

CLIENT PORTAL

User handbook



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Getting started

Introduction

The United Limousines client portal – a whole new way to cater to the clients

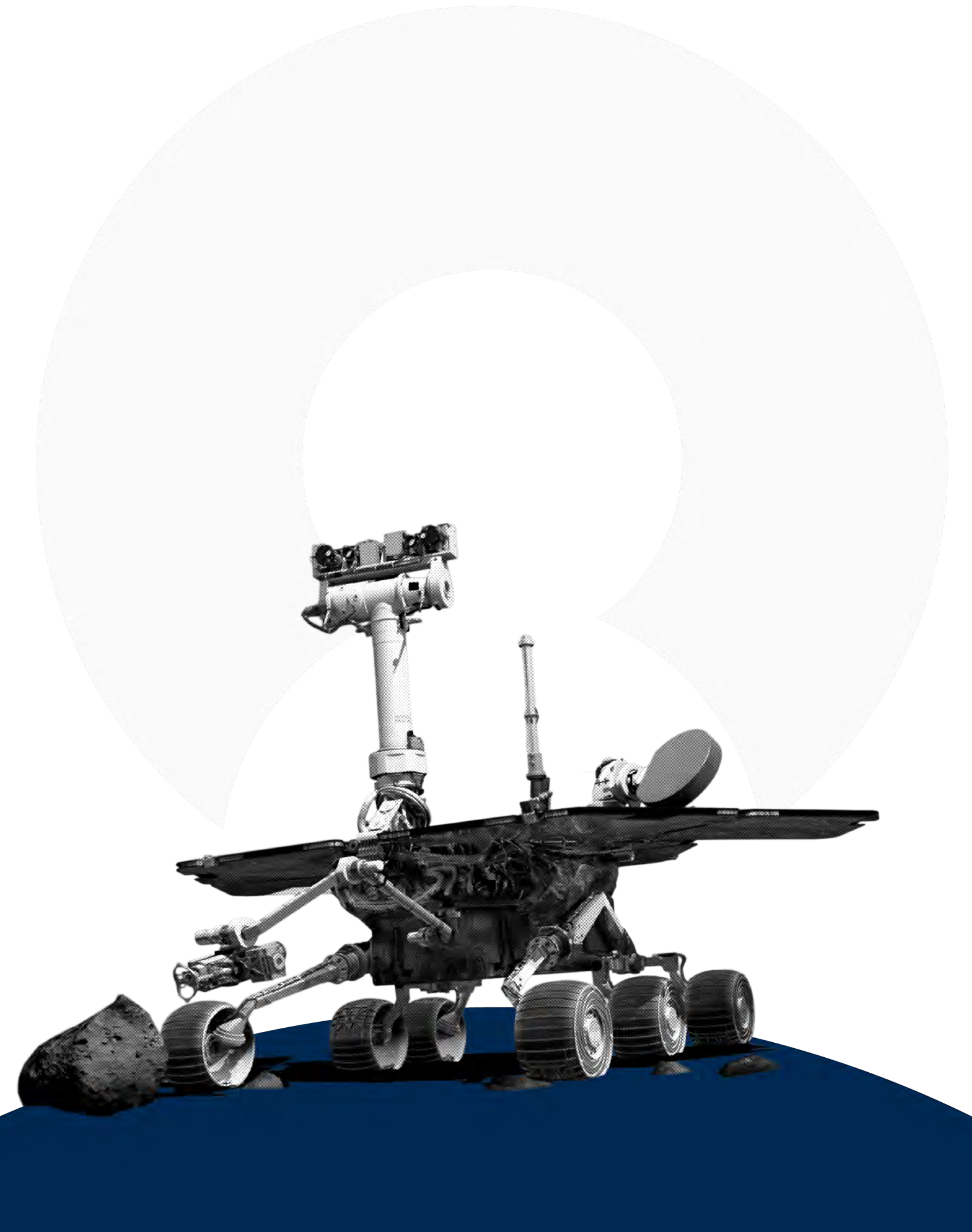
In order to give our corporate clients an even better user experience, we have created a one-of-a-kind client portal. Its development hasn't been quick and easy, as we wanted it to be comprehensive, yet extremely simple to navigate it and use it. While crafting it, we only had one thing in mind – to streamline the overall United Limousines experience process., i.e. save the client's time as much as possible.

With a secure and private login, you are enabled to manage your company chauffeured ground transportation services in one place and find everything you need in a flash.

Not only would you be able to review the past and upcoming trips and update billing information, as well as download invoices and payment receipts, among many other options, but also to make a booking, change or cancel the service without the need to contact our customer care team. What's more, the United Limousines Client Portal platform offers customization possibilities, so that you can set specific preferences for the passengers, vehicles, chauffeurs and routes.

Made to increase your options for working with us, the Portal provides a secure environment for doing so at your convenience.

Welcome to the United Limousines Client Portal!



Profile registration

You can easily request a new profile registration by clicking the **Register** link in the upper right corner of the United Limousines website and fill out the requested information.

Then click the **Send registration request** button.

As soon as you submit your request, our Support team will set up your account and you will receive a Client's Portal Registration email.

UNITED LIMOUSINES CLIENT PORTAL

REGISTRATION REQUEST

Your name and surname *

John Doe

Your email *

john.doe@example.com

Your phone *

+12345678

Company name *

Company Ltd.

Company type *

Select type

Website (optional)

www.mycompany.com

Street address *

Street 123


City *

etc. Zurich

Country *

Select status

☐ I'm not a robot


reCAPTCHA
[Privacy](#) - [Terms](#)

Send registration request

Already have an account?

[Sign in »](#)

