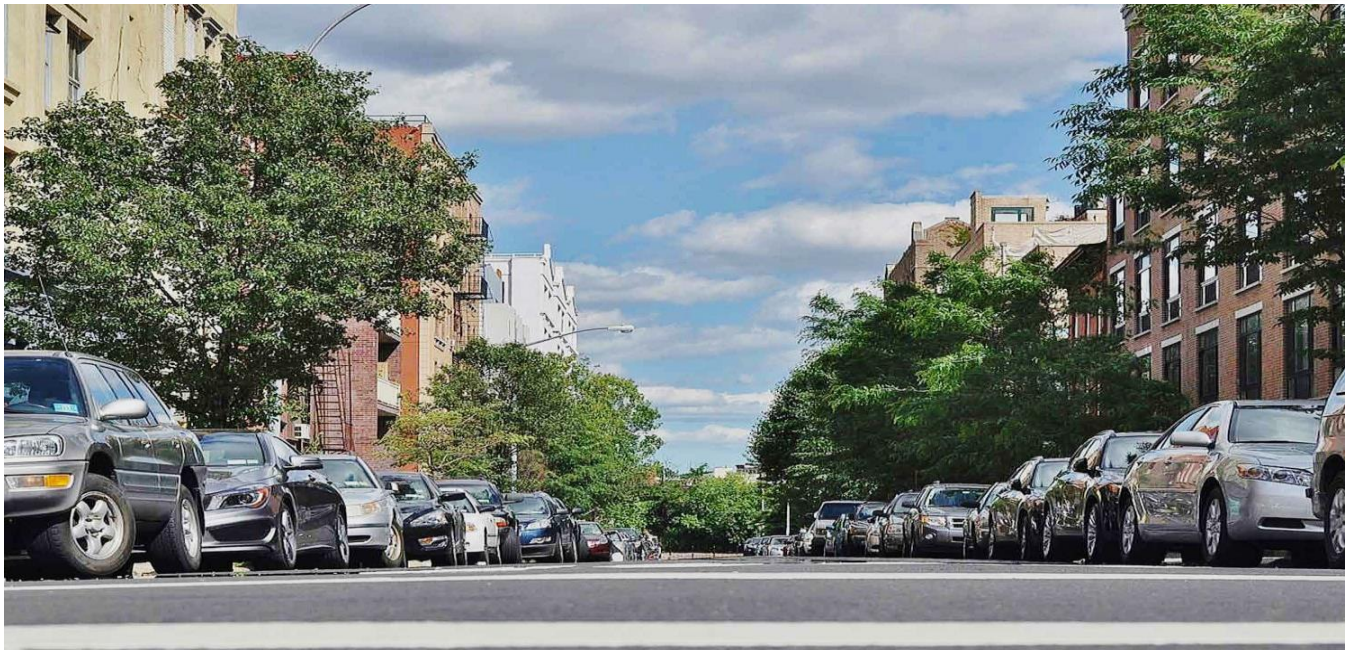


Back - Office Application
Reference Guide

Table of Contents

1. Introduction 4
2. Log in page 4
3. Home page 5
3.1 Utilities 6
3.1.1 Dashboard 6
3.1.2 Map 7
3.1.3 Fleet 7
3.1.4 Users 8
3.1.5 Reservations 8
3.1.6 Trips 9
3.1.7 Transactions 9
3.1.8 Calendar 10
3.1.9 Analytics 10
My Analytics 11
Users 11
Revenue 12
Reservations 12
Telemetry 13
3.2 Management 13
3.2.1 User Management 14
Members 14
(a) Information 15
(b) Reservations 18
(c) Transactions 20
Customers 22
Administrators 23
3.2.2 Vehicle Management 25
Fleet 25
(a) Vehicles 25
(b) Vehicle Groups 31
(c) Group Insurances 35
(d) Group Extras 37
(e) Vehicle Reports 40
Reservations 41
(a) Reservations 42
(b) Reservation Expenses 42

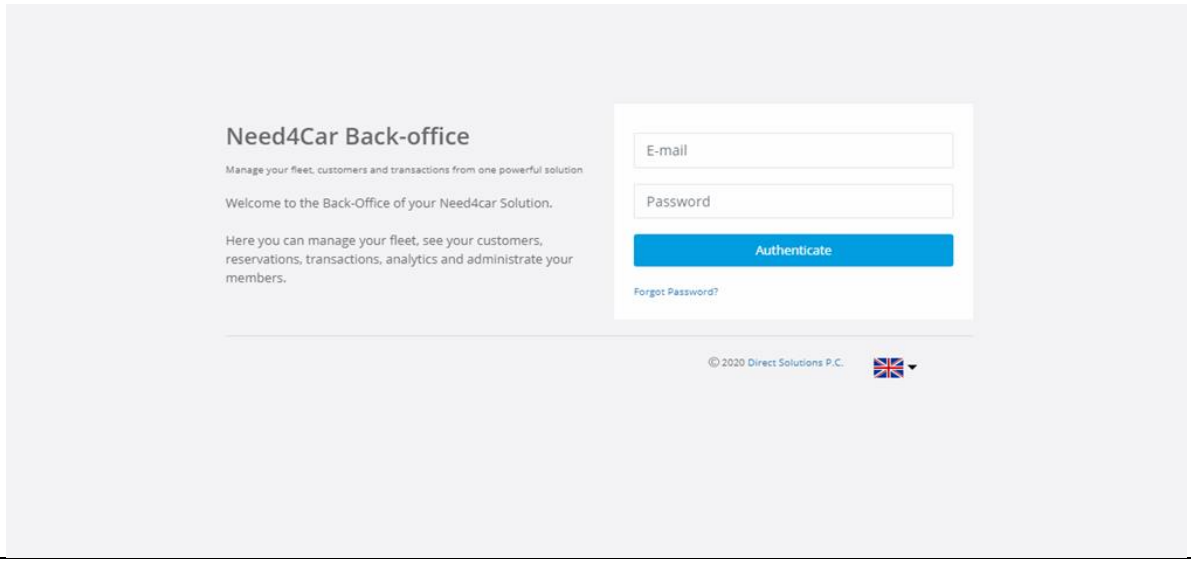
(c) Reservations Damages 44
(d) Reservation Map 44
Calendar 45
Damage Report 45
No Signal 46
Distance Driven 46
Map 47
Average Speed 48
Out of Geofence 48
3.2.3 Finance 48
Transactions 48
Failed Transactions 49
3.2.4 Support 50
Documentation 50
Open ticket 50
Changelog 51
Monitoring Tool 51
Change Password 52
3.3 Notifications 52

1. Introduction

The “Need4Car: B/O Guide” is a useful tool for the initial presentation of the Back Office Platform, as it describes the features of it.

The Back Office Platform is a powerful tool for every Back Office Administrator for the daily reporting and management of the car sharing procedure. This tool gives the Administrator the option to manage the vehicles, the users, the sharing procedure, the daily events (loss of user’s connection, etc). Additionally, he can plan and define the business strategy of his car sharing service. That means that he can define the tariff models, the car sharing model (station based, free floating, round trip, etc), the vehicle stations, etc.

2. Log in page

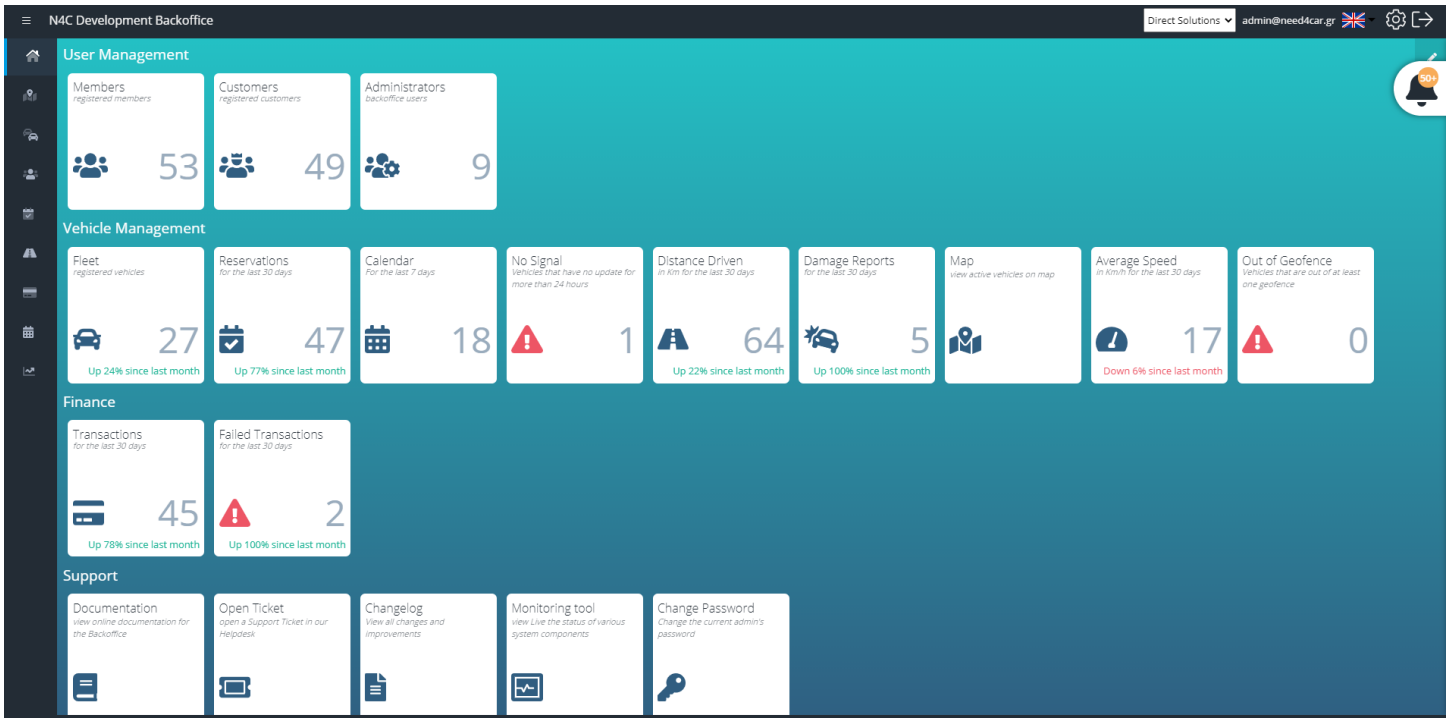


By clicking in the url:

https://backoffice.need4car.com/authenticate?redirect=https://backoffice.need4car.com:///authenticate

You go to the log in page of the Need4Car Backoffice platform. Type the email and the password and enter in the Backoffice platform.

3. Home page



After completing the login process, the “Home Page” appears which provides the basic information of the fleet, along with the utilities buttons.

It includes 3 sections: The “Utilities” on the left side of the screen in a sidebar, the “Management” in the center and the “Settings & Notifications” on the right side.

- **Utilities**

The utilities are in a sidebar with active links in order to redirect faster into the selected section which are Home, Map, Fleet, Users, Reservations, Trips, Points of Interest, Transactions, Calendar, Analytics.

- **Management**

The Management section consists of 4 pillars.

- User Manager: this section gives all the information to the user about the “Customers”, the “Members” and the “Administrators”
- Vehicle Management: here the user can have a total view of the “Fleet”, “Reservations”, “Calendar”, “Damage Reports”, “No Signal”, “Distance Driven”, “Map”, “Average Speed” and “Out of geofence”
- Finance: this section informs the user about the “Transactions” and the “Failed transactions”

- Support: at this point the user can have support for the platform by choosing “Documentation”, Open ticket”, “Changelog”, Monitoring tool” and “Change password”

➢ **Settings**

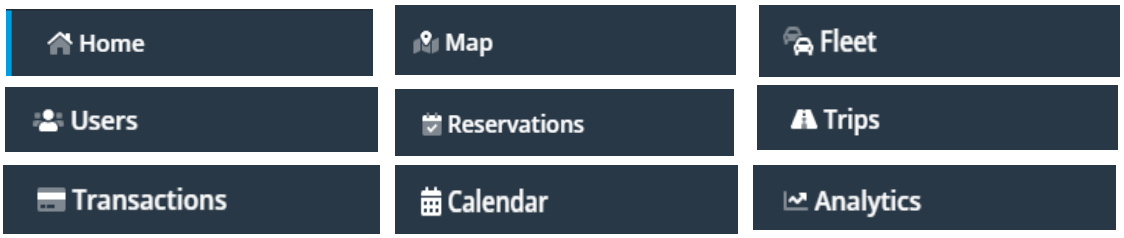
The Settings includes the “Provider”, “Pricing Models”, Pricing Factors”, “Geofences”, “Stations” and “FAQ” tabs.

➢ **Notifications**

The user gets live notifications about the activities that a “Member” or a “Customer” does.

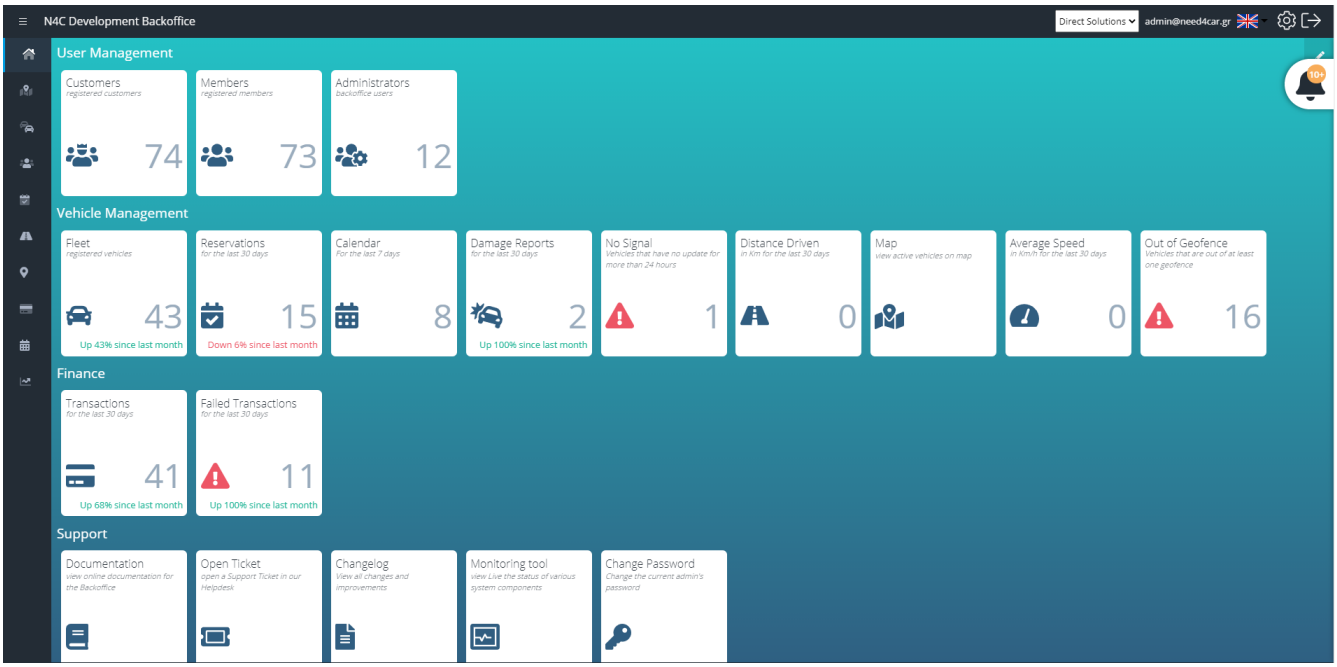
3.1 Utilities

The “Utilities” section is placed as a sidebar on the left side of the home page. It includes all the available utilities that the back office administrator needs for the management of the whole car sharing procedure, as further described.



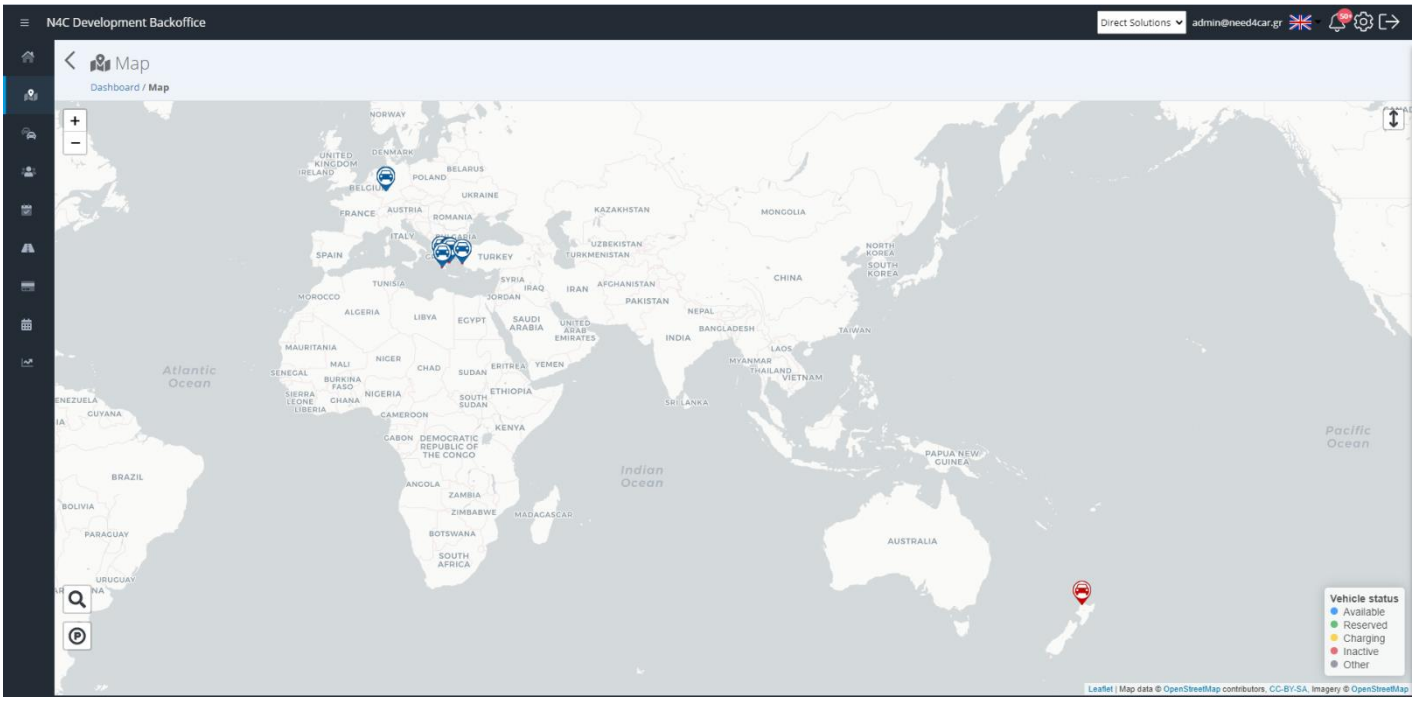
3.1.1 Dashboard

The first option in the sidebar is “Home” and by choosing it the user gets redirected to the Home page.



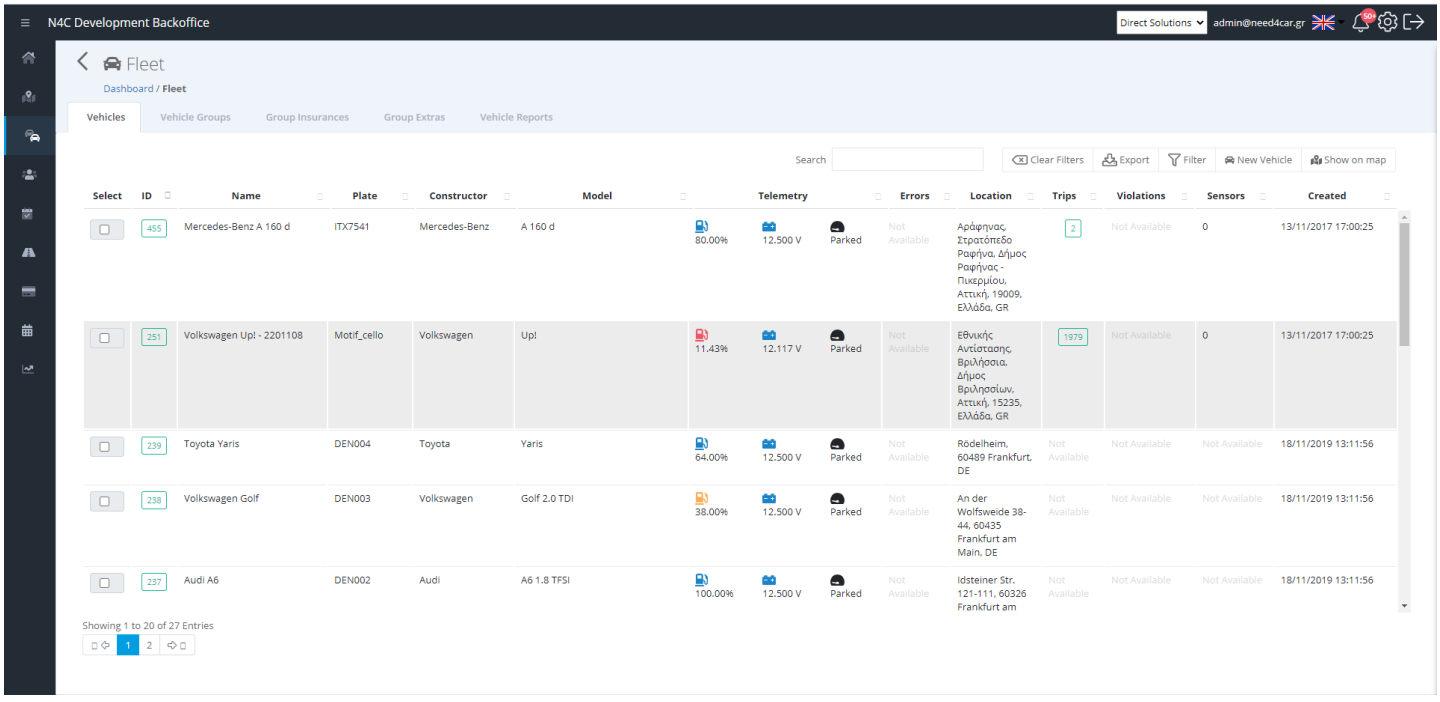
3.1.2 Map

All the vehicles are displayed on the map and they are colored according to their availability status.



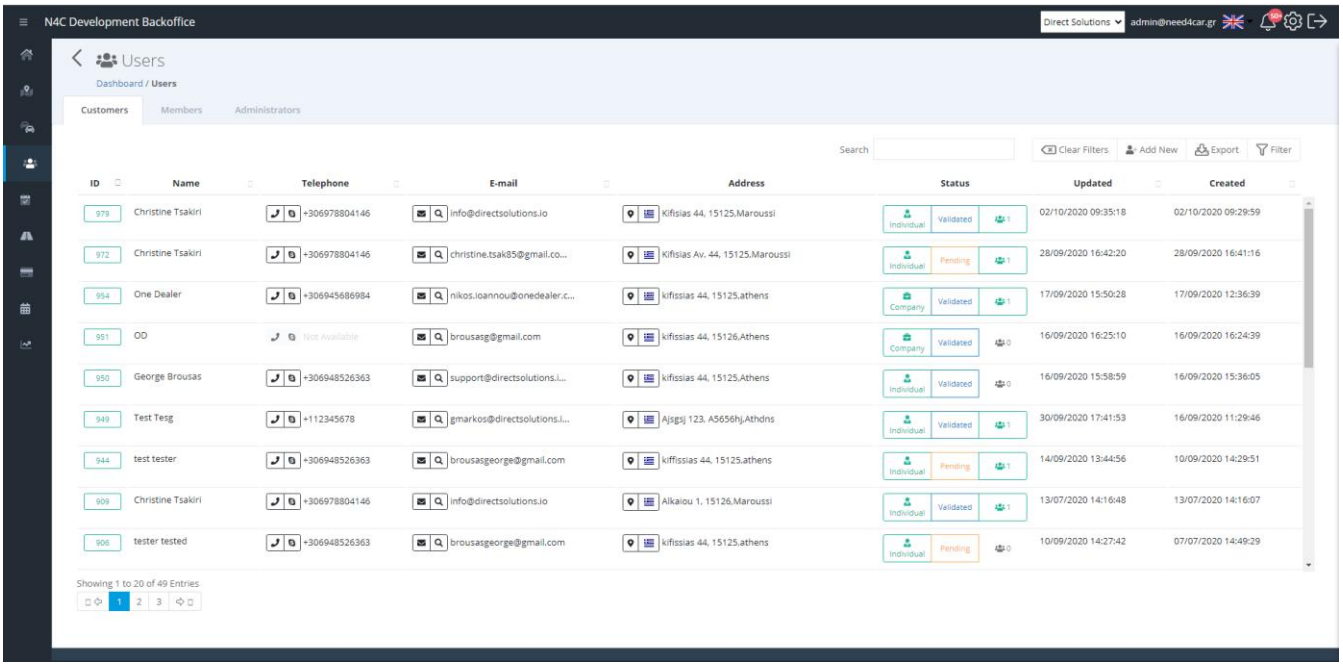
3.1.3 Fleet

This option provides full information of the fleet, with additional searching and monitoring utilities of the status of each vehicle.



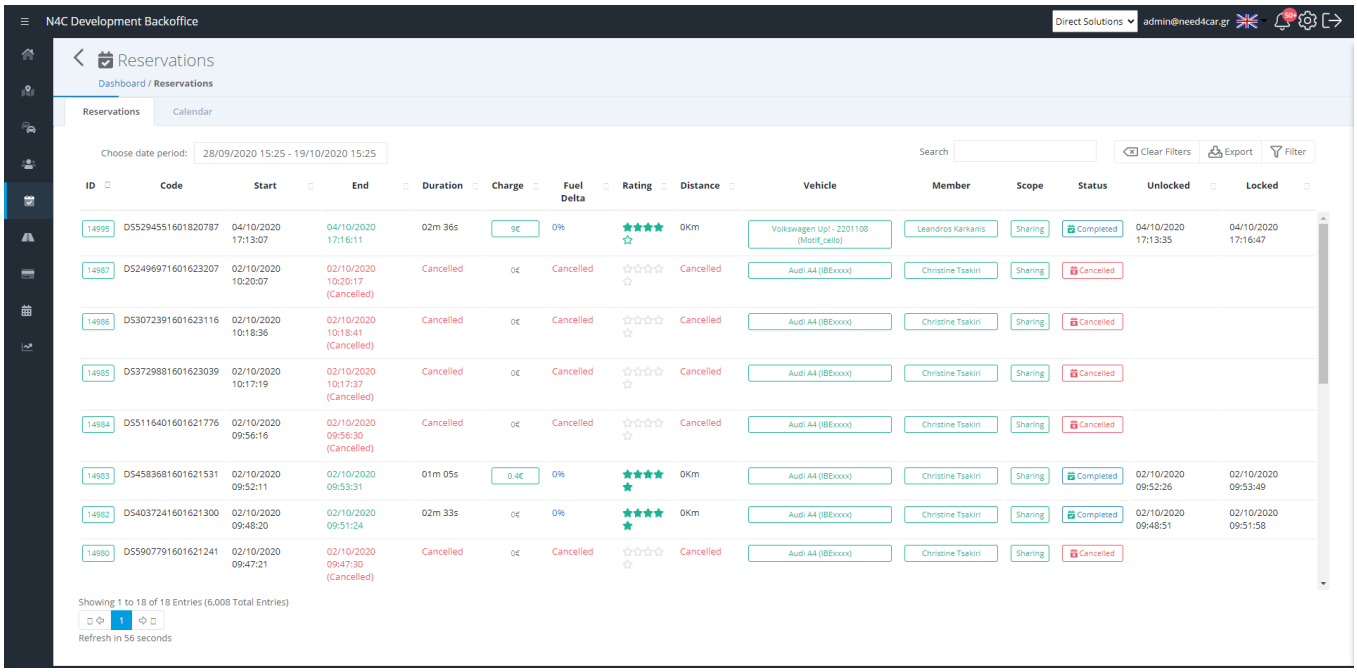
3.1.4 Users

The list of all users is available on this screen, with their personal info, their activity status (validated or not).



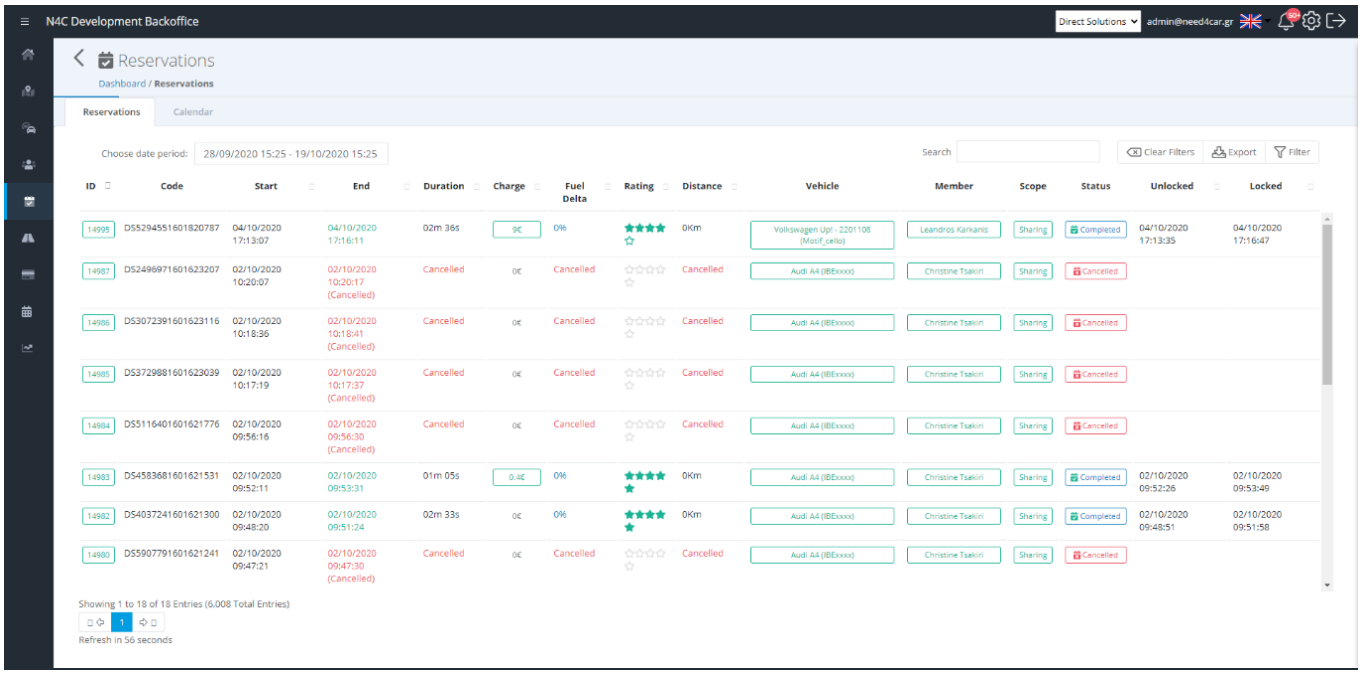
3.1.5 Reservations

This section includes the list of Reservations with all the available information, eg reservation code, start time, stop time, status, price, cancelation time, member name and vehicle plate. The reservation code, member name and vehicle plate are active links.



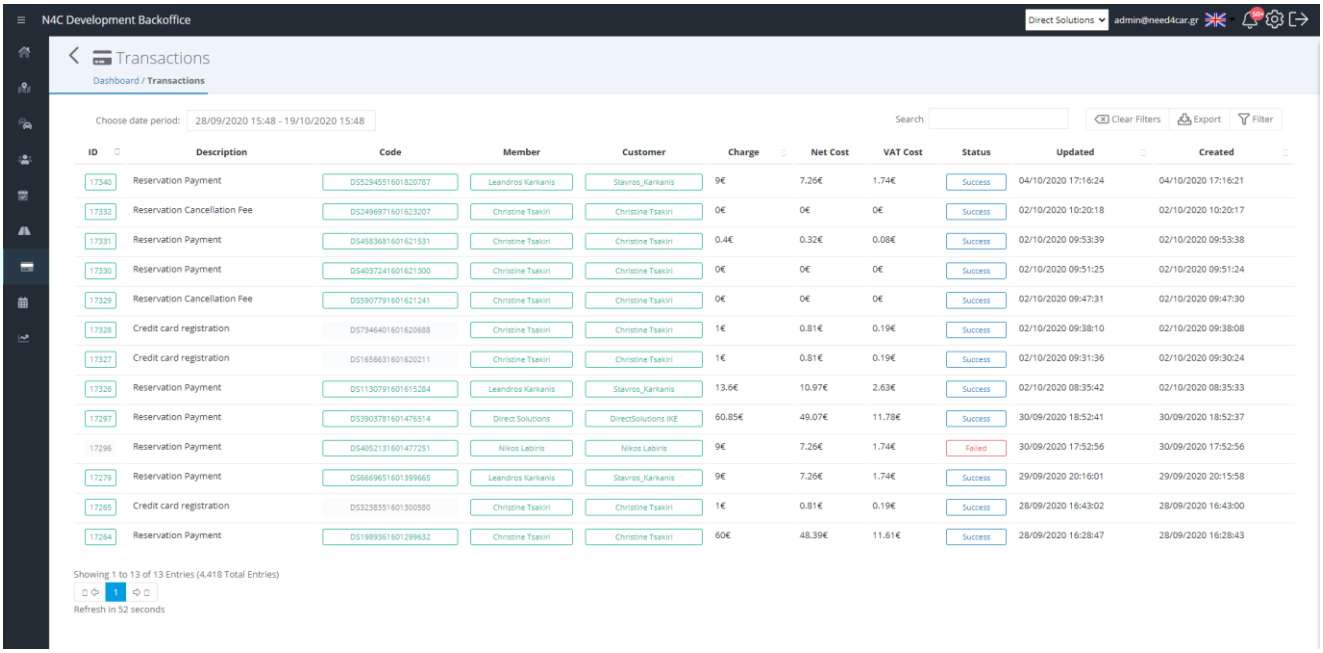
3.1.6 Trips

The list of all the trips are displayed on this screen and can also be shown on map.



