Purpose

The Purpose of this user guide is to describe:

1. What are the CabCharge Settings
2. How to configure the CabCharge Settings in Lighthouse

Related User Guides:

- CabCharge Central Request Application
- CabCharge Central Trip Reconciliation

1. What are the CabCharge Settings?

The CabCharge Settings allow the configuration of Lighthouse to:

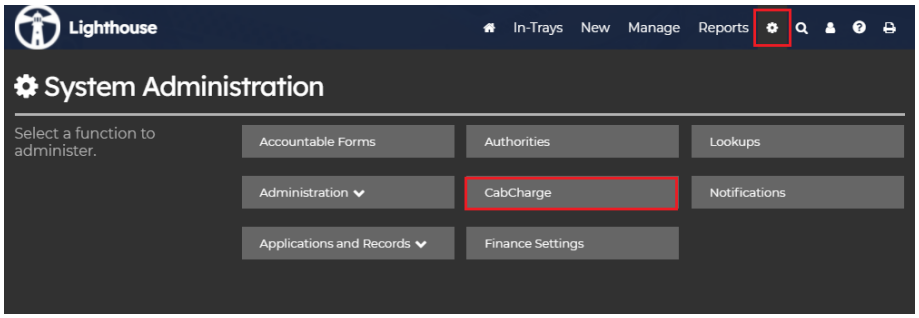
i. facilitate the transfer of data between CabCharge Plus (the CabCharge Australia system) and Lighthouse
ii. synchronise trip data between CabCharge Plus and Lighthouse
iii. Select the custom forms that will be used for the reconciliation process (If you elect to have a reconciliation process)
iv. Define who can build CabCharge-related custom forms
v. Identify the types of physical accountable forms that are used to Issue eTickets (If you use eTickets)

The CabCharge Settings are also contains two tabs where all the CabCharge product rrders generated through Lighthouse are listed, and details of all trips taken are listed, respectively.

2. How to Configure the CabCharge Settings

Access

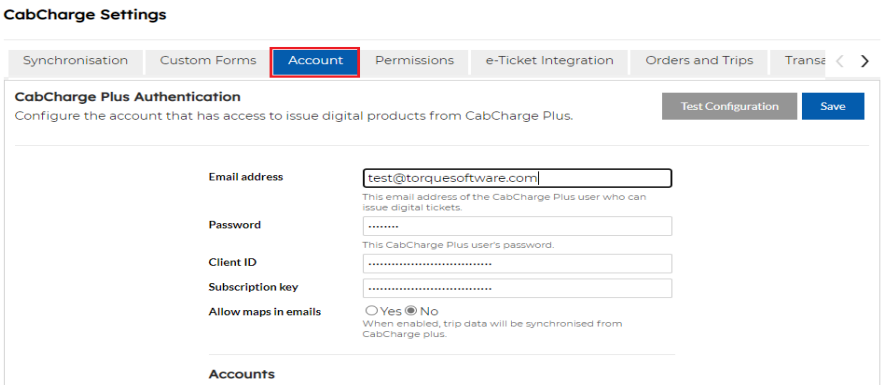
- To Access CabCharge configuration go to the Admin Section from the Cog.
- Click CabCharge



3. How to Configure the Account Settings

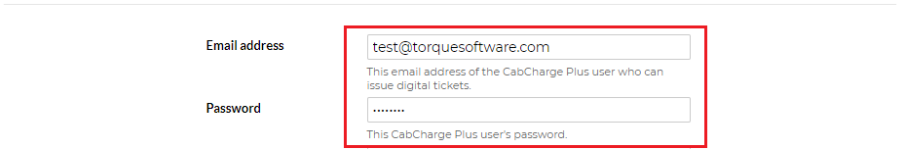
Step **1**.

- Go to Account Tab.



Step 2. Account Details:

- Insert the login details (email address and password) of the organisations CabCharge Plus account/s.
- *TIP: All of the CabCharge accounts In CabCharge Plus that this login has access to will be linked*

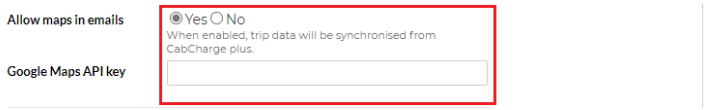


Step 3. CabCharge Subscription:

- Insert the Client ID and the Subscription Key provided by CabCharge.
- *TIP: If you do not have a Client ID and Subscription Key, contact CabCharge Australia*

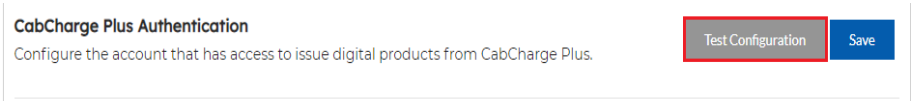
Step **4**. Google Maps:

- Select "Yes" if your organisation wants to display maps for Cab trips.
- If you select "Yes", a Google Maps API Key is required for this capability to function.



