presented with the screen below:

Reset My Password

Required field

Email Address

Reset Password

Field Name	Description	Validation
Email address	Email address you use to login to the system. If you can't remember email you use to login, please speak to your administrator. Alternatively, you can contact us on info@cemshuttle.co.za	Required

Add your email address and press reset password. A link will be sent to you with instructions on how to reset your password.

Change Your Password

To change password, you click on the **Change Password** link on the top right of the page. Only shown when you are logged in for security reasons. You will be presented with the screen shown below:

Change My Password

* Required field

Old Password

New Password

Confirm Password

Change Password

Field Name	Description	Validation
Old Password	Current password that you use to login to the system	Required
New Password	New password you want to change to	Required
Confirm Password	Confirmation of the new password. Just to make sure you entered it correctly	Required

ADMINISTRATION

ADMIN DASHBOARD

As an administrator user, when you login, you will be presented with a screen shown below:



This screen shows a summary of your company activities on the system. For detailed information, simply click on the icon and you will be redirected to the page.

MANAGE MY COMPANY



To manage your company details, you click on **ADMIN** link, then click **MANAGE MY COMPANY** on the expanded menu.

There 4 tabs on the page, namely:

SHUTTLE TAB

View Company Details

This is the information is mostly used by us when communicating with you.

A screenshot of the 'Company Details' form. The form has four tabs: Shuttle, Banking Details, Invoice Details, and Subscription. The 'Shuttle' tab is active. The form contains the following fields:

- Company Name: Test Shuttle
- Pricing Option: Premium
- Billing Period: Annually
- Email Address: test@testshuttle.com
- Telephone Number: 0123456789
- Activity Status: Yes
- Company Logo: A placeholder image showing a circular logo with dots and a teal swoosh.

At the bottom left of the form, there is an orange button labeled 'Edit Company'.

Edit Company

To update company information, click on **Edit Company** button on the **SHUTTLE TAB**. Use this page to update information we must use when communicating with you. Also to customise logo which is use when system sends invoices to your clients.

[Home](#) / [Company](#) / [Edit](#)

Edit Company Details

✖ Required field

Company name

Email address

Telephone number

Pricing Option

Billing Period

Company Logo



No file chosen

Only jpeg, png and gif allowed. Width: 200. Height: 200

Field Name	Description	Validation
Company Name	Name of your shuttle company	Required
Email Address	Email address of the administrator of the company	Required
Telephone Number	Your telephone number that we must use when contacting you. Also sent with the SMS to people you transport	Optional
Pricing Option	Selected pricing option. Depends on number of drivers that you have	Required
Billing Period	You have a choice to pay subscription on a month-to-month basis, quarterly, bi-annually or annually . You change it here. Did I mention that you get discounts when you pay months in advance?	Required
Logo	This is the logo that appears on invoices and statements you send to agents	Optional Make sure the size is 200X 200

BANKING DETAILS TAB

[View Banking Details](#)

Banking details your agents will use when pay you. We don't debit your account using these details. Only the system have access to this information. Stored on the system using bank-grade security. You will be presented with screen below:

Company Details

Shuttle

Banking Details

Invoice Details

Subscription

Account Number:	123456789
Account Holder:	Test Shuttle
Bank Name:	FNB
Branch Name:	Bank City
Branch Code:	250655
Account Type:	Cheque Account

Edit

Edit Banking Details

To edit these details, you simply click on **Edit** button on the **BANKING DETAILS** tab. You will be presented with screen shown below:

Edit Banking Details

Required field

Account Number
123456789

Account Holder Name
Test Shuttle

Bank Name
FNB

Branch Name
Bank City

Branch Code
250655

Account Type
Cheque Account

Update

Field Name	Description	Validation
Account Number	Bank account number	Required
Account Holder Name	Bank account holder name	Required
Bank Name	Name of your bank	Required
Branch Name	Branch where account I held	Required
Branch code	Branch code where your account is held	Required
Account Type	Type of account	Required

INVOICE DETAILS TAB

[View Invoice Details](#)

This information appears on the invoices you sent to agents. This is found on the **Invoice Details** tab.