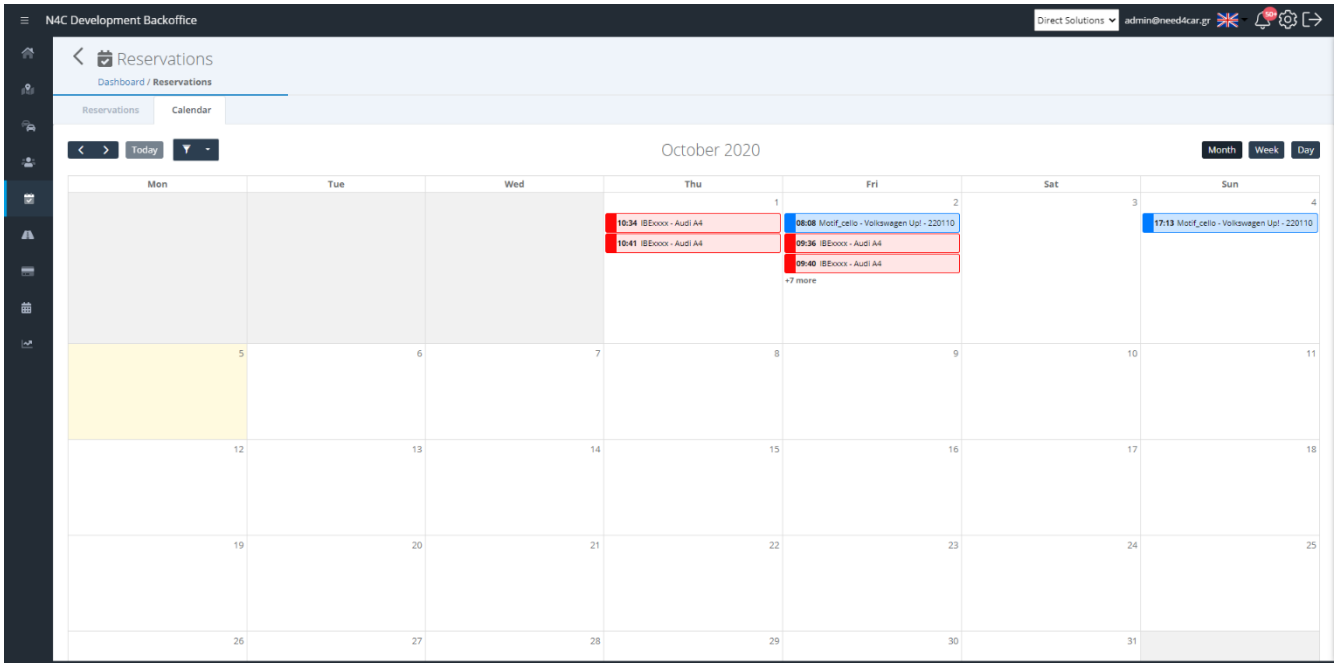
3.1.7 Transactions

The “Transactions” include all the history of the bank transactions.



3.1.8 Calendar

The “calendar” displays all the reservations, either completed or canceled, on a calendar.



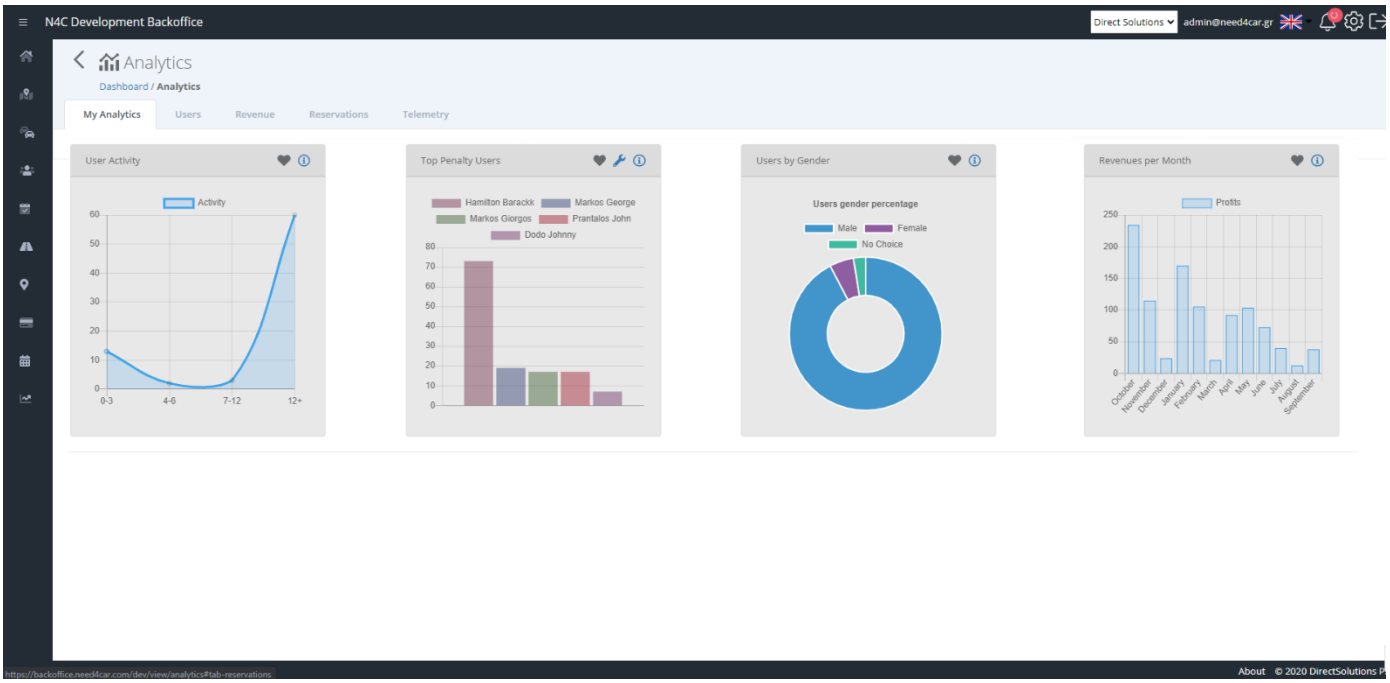
3.1.9 Analytics

The Analytics is an environment which provides a useful statistical Analysis from the collected Data. It is based on particular KPI’s: Revenues, Reservations and Users. The Analysis concerns both basic statistic results and more complex predictions. The results are continuously enriched with new KPI’s and more in-depth analysis.

These charts are divided in four categories: Users, Revenue, Reservations and Telemetry. Each category has total reports from the collected data. “My Analytics” is a category that the user has at his disposal the charts of his preference. At the top and right of each chart there are a “Heart” button and an “i” button. The “i” informs the user about the parameters of the chart.

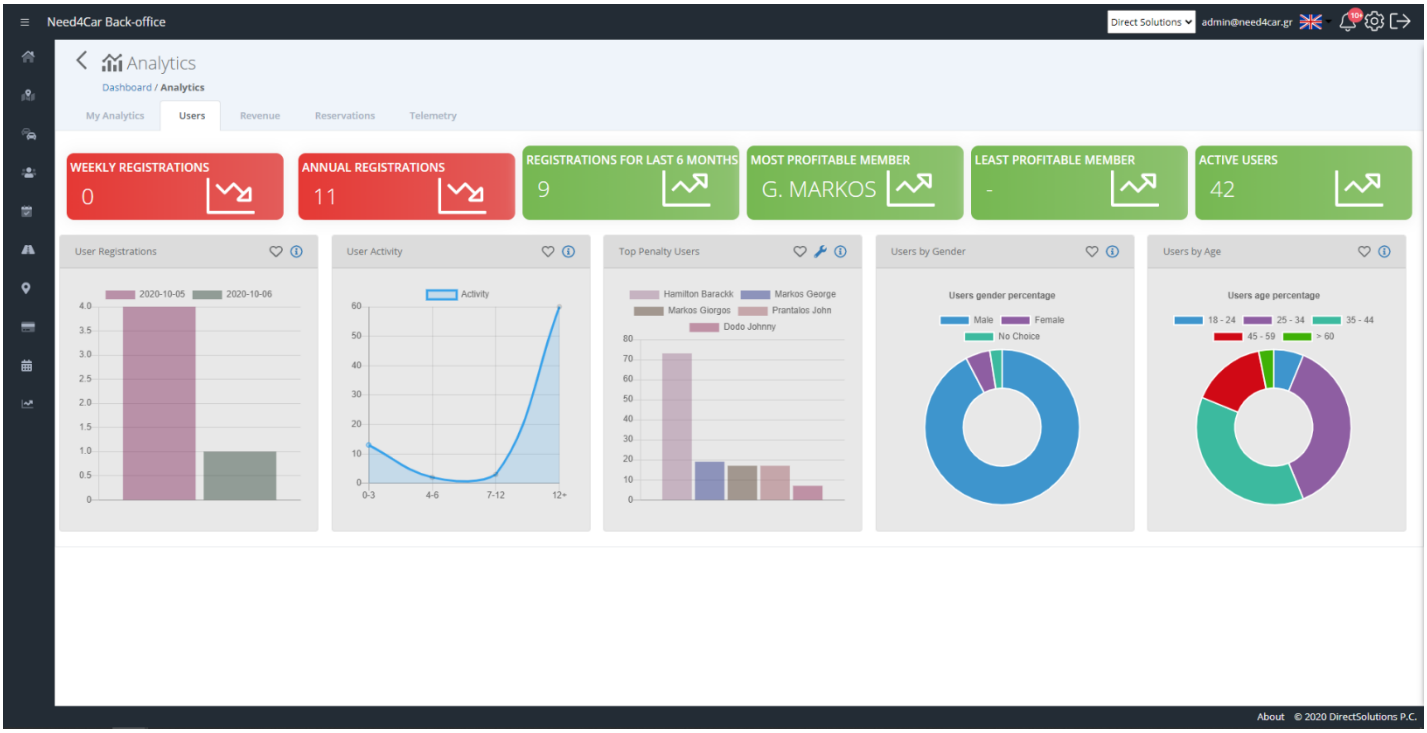
My Analytics

By pressing the “Heart”, the charts re also displayed in “My Analytics”



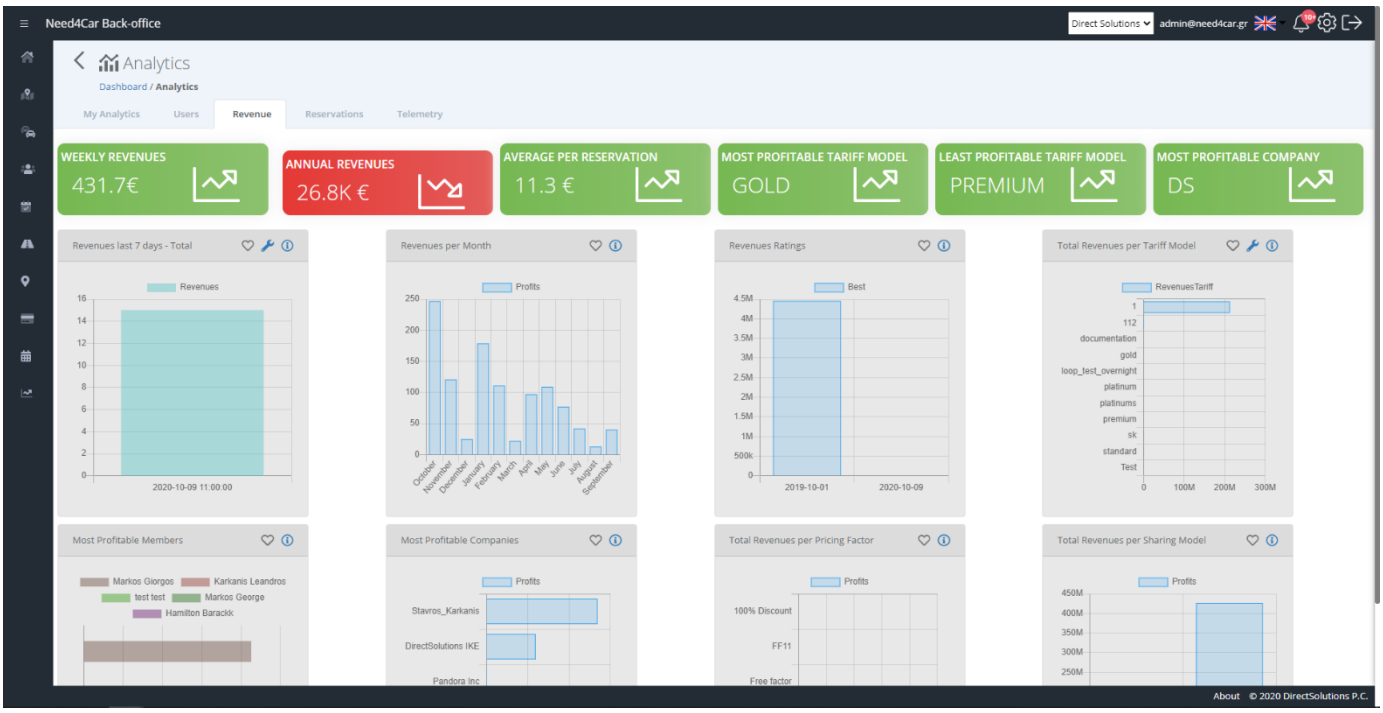
Users

The “Users” show the charts about the users versus registration, activity, penalties, gender and age.



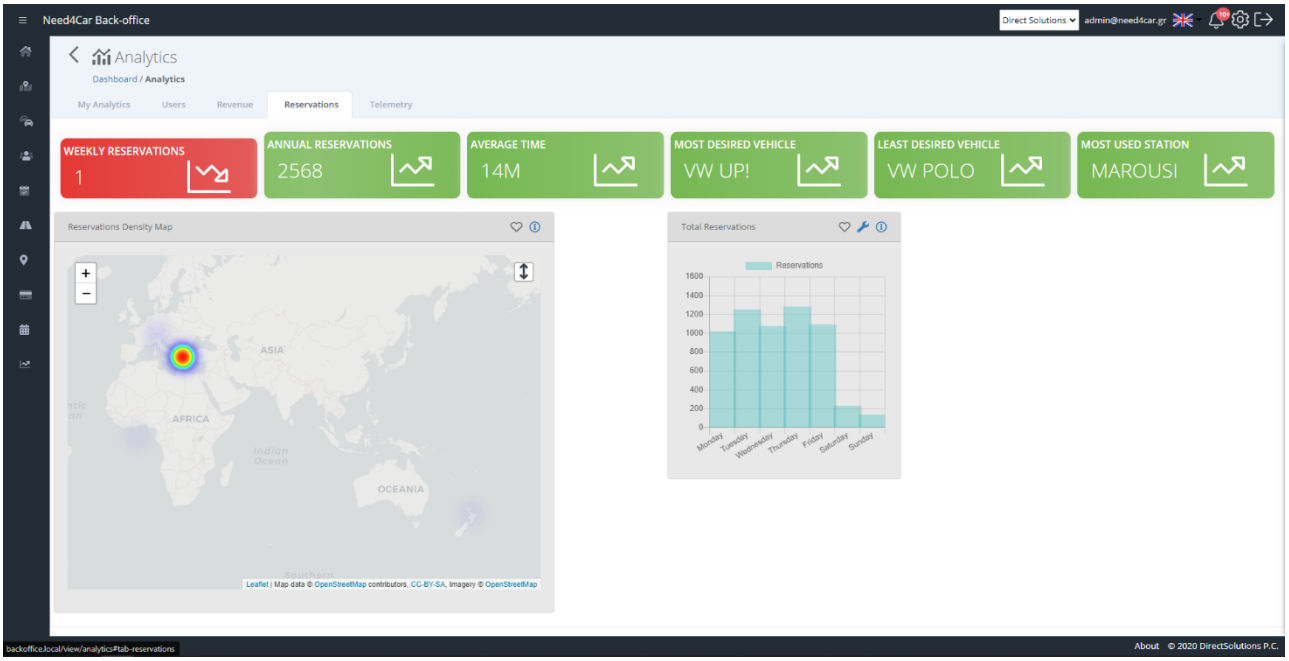
Revenue

The “Revenue” shows the charts about the revenue versus date, ratings, tariff models, members, companies, pricing factor and sharing model



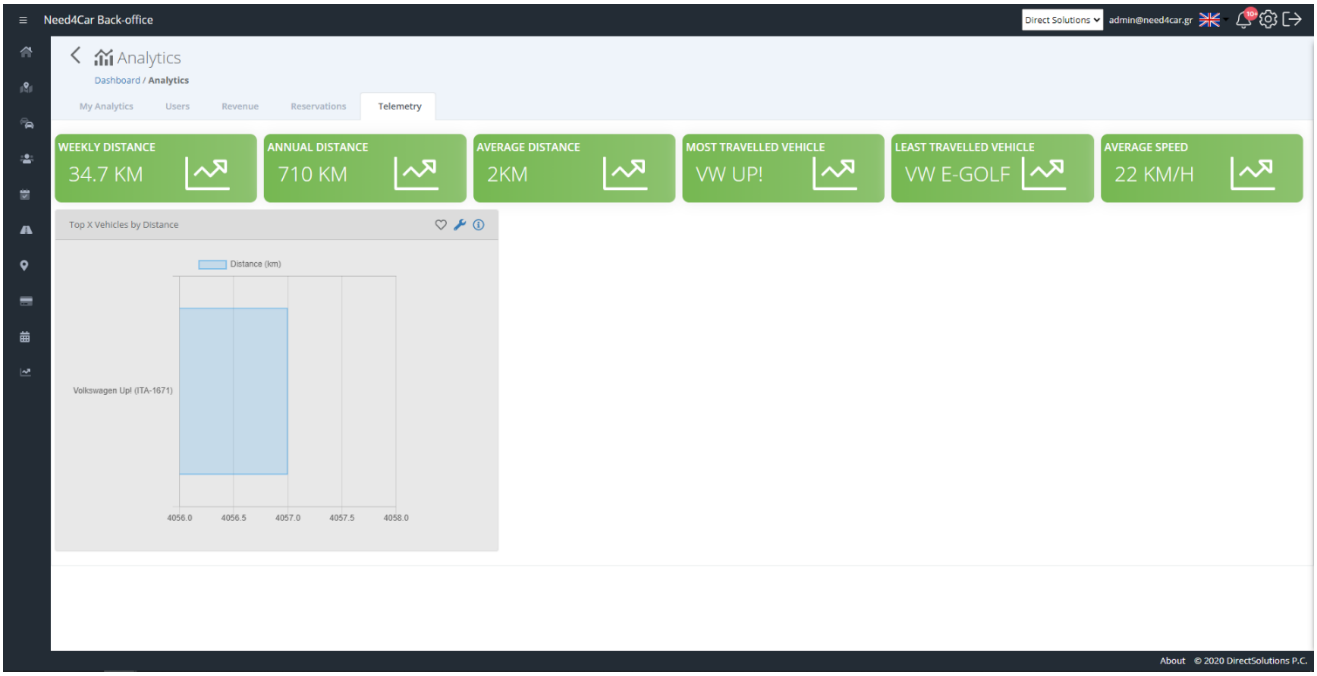
Reservations

The “Reservations” show the chart about the reservations versus days and a map with pointed areas, in different colors, that have the most reservations.



Telemetry

The “Telemetry” shows the chart about a vehicle and the driven distance.



3.2 Management

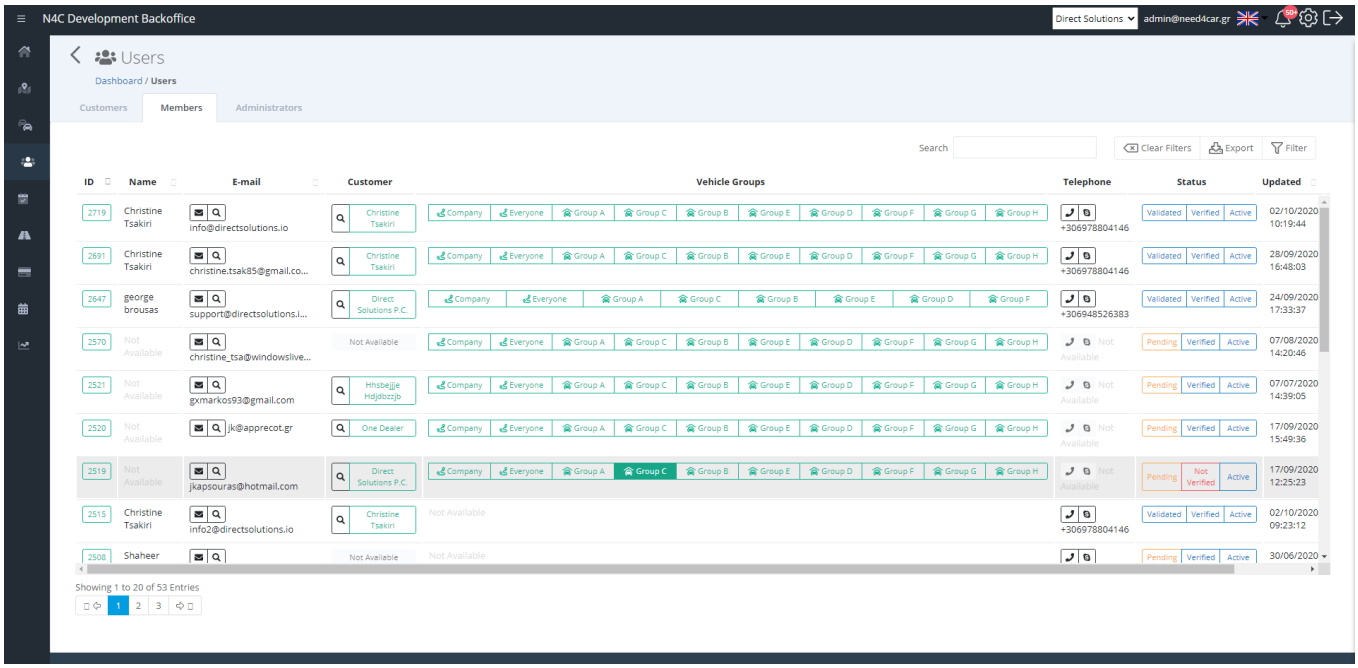
The “Daily Management” section includes the most frequent features that the administrator access in a daily basis. It is a “quick access” section, since all these features are included in the “Utilities” section. It is separated in 4 categories, but the Administrator can modify them, according to his preferences. The default categories are: 1) User management, 2) Vehicle management, 3) Finance and 4) Support.

3.2.1 User Management

The “User Management” consists of 3 pillars:

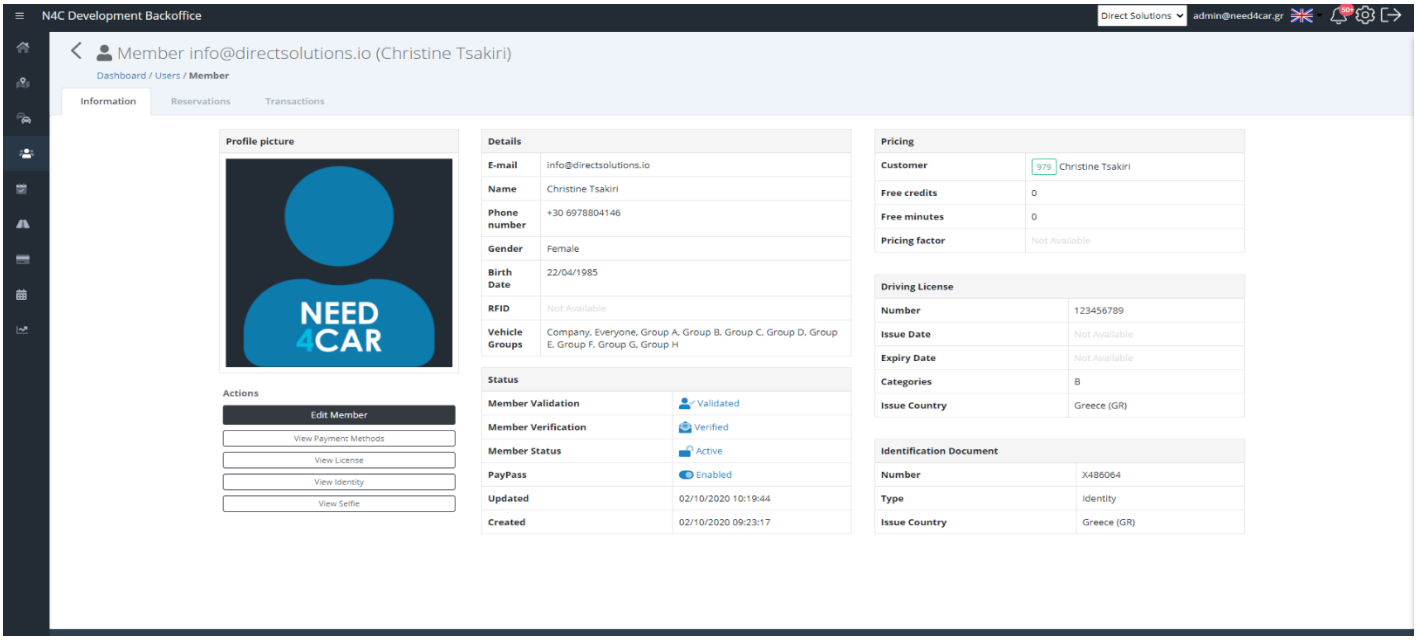
Members

The member is the end user who is making reservations via the mobile application. This section includes each member’s personal and contact details, his reservations and his validated cards.

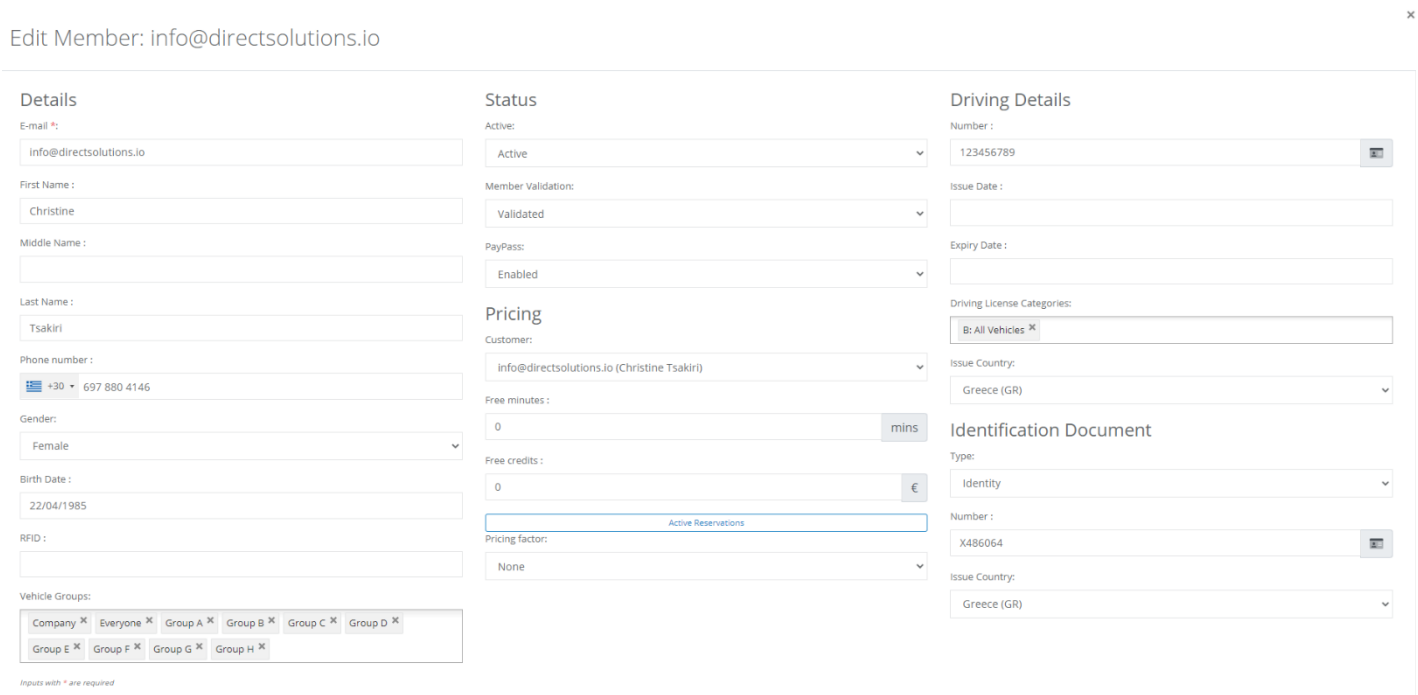


Each member has a unique ID number and by choosing it the user can see some general information, such as communication details, driving license, id, pricing and the status of this member.

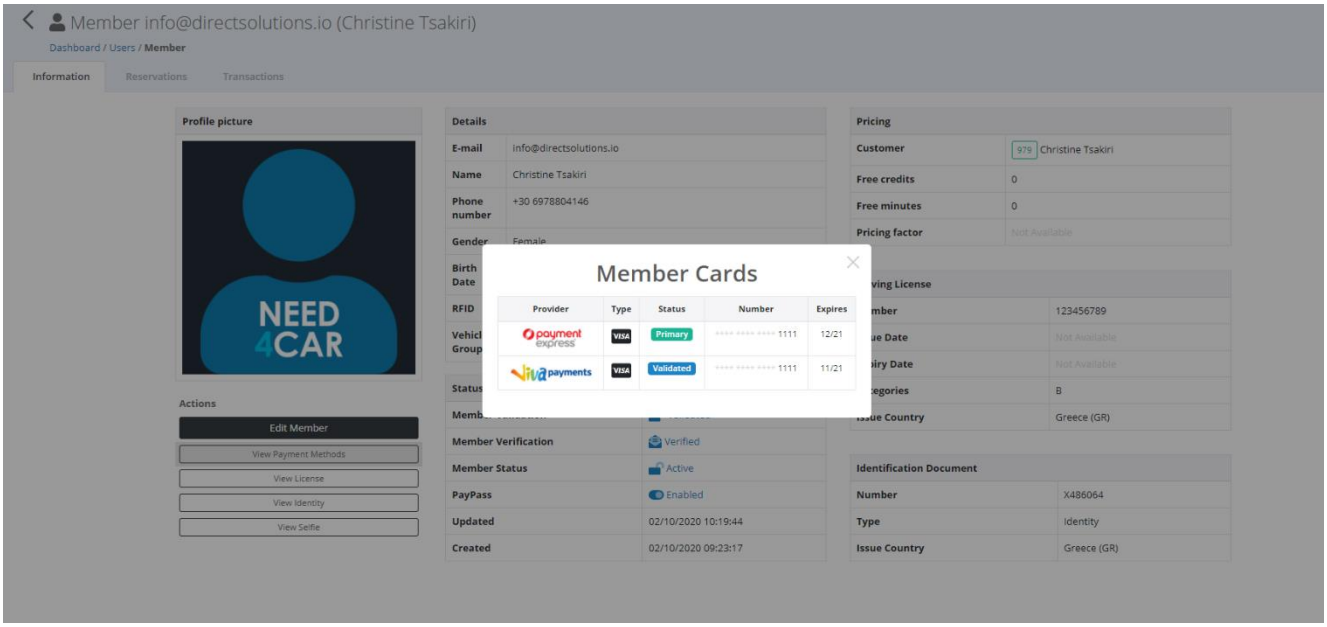
(a) Information



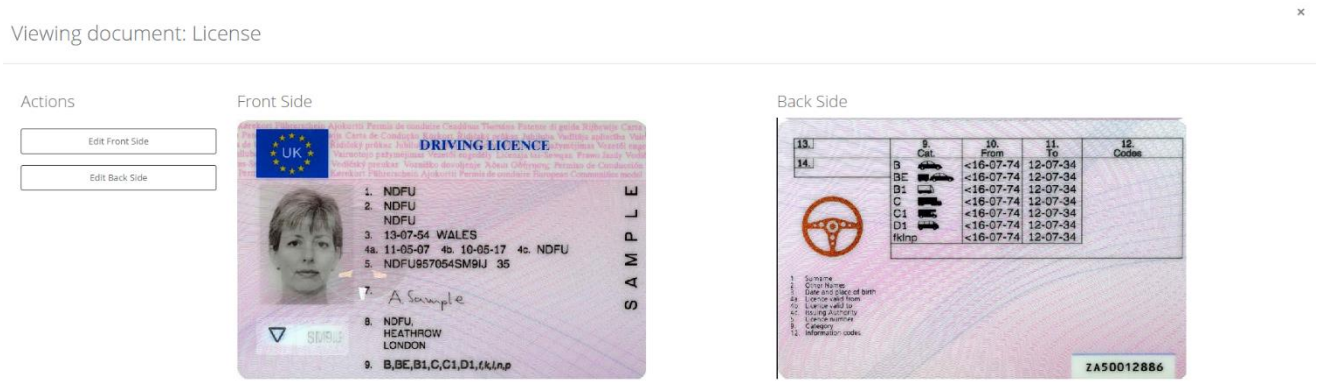
By choosing the “Edit Member” the user can work through member’s details, communication details, the status of the member, pricing, driving details, id and the vehicle groups that the member can share/rent.