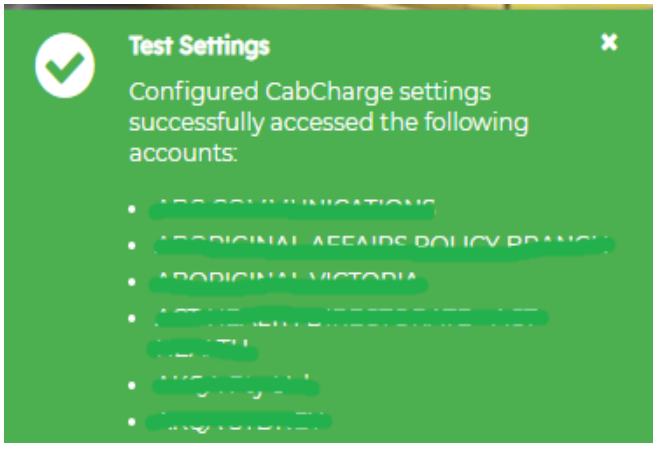
Step **5**. Test the Configuration:

- Once you added all the above Information Click Test Configuration.
- This allows the system to verify that all the details entered are valid.



Step **6**. Result:

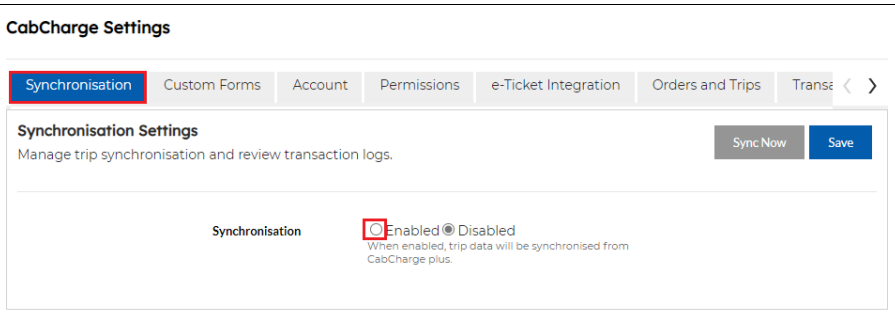
- The system will display a Green or a Red window on the left of the screen depending on If the account Info was successful to be accessed.



4. How to Configure the Synchronisation Settings

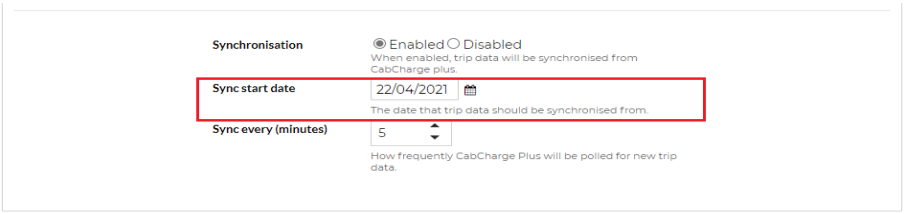
Step **1**.

- **Enable** Synchronisation after the account has been setup by clicking the "Enabled" radio button.
- *TIP: This tab will not appear unless you have successfully configured and tested the settings*



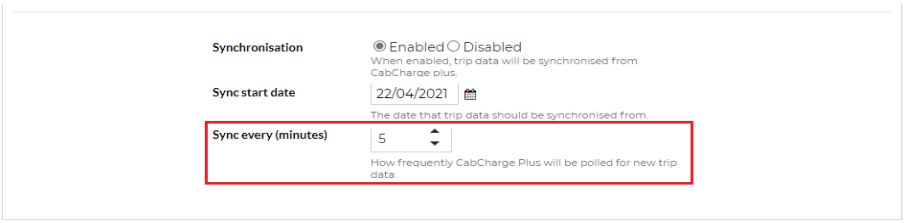
Step **2**.