Company Details

Shuttle

Banking Details

Invoice Details

Subscription

Registered Name:	Test Shuttle
Company Reg. No:	2014/008890/01
VAT Registration Number:	0808080809
Business EmailAddress:	test@testshuttle.co.za
Business Telephone:	0123456789
Business Fax:	
Business Address:	123 Shuttle way Pretoria Central 0002

Edit

Edit Invoice Details

Home / Company / Edit Invoice Details

Edit Invoicing Details

Required field

Registered Name

Registration Number

VAT Number

Business Email Address

Business Telephone

Business Fax

Business Address

Field Name	Description	Validation
Registered Name	Company name as registered at CIPRO	Required
Registration Number	Company registration number	Required
VAT Number	VAT number as issued by SARS	Optional
Business Email Address	Email address agents can enquire about invoices you sent them. Also for sending payment notification	Optional
Business Telephone Number	Telephone number in which agents can call you to enquire about the invoice you sent them	Required
Business Fax	Just in case you are still using fax for communication	Optional
Business Address	Your official business address	Optional

SUBSCRIPTION

This tab shows all the invoices which were sent to you by us. You access it on the **Subscription** tab.

Company Details					
Shuttle	Banking Details	Invoice Details	Subscription		
Invoice #	Billing Period	Drivers	Date Issued	Paid	WAT Number
00001	Monthly	1	23 Apr 2017	Yes	View

MANAGE USERS

To manage your users, you click on **ADMIN** link, then click **MANAGE USERS** on the expanded menu.

Add Users

To add your users, you click on **ADMIN** link, then click **MANAGE USERS** on the expanded menu. On the manage users page, you will be presented with screen shown below:

Home / Users / Add User

Add New User

Required field

Full Name

Cell Number

Email Address

Password
[Auto generated and sent to user]

Administrator? ☐

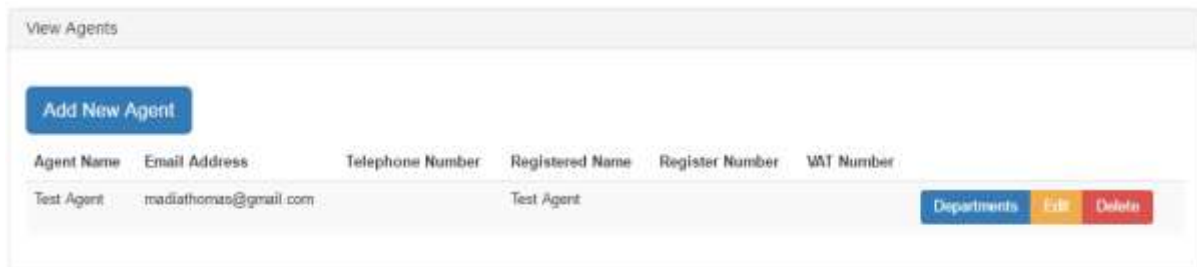
Add User

Field Name	Description	Validation
Full Name	Full name of the user	Required
Cell Number	Cell number of the user. Used to send passwords and other important system communications	Required
Email Address	Used as a user name. Also used to send passwords and other important information	Required
Password	Auto-generated and sent to user	Auto
Administrator	When selected, a user will be added with admin roles	Optional

AGENT MANAGEMENT

View agents

To manage agents, you click on **ADMIN** link, then click **MANAGE AGENTS** on the expanded menu. You will be presented with screen below:

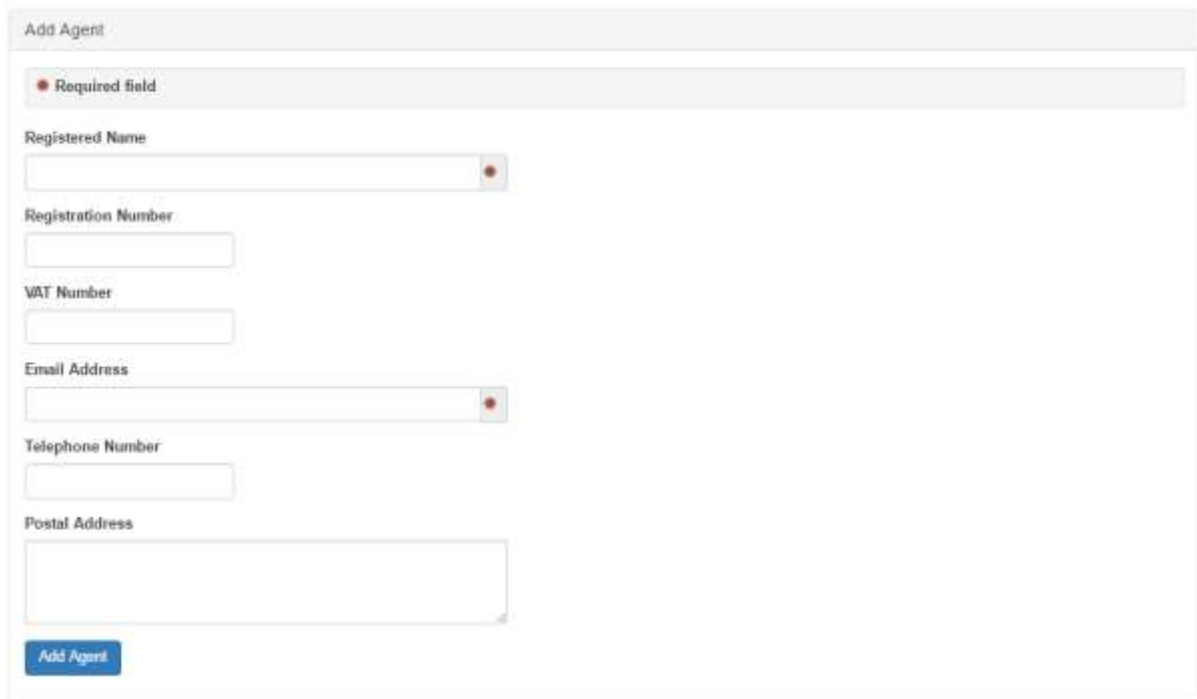


The 'View Agents' screen features a header bar with the title 'View Agents'. Below the header is a blue button labeled 'Add New Agent'. A table displays agent information with the following columns: Agent Name, Email Address, Telephone Number, Registered Name, Register Number, and VAT Number. The table contains one row with the following data: Test Agent, madiathomas@gmail.com, , Test Agent, , and . To the right of the table are three buttons: 'Departments' (blue), 'Exit' (yellow), and 'Delete' (red).

Agent Name	Email Address	Telephone Number	Registered Name	Register Number	VAT Number
Test Agent	madiathomas@gmail.com		Test Agent		

Add Agent

To add a new agent, you click on **Add New Agent** button on the screen above. You will be presented with screen shown below:



The 'Add Agent' screen features a header bar with the title 'Add Agent'. Below the header is a red error message: 'Required field'. The form contains the following fields: Registered Name (with a red error icon), Registration Number, VAT Number, Email Address (with a red error icon), Telephone Number, and Postal Address. At the bottom left of the form is a blue button labeled 'Add Agent'.

Field Name	Description	Validation
Registered Name	Agent name as registered at CIPRO	Required
Registration Number	Company registration number	Optional
VAT Number	VAT number of the agent as issued by SARS	Optional
Email Address	Email address of the agent	Required
Telephone Number	Telephone number of the agent	Optional
Business Address	Your official business address	Optional

Edit Agent

To edit an agent, you click on the **Edit** button on the agent list page. Screen will be prepopulated for your convenience. You will be presented with a screen shown below:

Home Agents Edit Agent

Edit Agent

✱ Required field

Registered Name
Test Agent ✱

Registration Number

VAT Number

Email Address
madiathomas@gmail.com ✱

Telephone Number

Postal Address

Save Agent

Field Name	Description	Validation
Registered Name	Agent name as registered at CIPRO	Required
Registration Number	Company registration number	Optional
VAT Number	VAT number of the agent as issued by SARS	Optional
Email Address	Email address of the agent	Required
Telephone Number	Telephone number of the agent	Optional
Business Address	Your official business address	Optional