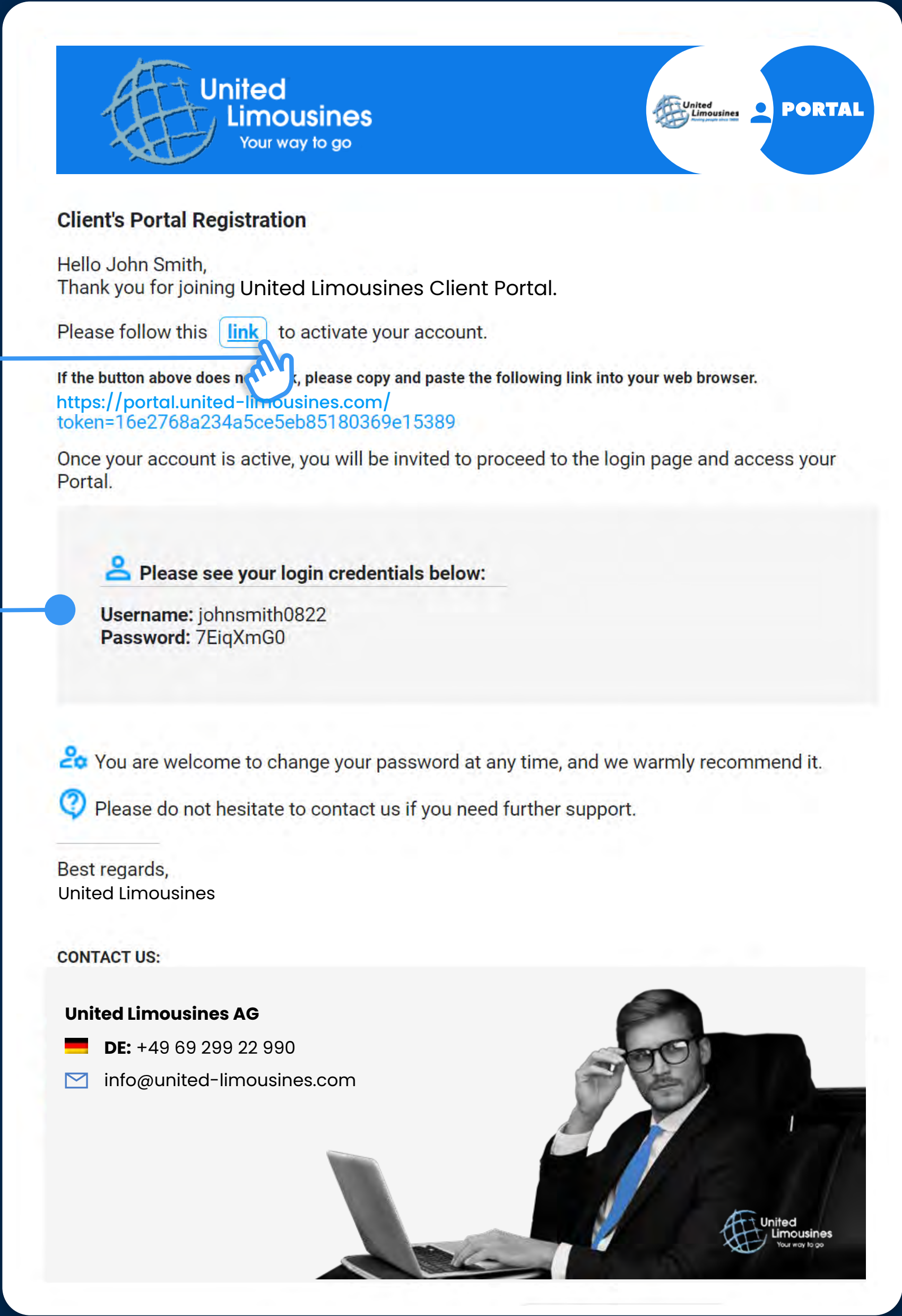
Profile activation

An email with a link to complete your profile activation is sent to the address you've input into the Your Email field upon submitting Registration request.

Click the **Link** to activate your profile.

This email contains your login credentials:
USERNAME and **PASSWORD**.

Once your profile is active, proceed to the **Login page** and input the credentials from the Activation email.



Reset a password

We encourage you to change the generic password right away and personalize it as per your preferences.

SET YOUR PASSWORD by inputting text into the appropriate form fields.

Your new password must contain at least 8 characters - a combination of upper & lower case letters, and at least one number or symbol.

UNITED LIMOUSINES CLIENT PORTAL

CHANGE PASSWORD

Password

Use 8 or more characters with a mix of letters, numbers & symbols.

Confirm Password

Submit

Book a ride



Step 1

Adding a passenger

The first step when booking a ride is to add the passenger(s).

You can simply do that by clicking the **Add new passenger** button, filling our required fields and clicking **Save new passenger**.

Each passenger needs to be added only once and they will appear in the **Select passenger(s)** drop down list upon making new bookings.

You can add additional passengers to the ride simply by typing their names next to the lead passenger's and the passenger count will automatically rise with each new entry.

Once all the passengers are added, you may proceed by clicking the **Next step** button.

The image displays two sequential screenshots of a web form titled "New ride for".

The top screenshot shows the initial state of the form. It includes a dropdown menu labeled "Select a passenger(s)" with a downward arrow. Below this are two input fields: "Passengers count" and "Luggage count", both containing the number "1". At the bottom right, there is a "Next step" button with a right-pointing arrow. A blue hand icon points to the "Add new passenger" link in the top right corner.

The bottom screenshot shows the form after a passenger has been added. The "Name/Surname" field now contains "John Doe" and the "Phone" field contains a US flag icon followed by "+12345678". The "Passengers count" and "Luggage count" fields are no longer visible. The "Next step" button remains at the bottom right. A blue hand icon points to the "Save new passenger" button in the top right corner.