- Synch start date: Select the date from which you want to synchronise CabCharge data
- *TIP: You can select a date before the current date*



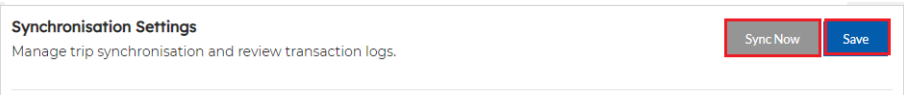
Step **3**.

- Sync every (minutes): Set the frequency for the data to be polled from CabCharge Plus in Minutes.
- *TIP: The* maximum allowed is 60 minutes. Remember, reconciliation of trips can only occur once the data has been polled from CabCharge Plus. If you want close to real-time reconciliation, select a low number here (e.g., 5 minutes)



Step **4**.

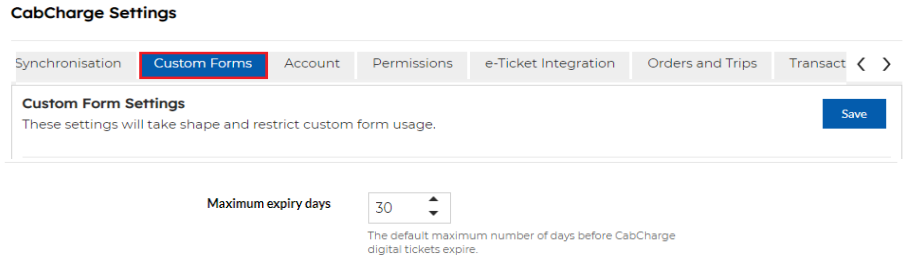
- Click Sync Now and Save to complete the configuration of this tab

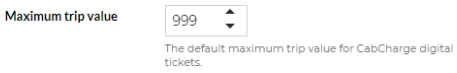
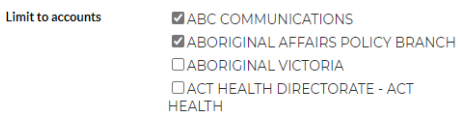
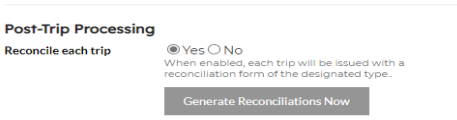
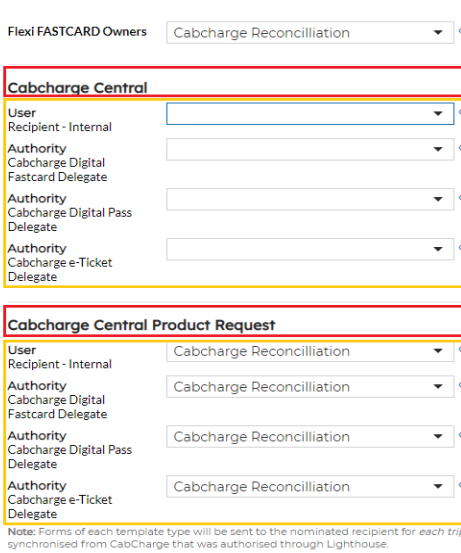


5. How to Configure the Custom Forms Settings

Step **1**.

- Set the maximum number of days that a CabCharge Digital pass will last before It expires
- *TIP: This should be set within your organisation policy*

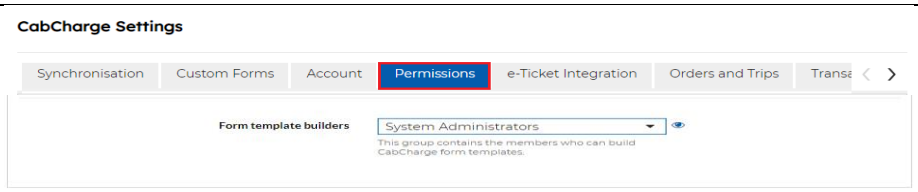


Step **2**. • Set the maximum number of trips that can be issued on a single CabCharge Digital Pass.	
Step **3**. • Set the maximum trip value (per individual Cab trip)	
Step **4**. • *TIP:* The list of accounts here are all the accounts that the login credentials you used in the Account tab has access to • Tick the box alongside those accounts that you want to allow access to through CabCharge Central • *TIP: If you select more than one account, users of CabCharge Central will be invited to select which account they wish to be charged when they request a CabCharge product*	
Step **5**. • Click the Yes radio button if you want to activate Post-Trip Processing. Post Trip processing is a Lighthouse-generated process where the traveller and/or the trip approver, depending on the settings you use, are asked to confirm the details of the trip after the trip is completed.	
Step **6**. • *TIP: This section only appears If Post-Trip Processing Is activated* • For each type of CabCharge product, select the custom form that will be used for the reconciliation process • *TIP: If you do not want a reconciliation process for one type of product, or you do not want the delegate to review/confirm the trip, leave the relevant field blank and there will be no reconciliation process*	

6. How to Configure the Permissions Settings

Step **1**.