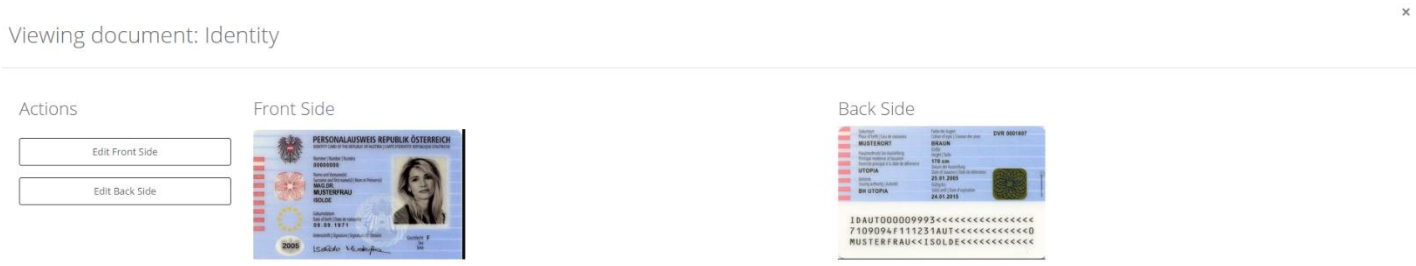
When the user chooses the “View Payment Methods”, then a window appears with the cards that the member has added, in order to pay his reservations.



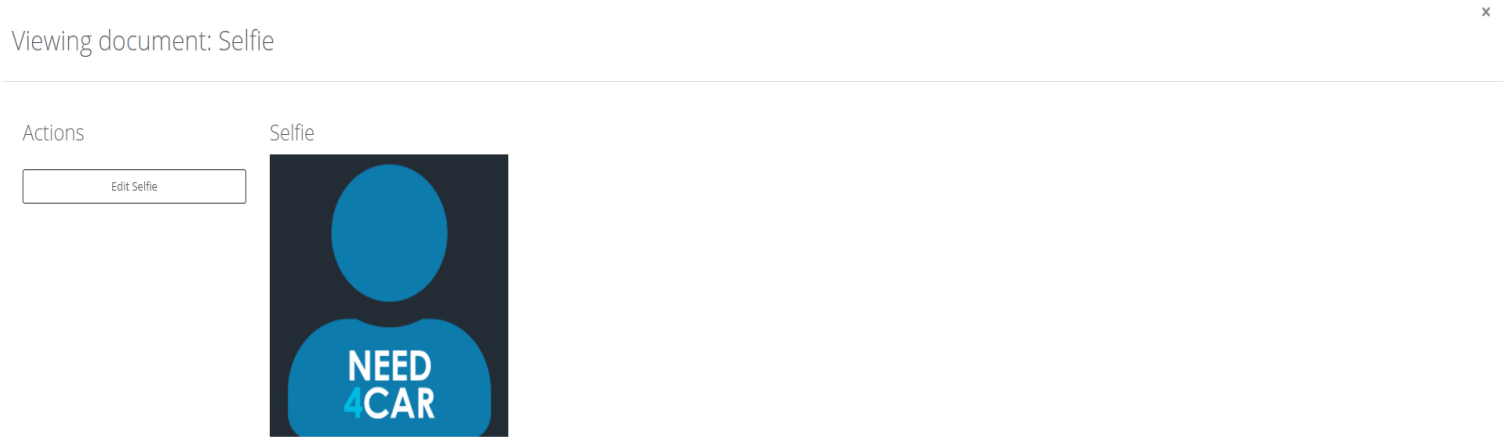
The “View License” button shows the driving license of the member and a new driver license can be edited.



The “View Identity” button shows the member’s id and a new id can be edited.

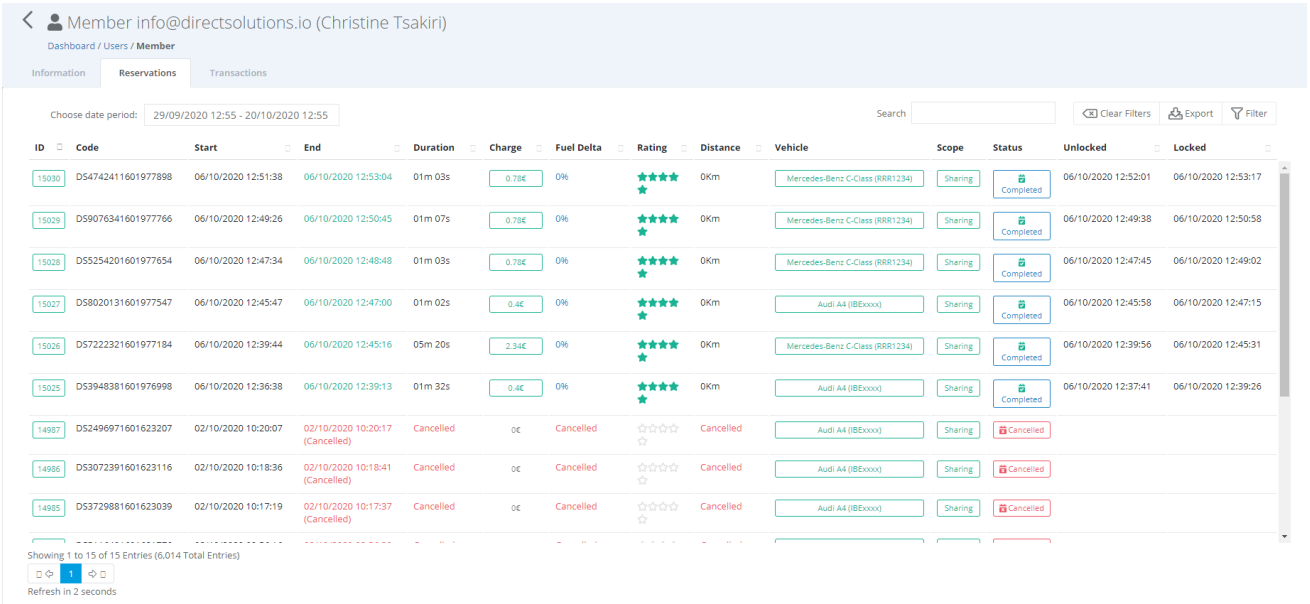


The “View Selfie” button shows the selfie that the member has uploaded and an new selfie can be uploaded.



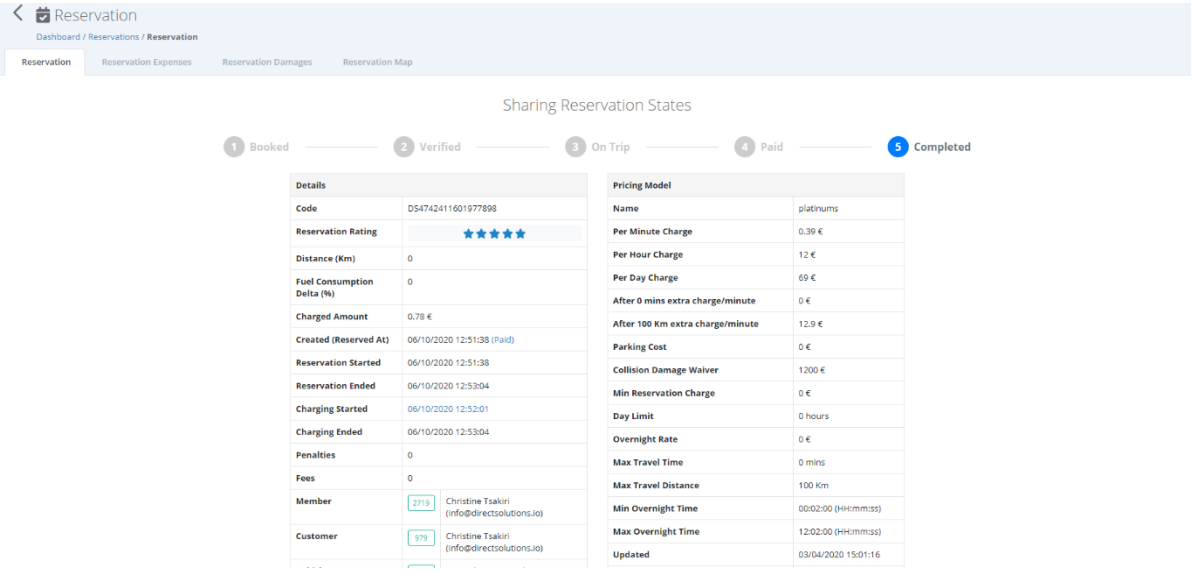
(b) Reservations

The “Reservation” tab show all the reservations, either the completed or the cancelled, that the member has done. The information that the user has at his disposal are: the ID number of each reservation, the Starting and Ending time of the reservation, the duration of the trip, the charge, the fuel data, the rating that the member has given, the driven distance, the vehicle that was used, the scope either sharing or rental, the status of the reservation and what time was locked and unlocked.

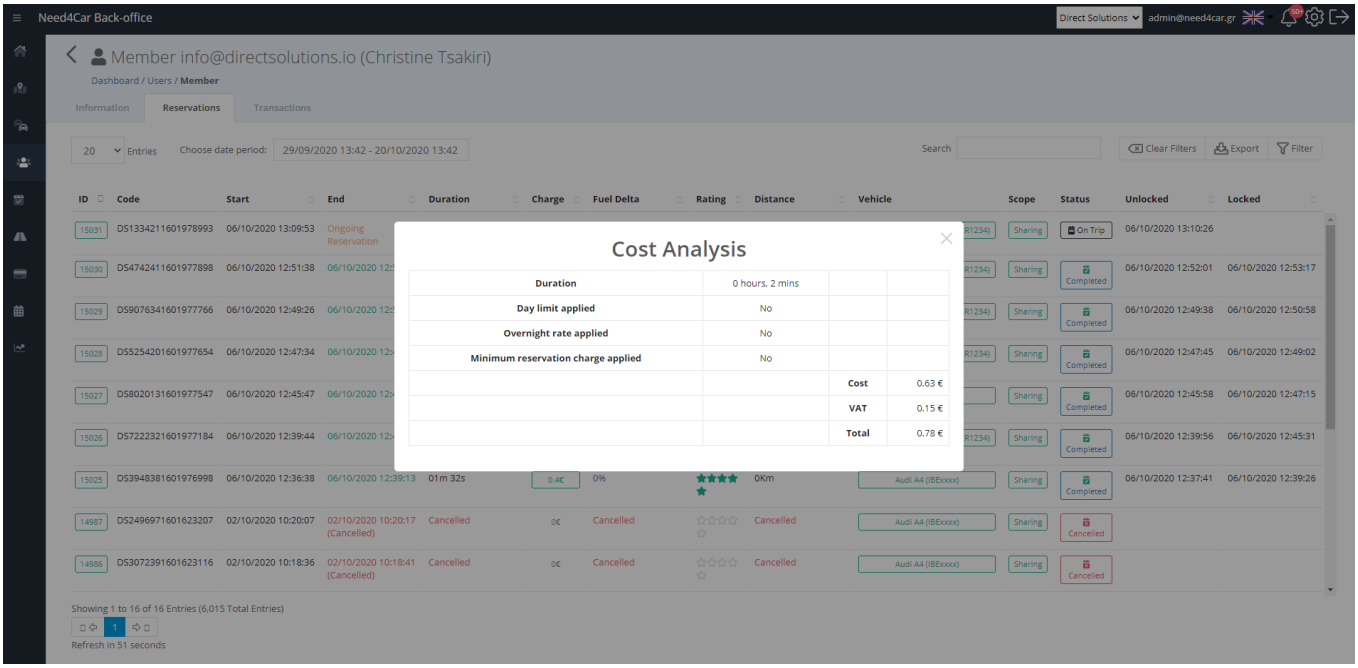


The information that are in a green box, are clickable and gives the user further information.

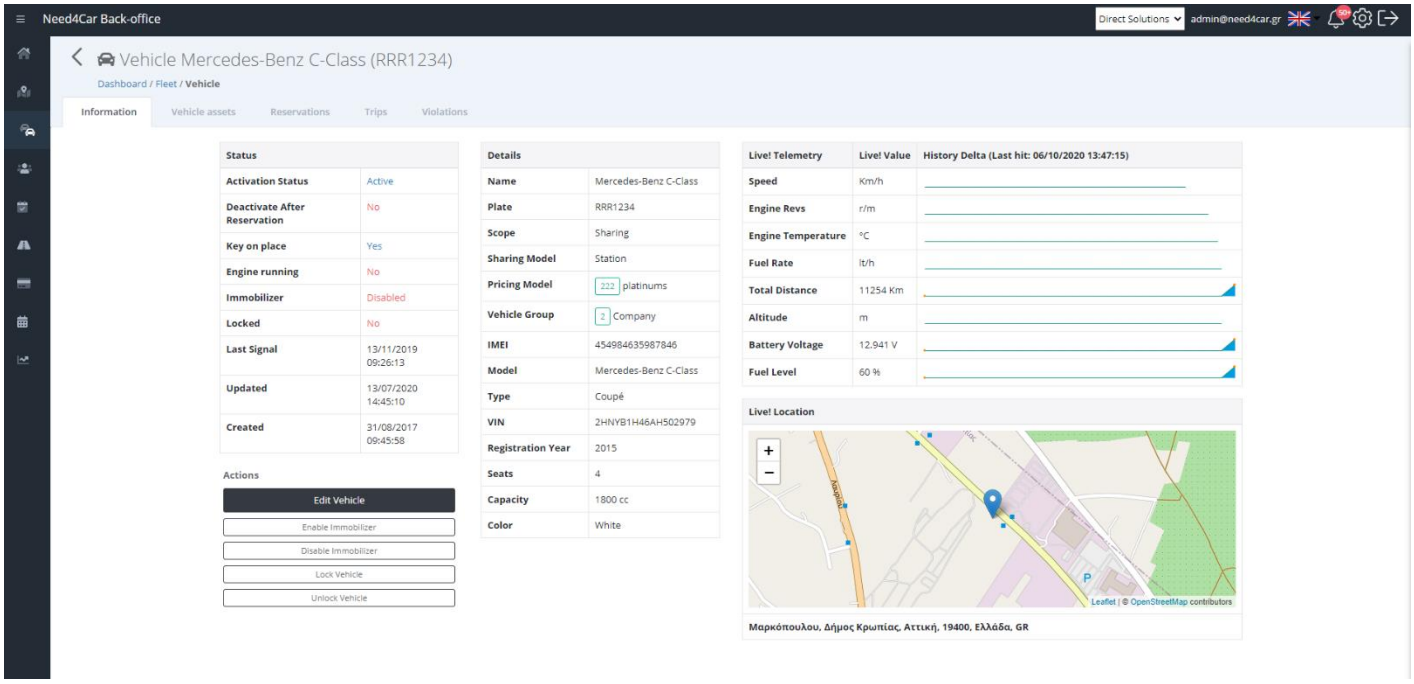
- Every reservation has a unique ID number, once the user chooses this ID number, he gets redirected to “Reservations” option where he can see the whole information about the specific reservation.



- By choosing the “Charge”, a pop-up window appears with the cost analysis of the reservation.

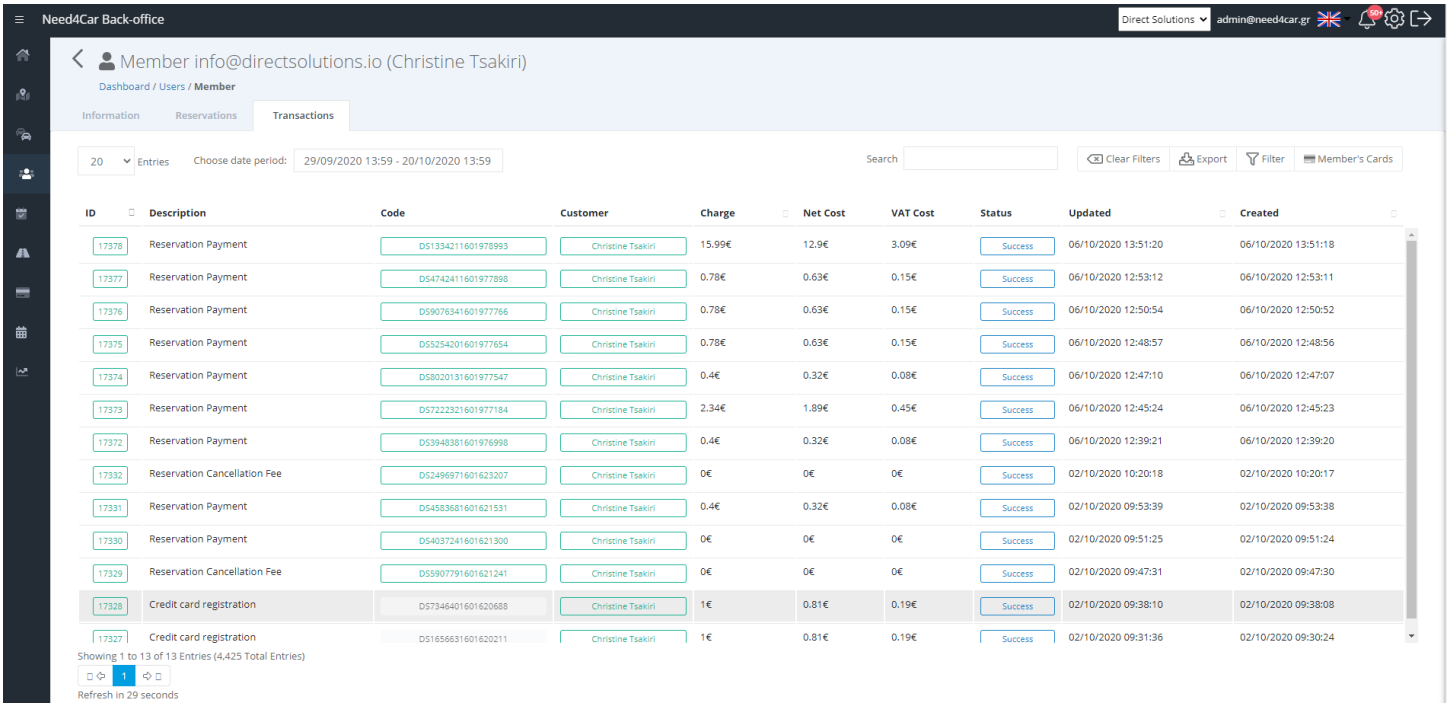


- When the user chooses the vehicle, he can see the current status of the vehicle, details such as type, color, capacity etc., live telemetry and he can manage the car by enabling or disabling the immobilizer and lock or unlock it.

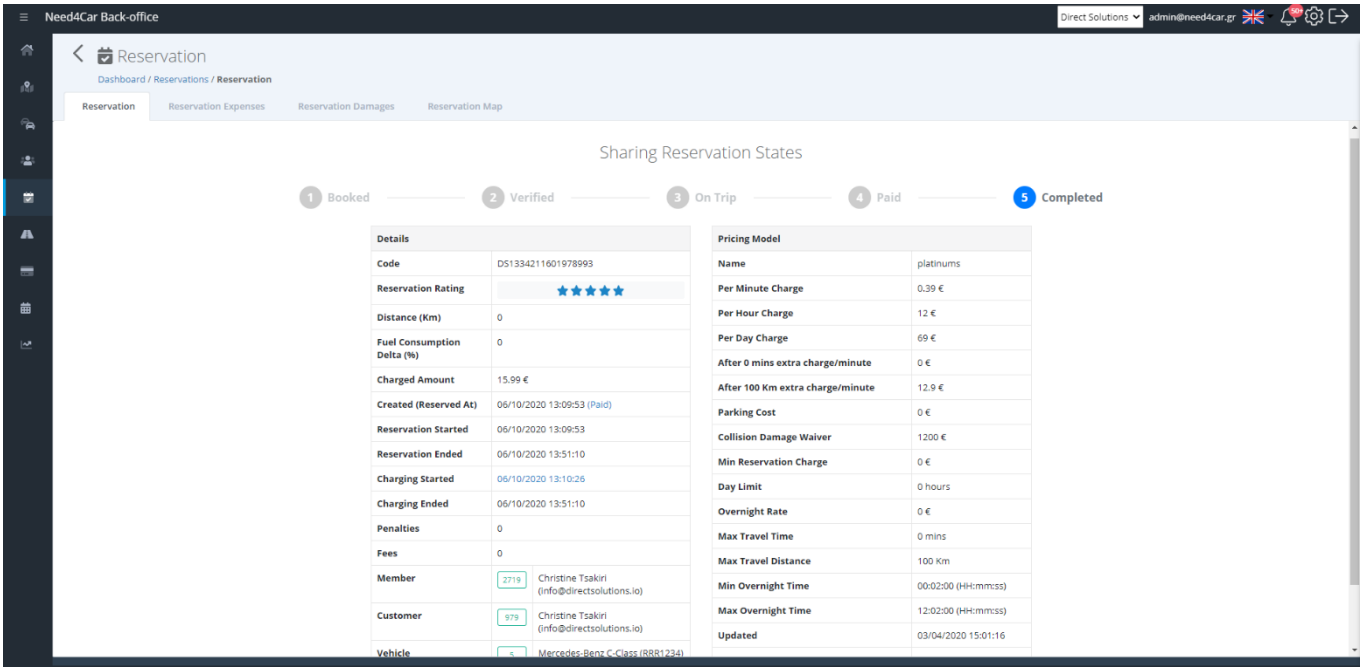


(c) Transactions

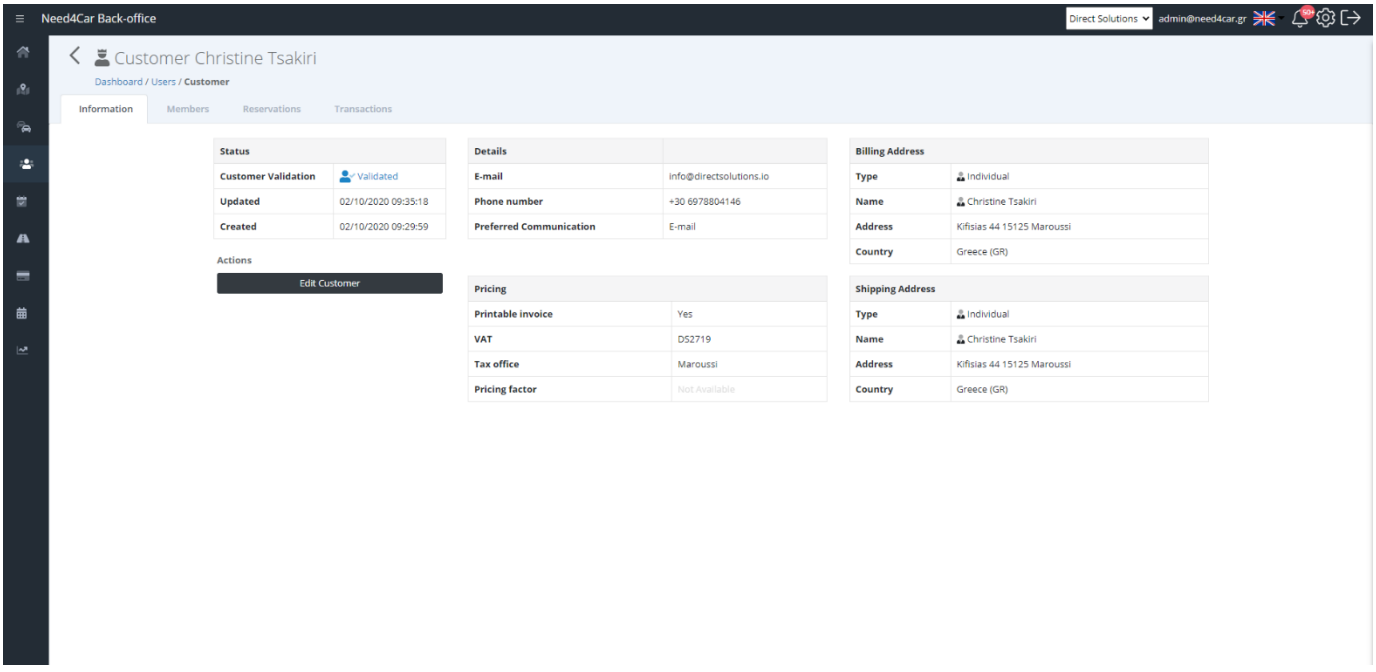
The “Transactions” tab shows the history of all the transactions that the member has made. The information that the user has at his disposal are: the ID number of each transaction, the Code number of the reservation, the Customer, the Charge Net cost and VAT cost, the status of the transaction either success or fail and the starting and ending time.



- Once the user chooses the “Code”, he gets to the reservation and see the information and the current status.

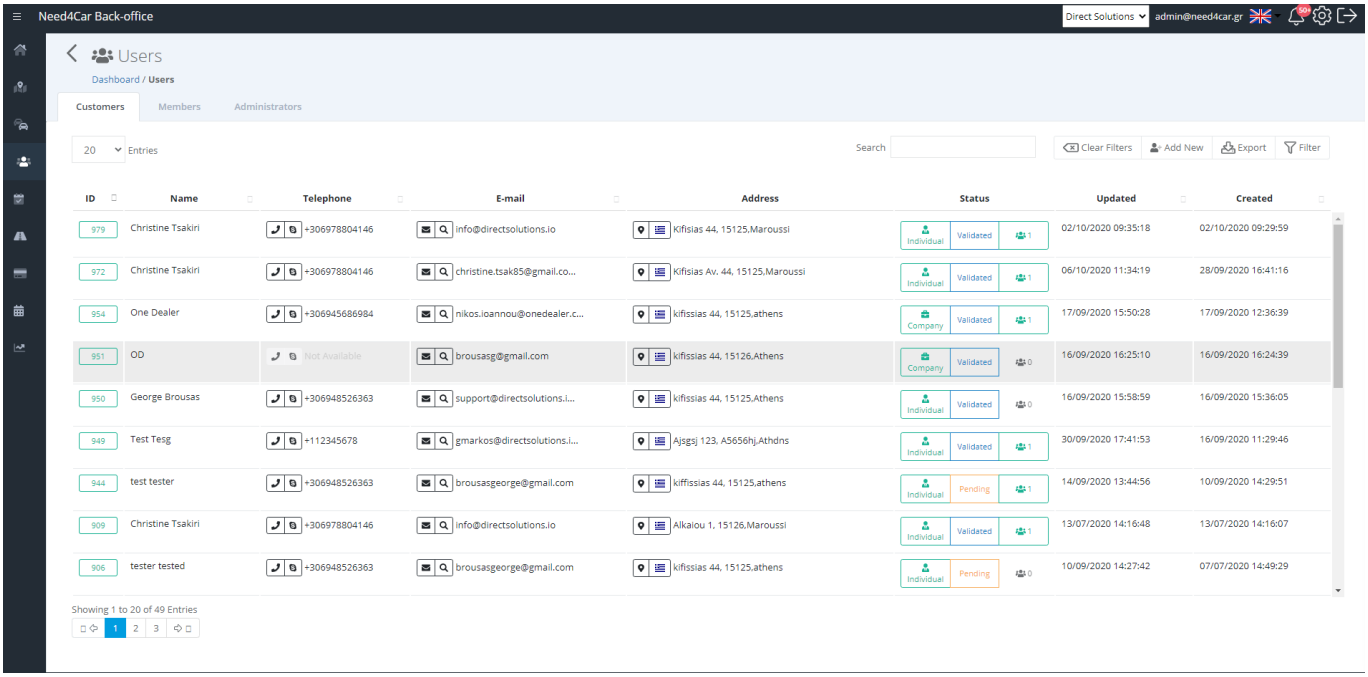


- When he chooses the “Customer”, he can see all the information about the customer who the member belongs.

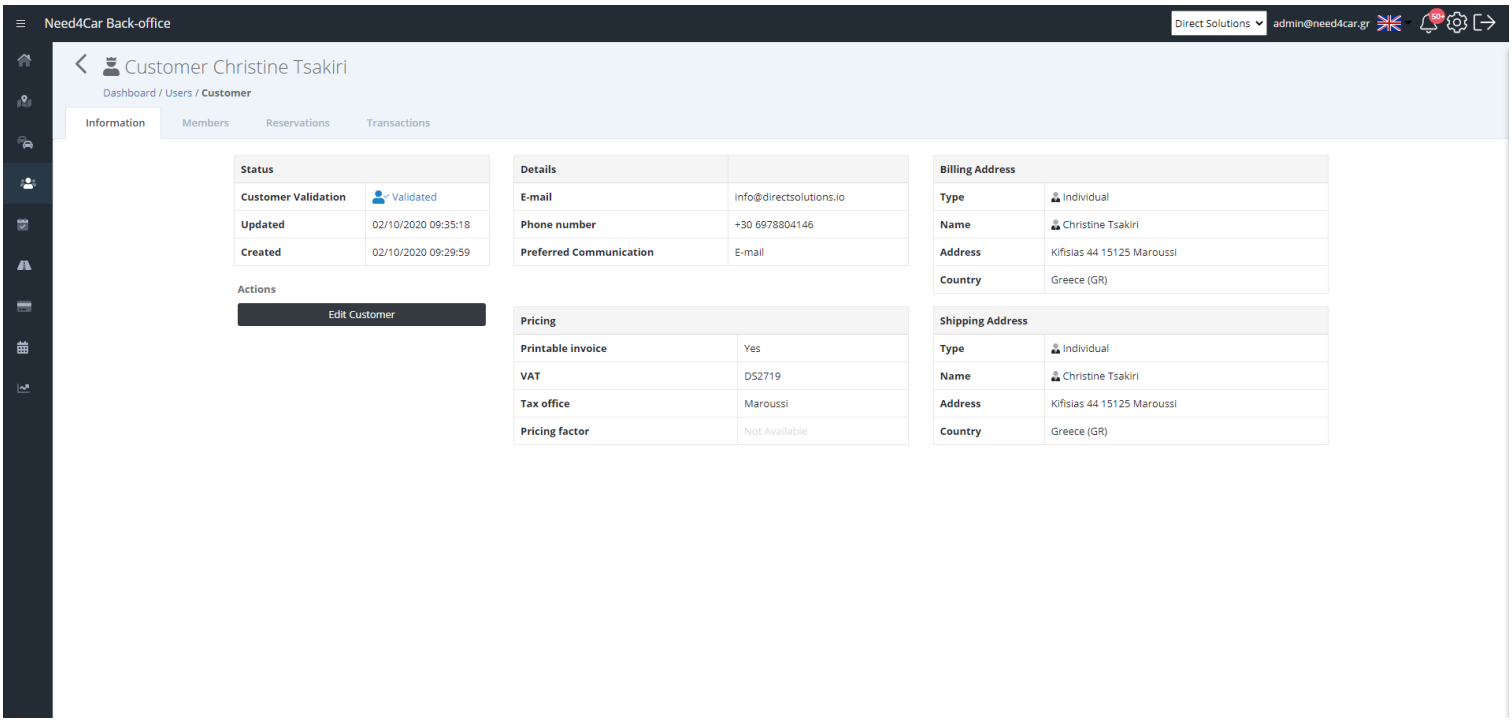


Customers

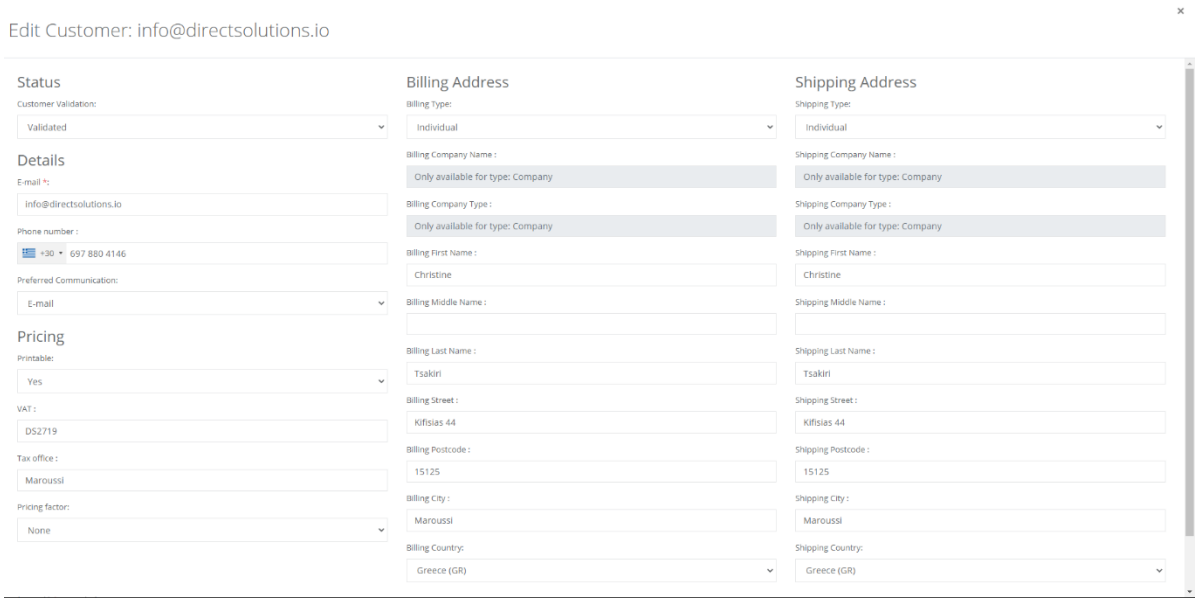
The Customers act as car sharing providers and they have a separate profile with their contact details, their car sharing members and the billing and shipping address



Each Customer has a unique ID number and by choosing it is displayed some general information, such as the current status, communication details, pricing and the billing and shipping address.