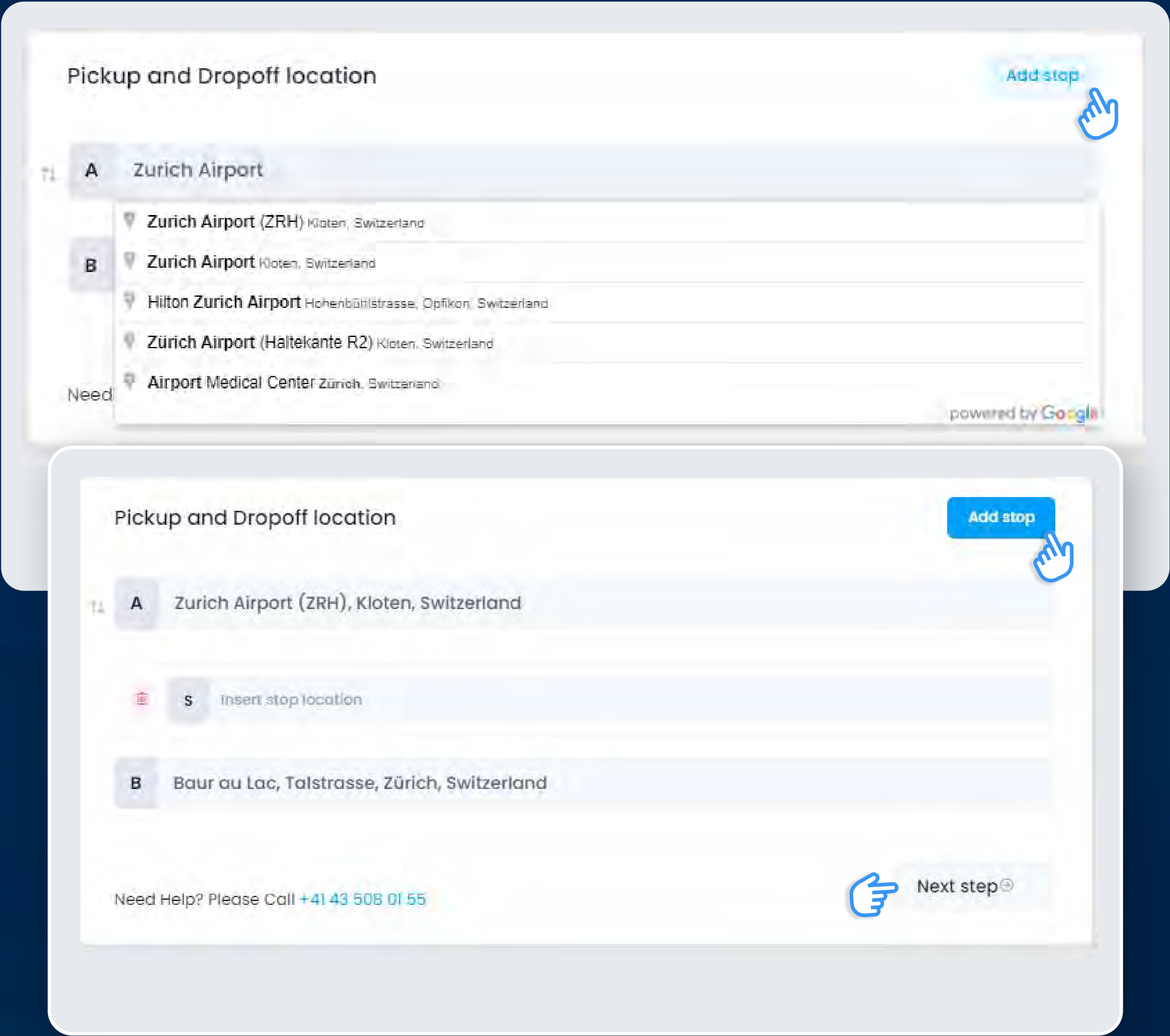
Step 2

Pickup and drop-off locations

Enter your **Pickup location** and **Drop-off locations** into the appropriate fields.

Google is there to help you with the exact addresses. If you need to add a **Stop(s)** between these two destinations, click the **Add stop** button and enter the address(es) in the appropriate field.

You can add as many stops as your itinerary has.



Step 3

Select the service type and schedule your pickup

You can choose between 2 types of services:

- **Transfer service** (a simple point-to-point transfer)
- **Hourly service** (at-your-disposal service for a certain amount of hours)

Select a desired **pickup date and time**.

In case your service starts/ends at the airport, train station or cruise port, please select the corresponding option and fill out the required fields and click the **Next step** button.

The image displays two versions of the 'Schedule your pickup' form. The left form shows the 'Transfer service' selected, with a hand cursor pointing to it. The right form shows the 'Hourly Service' selected, with a hand cursor pointing to it. Both forms include fields for date and time, a 'Flight details' section with a checked checkbox, and a 'Choose flight type' section with 'Commercial Flight' and 'Private Jet' options. The right form also includes a 'Duration' dropdown set to '3 hours' and a 'No more wait time charges!' message.

Screenshot 1 (Left):

- Section: Schedule your pickup
- Service: **Transfer service** (selected)
- Date: 10. August 2022. (Wednesday)
- Time: 11:15
- Flight details: ☒ Flight details
- Ship name / train number: [input field]
- Choose flight type: **Commercial Flight** (selected), Private Jet
- Flight number: LX [input field]
- Flight number: 1413 [input field]
- Don't know your flight number? [Search by Departure Airport](#)

Screenshot 2 (Right):

- Section: Schedule your pickup
- Service: **Hourly Service** (selected)
- Date: 10. August 2022. (Wednesday)
- Time: 11:15
- Flight details: ☒ Flight details
- Ship name / train number: [input field]
- Duration: 3 hours [dropdown menu]
- Choose flight type: **Commercial Flight** (selected), Private Jet
- Flight number: LX [input field]
- Flight number: 1413 [input field]
- Don't know your flight number? [Search by Departure Airport](#)
- Message: **No more wait time charges!**
LET US TRACK YOUR FLIGHT.
Should your flight arrival time change or be delayed, we will automatically adjust your pickup time and let you know about it.

Step 4

Choose a vehicle class

Choose your vehicle from the list of options.


Here, you will be able to look through the vehicle classes, see how many passengers and pieces of luggage can fit in each vehicle, **Add a note** with special instructions, and/or add a **Luggage trailer** or a **Child seat**.

Once you have selected your desired vehicle and input all necessary notes, the system will calculate the rate and you are welcome to confirm the booking by clicking **Book a ride**.



Details

FIRST CLASS
3 3



Add a note


Luggage trailer? ☐ Traveling with children? ☒

Infant (ages 0-1) Toddler (ages 1-5) Booster (ages 5-12)

0 1 0

Payment method
Invoice Post Payment (primary)