Delete Agent

To delete an agent, you click on the **Delete** button on the agent list page. A confirmation dialog will be presented just to make sure you didn't click the button by mistake. If you confirm, an agent will be deleted

Departments

View Departments

When you have a big agent, you can partition it using departments. To add departments, you click on **Departments** button next to the agent. You will be presented with a screen shown below:

Departments - Test Agent

[Add New Department](#)

Department Name	Contact Name	Contact Email Address	
Depart of Education	Petr Cech	test@testshuttle.co.za	Edit Delete

Delete Department

To delete a new department, you click on the **Delete** button on the screen shown above.

Add Department

To add a new department, you click on the **Add New Department** button on the screen shown above. You will be presented with the screen below:

Home / Test Agent / Departments / Add Department

Add Department - Test Agent

* Required field

Department Name

Contact Name

Contact Email Address

Add Department

Field Name	Description	Validation
Department Name	Department name	Required
Contact Name	Name of the contact	Required
Email Address	Email address of the contact. Invoice is sent to this person.	Required

Edit Department

To add a new department, you click on the **Edit** button on the **Departments** screen. You will be presented with the screen below. Prepopulated for your convenience:

Home / Test Agent / Departments / Edit Department

Edit Department - Test Agent

Required field

Department Name
Depart of Education

Contact Name
Petr Cech

Contact Email Address
test@testshuttle.co.za

Save Department

Field Name	Description	Validation
Department Name	Department name	Required
Contact Name	Name of the contact	Required
Email Address	Email address of the contact. Invoice is sent to this person.	Required

DRIVER MANAGEMENT

View Drivers

To manage your drivers, you click on **ADMIN** link, then click **MANAGE DRIVERS** on the expanded menu. You will be presented with a screen show below.

View Drivers

Add New Driver

Driver Name	Cell Number	
Maxwell	0721234567	EditDelete

Delete Driver

To delete a driver, you click on **Driver button** on the screen shown above. Confirmation dialog will be presented to you before a driver is deleted. Just in case you clicked the button in error.

Edit Driver

To edit a driver, you click on **Edit button** on the screen shown above. You will be presented with a screen show below. Prepopulated for your own convenience:

Home / Drivers / Edit Driver

Edit Driver

Required field

Full Name

Maxwell

Cell Number

0721234567

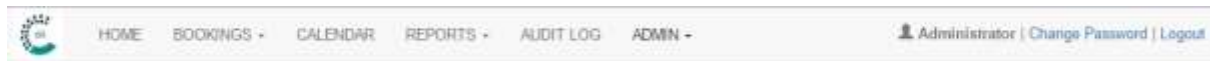
Save Driver

Field Name	Description	Validation
------------	-------------	------------

Driver Name	Name of the driver	Required
Cell Number	Cell number of the driver. Will be used to send SMSes when a trip is booked using his name	Required

MAIN MENU

When you login as an administrator user, you will see a menu shown below:



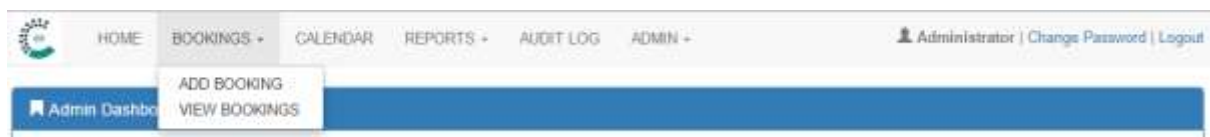
Normal user only have access to HOME, BOOKINGS and CALENDAR tabs. Admin user have access to all tabs.

HOME

Home is for returning to the home page. To go back to the dashboard, you simply click home when you are logged in.