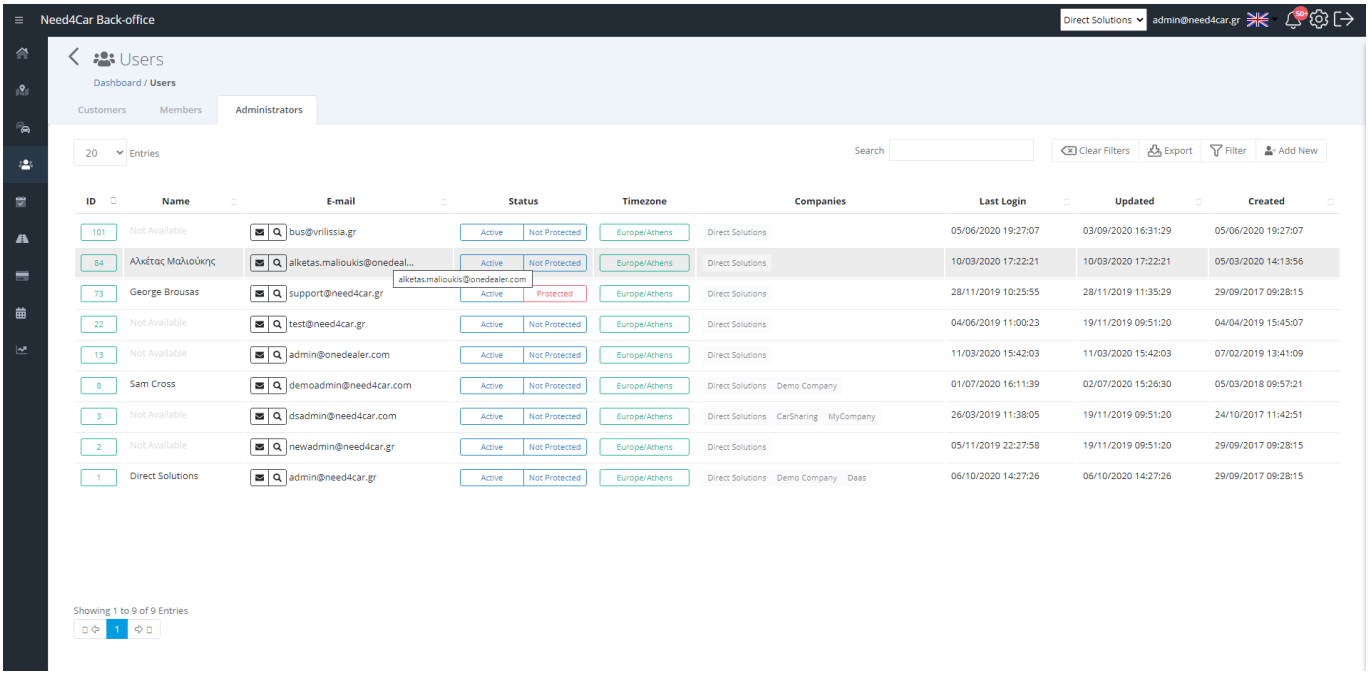


In case of changing any information from the Customer, the user can choose the “Edit Customer” button and proceed to the changes that he wants.

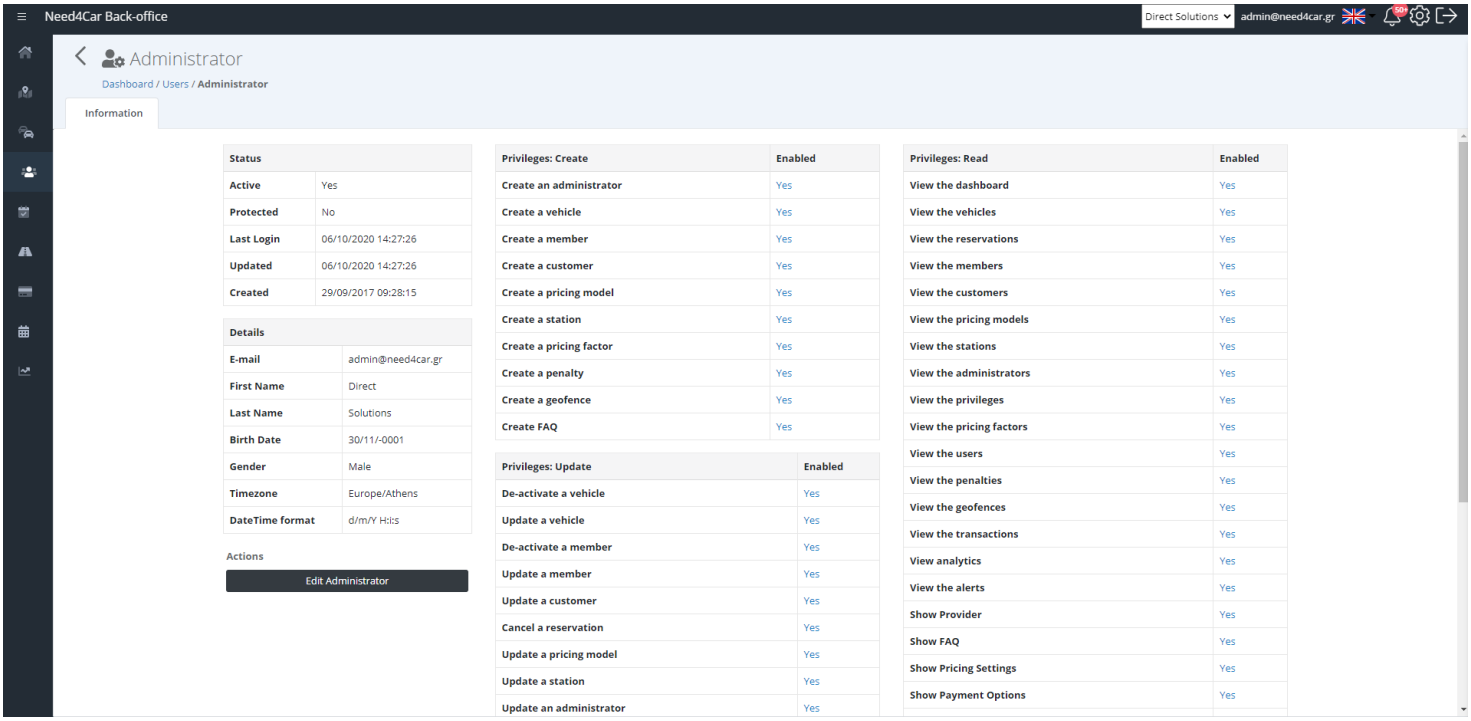


Administrators

The administrators are super users that have the overview of all customers and all members and can manage the information of the customers, the members and the fleet. This section contains administrators’ communication details and their current status.



The administrators are prescribed from the technology provider. Each of administrator has a unique ID number, which redirects to their general information and privileges.



If the administrator wishes to change any details from his profile, then he has to choose the “Edit Administrator” button and change his account details.

3.2.2 Vehicle Management

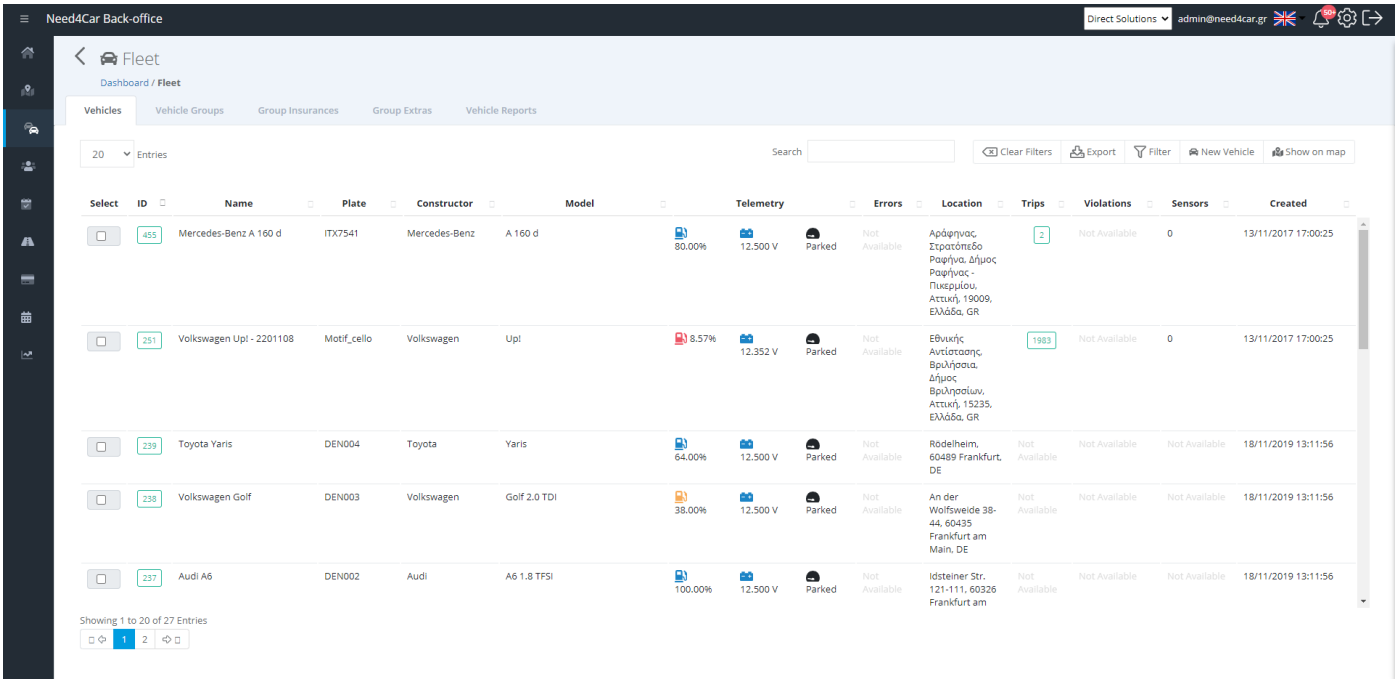
The Vehicle Management has to do with every detail about the fleet and consists of nine sections

Fleet

By entering this section, the user has at his disposal all the information about all the vehicles, model, type, plate number, etc.

(a) Vehicles

The “Vehicles” tab shows some general information about all the vehicles of the fleet. The user can search a vehicle by typing a key word in the search bar, or he can apply filters in order to find what he wants. This piece of information can be exported in a excel, csv, pdf file, or can be copied and printed. Furthermore, the user can choose one or more vehicles and displayed on the map.

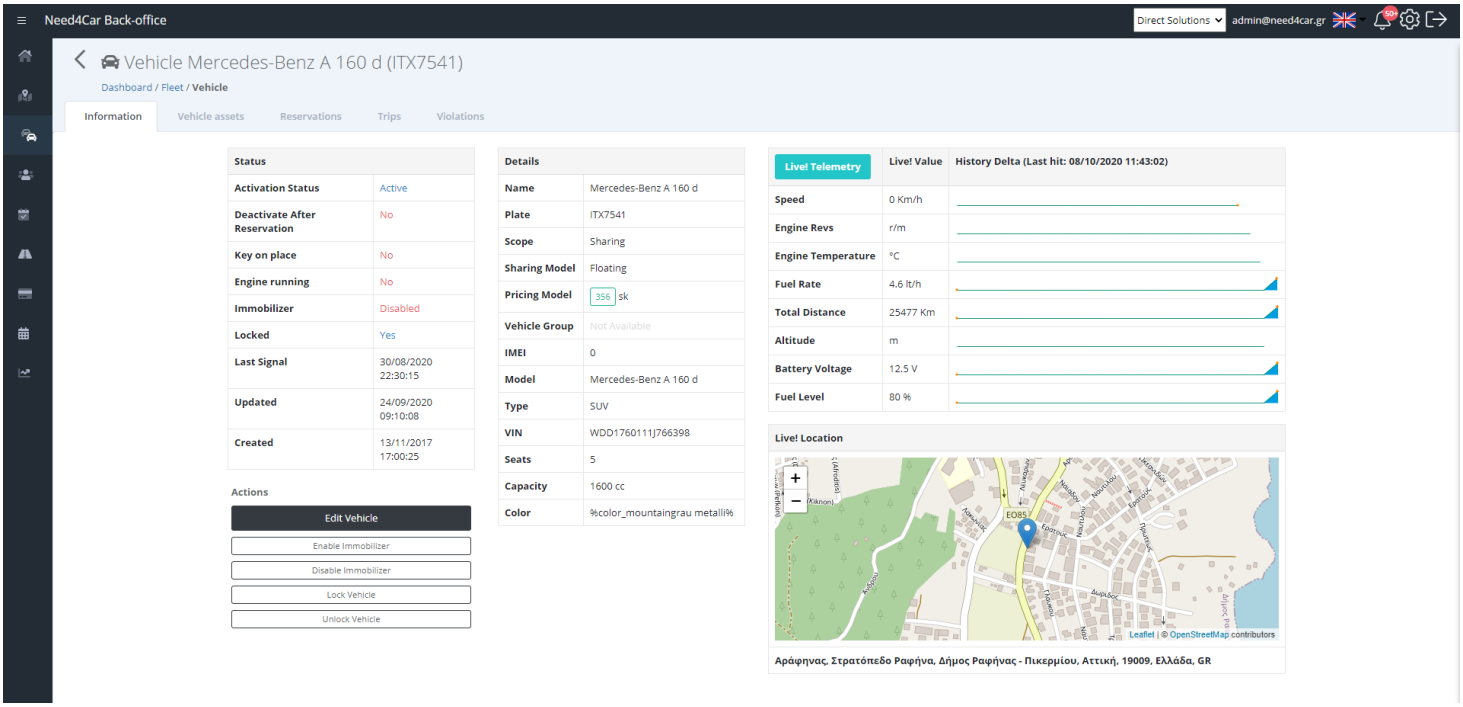


Each vehicle has a unique ID number, which redirects the user to the vehicle’s page and the user has at his disposal all the vehicle’s trips which redirects to trip’s page.

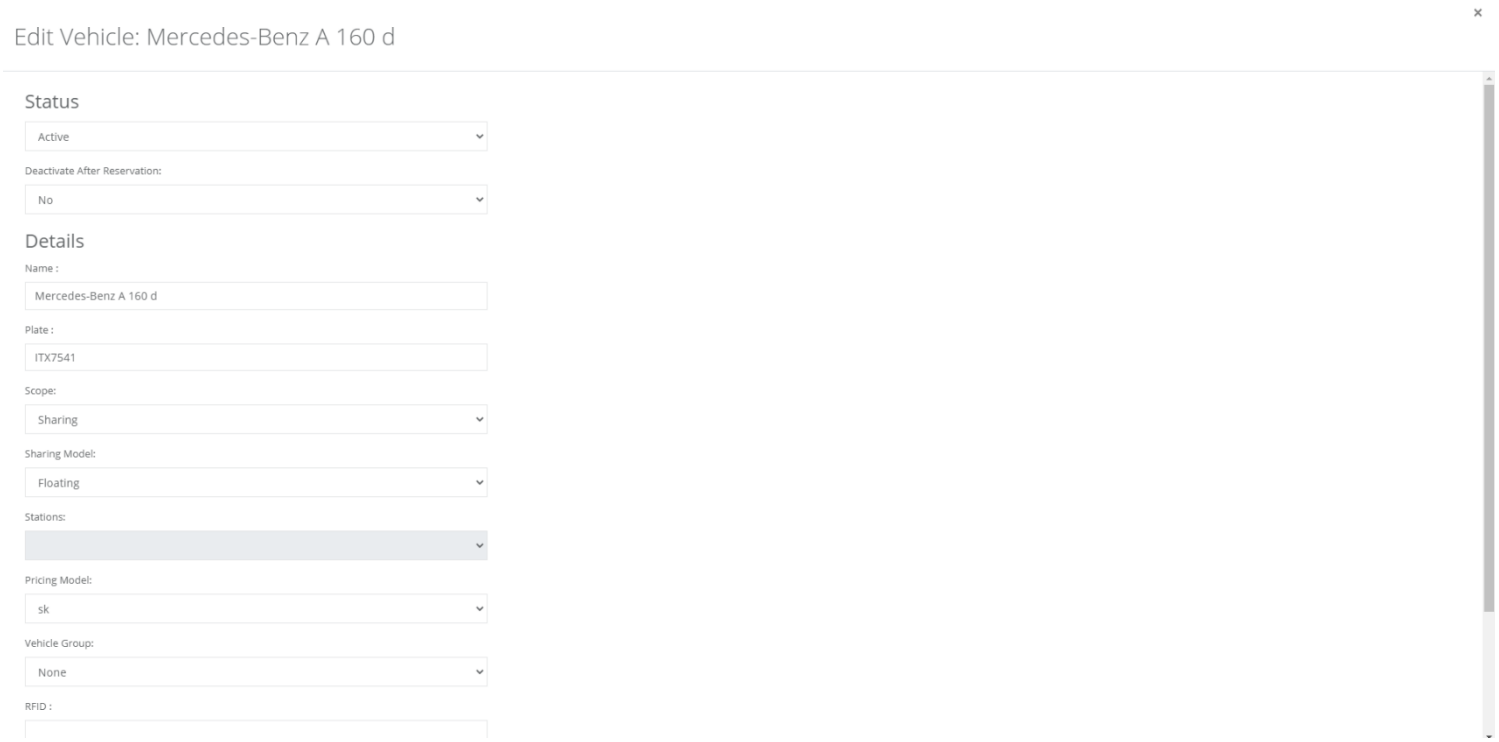
When the user chooses the ID number of a specific vehicle, then he has at his disposal the below:

(i) Information

This section informs the user about the status of the vehicle, details such as name, plate, model, type, etc. and live telemetry. The user can manage all this information and enable/disable the immobilizer, or lock/unlock the vehicle.



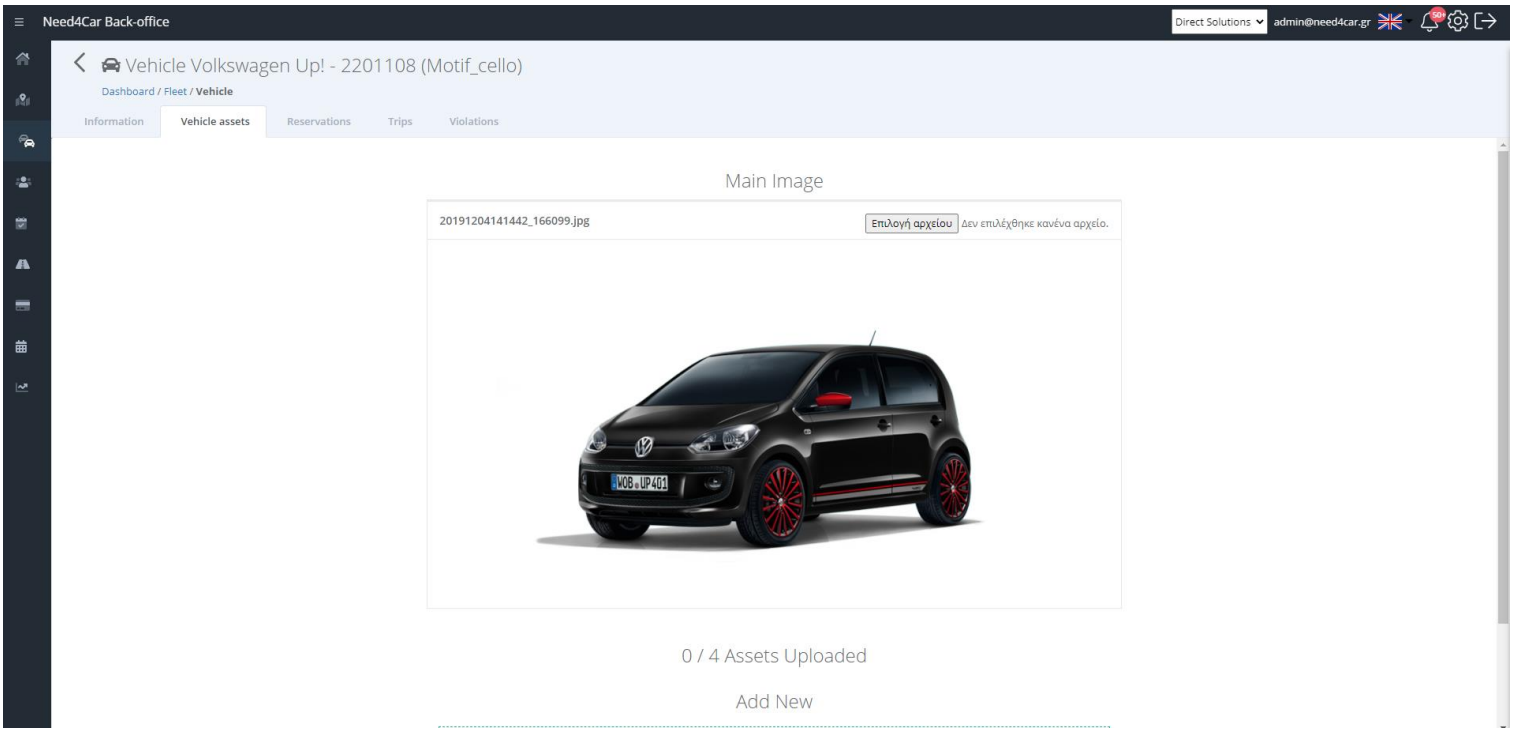
The user can also change the Status, Details, Scope, Pricing Model of the vehicle by choosing the “Edit Vehicle” button.



By choosing the Pricing Model, the user gets redirected to this specific pricing model’s page.

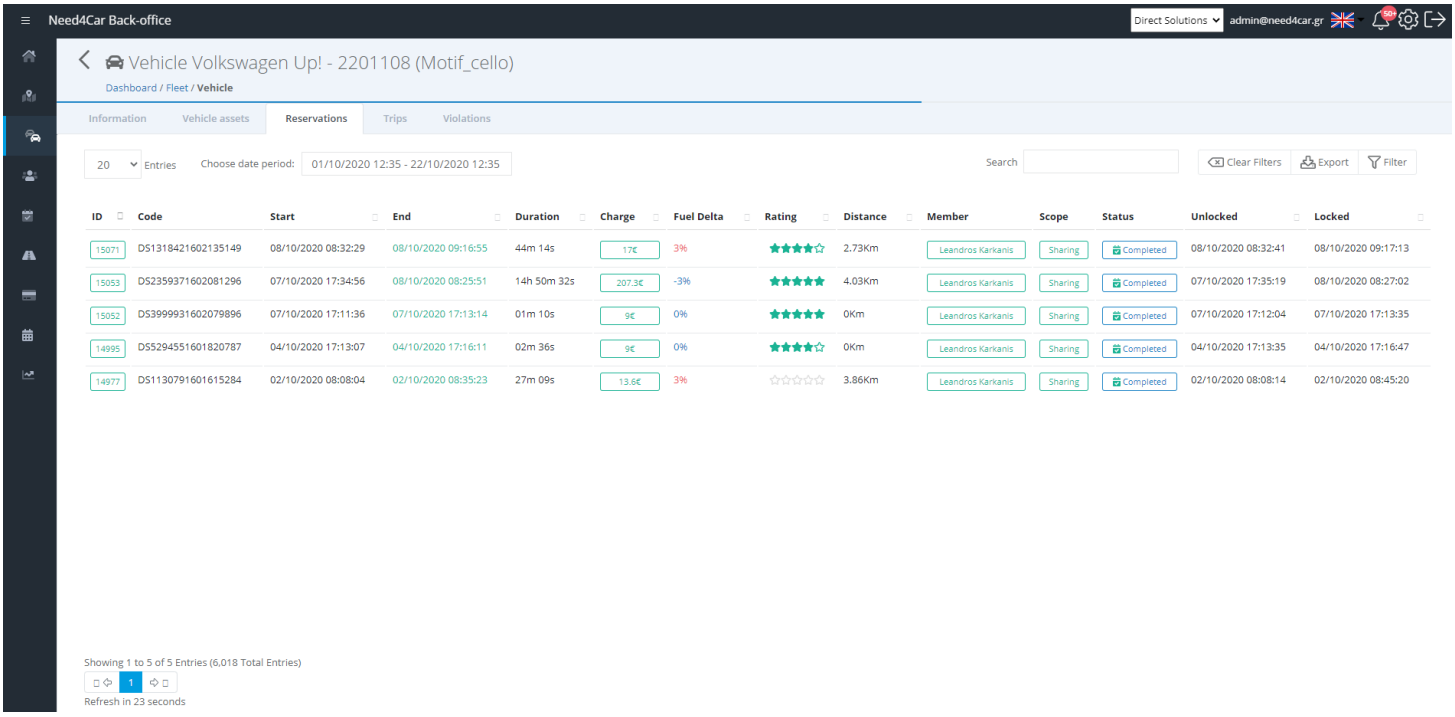
(ii) Vehicle assets

The user, in this section, can upload the photographs of the vehicle, that are going to be displayed on the web and mobile application.

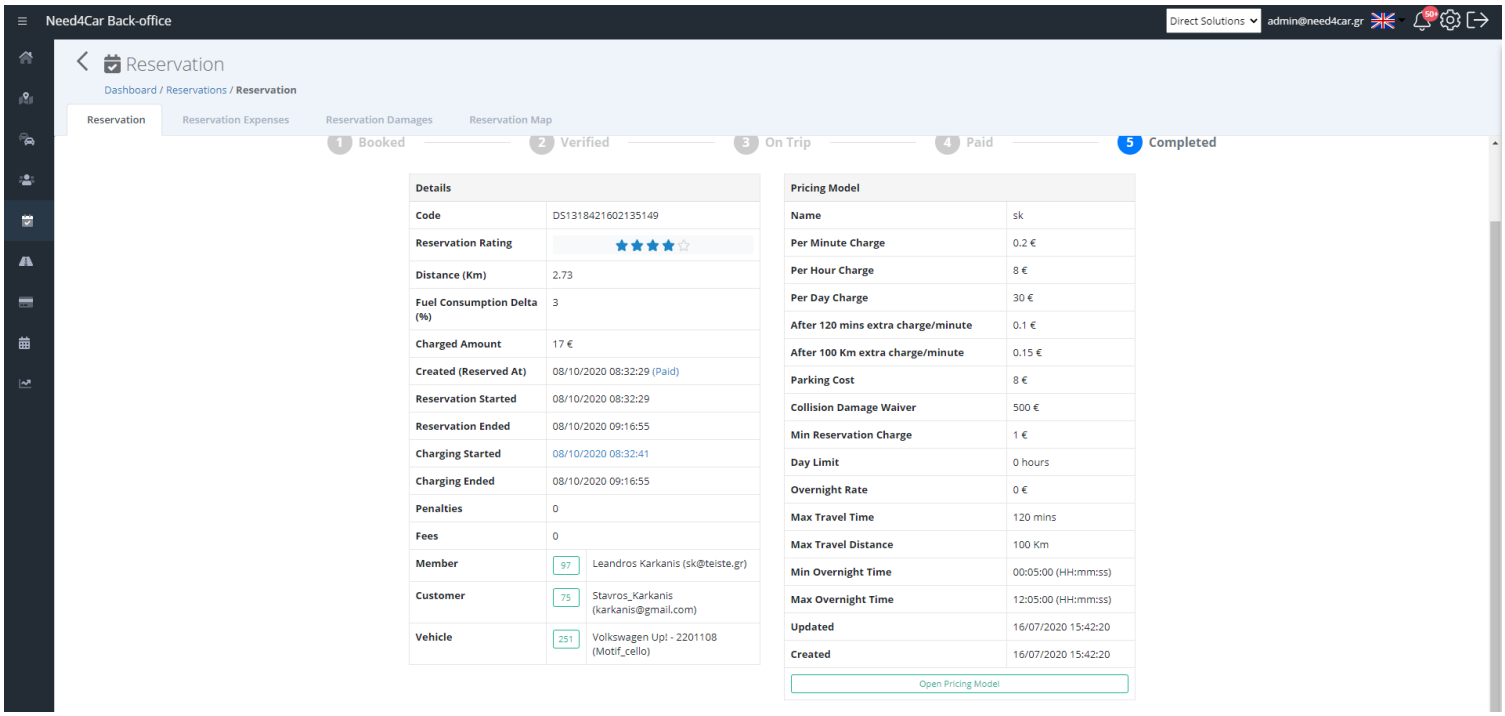


(iii) Reservations

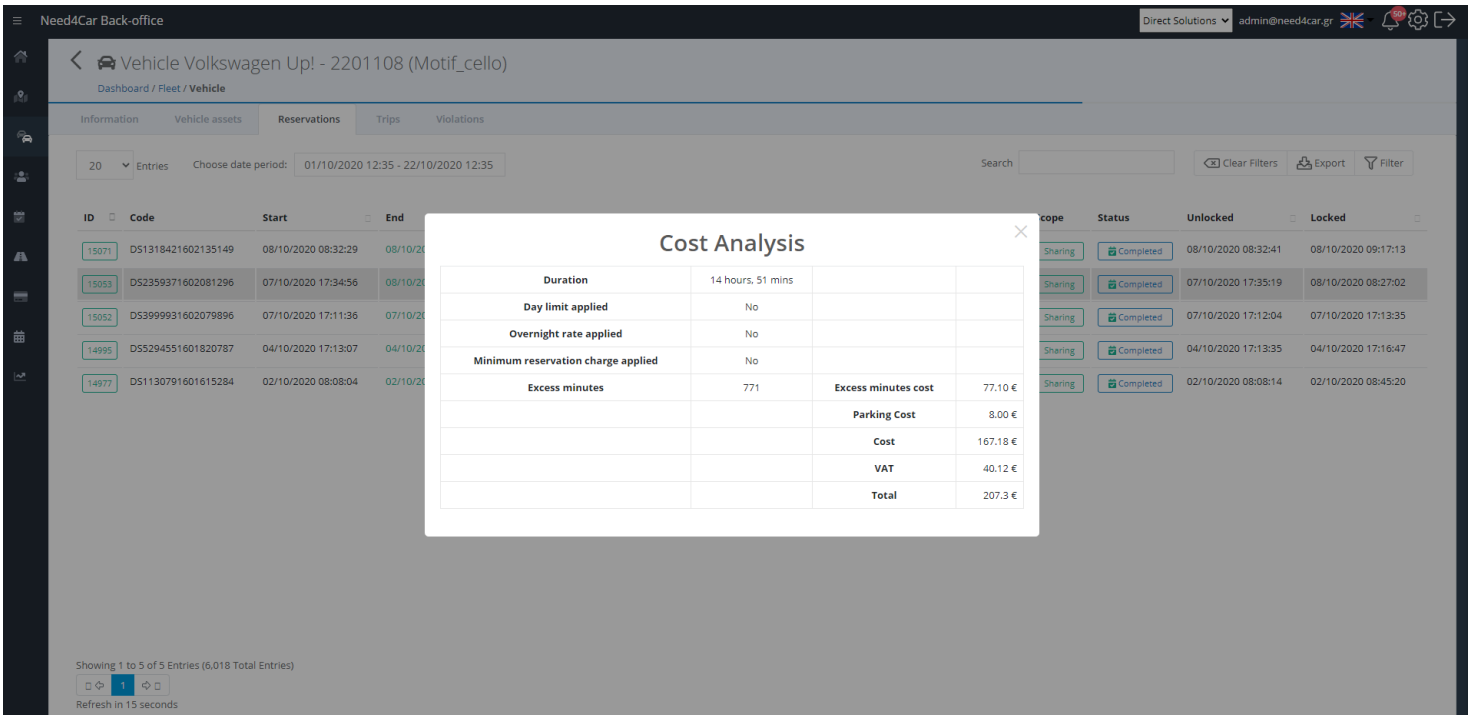
The Reservations section, shows all the reservations that have been fulfilled, in the period that the user has defined, with the specific vehicle. He can also search by typing a key word, or apply filters in order to find what he wants. This piece of information can be exported in a excel, csv, pdf file, or can be copied and printed.