- Select the group from the list who can manage and create CabCharge-related forms in Custom Forms.



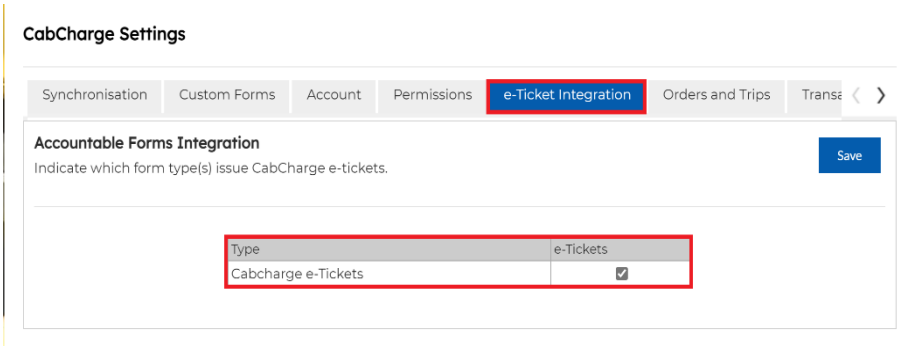
Step **2**.

- Click the Save button

7. How to Configure E-Ticket Integration

Step **1**. Set accountable form type for the Issue of e-Tickets

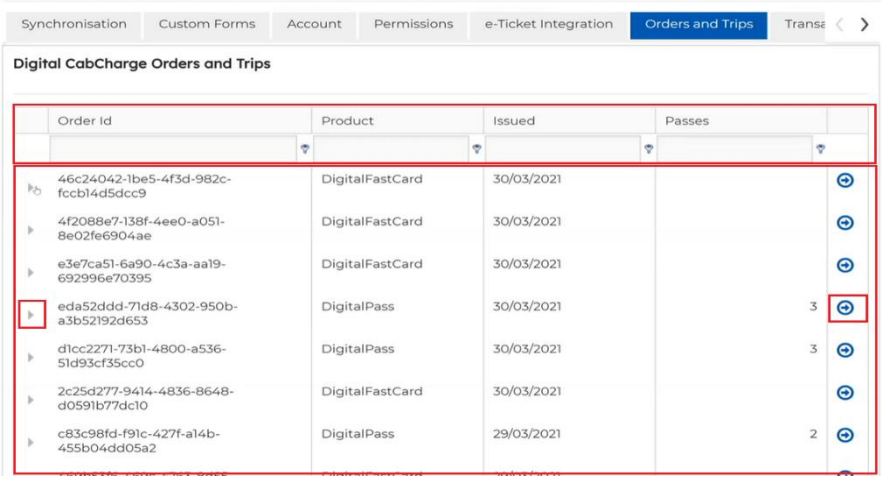
- NOTE: CabCharge Central integrates with the Accountable Forms module in Lighthouse and allows you to request CabCharge eTickets that are managed using the Accountable Forms module
- Select the name of the accountable form type that will be used to issue e-Tickets (In this example "CabCharge e-Tickets") by clicking the box by the relevant form type
- TIP: You can only select accountable form types that already exist in the Accountable Forms module