BOOKINGS

Bookings page is where you find links for making a booking and viewing bookings. If you click on the bookings link, it will expand and show something like what is shown below:



ADD BOOKING

To add a booking, you click on **BOOKINGS** link on the main menu and select **ADD BOOKING** link. You will be presented with a new booking capture screen shown below:

[Home](#) / [Bookings](#) / [Add](#)

Book Shuttle

Required field

Agent
<Select agent> + *

Voucher Number

Transferee Information
Transferee Full Name
 *
Transferee Cell Number
 *

Trip Information
Number of passengers
1 *
Transfer Amount
0 *
Driver
<Select driver> + *
Pickup Address
 *
Delivery Address
 *
Pickup Date
 *
Return Date

Return Address

Special Instruction/s

Flight Number

Book Shuttle

Field Name	Description	Validation
Agent	List of agents with departments	Required
Voucher Number	Voucher number allocated to you by your agent	Optional
Transferee Full Name	Name of the person who is going to be transported	Required
Transferee Cell Number	Cell Number of the person who is going to be transported. Confirmation SMS will be sent to this person	Required 10 digits
Number of passengers	This is the number which shows number of people to be transported on that trip	Required. Minimum of 1
Transfer Amount	Cost of the trip	Required Numeric
Driver	List of drivers registered under your company. Select driver. This field can be left blank and trip will be marked as unallocated. You can always allocate a driver at a later stage	Optional
Pickup Address	Address where driver will pick-up people to be transported	Required
Delivery Address	Address where driver will deliver people to be transported	Required
Pickup Date	Scheduled trip date and time	Required
Return Date	Trip return date and time	Optional Only required if there is a return trip
Return Address	Address where driver will deliver people to be transported on a return trip	Required
Special Instruction/s	Free-flow text to add any extra information that you want to add for the driver which is not catered for on the form	Optional
Flight Number	Flight number of the person who is going to be picked up. In case a plane is delayed, driver will be able to check at the airport and adjust	Optional

SEARCH BOOKINGS

This page allows you to search bookings that you have made in the past. You click on **BOOKINGS** link on the main menu and select **VIEW BOOKINGS**. You will be presented with the screen shown below.

Search Bookings

Agent	Start Date	End Date	Voucher Number	Booking Status	Payment Status
<Select A ▾	2016/07/01 	2017/04/30 		< Select All ▾	< Select All ▾

Search

Agent	Transferee Name	Cell Number	Voucher Number	Total Amount	Status	Paid?
Test Agent	John Smith	0721234567	DPA-3752310	R800.00	Captured	No

View

You can search using following filters:

- Agent
- Date range
- Voucher number
- Bookings status
- Payment status

VIEW BOOKING

To view a booking, simply select on the **View** link corresponding to the booking you want to view. You will be presented with the screen shown below:

Home / Bookings / View

View Booking

Booking Information

Agent:	Test Agent
Client Name:	John Smith
Client Cell:	0721234567
Voucher Number:	DPA-3752310
Total Transfers:	1
Status:	Captured
Paid?	No
Total Amount:	R800.00

Edit Booking Finalise Booking Delete Booking

Transfers

Add New Transfer

Transfer Date:	29 March 2017
Time:	06:00 PM
Number of Passengers:	1
Transfer Amount:	800
Flight Number:	
Driver:	Maxwell
Pickup Address:	Sandton
Drop-off Address:	Pretoria

Edit Delete

You can delete bookings, finalise bookings and reopen bookings you finalise by mistake. A list of transfers associated with this booking will also be shown. You can add more transfers to this booking, edit or delete transfers.

EDIT BOOKING

To edit a booking, you click on the **Edit Booking** button on the VIEW BOOKING screen shown above. You will be presented with the screen shown below:



Home / Bookings / View / Edit

Edit Booking

Client Information

Agent:	Test Agent
Voucher Number:	DPA-3752310
Transferee Name:	John Smith
Cell Number:	0721234567

[Update Booking](#)

Only field you are allowed to edit on this form is the voucher number. Just in case you forgot to add it while adding a booking.

DELETE BOOKING

To delete a booking and cancel all trips associated with it, you simply click on **Delete Booking** button on the **VIEW BOOKING** page. All transfers associated with this booking will be cancelled and the driver will be informed via SMS of the changes. Another SMS is sent to people who was supposed to be transported to alert them of the changes.

FINALISE BOOKING

When you are ready to send an invoice to the agent for payment, you simply click on **Finalise Booking** button and an invoice will be generated and sent to the agent for payment.