Each reservation has a unique ID number, which redirects to the specific reservation's page. From that page the user can get redirected to the member's page, to the customer's page, to the vehicle's page and to the pricing factor's page.



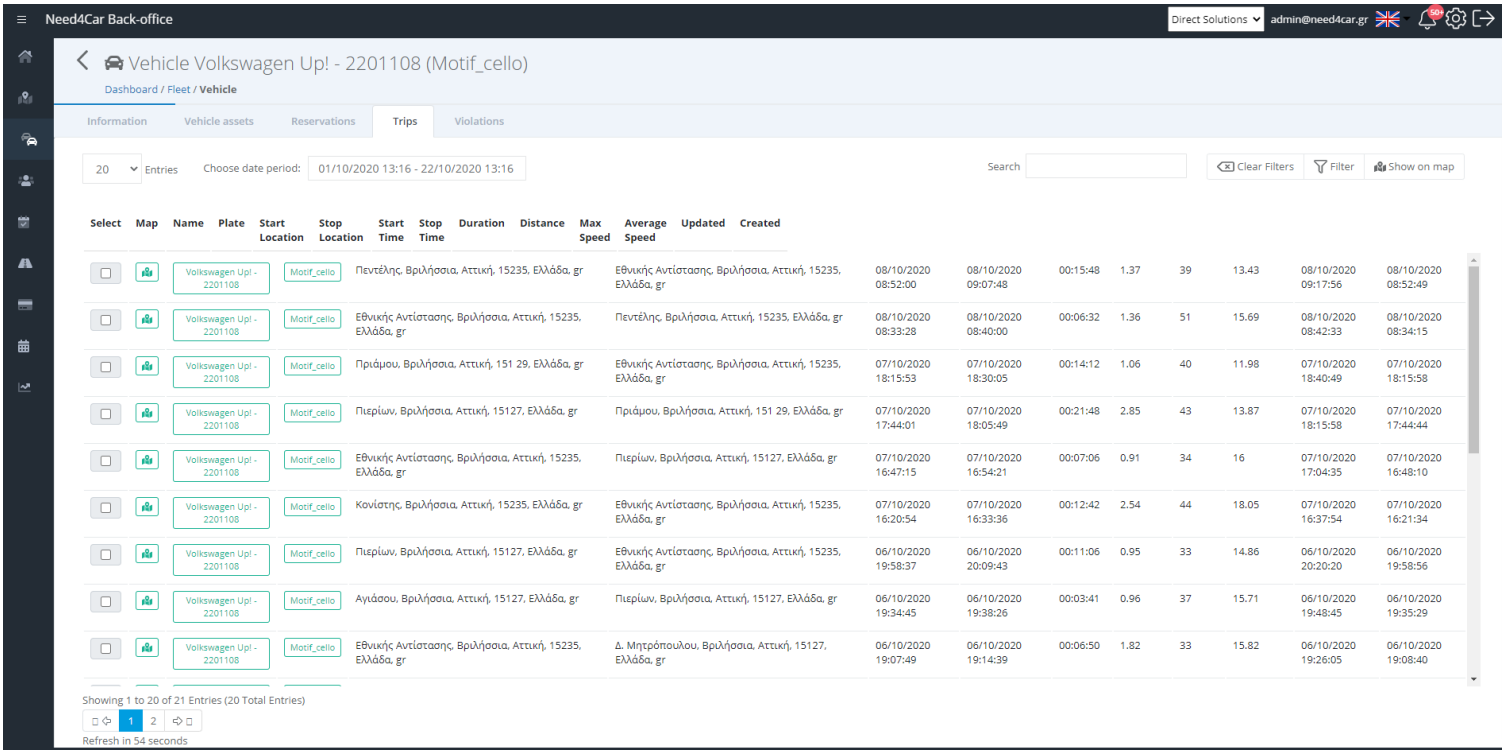
When he chooses the Charge, a pop-up windows appears with the cost analysis



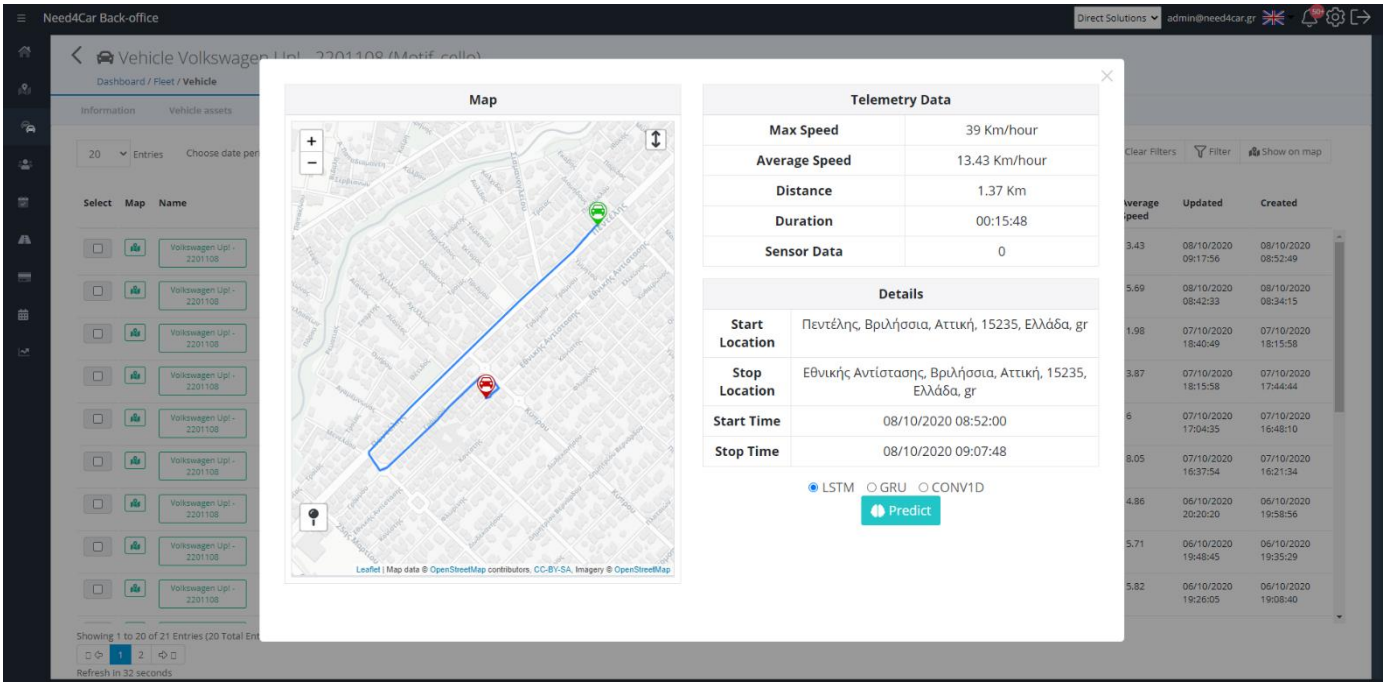
When the user chooses the member, then he gets redirected to the member's page, who has made the reservation.

(iv) Trips

The Trips section, displays all the trips that have been fulfilled in the period that the user has defined. He can also search by typing a key word, or apply filters in order to find what he wants. Furthermore, he can choose one or more trips and display them on the map.



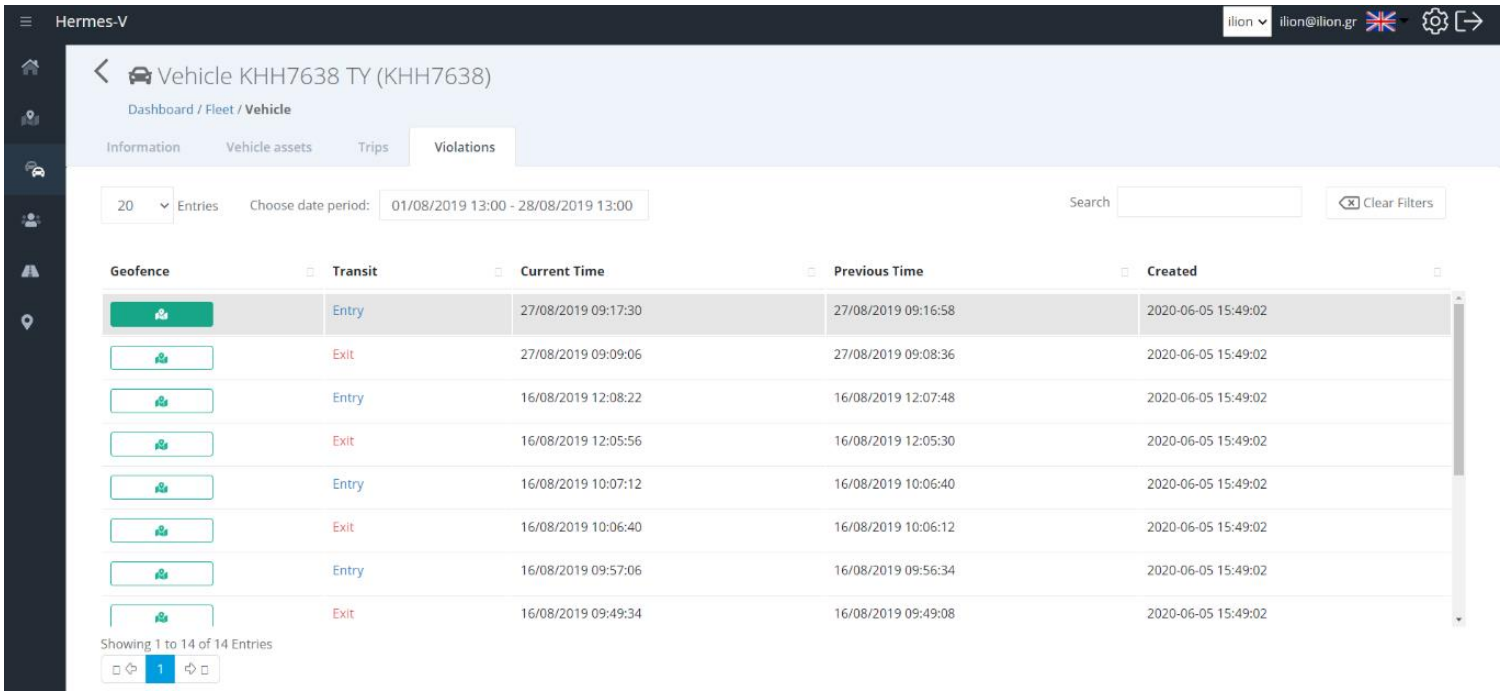
The “Map” button opens a pop-up window, which shows the trip on map, telemetry data and details about the start/stop location and the start/stop time of the trip.



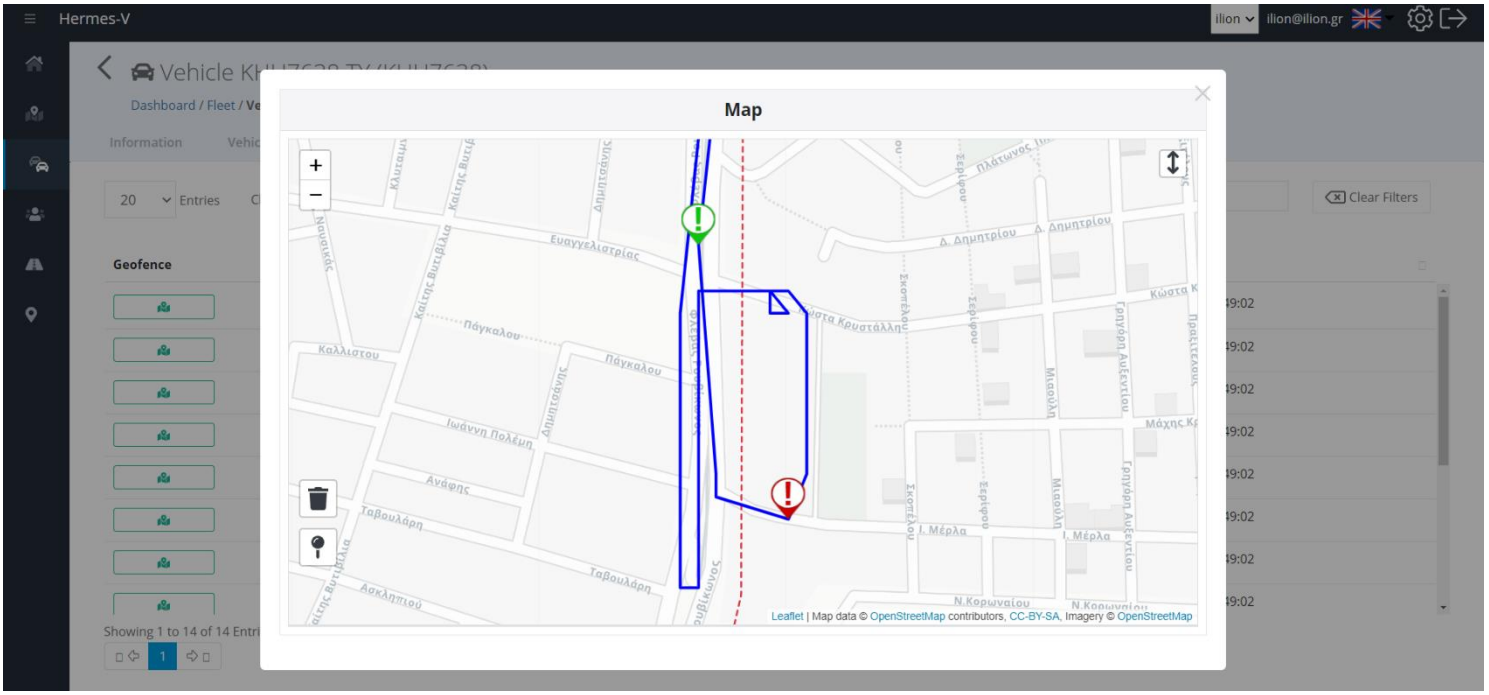
The “Name” and “Plate” buttons, redirect to the vehicle’s page.

(v) Violations

The Violations section show all the vehicles that went out of geofence, in the chosen period. The user can search by typing a key word in the search bar, in order to find what he wants.

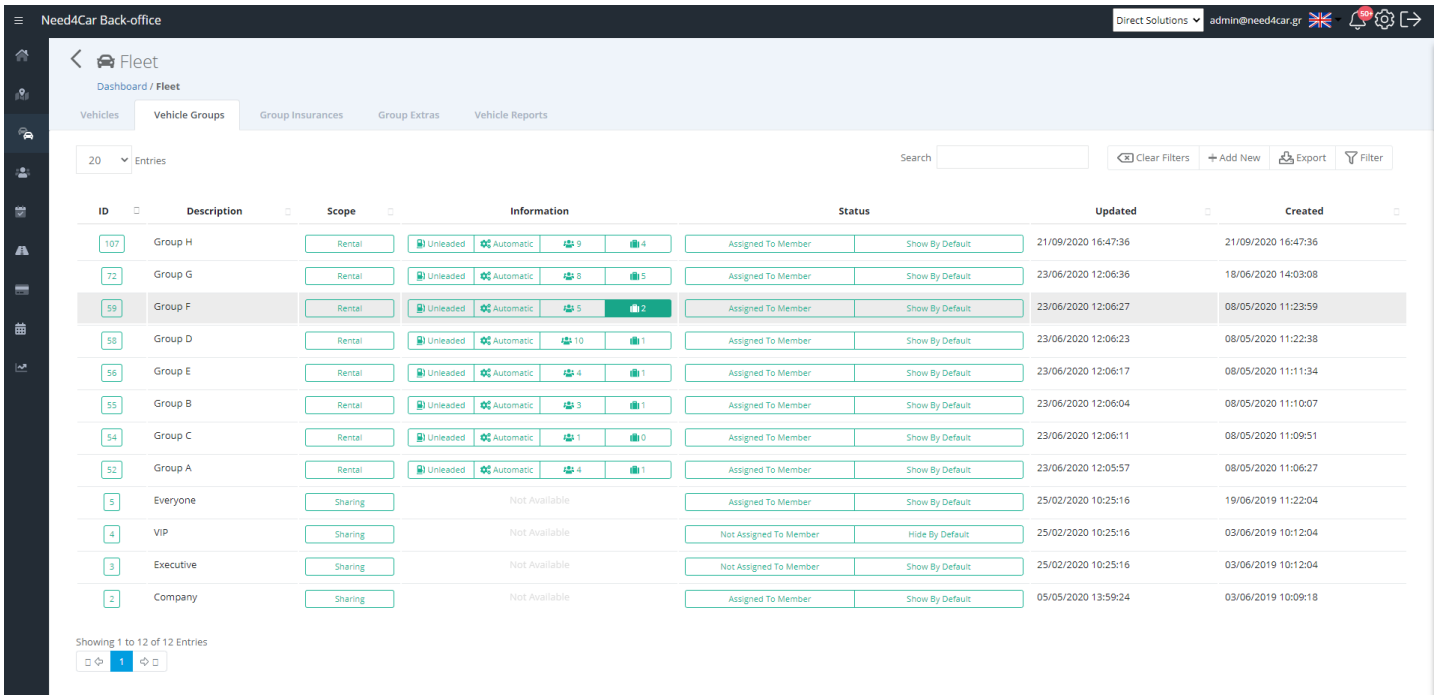


By choosing the “Geofence” button, a pop-up window appears, which shows on the map where the vehicle went out of the geofence and the trip that made out of it.



(b) Vehicle Groups

The “Vehicle Groups” tab show all the groups that the vehicles are divided. These groups can be divided in many ways, e.g. to the scope (sharing/rental), the type of the vehicle. The user can create them according to his preferences. The user can search by typing a key word in the search bar, or apply filters, in order to find what he wants. This piece of information can be exported in a excel, csv, pdf file, or can be copied and printed.

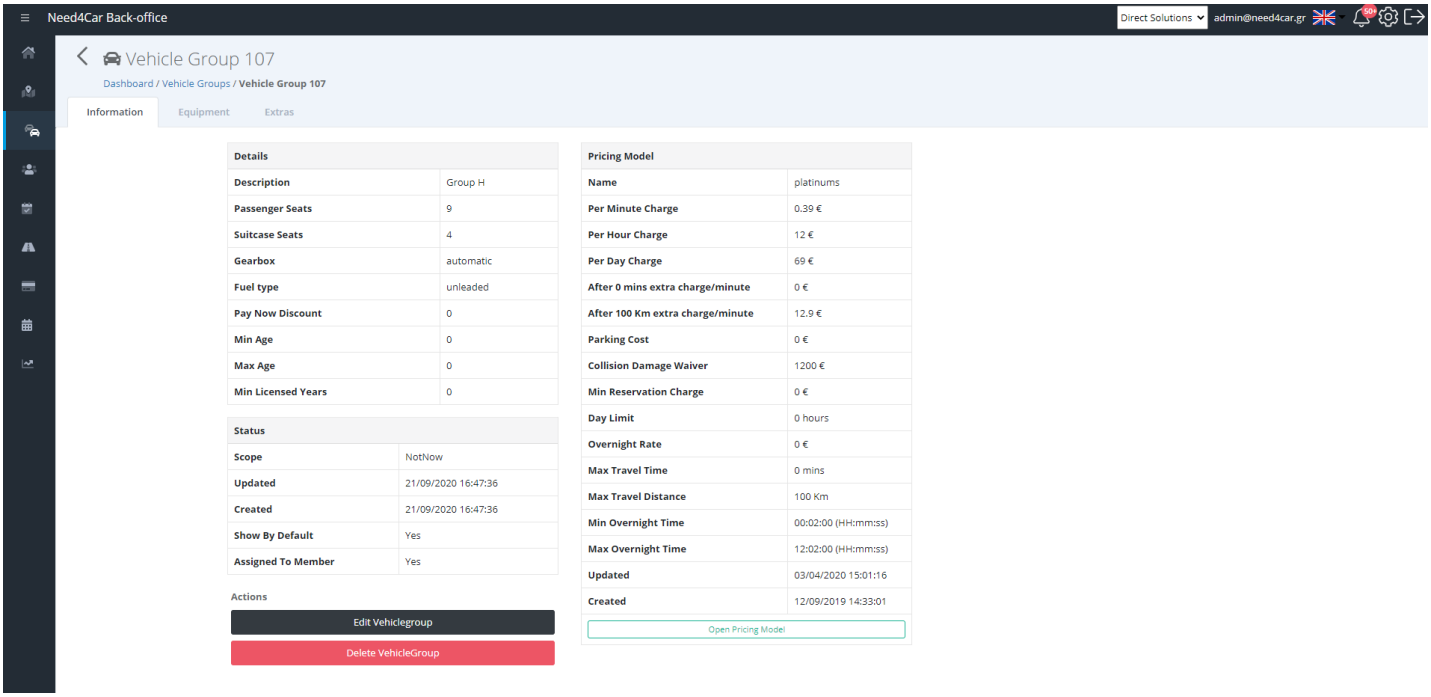


Each vehicle group has a unique ID number, which redirects to the specific group’s page.

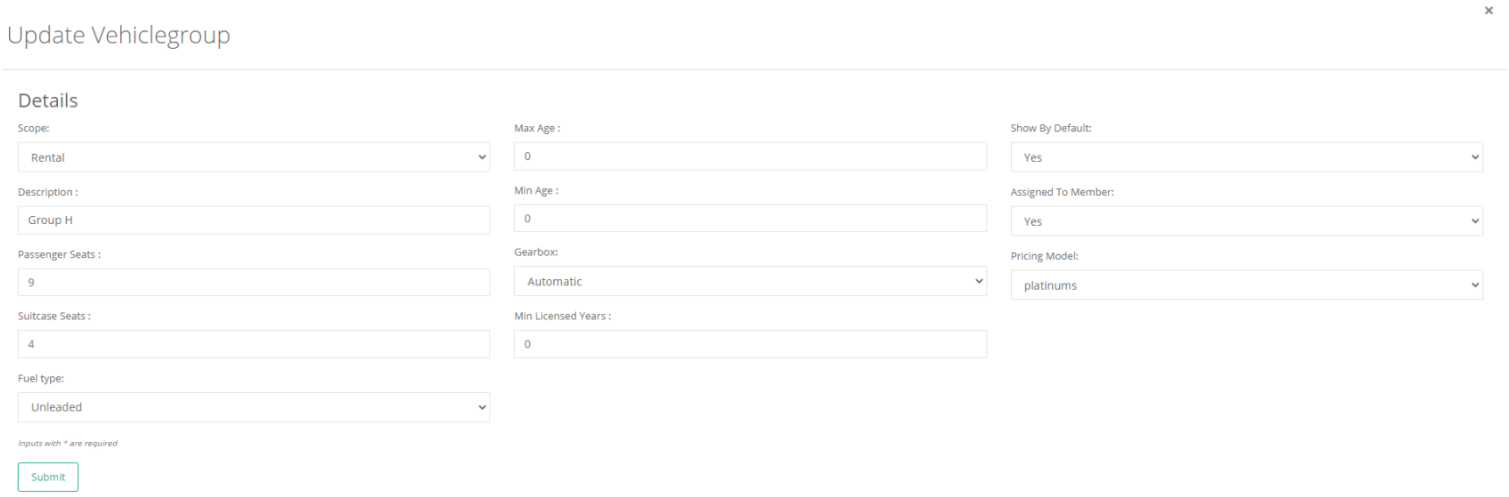
When the user chooses the ID number of a specific vehicle group, then he has at his disposal the below:

(i) Information

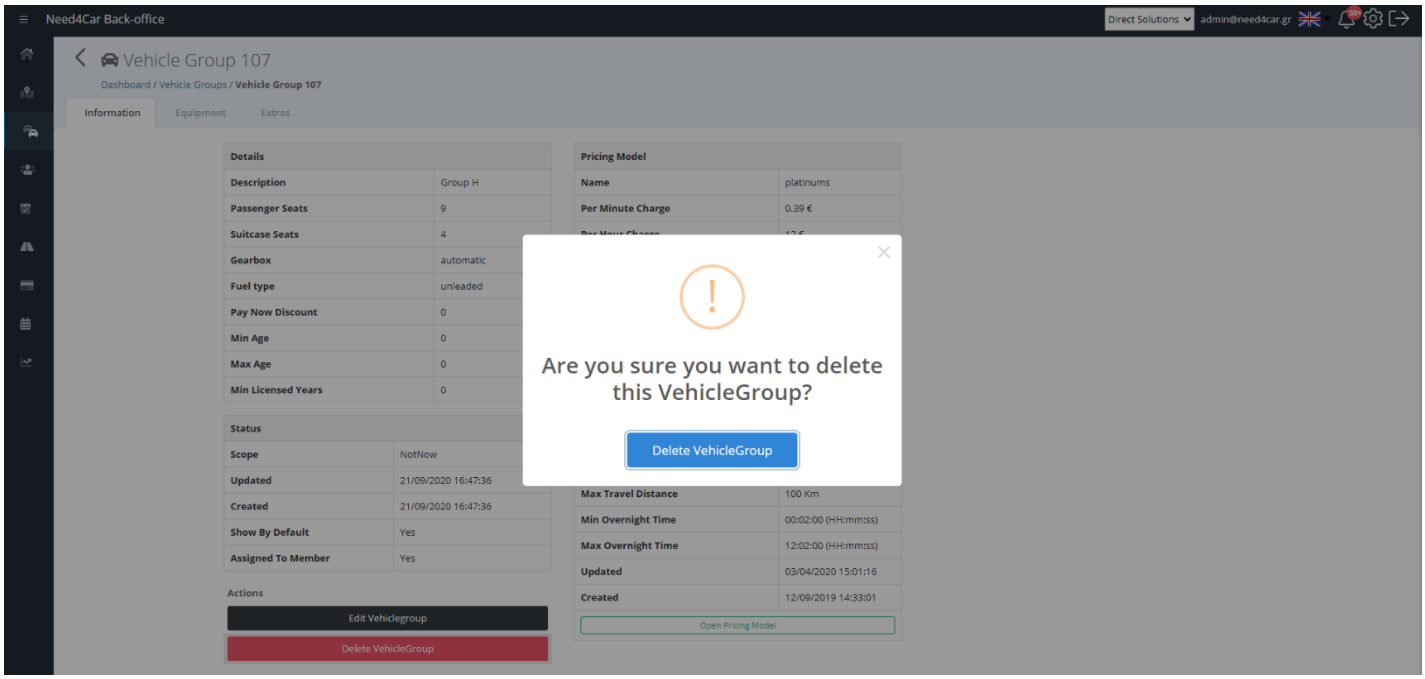
This section informs the user about the details of this group, the status and the pricing model.



The user can update the vehicle group by changing the details below.

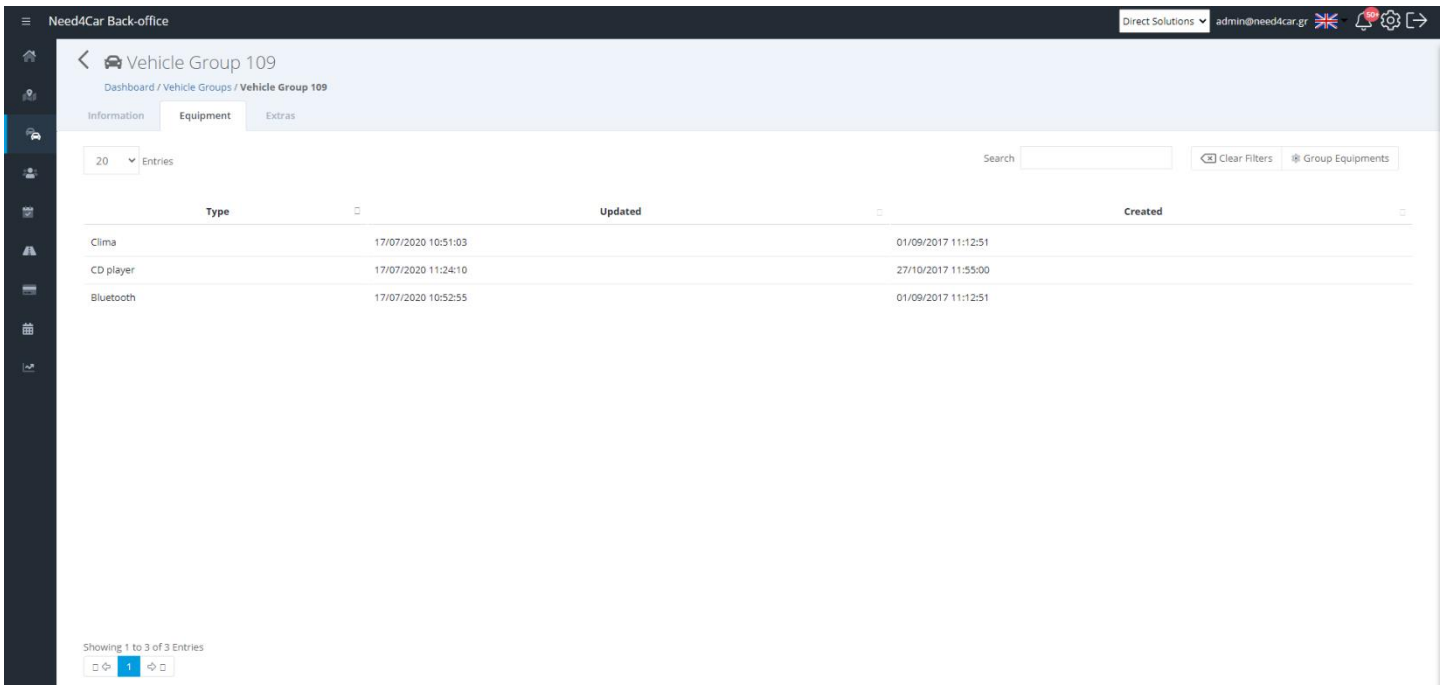


Also, the user can delete the vehicle group and by choosing the “Delete Vehicle group” button, a pop-up window appears which requires confirmation about the delete of the group.



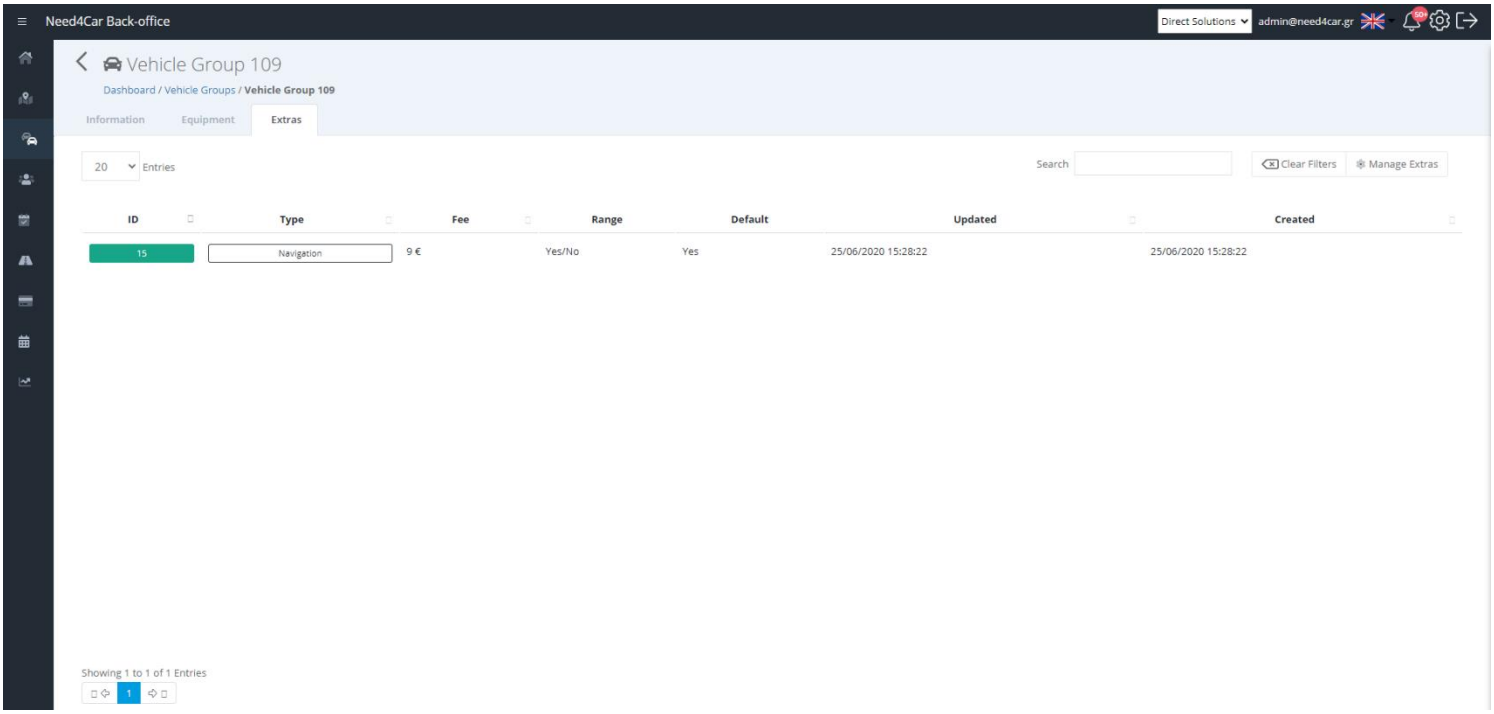
(ii) Equipment

This section, shows the equipment that are available in the specific Group. The user can search by typing a key word in the search bar, or apply filters, in order to find what he wants.