Need Help? Please Call +41 43 508 01 55

BOOK A RIDE FOR 137.00 CHF 

Step 5

Booking confirmed

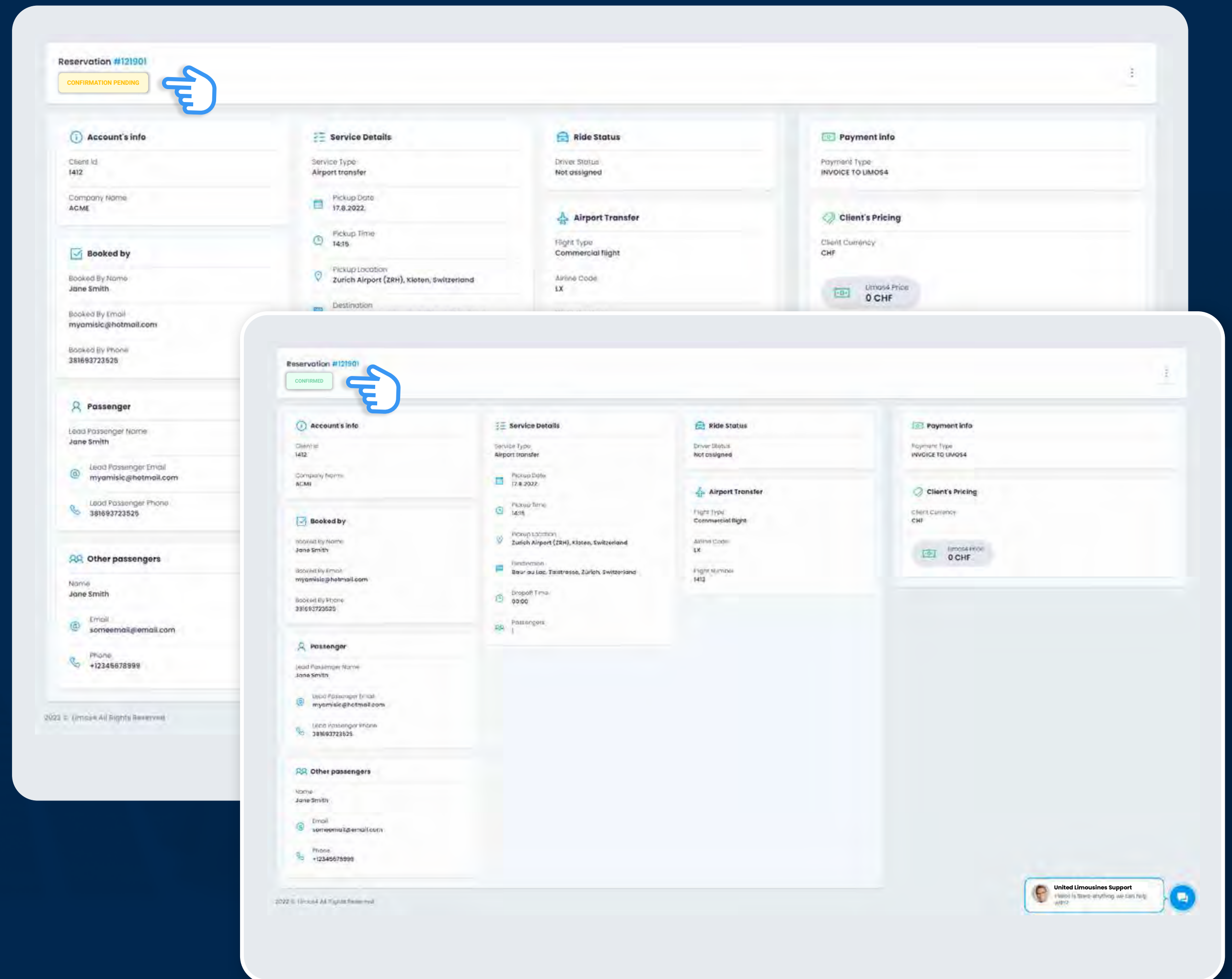
Upon confirming the booking, your page will switch to the **Reservation page** which contains all the details of your service.

Your booking is now in the **CONFIRMATION PENDING** status, which means that our Customer Care Team needs to approve it. This is done within 15 minutes.

As soon as we confirm your booking, the reservation status changes to **CONFIRMED**.


If you don't see the status change within a reasonable time, please refresh the page or contact our Customer Care Team.

Simultaneously, you will receive a **Reservation Confirmation email**.



Step 6

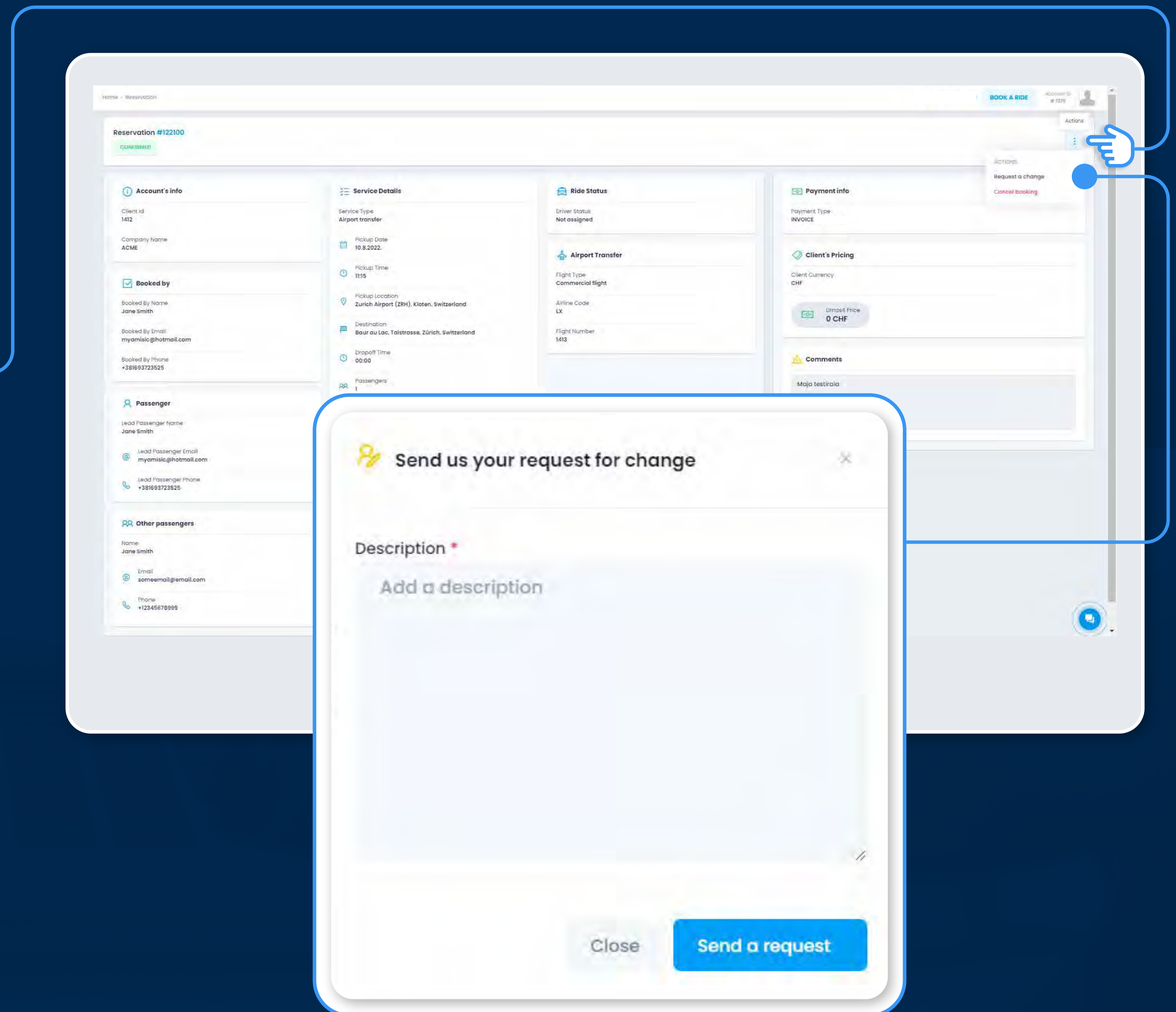
Changing / canceling a booking

In case you need to amend or update the booking details or cancel the ride, you can do that by clicking the **three dots**  in the upper right corner of the Reservation page.