8. The Orders and Trips Tab

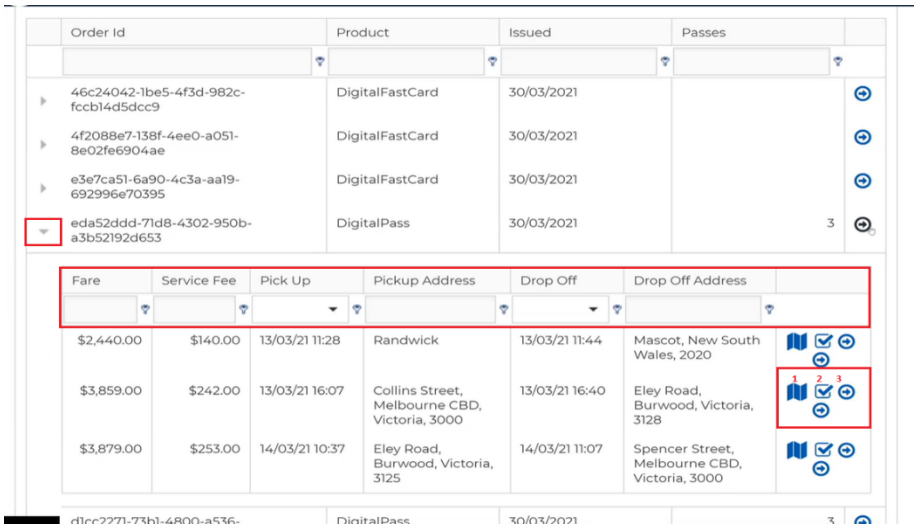
Step **1**. View Orders

- This tab is a register of all the orders that have been placed for CabCharge products
- You can search by Order Id, Product (type of CabCharge product e.g. Digital Pass), Issued (date the product was issued), and Passes (number of Digital Passes in the order, if any)
- You can also link back to the approval for the order by clicking the arrow on the right.



Step **2**. View trips

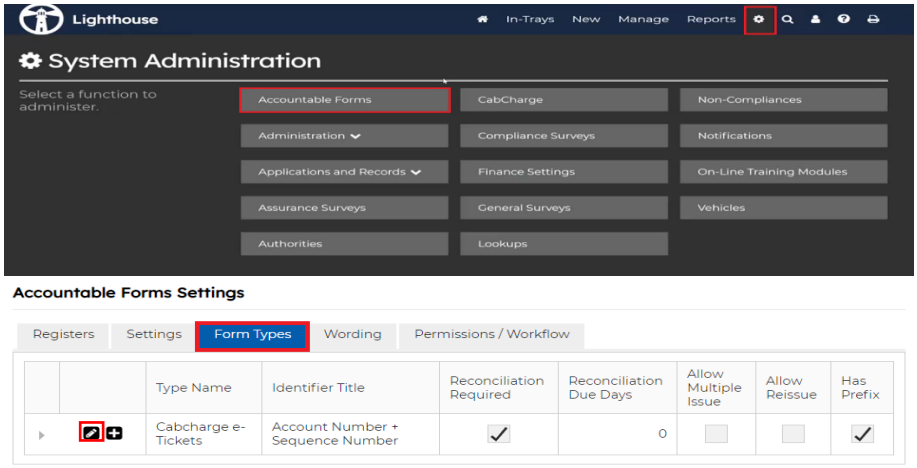
- In this tab you can also view the Cab trips that have been taken using the issued products
- To access the trip Information click the the arrow to the left of the order row. The arrow will twist and a list of the trips for those products will be displayed, if there are any
- You can filter by Fare, Service Fee, Pick Up date, Pickup Address, Drop Off Date, Drop Off Address.
- You can view trip information, as follows:
  Map of the trip (1)
  Approval for the trip (2)
  Reconciliation/s for the trip (3)



9. Configure CabCharge e-ticket Settings in Accountable Forms

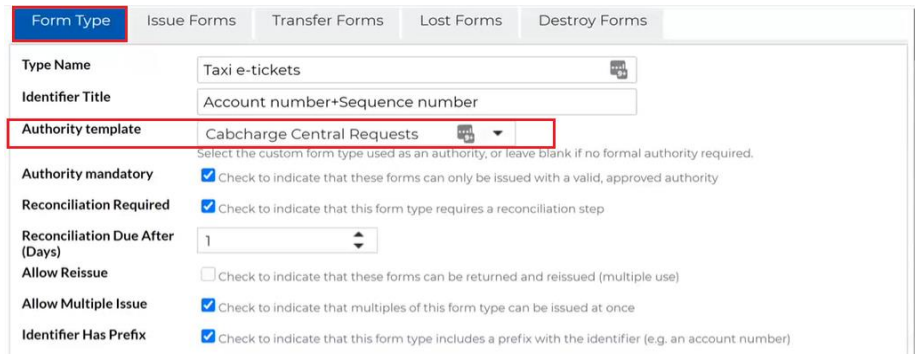
Step **1**. Navigate to the the Custom Form to be used to request and approve the Issue of CabCharge products

- Navigate to the "Form Types" tab in Accountable Forms settings and click on the edit button for the form type used for issuing e-Tickets
  (> Accountable Forms > Form Types >)