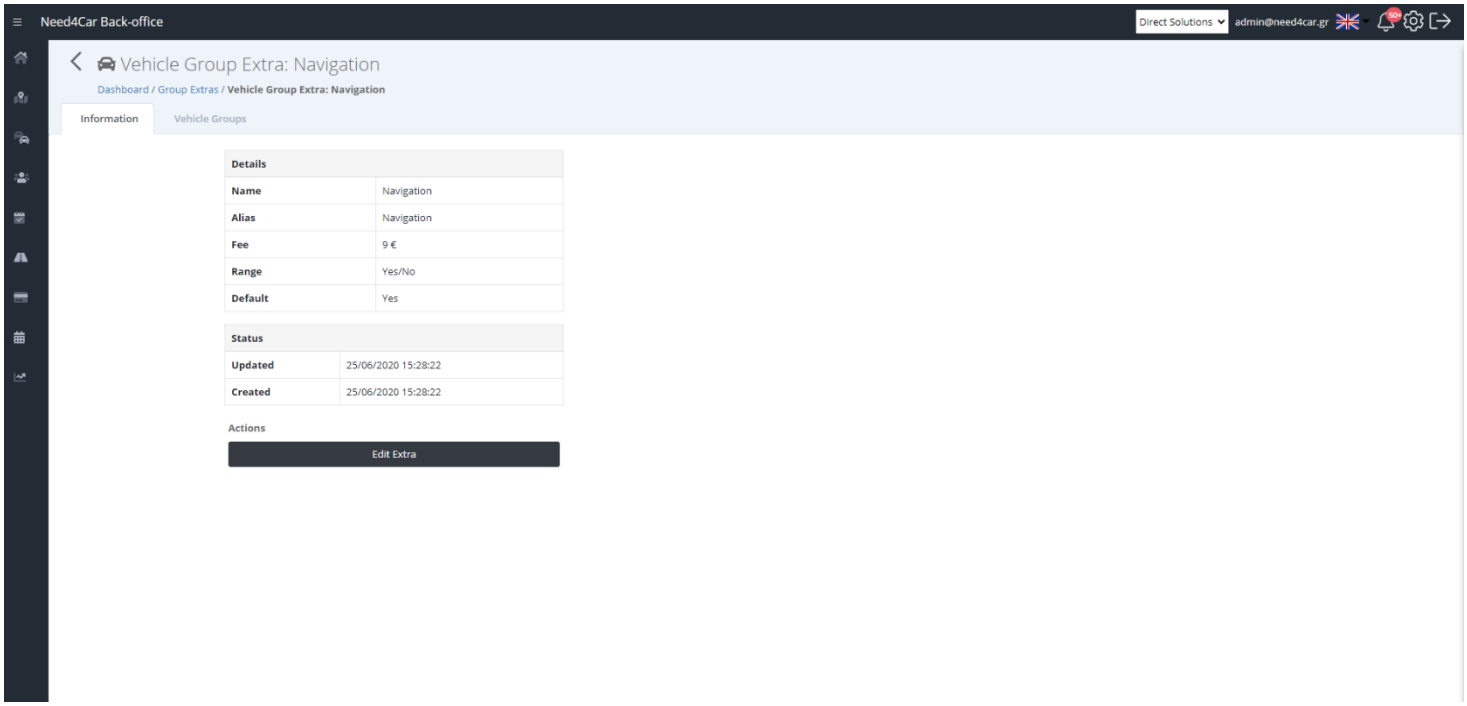


(iii) Extras

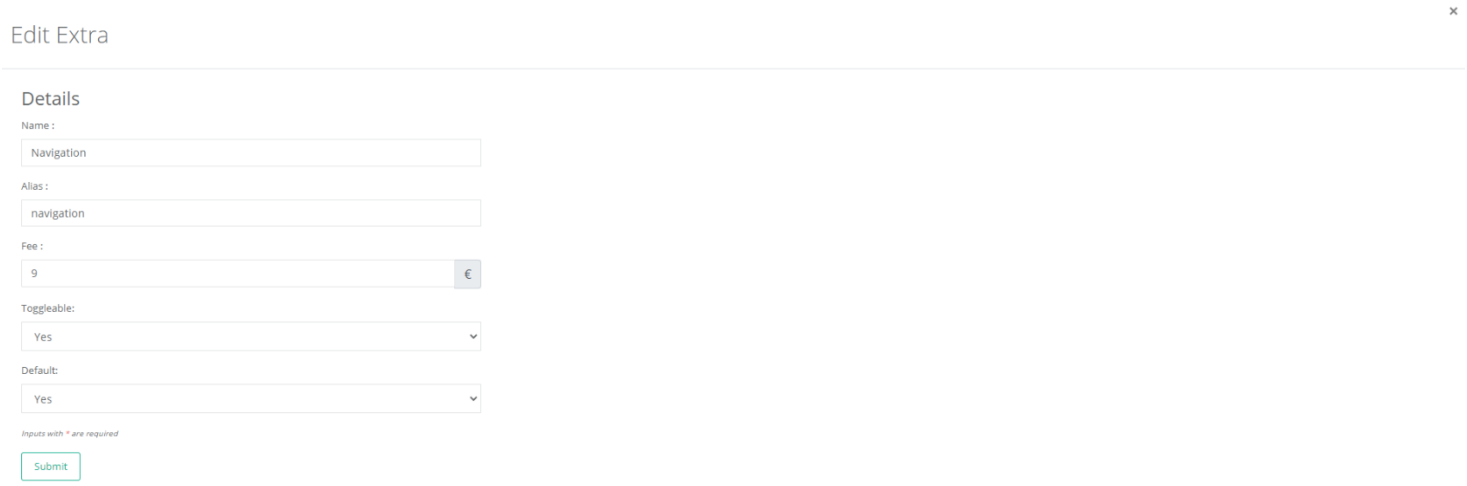
The Extras section informs the user what extra equipment this vehicle group has. The user can search by typing a key word in the search bar, or apply filters, in order to find what he wants.



Each “Extras” has a unique ID number, which redirects to the page of the specific Extras. The first screen that appears is the information tab where are listed all the details.



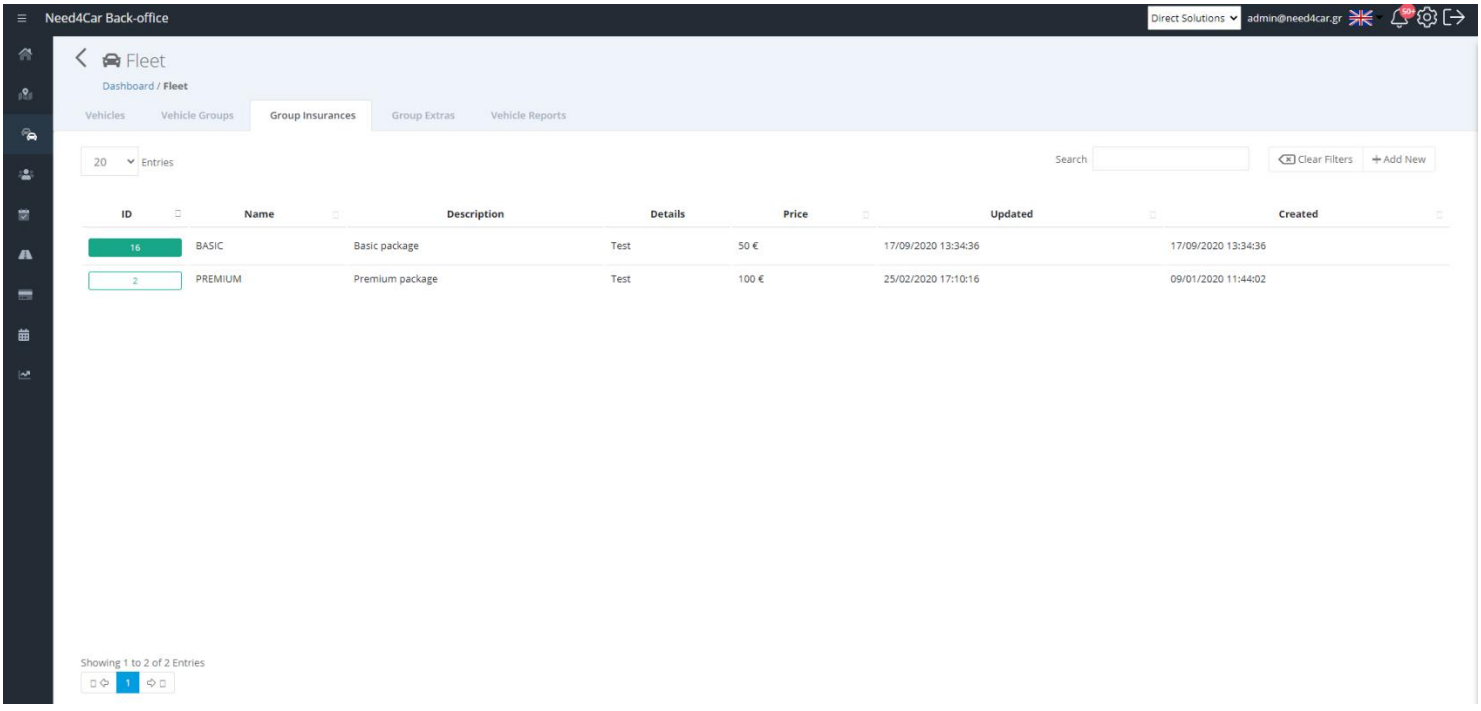
By choosing the “Edit Extra” button, the user can change details such as the name, the fee etc.



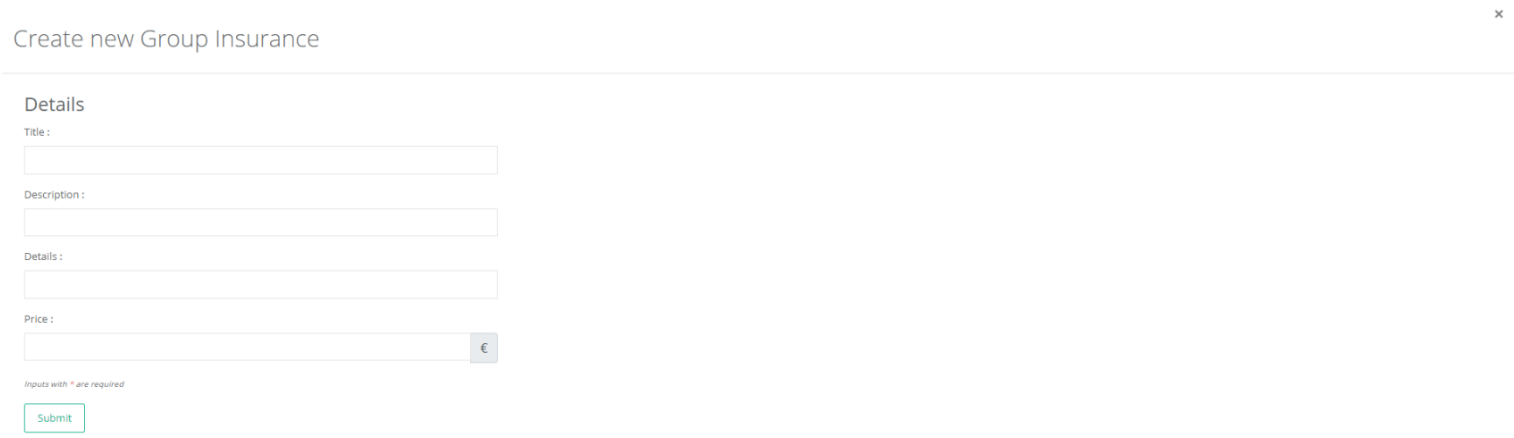
If the user chooses the “Vehicle groups” tab, he gets redirected to the “Vehicle Groups” page.

(c) Group Insurances

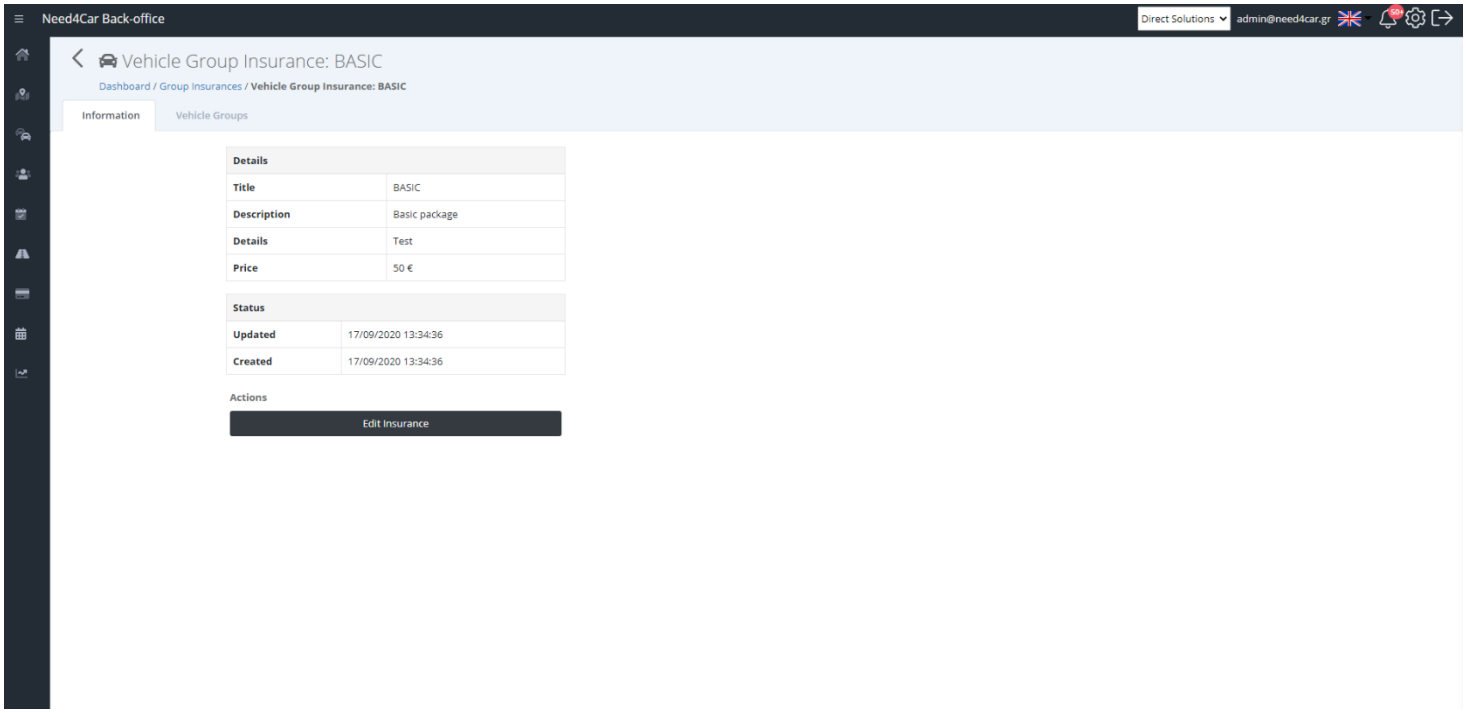
The “Group Insurances” tab show which insurances are available in the vehicle groups. The user can search by typing a key word in the search bar in order to find what he wants.



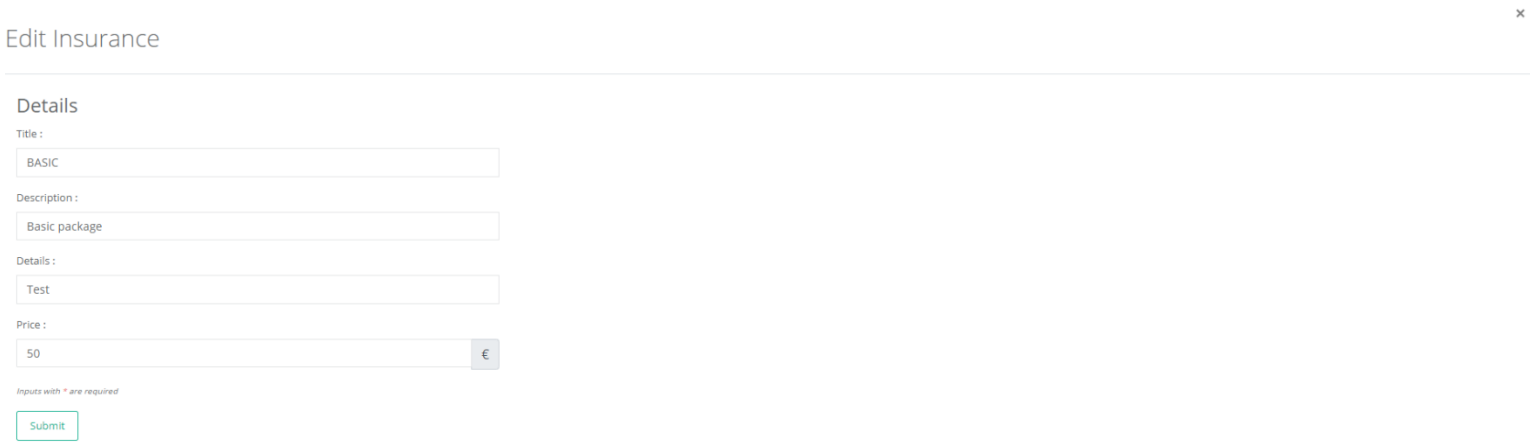
The “Add new” button, creates a new group insurance.



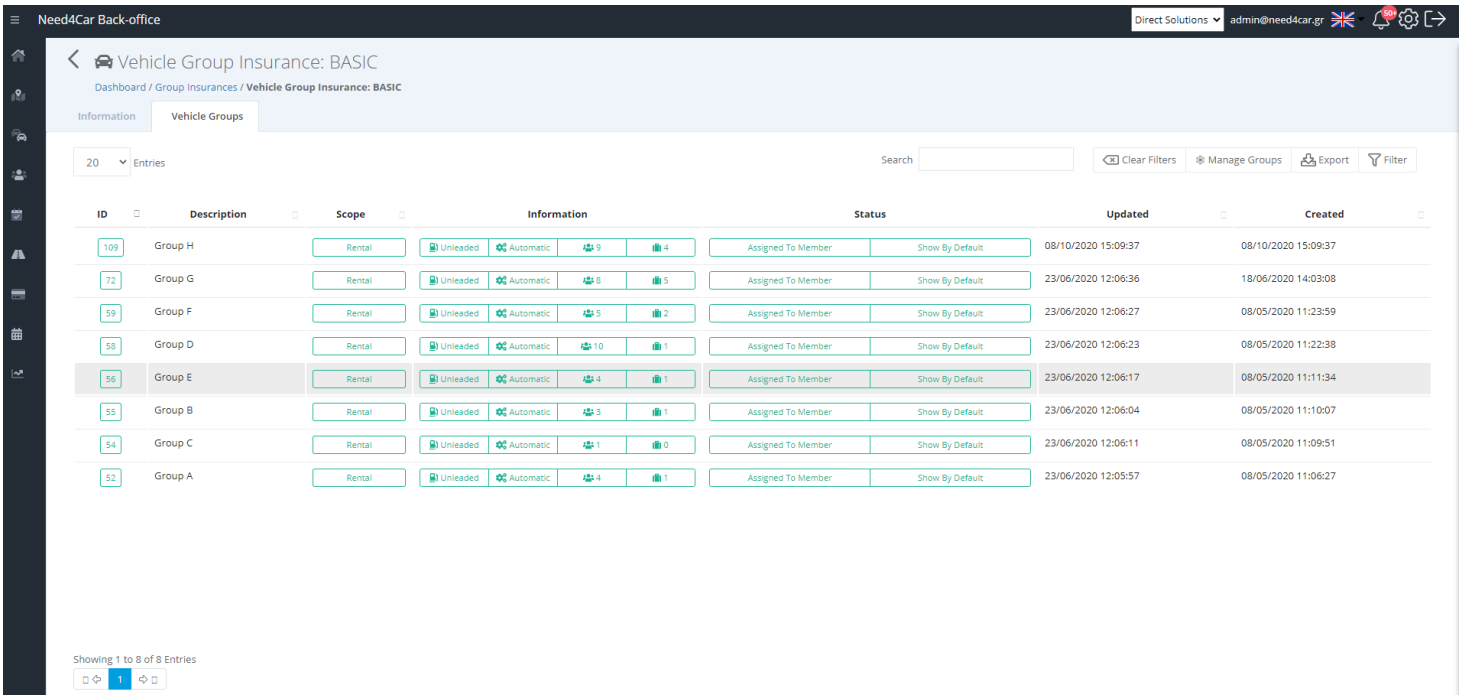
Each Group Insurance has a unique ID number, which redirects to the insurance’s page and the user has at his disposal the details and the status of the specific group insurance.



By choosing “Edit Insurance”, the user can make changes to the specific insurance.



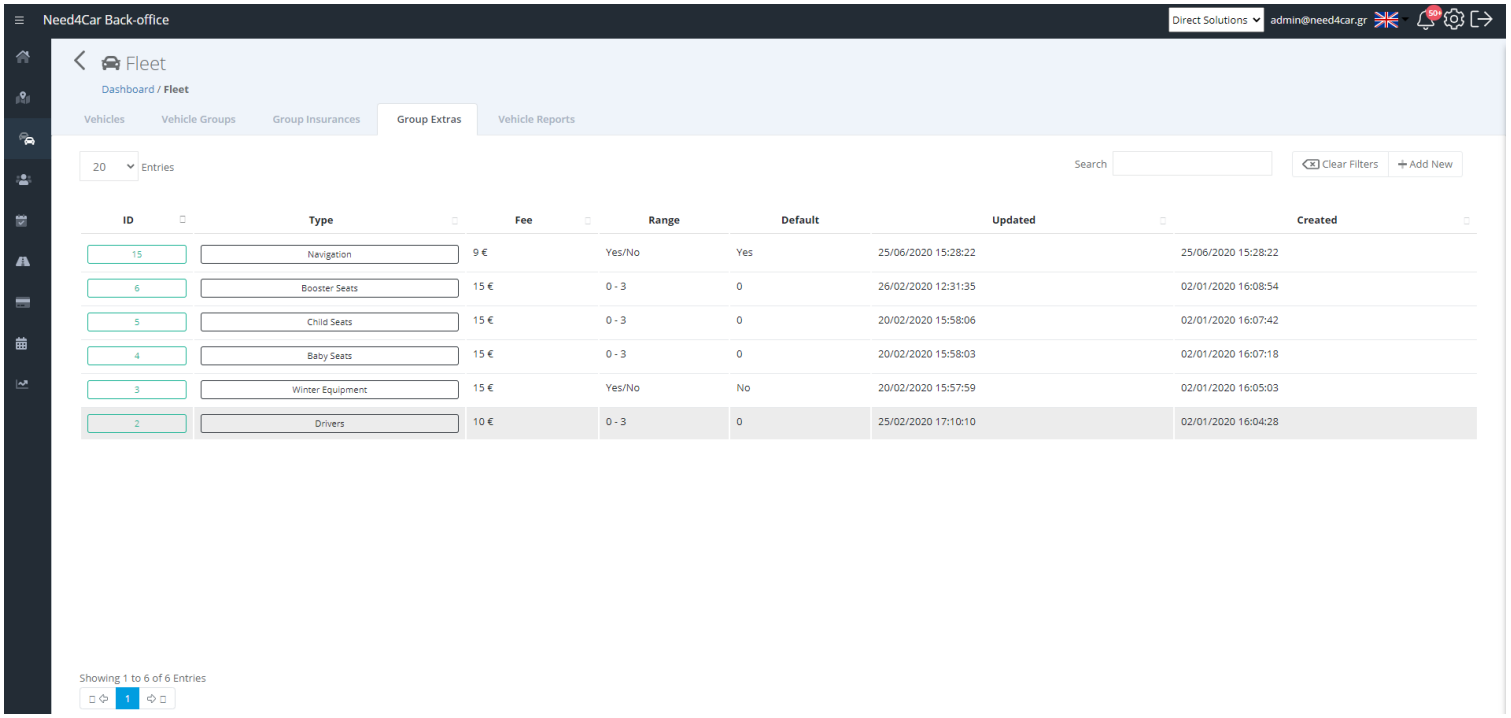
The second tab is the “Vehicle Groups” that belong to the specific group insurance.



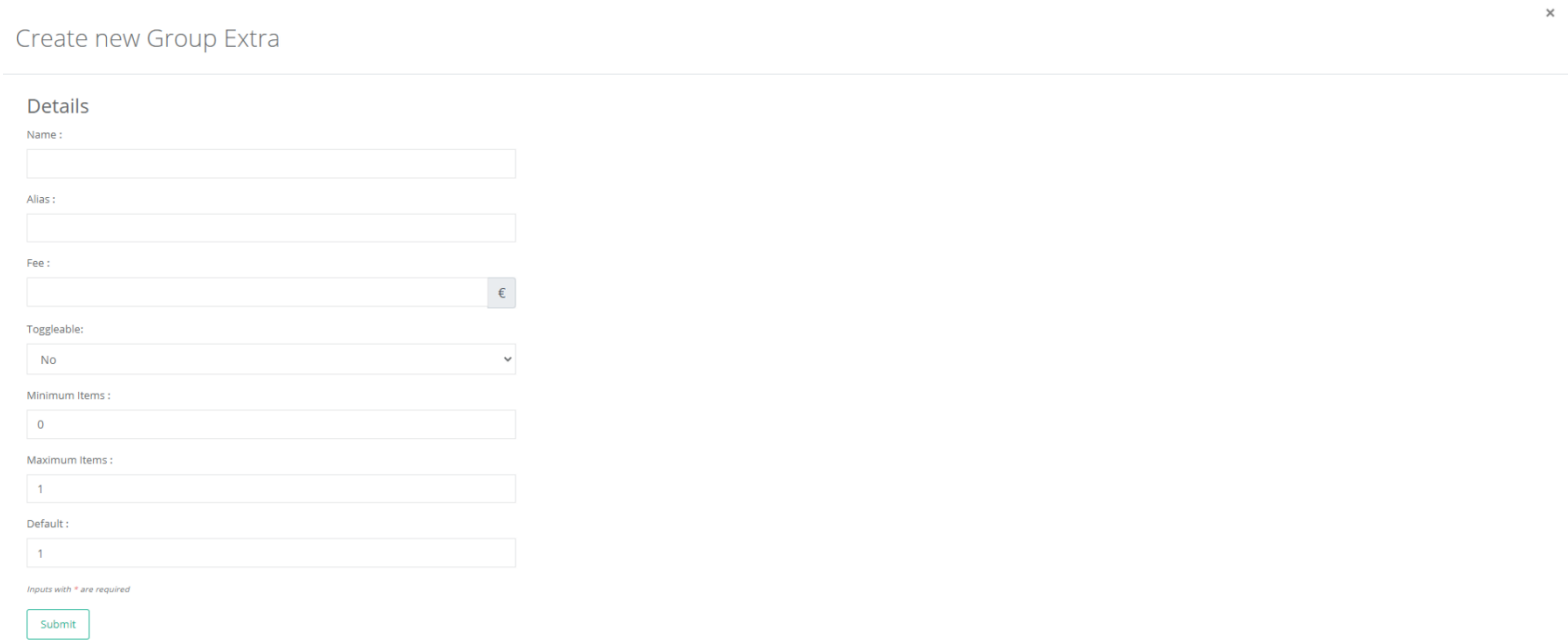
The ID number that is displayed is the one of each vehicle group and redirects to the group’s page.

(d) Group Extras

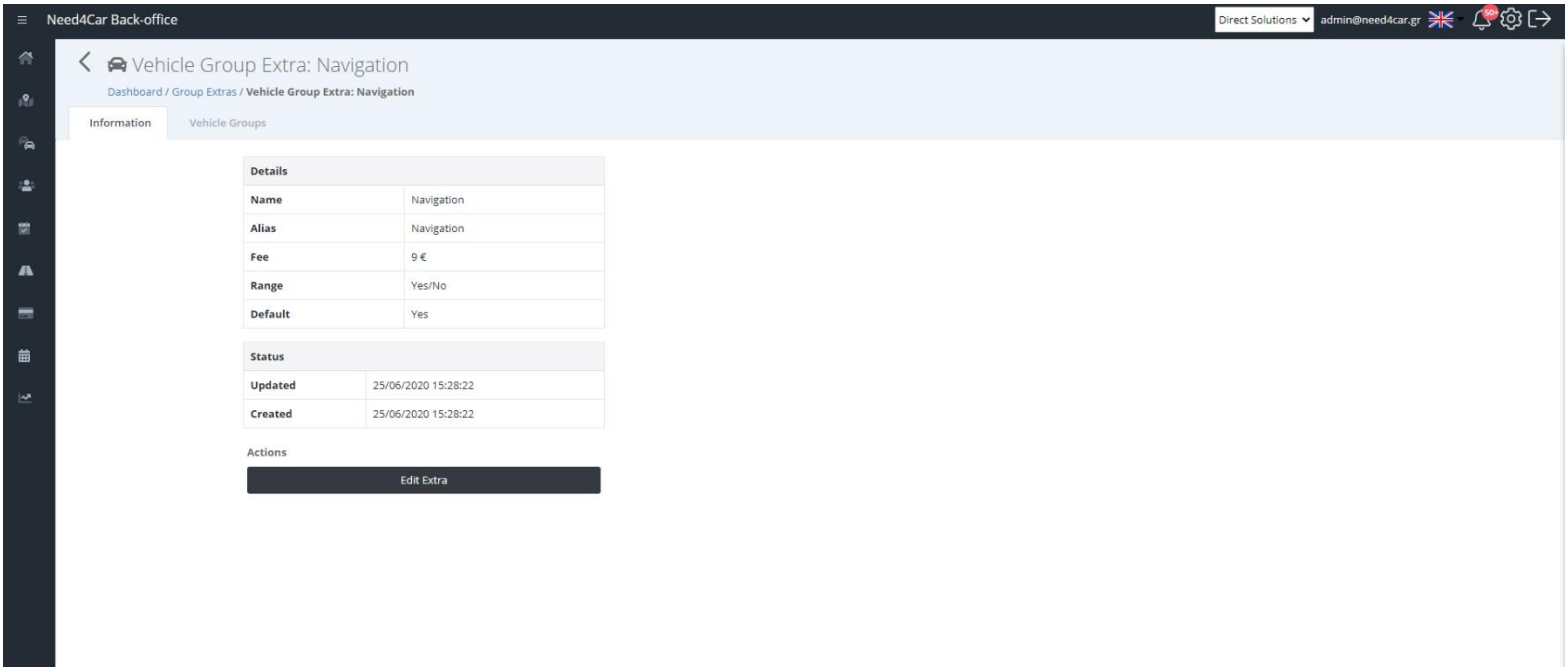
The “Group Extras” tab shows which of the vehicle groups have extras. The user can search by typing a key word in the search bar in order to find what he wants.



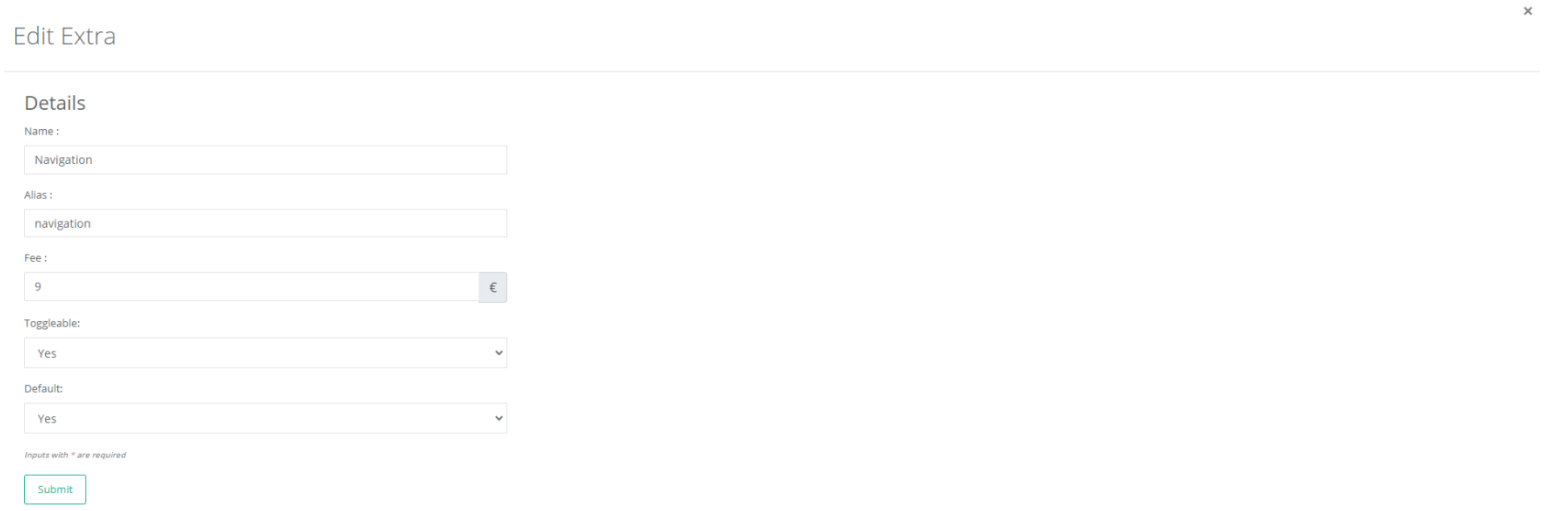
The “Add new” button, creates a new group extra.