For any booking modifications and/or updates, click the **Request a change** in the drop-down menu. A dialog box will pop up and you will be asked to describe a change you wish to implement (e.g. a new flight number or pickup address).

Our team will process your request and inform you if it affects the price of the service.

For a booking cancellation, click **Cancel (a) booking**. A pop up window will appear asking you to confirm the cancellation.



Account features

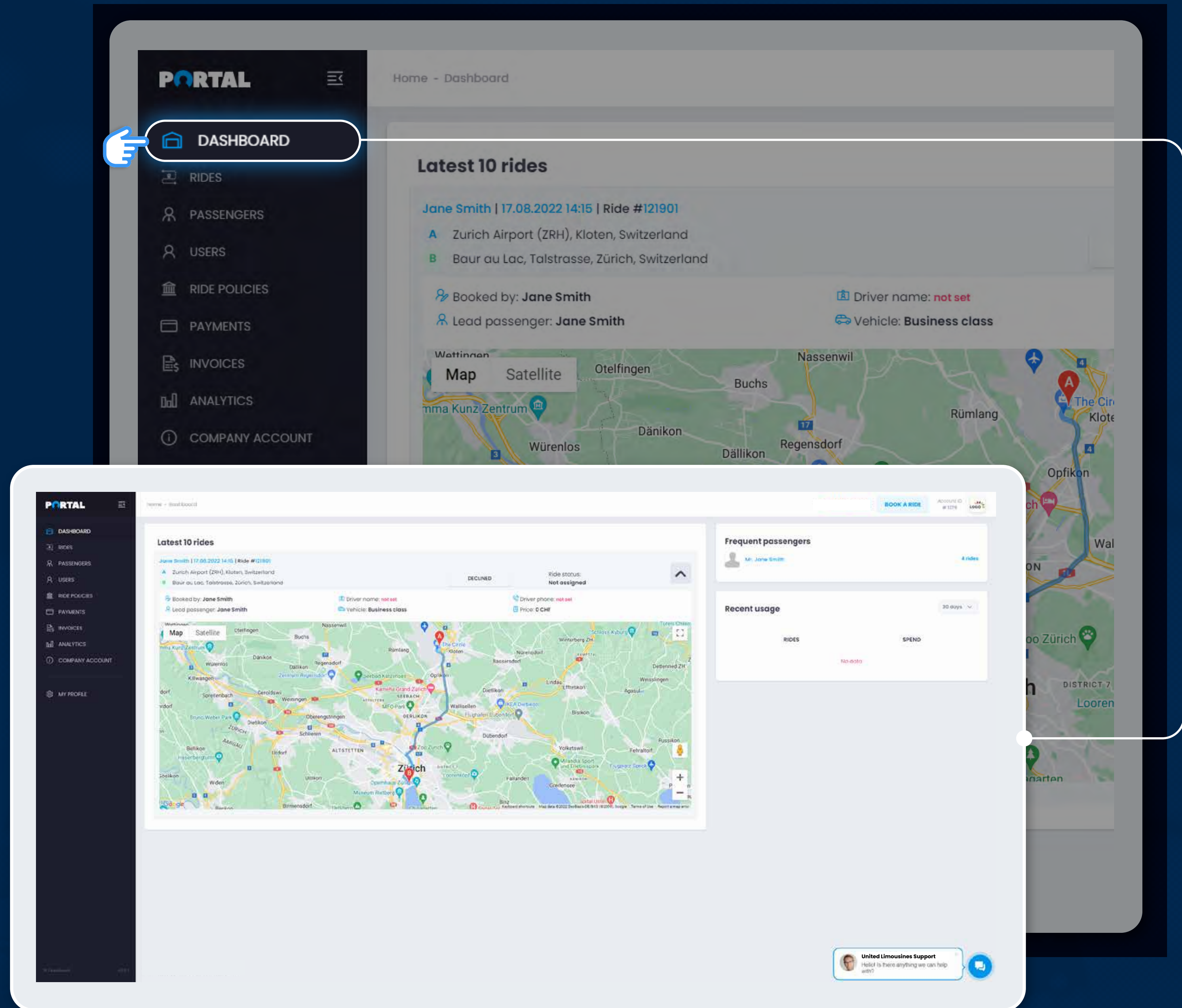
Dashboard

Dashboard is your Portal's home page.

It provides a quick overview of your latest rides and some interesting data, such as **Frequent passengers, Recent expenditure and rides, Frequent booker** (if you have more than one user on your account).

If you wish to quickly check the details of a recent ride, without changing the page, you can simply click on the drop-down **Arrow** and the most relevant booking details will be expanded.

The **Portal's Main Menu** is displayed on the left for quick access, regardless of the page you are on.