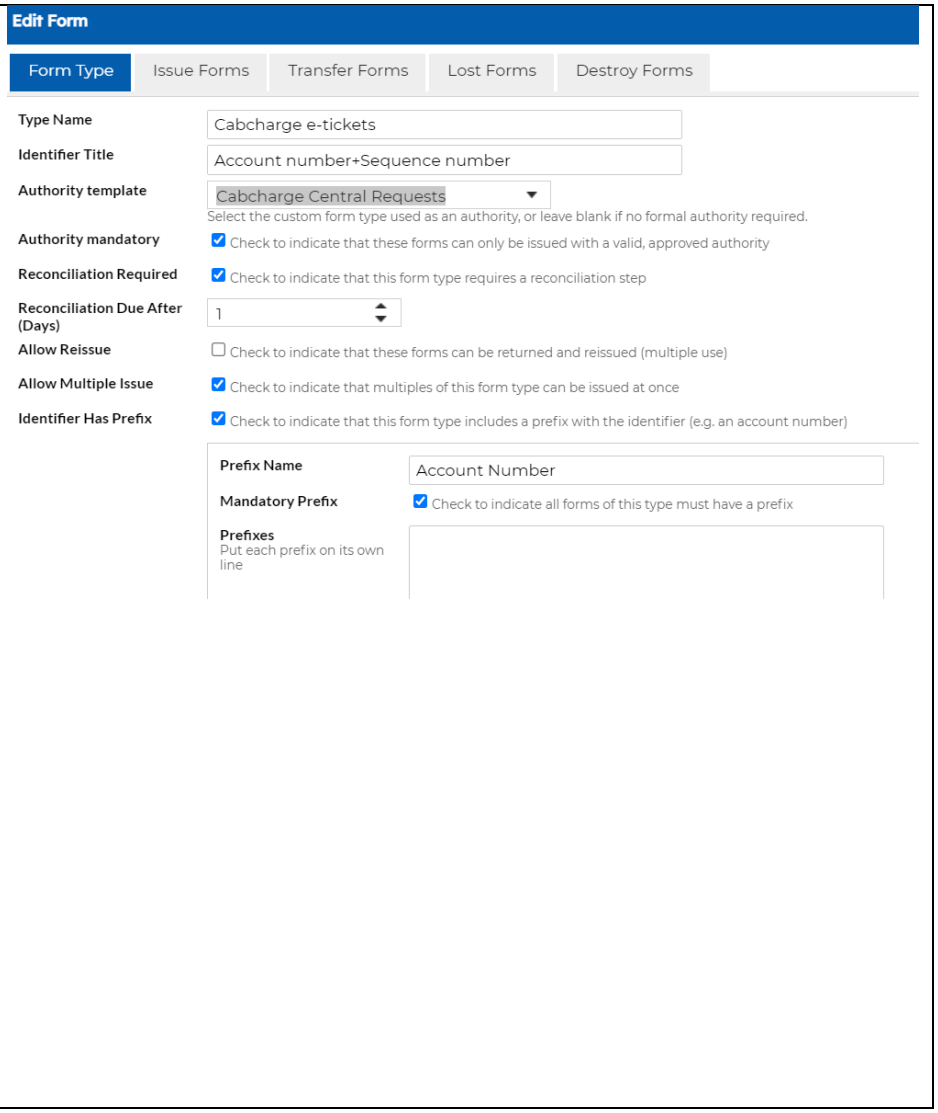
Step 2. Select the Custom Form template that will be used to request/approve the Issue of CabCharge products

- The Authority Template field provides a list of all active Custom Form templates. Select the one that you will use for requesting and approving the Issue of CabCharge e-Tickets
- TIP: This setting can be used independent of a CabCharge integration



Step 3. Set the other settings for the use of this accountable form

- You can edit the name of the form in the "Type Name" field
- The "Identifier Title" is the name used for the unique identifier of the CabCharge e-Ticket
- You can make the use of an authority mandatory by checking the box next to "Authority mandatory"
- If the "Reconciliation Required" box Is ticked, the Accountable Forms module will automatically trigger a reconciliation process
- You can choose the number of days that the reconciliation occurs after the issue of the e-Tickets in the "Reconciliation Due After (Days)" field
- Ticking the "Allow Reissue" box will mean that any e-Tickets returned can be re-issued to another user
- Ticking the "Multiple Issue" box means that more than one e-Ticket can be issued in one transaction
- CabCharge e-Tickets have a unique identifier that includes a standard prefix - the CabCharge account number. To enter the account number, tick the "Identifier Has Prefix" box, enter the "Prefix Name" (for CabCharge e-Tickets this will be CabCharge Account Number) and then tick the "Mandatory Prefix" box to make it mandatory for this to be included for this accountable form.



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