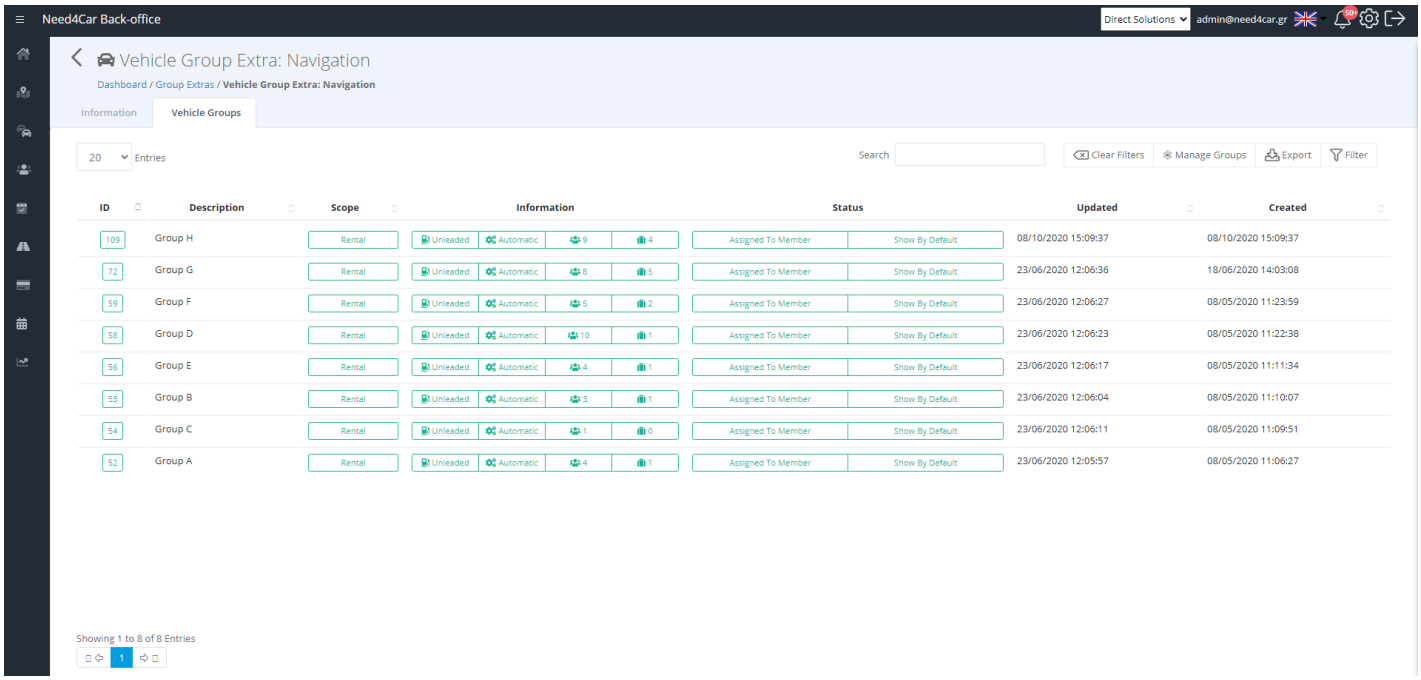
Each Group Extra has a unique ID number, which redirects to the specific group extra page and the user has at his disposal the details and the status of the specific group



By choosing “Edit Extra” the user can make changes to the specific group extra.



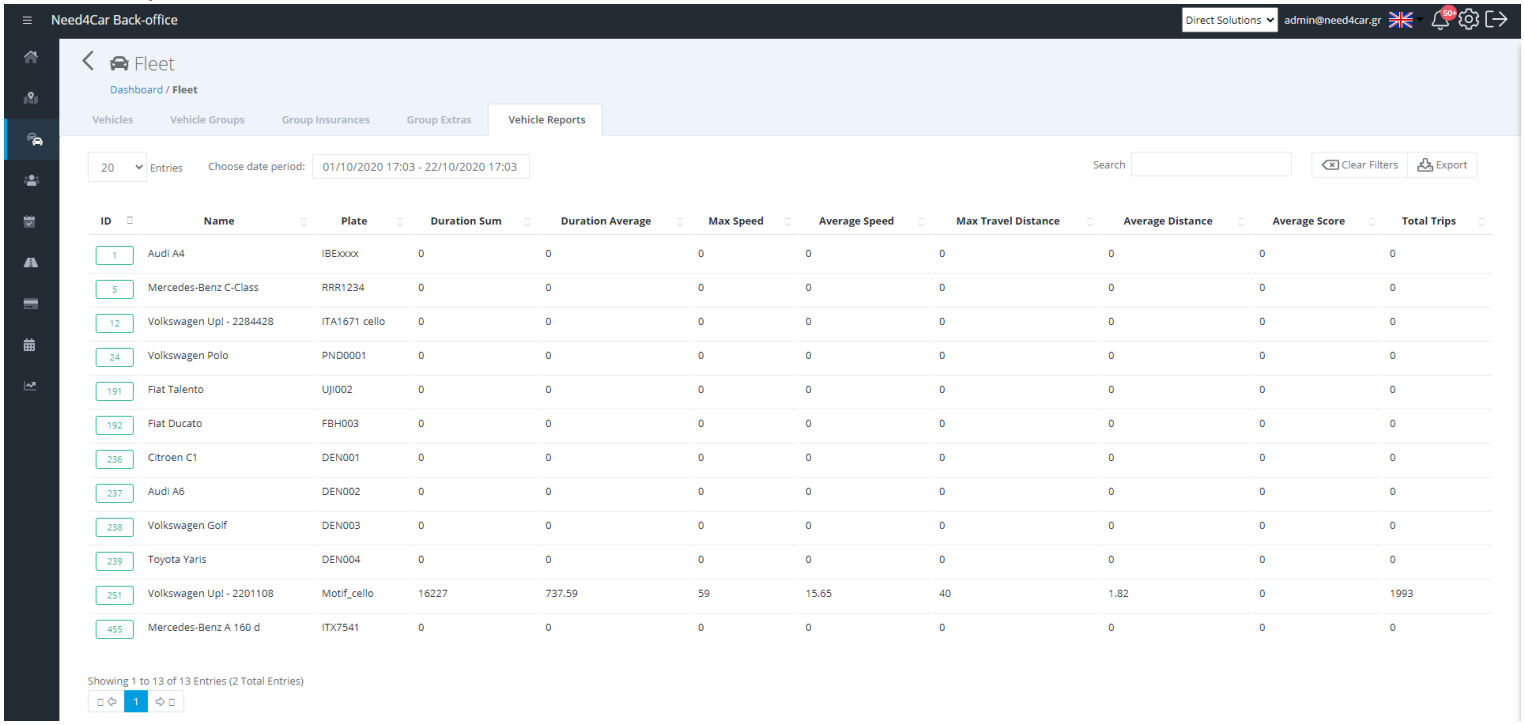
The second tab is the “Vehicle Groups” that belong to the specific group extra.



The ID number that is displayed is the one of every vehicle group and it redirects to the specific vehicle page.

(e) Vehicle Reports

The “Vehicle Reports” tab gives the user useful reports about the vehicles that contain average and sum duration of the trip, average and max speed of the vehicle, average and sum of the driven distance, average score of the driver and the total trips, for the period that the user has chosen.

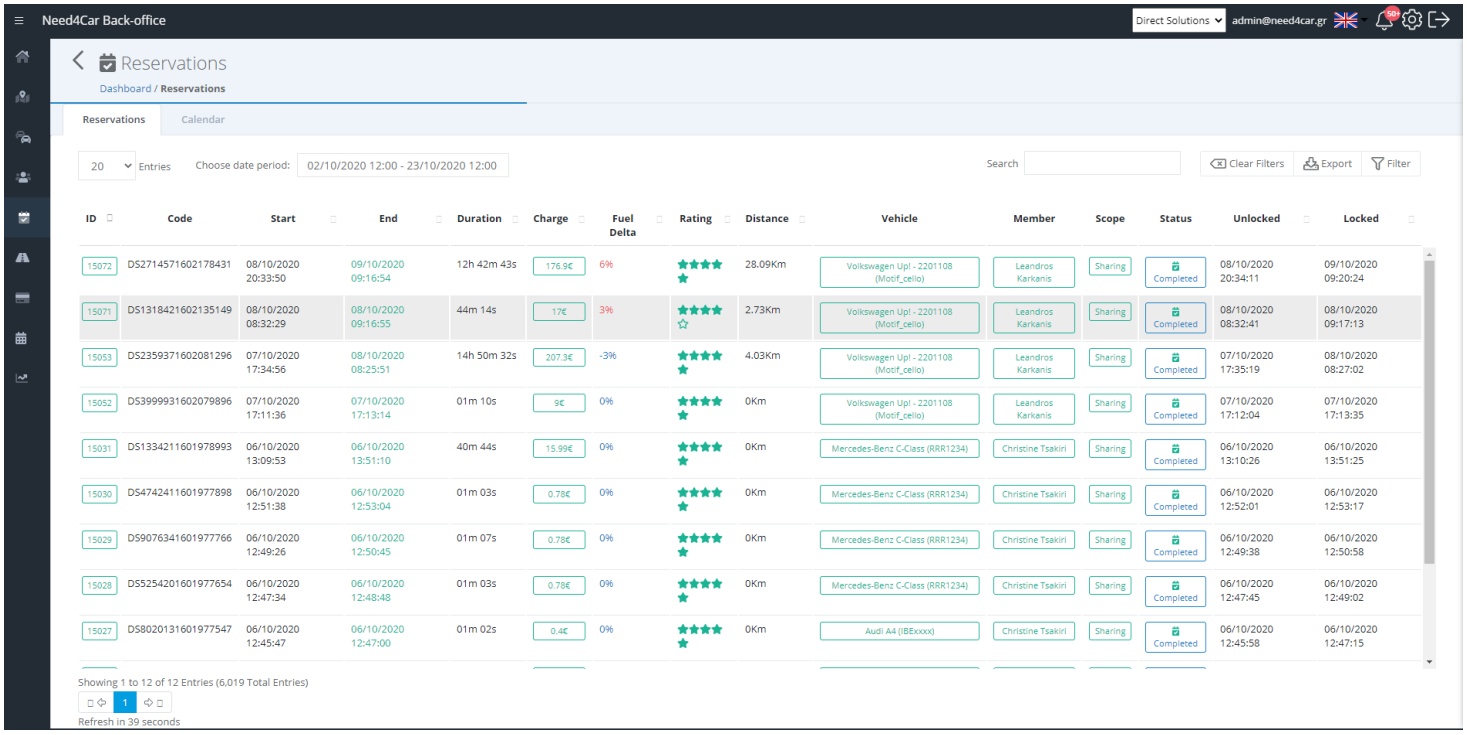


The user can search by typing a key word in the search bar, in order to find what he wants. This piece of information can be exported in a excel, csv, pdf file, or can be copied and printed.

The ID number that is displayed is the number of every vehicle and redirects to the vehicle's page.

Reservations

This section includes the list of Reservations with all the available information, eg reservation code, start time, stop time, status, price, cancelation time, member name and vehicle plate. The reservation code, member name and vehicle plate are active links. The user can search by typing a key word in the search bar, or apply filters, in order to find what he wants. This piece of information can be exported in a excel, csv, pdf file, or can be copied and printed.

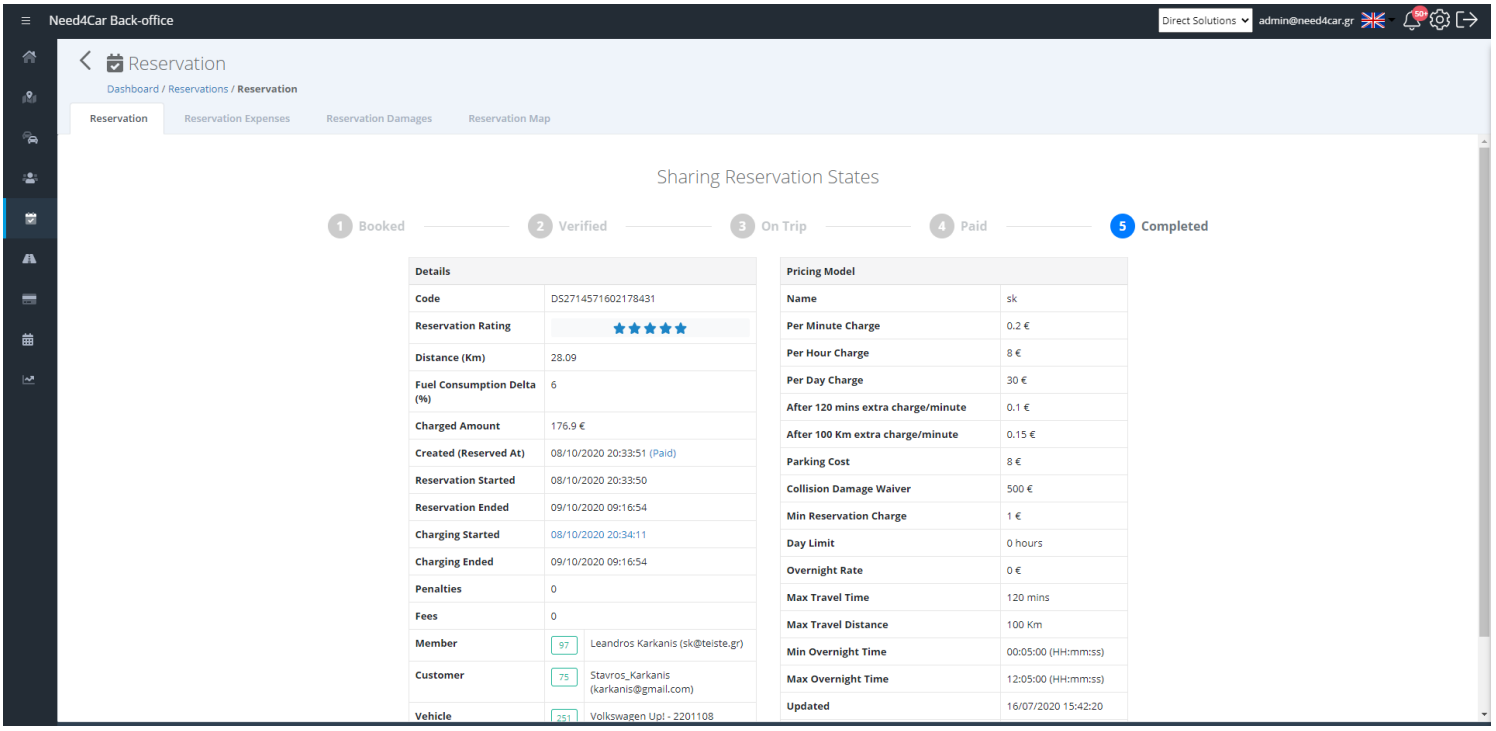


Each Reservation has a unique ID number, which redirects to the specific reservation page. The vehicle and the member are actual links that redirect to the corresponding pages. By choosing the charge, a pop-up window appears and informs the user about the cost analysis of the reservation.

For further information about specific reservation, the user has to choose the unique ID number of each reservation and he has at his disposal the below:

(a) Reservations

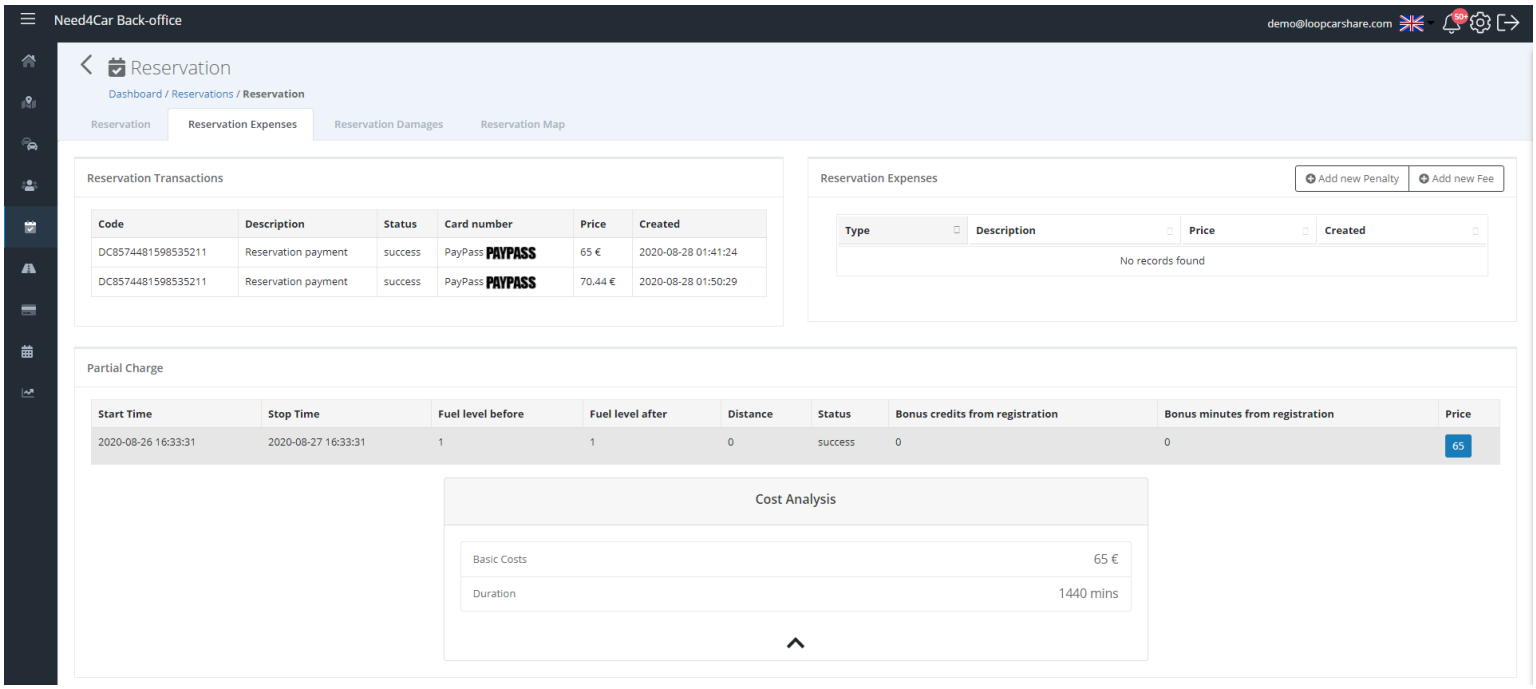
The “Reservations” tab, gives to the user information about the reservation. Such information is the code of the reservation, the start and the end of the trip, the rating, the pricing, the vehicle, the member and the customer. The vehicle, the member and



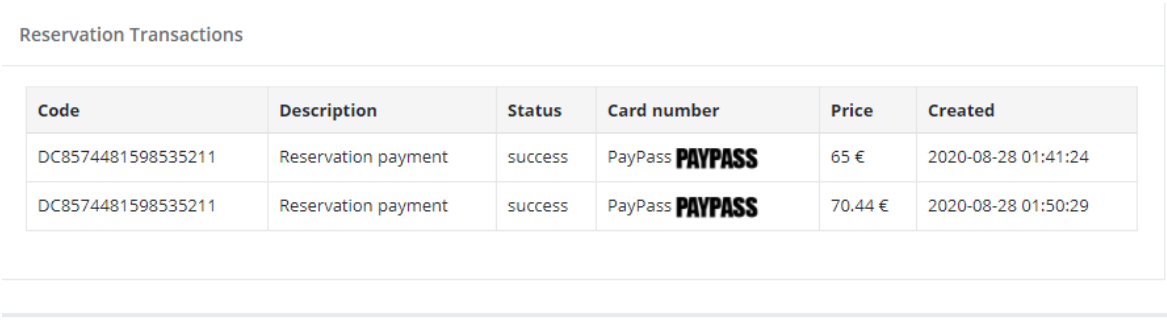
the customer are actual links and redirect to each page.

(b) Reservation Expenses

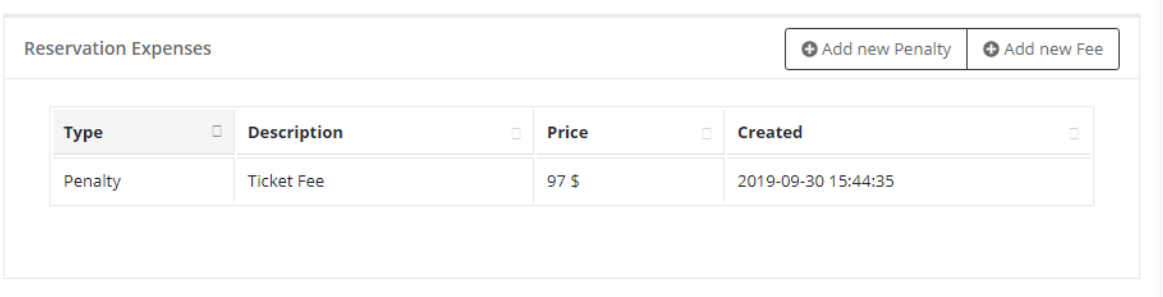
The “Reservations Expenses” tab consists of three charts the Reservation Transactions, the Reservations Expenses and the Partial Charge.



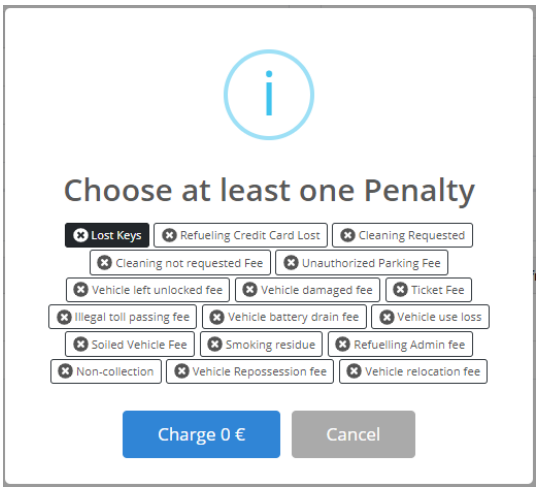
The Reservations Transactions show the code of the reservation, the card number and the charge.



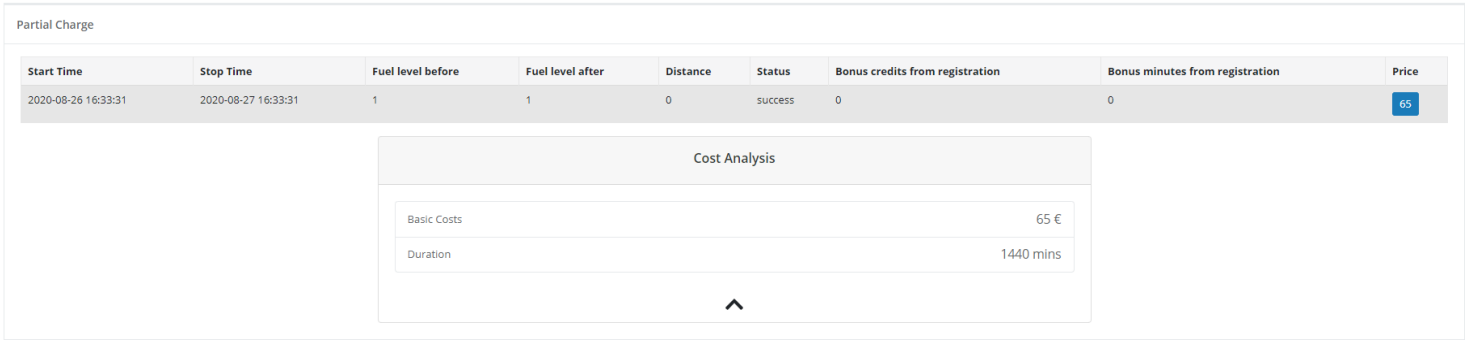
The Reservations Expenses are the penalties that the user may charge a member in case of not good driving.



A pop-up windows appears with all the circumstances of penalty.



The Partial Charge shows the cost analysis per day.



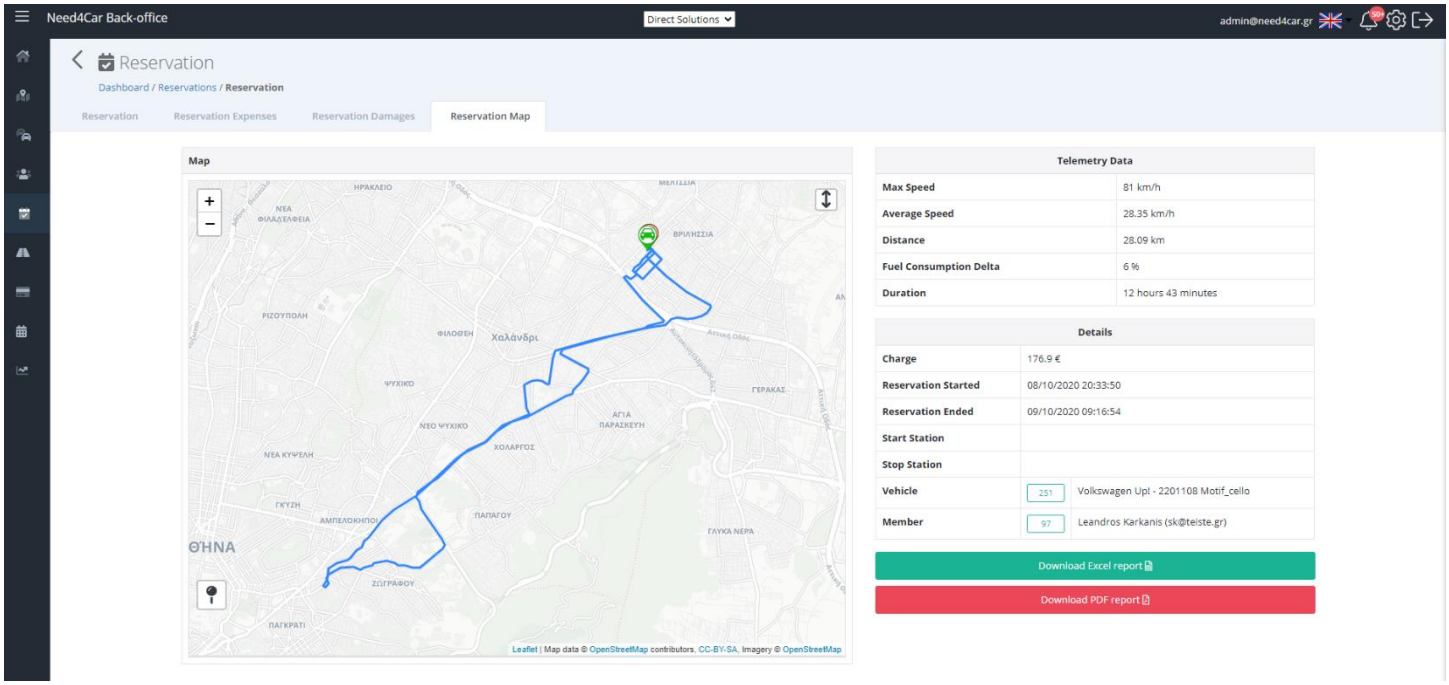
(c) Reservations Damages

The “Reservations Damages” tab show the reported damages that the vehicle has, where the damage is located, photographs that the user has uploaded and the time that this report is created.

Damaged Parts	Images	Created
Front Right Door Rear Right Door		16/09/2020 13:31:33 Before unlocking Vehicle

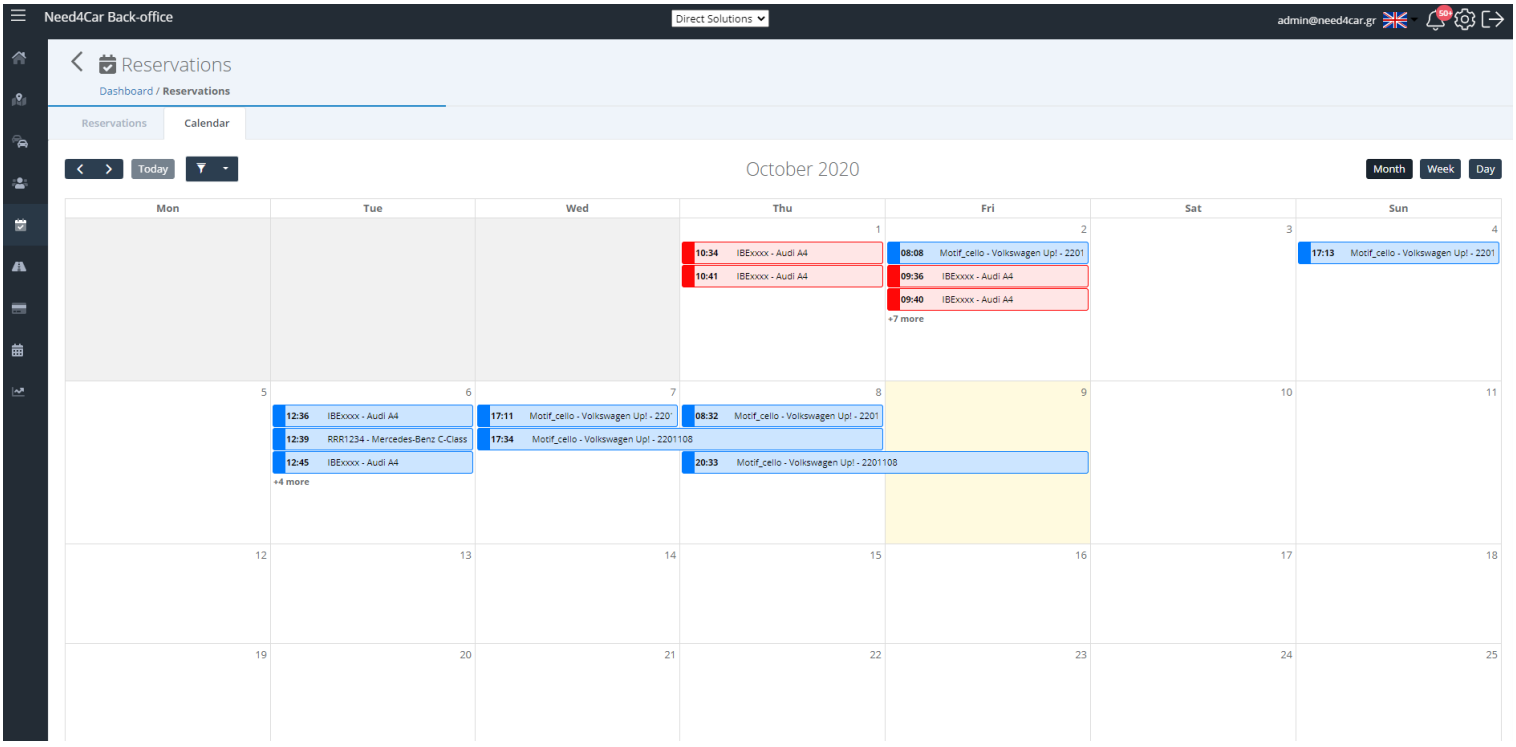
(d) Reservation Map

The “Reservation Map” tab, displays the trip on the map with information about telemetry data and details about the reservation such as the start and the end of the trip, the charge, the vehicle and the member. The vehicle and the member are actual links that redirect to the corresponding pages. The user can download the trip’s information either in excel or in pdf form.



Calendar

The “Calendar” displays all the reservations on a calendar. Default mode is monthly and can be changed into weekly or daily. Also, from filter button the administrator can change view between all statuses of the existing reservations (canceled, on trip, etc) and also between rental or sharing reservations.