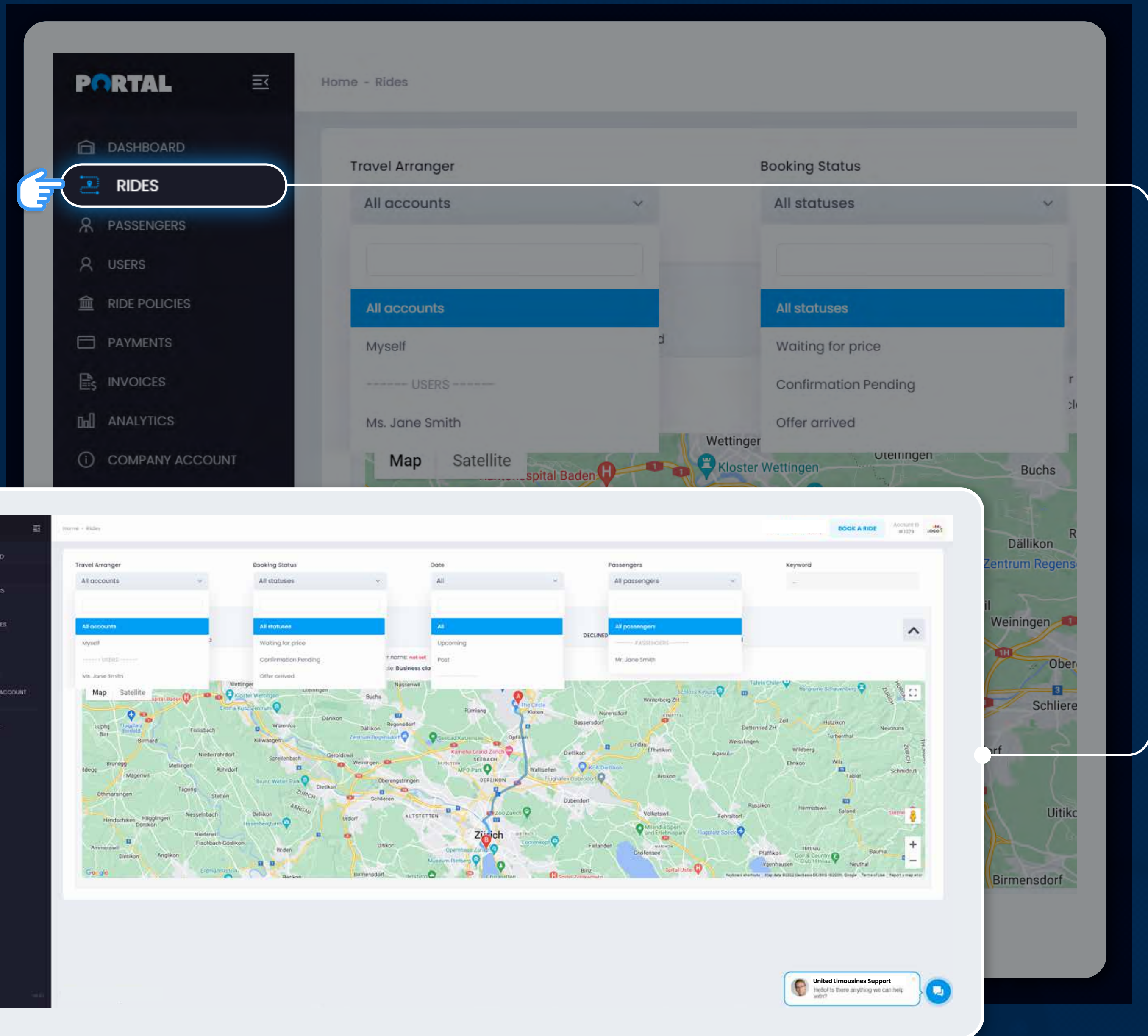
Rides

The **Rides tab** allows you to monitor your upcoming, completed and canceled bookings.

You can **filter the rides per several parameters** to create the view you need:

- Travel arranger (portal user)
- Booking status
- Date (upcoming and past rides or per month)
- Passenger
- Keyword

Each ride can be expanded by clicking the drop-down **Arrow**, like in the Dashboard tab.



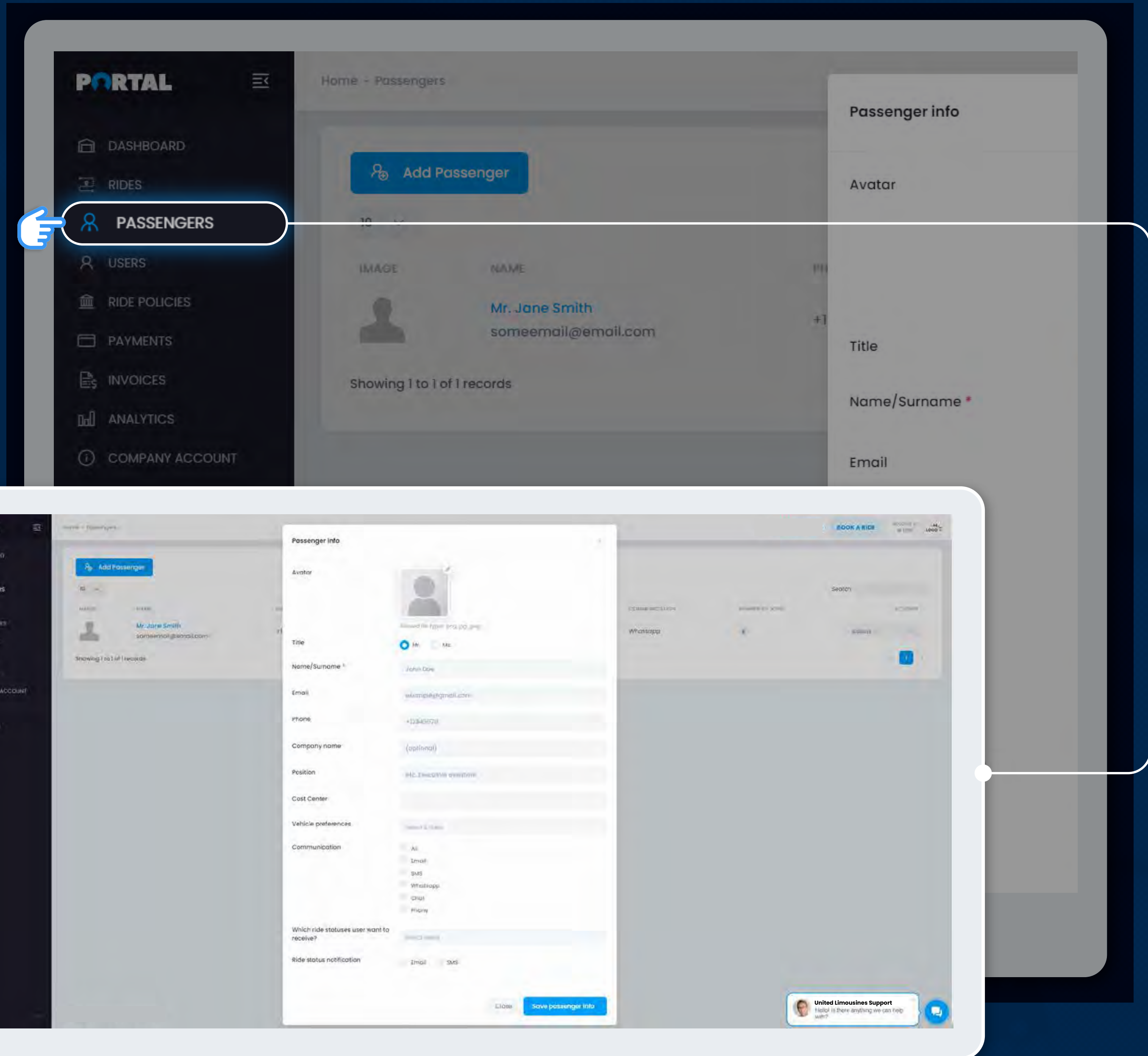
Passengers

In the **Passengers tab**, you can view, edit, add or delete your frequent passengers.

You can add as many passengers as you wish.

Furthermore, you can set specific preferences and ride policies for each passenger, such as:

- Vehicle class;
- Communication channel;
- Ride status notifications
(which ones are to be sent and via which channel);
- Cost center
(in case your company has multiple cost centers);



Users

In the **Users tab**, you can view, edit, add or delete users. If you need to add a new user to your account, click the **Add User button** at the top of the page.