REOPEN BOOKING

If you finalised a booking by mistake, you are only allowed to correct those mistakes after reopening the booking. To reopen a booking, you click on **Reopen Booking** button on the **View Booking** page.

TRANSFERS

ADD TRANSFER

To add more transfers to a booking, you click on **Add New Transfer** button on the **View Booking** page. Section shown below for your convenience. There is no limit on the number of transfers you can add to one booking. Total billed will be added to the final invoice and sent to the agent.

Transfers

Add New Transfer

Transfer Date:

29 March 2017

Time:

06:00 PM

Number of Passengers:

1

Transfer Amount:

800

Flight Number:

Driver:

Masovell

Pickup Address:

Sandton

Drop-off Address:

Pretoria

Edit

Delete

You will be presented with the screen show below:

[Home](#) / [Bookings](#) / [View Booking](#) / [Add Transfer](#)

Add Transfer

✖ Required field

Trip Information

Number of passengers

✖

Transfer Amount

✖

Driver

✖ +

Pickup Address

✖

Delivery Address

✖

Pickup Date

📅 ✖

Return Date

📅

Return Address

Special Instruction/s

Flight Number

Add Transfer

Field Name	Description	Validation
Number of passengers	This is the number which shows number of people to be transported on that trip	Required. Minimum of 1
Transfer Amount	Cost of the trip	Required Numeric
Driver	List of drivers registered under your company. Select driver. This field can be left blank and trip will be marked as unallocated. You can always allocate a driver at a later stage	Optional
Pickup Address	Address where driver will pick-up people to be transported	Required
Delivery Address	Address where driver will deliver people to be transported	Required
Pickup Date	Scheduled trip date and time	Required
Return Date	Trip return date and time	Optional Only required if there is a return trip
Return Address	Address where driver will deliver people to be transported on a return trip	Required
Special Instruction/s	Free-flow text to add any extra information that you want to add for the driver which is not catered for on the form	Optional
Flight Number	Flight number of the person who is going to be picked up. In case a plane is delayed, driver will be able to check at the airport and adjust	Optional

EDIT TRANSFER

To edit transfer, you click on **Edit Transfer** button on the screen shown above on the **View Booking** page. Screen will be prepopulated for your convenience. You will be presented with the screen shown below:

[Home](#) / [Bookings](#) / [View Booking](#) / [Edit Transfer](#)

Edit Transfer

✖ Required field

Trip Information

Number of passengers

Transfer Amount

Driver

Pickup Address

Delivery Address

Pickup Date

Return Date

Return Address

Special Instruction/s

Flight Number

Edit Transfer

Field Name	Description	Validation
Number of passengers	This is the number which shows number of people to be transported on that trip	Required. Minimum of 1
Transfer Amount	Cost of the trip	Required Numeric
Driver	List of drivers registered under your company. Select driver. This field can be left blank and trip will be marked as unallocated. You can always allocate a driver at a later stage	Optional
Pickup Address	Address where driver will pick-up people to be transported	Required
Delivery Address	Address where driver will deliver people to be transported	Required
Pickup Date	Scheduled trip date and time	Required
Return Date	Trip return date and time	Optional Only required if there is a return trip
Return Address	Address where driver will deliver people to be transported on a return trip	Required
Special Instruction/s	Free-flow text to add any extra information that you want to add for the driver which is not catered for on the form	Optional
Flight Number	Flight number of the person who is going to be picked up. In case a plane is delayed, driver will be able to check at the airport and adjust	Optional

DELETE TRANSFER

To edit transfer, you click on **Delete Transfer** button on the screen shown above on the **View Booking** page. A transfer will be deleted and person to be transported will be alerted of the change via SMS. Driver who was appointed to transport the person will also be alerted via SMS.

CALENDAR

Calendar link is where you can see what your drivers will be up to for the day.

REPORTS

Reports link contains links for viewing reports

AUDIT LOG

Audit log is where you can see actions which were performed on the system by users.

ADMIN

Admin page is where you manage your company details, manage agents, departments, and drivers.