Damage Report

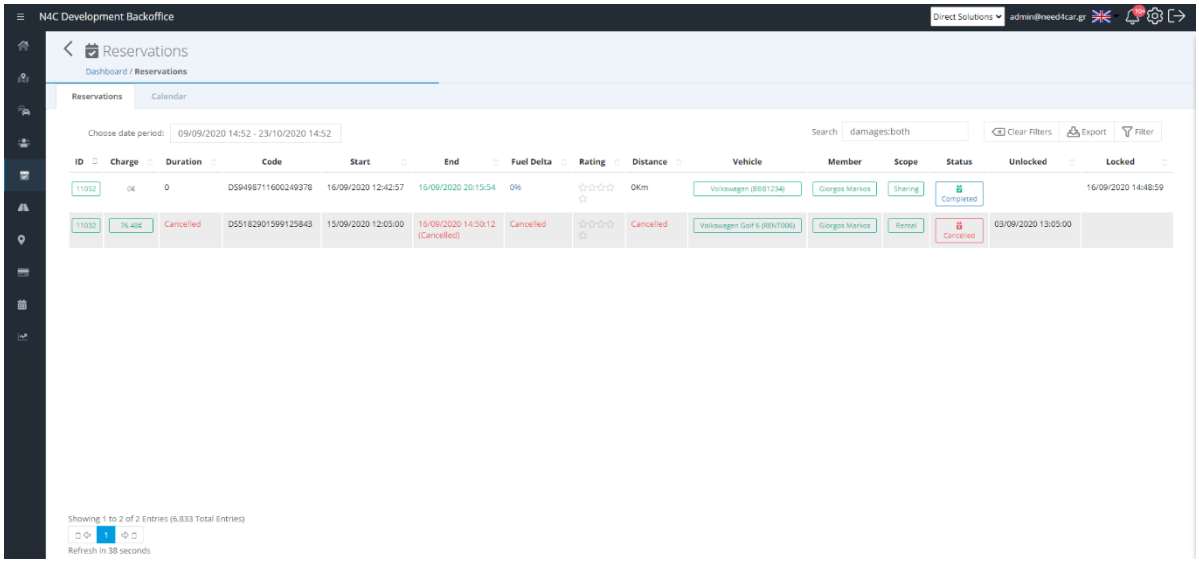
The “Damage Report” show to the user the reservations that has reports for damages. The vehicle and the member are actual links and redirect to the corresponding page.

The ID number redirects to the reservation’s page, where are all the information about the reported damage.

Damaged Parts	Images	Created
Front Right Door Rear Right Door		16/09/2020 13:31:33 Before unlocking Vehicle

No Signal

The “No Signal” gives to the user a list with the vehicles that have lost their signal.

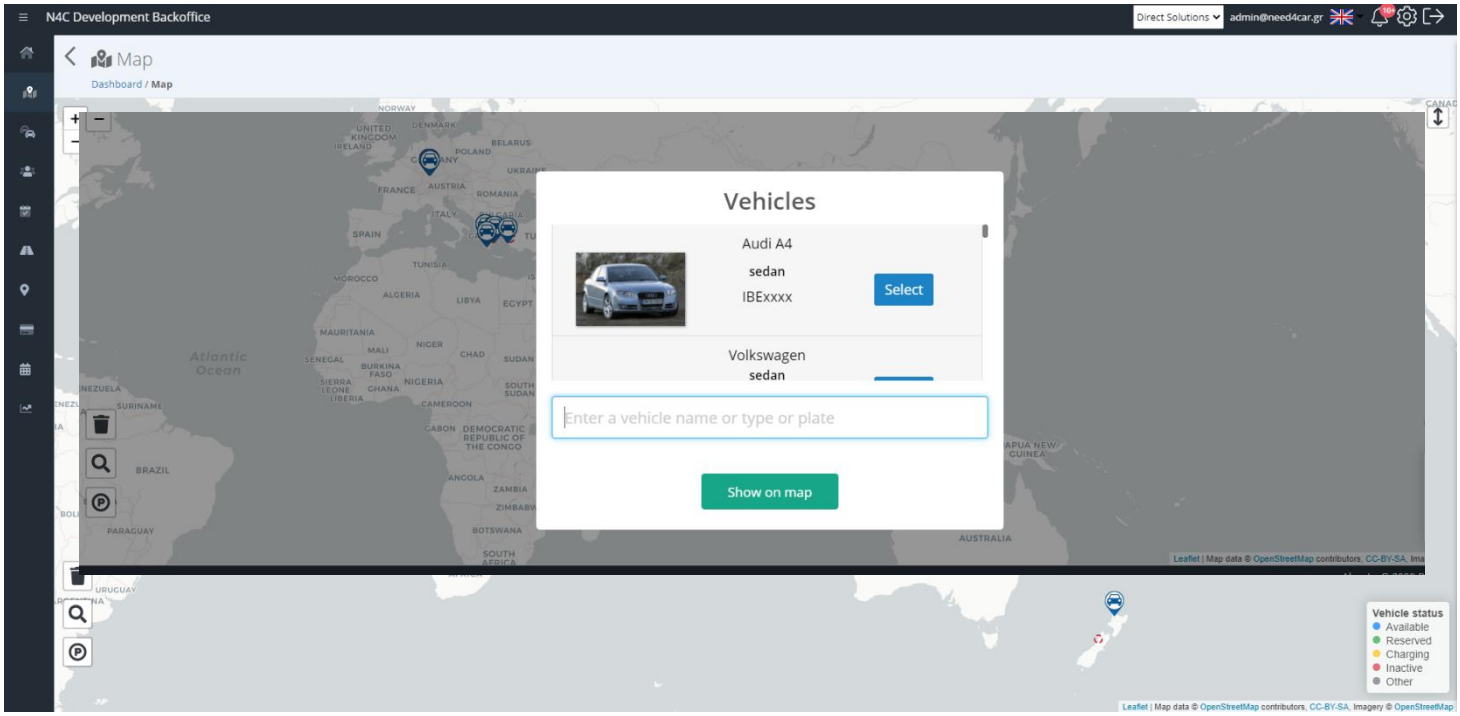


Distance Driven

The “Distance Driven” tile informs the user how many kilometers the vehicle have went through.

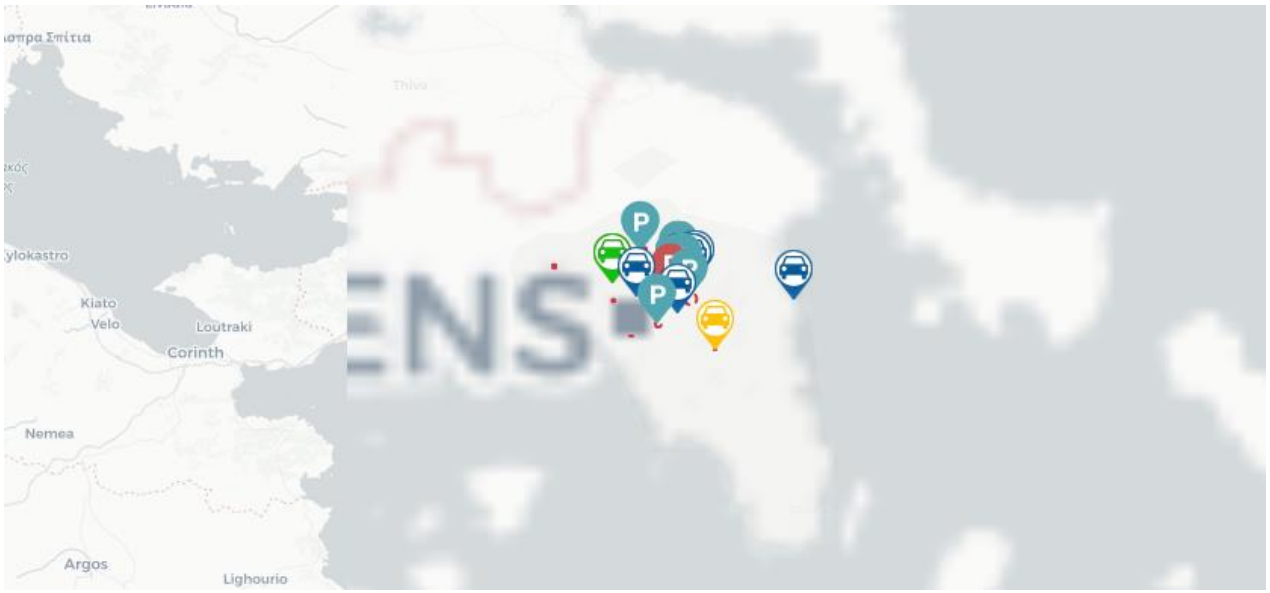
Map

The “Map” displays all the vehicles on the map. The vehicles are in different colors according to the its status. The “Bin” button gives the user all of the Points of Interest.



By choosing the “Search” button a pop-up window appears and the user search for a vehicle from a dropdown list.

The “P” button stands for the stations that the vehicles are parked.

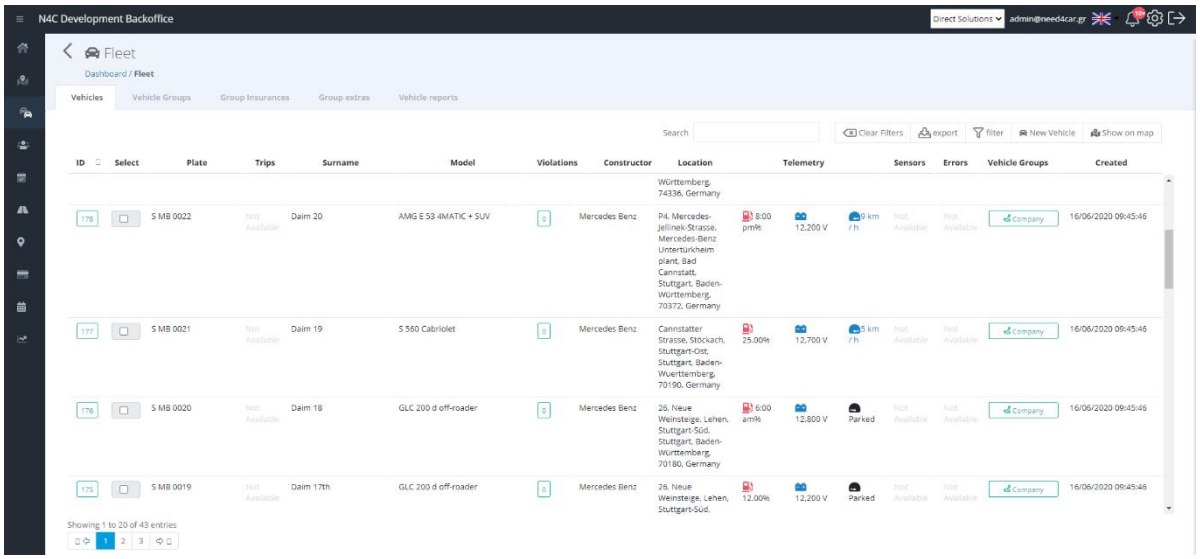


Average Speed

The “Average Speed” tile informs the user about the speed that the vehicles have been driving for the last 30 days.

Out of Geofence

The “Out of Geofence” tile redirects to the Vehicle list where the user can check the “Violations” column. This column refers the times that the vehicles have crossed the defined borders.

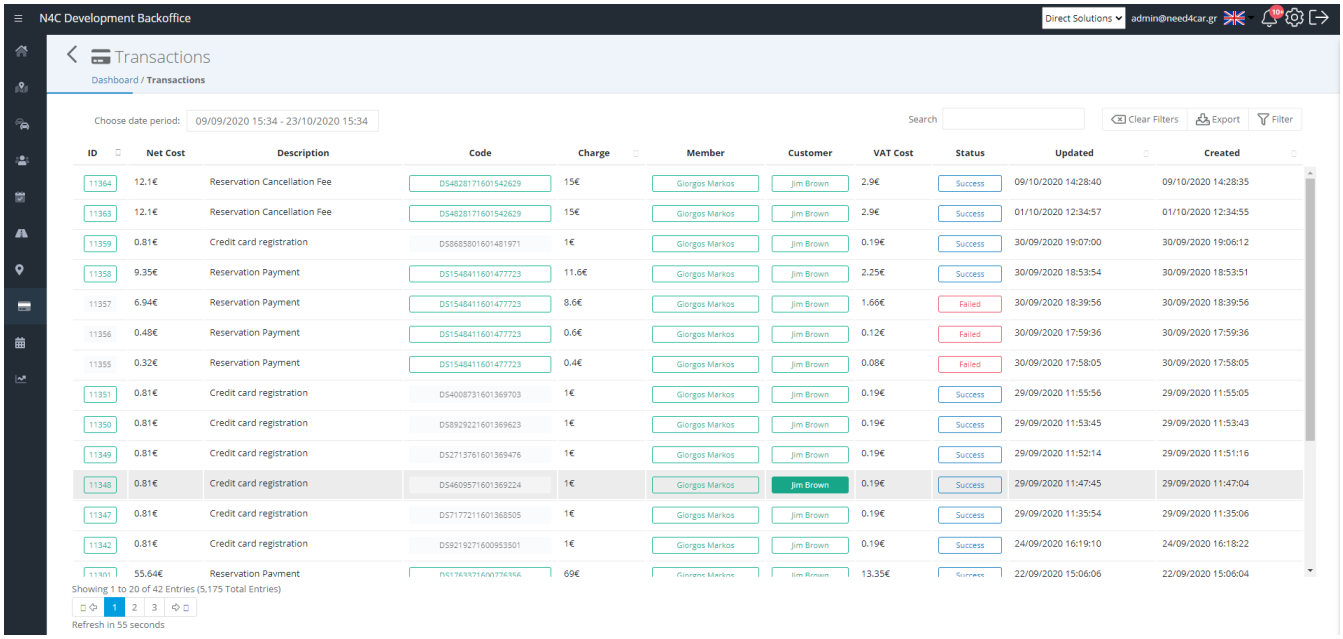


3.2.3 Finance

The “Finance” tile informs the user about the successful and failed transactions.

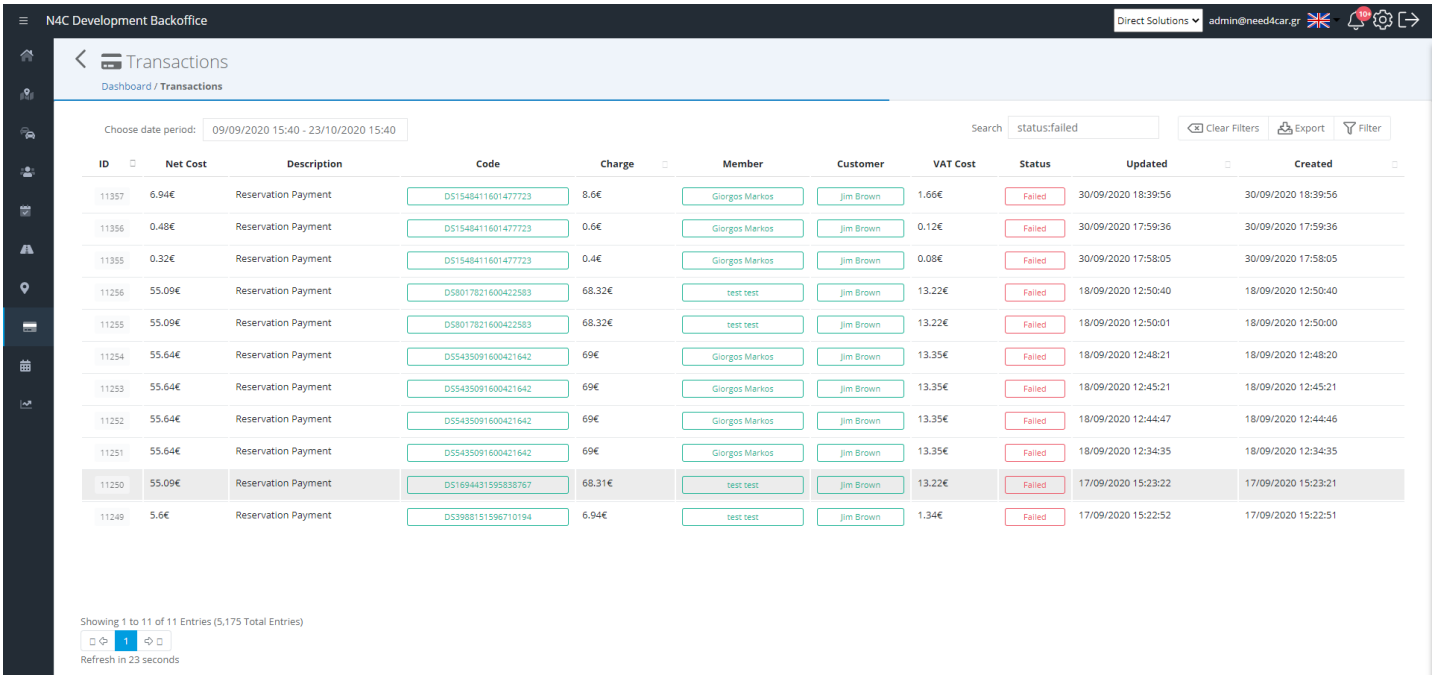
Transactions

This section includes the history of all the bank transactions. The table depicts transaction details, such as, code, description, status, price and date. In the ID column the administrator has the opportunity to open the generated invoice of this transaction which was attached in the end trip reservation report mail that the end user received when he ended his reservation. Download option is also available if needed in any case to resend it.



Failed Transactions

The “Failed Transactions” show the history of failed transactions. The Code, the Member and the Customer are actual links that redirect to the corresponding pages.

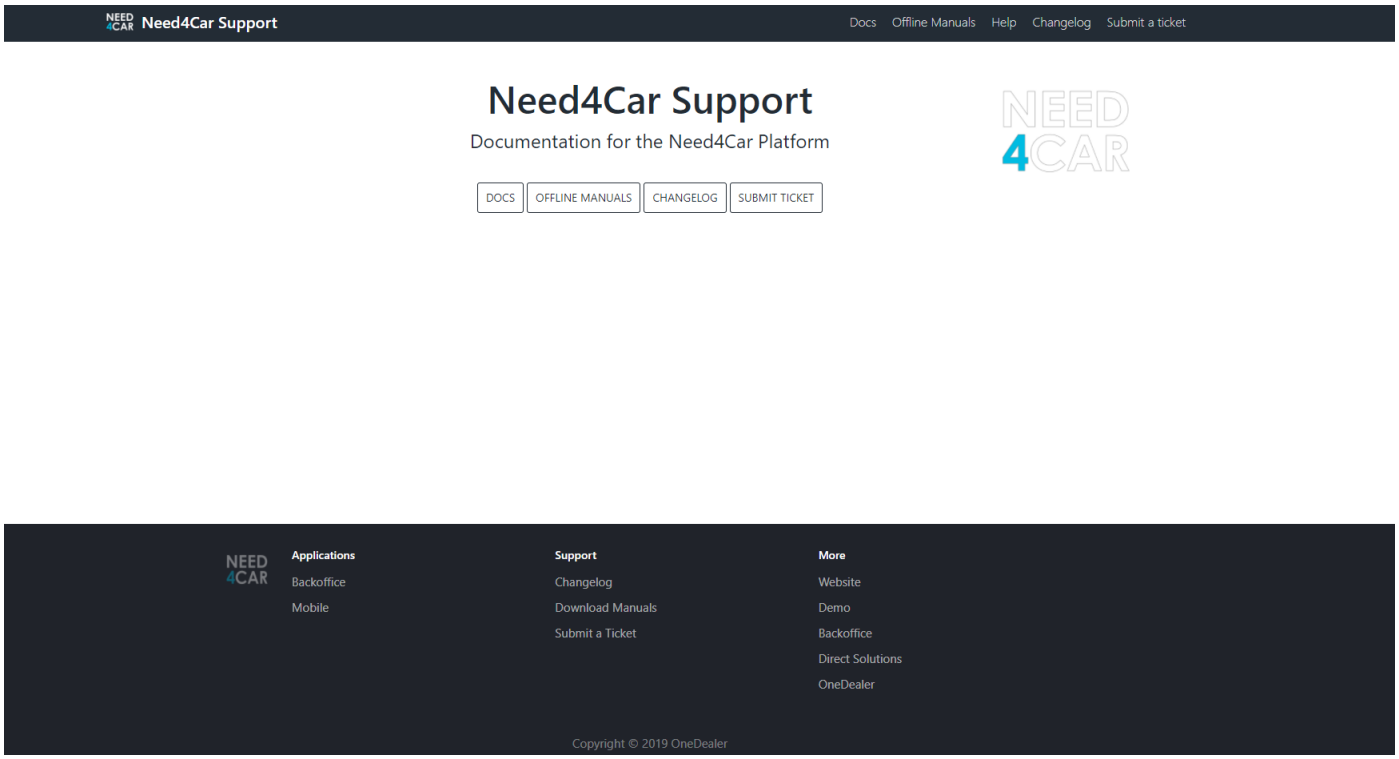


3.2.4 Support

The support section, is a tool that provides live and 24/7 Support to the Backoffice administrators.

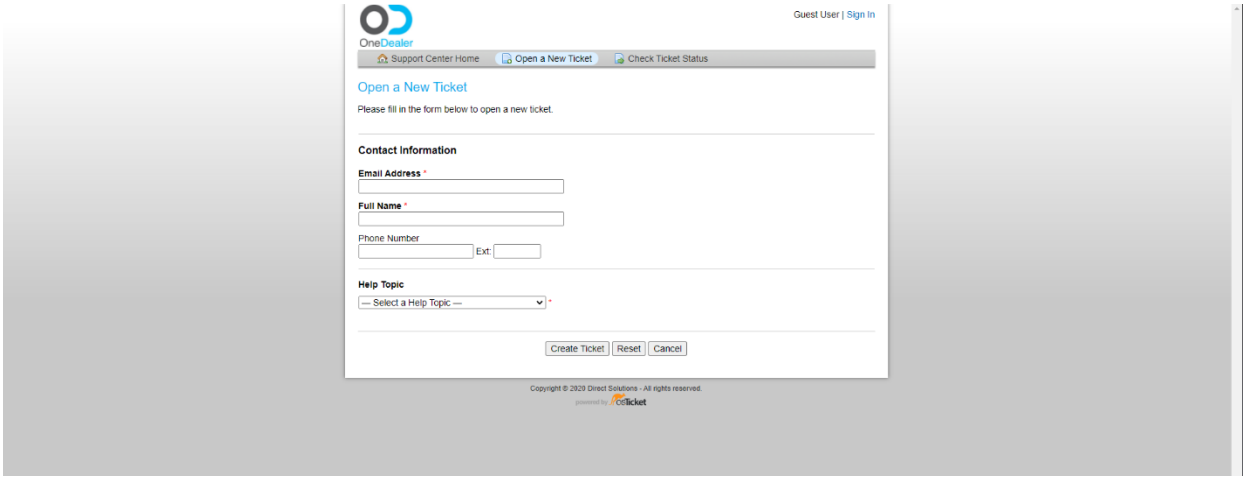
Documentation

The “Documentation” tile includes all the Support documents, e.g.manuals, in order to help the user with the daily management of the platform.



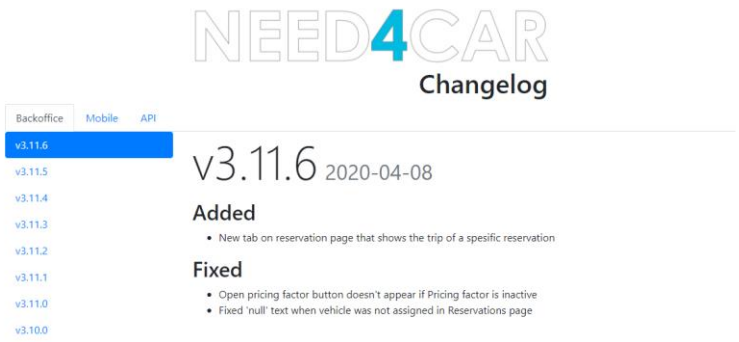
Open ticket

If an issue cannot be resolved by the Live Tools, the user can follow the procedure through the electronic ticket. By choosing the tool “Open a New Ticket”, the administrator enters to the “Support Center Home”.



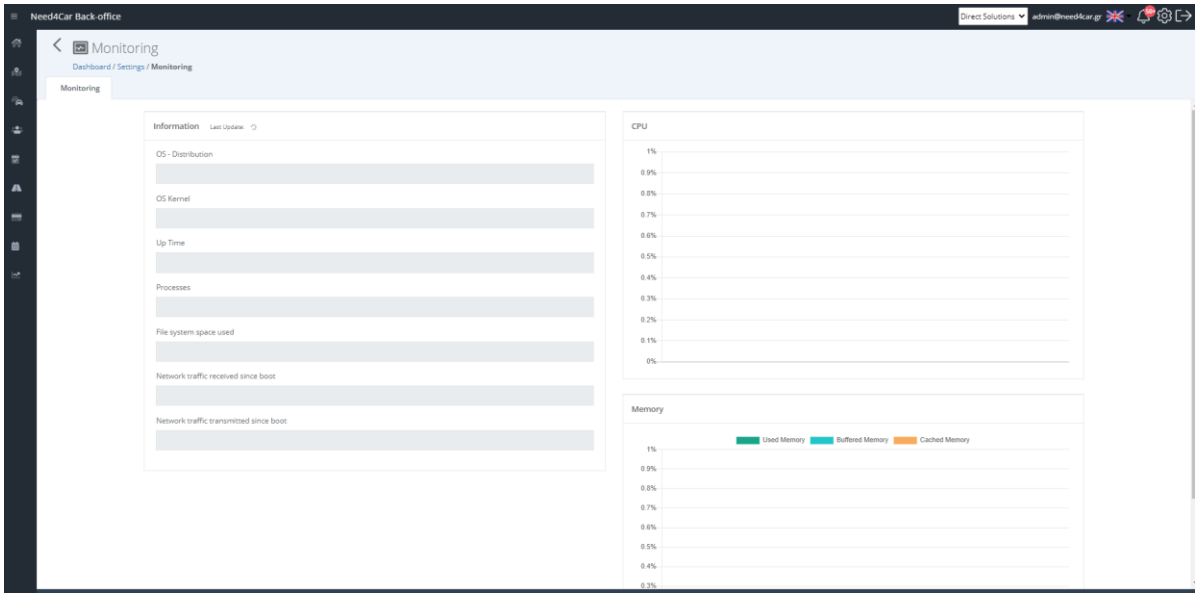
Changelog

The “Changelog” informs the user about the versions of the platform that have been produced.



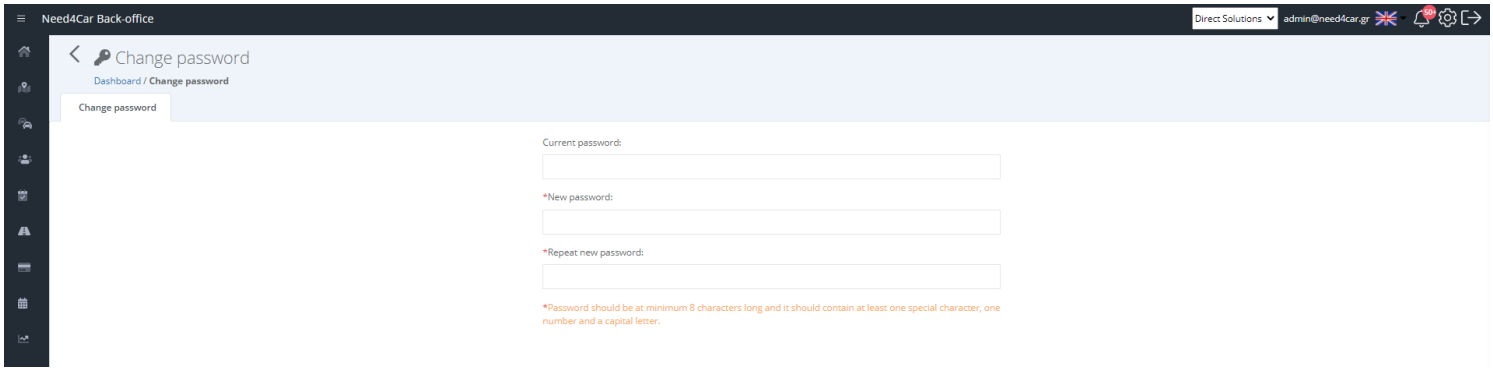
Monitoring Tool

The “Monitoring Tool” checks the usability of the servers.



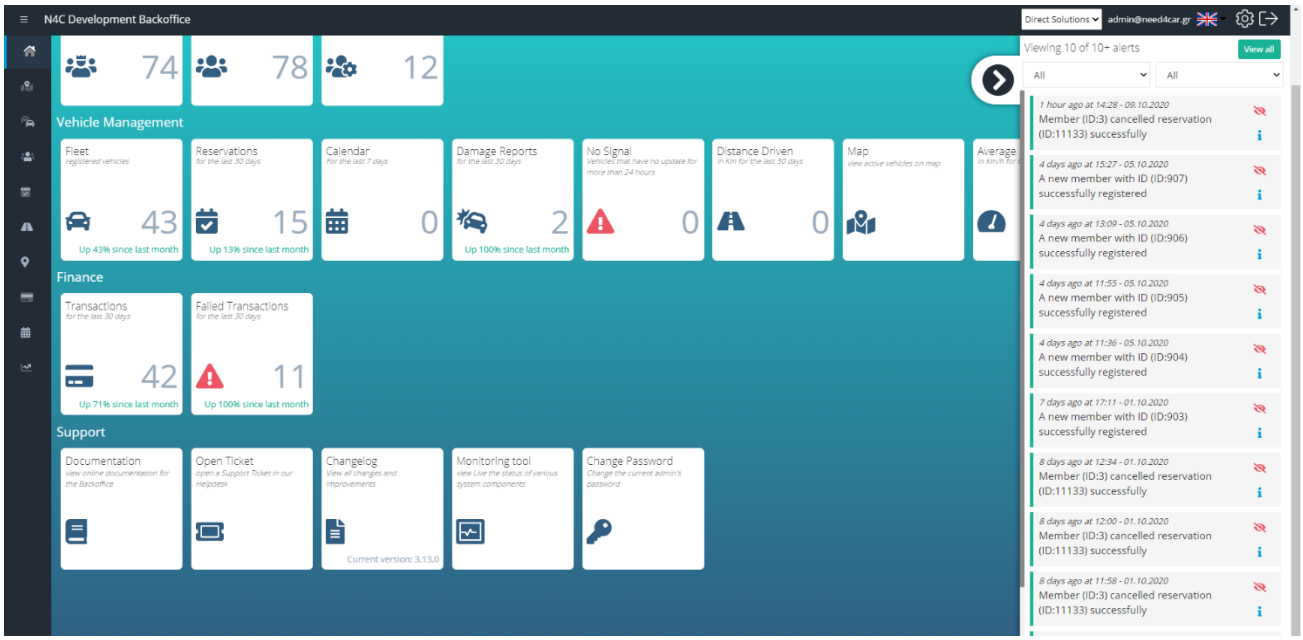
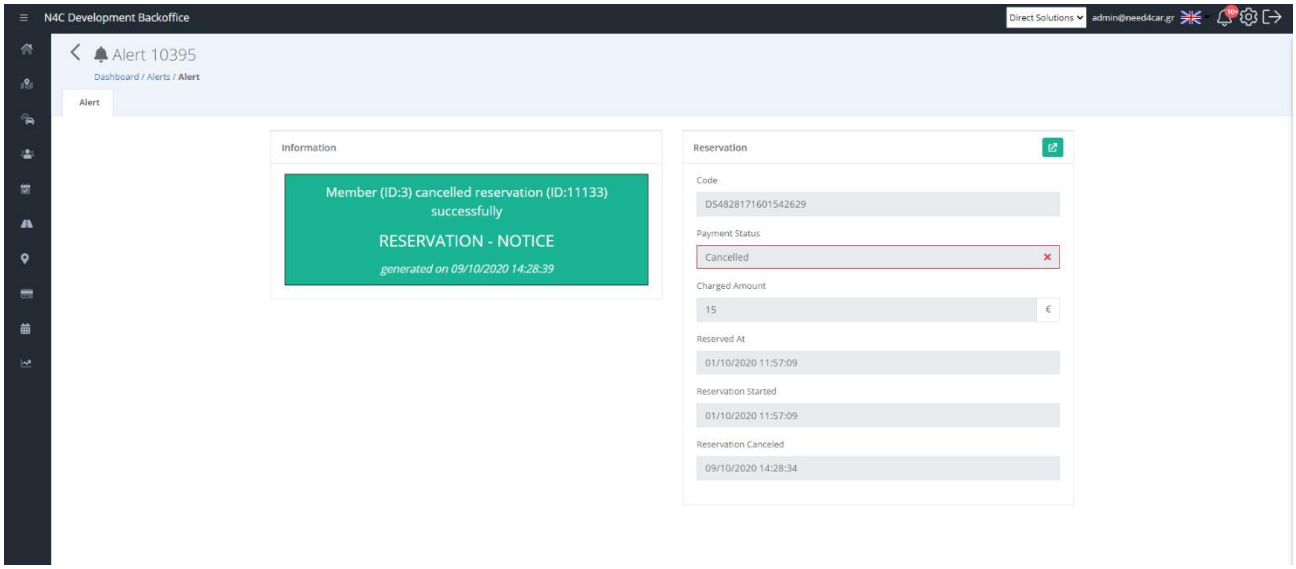
Change Password

This section the user can change his password and provide his new password with the specifications that are mentioned.



3.3 Notifications

The Administrator receives live notifications about every new action that a member or a user does, e.g. reservations, transactions, penalties, etc. The red eye button removes the notification from the list and the "i" button redirects inside the notification.



Inside the notification further details are displayed and also the administrator has the ability to redirect inside the reservation, transaction, member, customer or vehicle, depending on the reason that this notification was generated.