Enter the new user's information and choose a role:

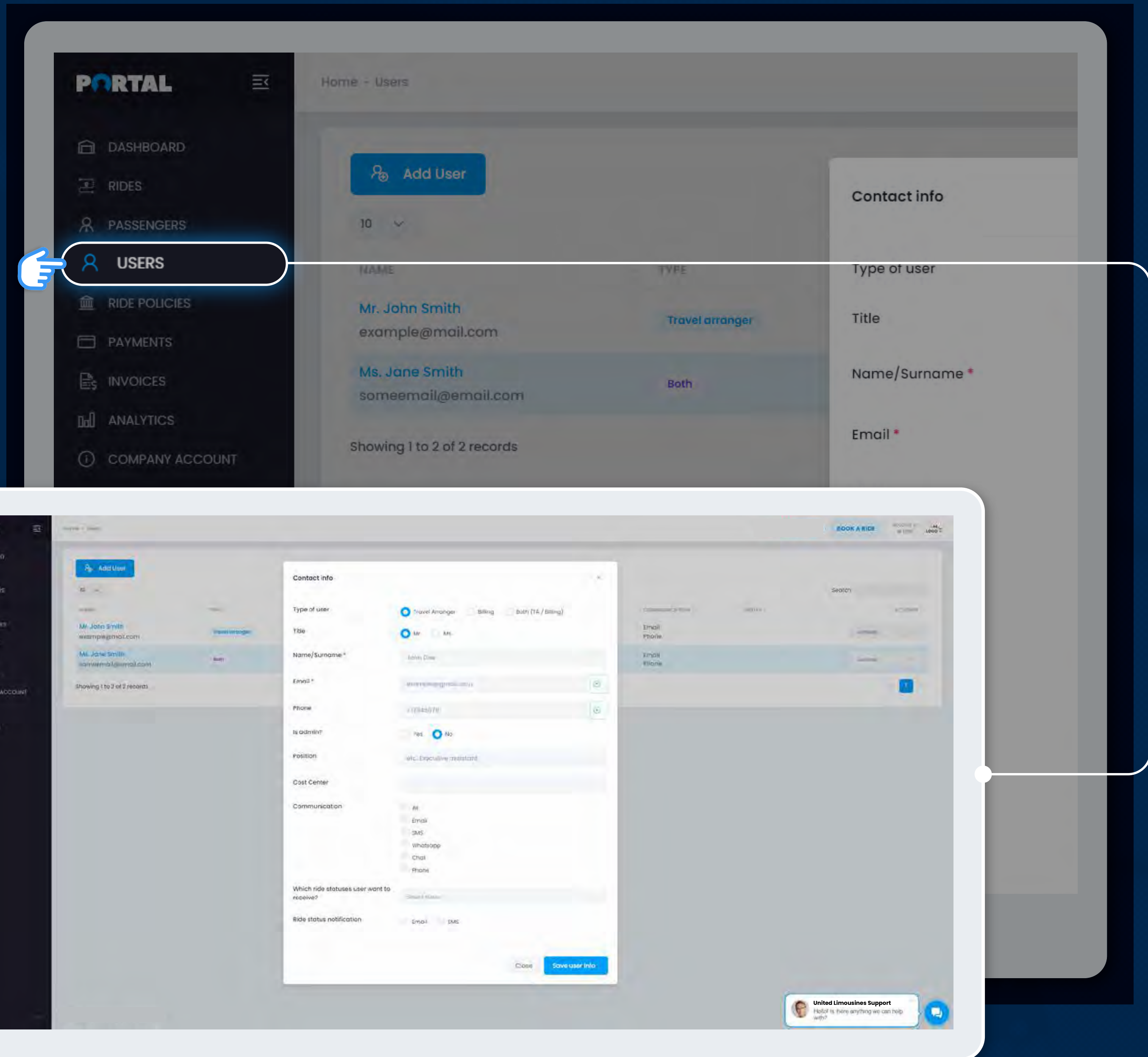
- A **Travel arranger** can book for themselves and others and have no access to billing information.
- A **Billing** user can only work in the Invoices and Payments section of the account.
- A user who has **Both** checked can manage both bookings and billing sections.

You can also choose access allowances / limitations:

- An **Admin** has full access to all information in the Portal and can add or delete other users.
- A User who is not an Admin can only access their profile, rides booked by them and cannot change any Company details.

To edit an existing user's information, click on the user's name in the list to open the details and you are free to edit the data.

Additionally, you can click the **Actions button** and edit the profile or delete the user from the account.



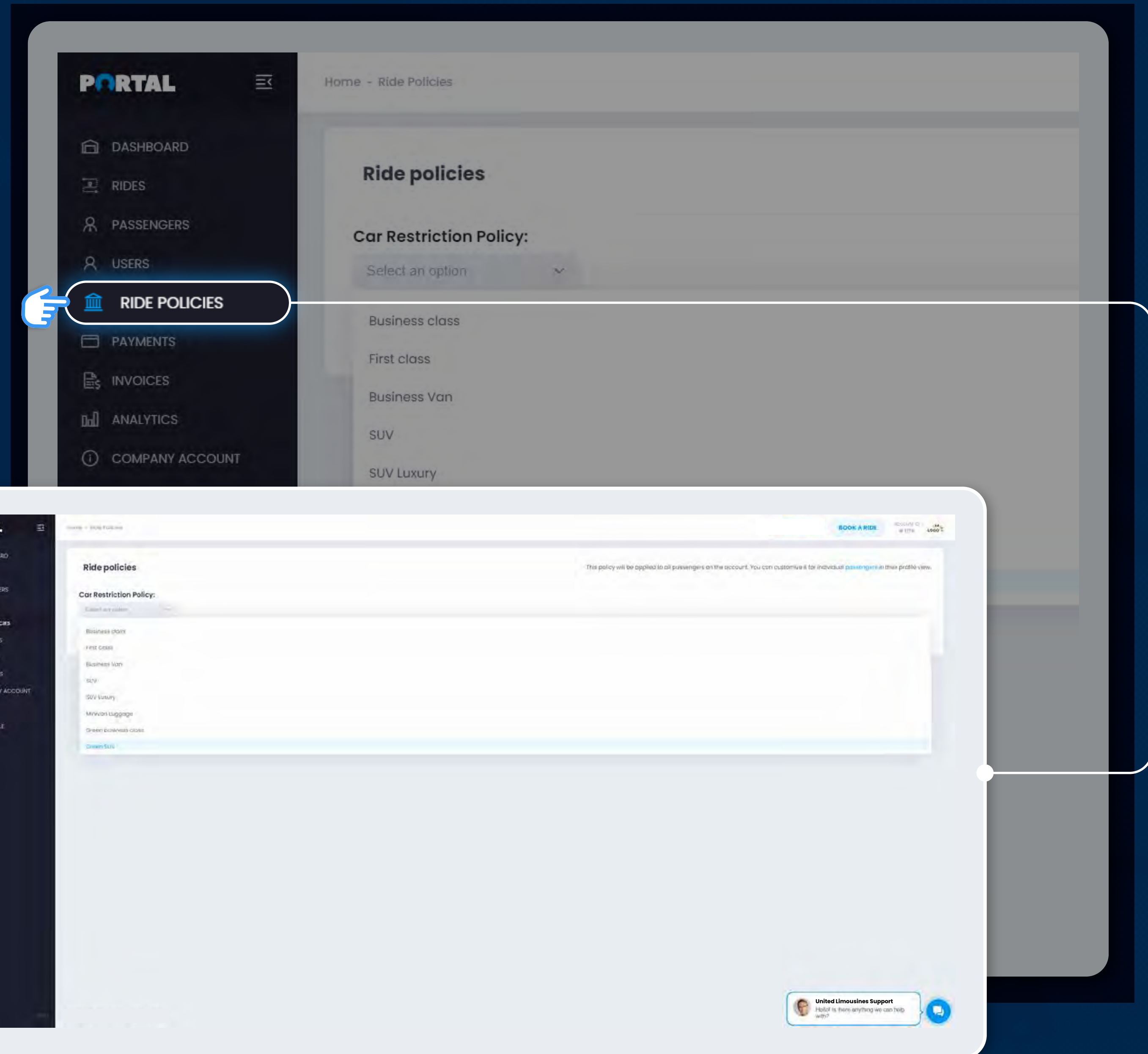
Ride policies

In the **Ride policies tab**, you can set rules that apply to all Users and Passengers.

Currently, the only available option is Car restriction policy which allows you to restrict certain classes of vehicles.

This policy will be applied to all passengers on the account.

You can customize it for each passenger in their profile view.



Payments

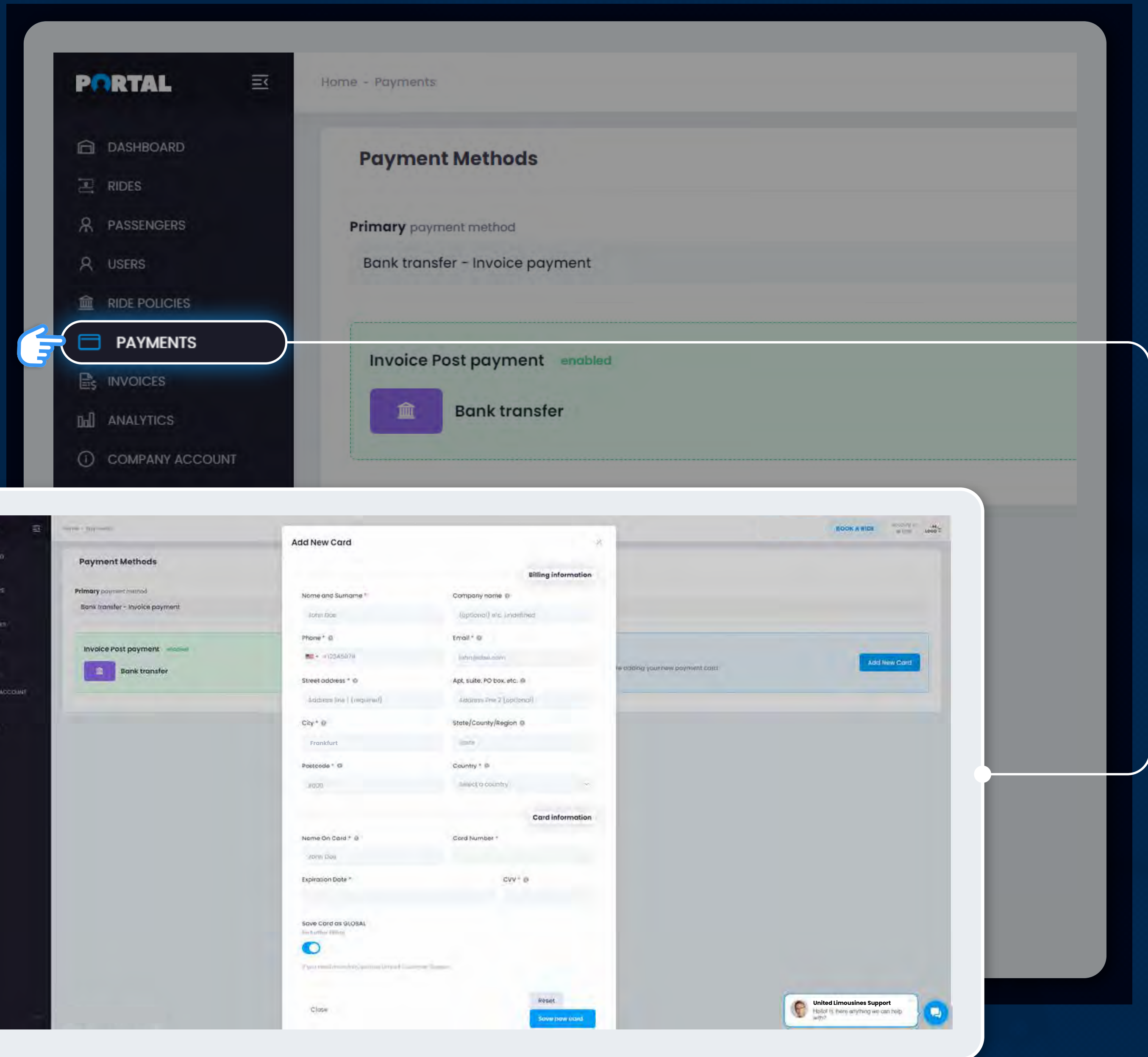
In the **Payments tab**, you can view, add or remove your payment methods for the selected account in the header.

Depending on the payment terms you have agreed with United Limousines, this tab can appear in two forms:

- **Credit Card prepayment** - you will be asked to enter your credit card details.
- **Invoice Post-Service payment** - no edit is required from your side, as the United Limousines team has already set this payment option for your account.

In case you are adding multiple payment methods (credit cards), you will be asked to set one as the **Primary Payment Method**.

This card will be offered as a default one upon making a new booking. Other cards will have a Backup status and can also be chosen upon booking a new ride.



Invoices

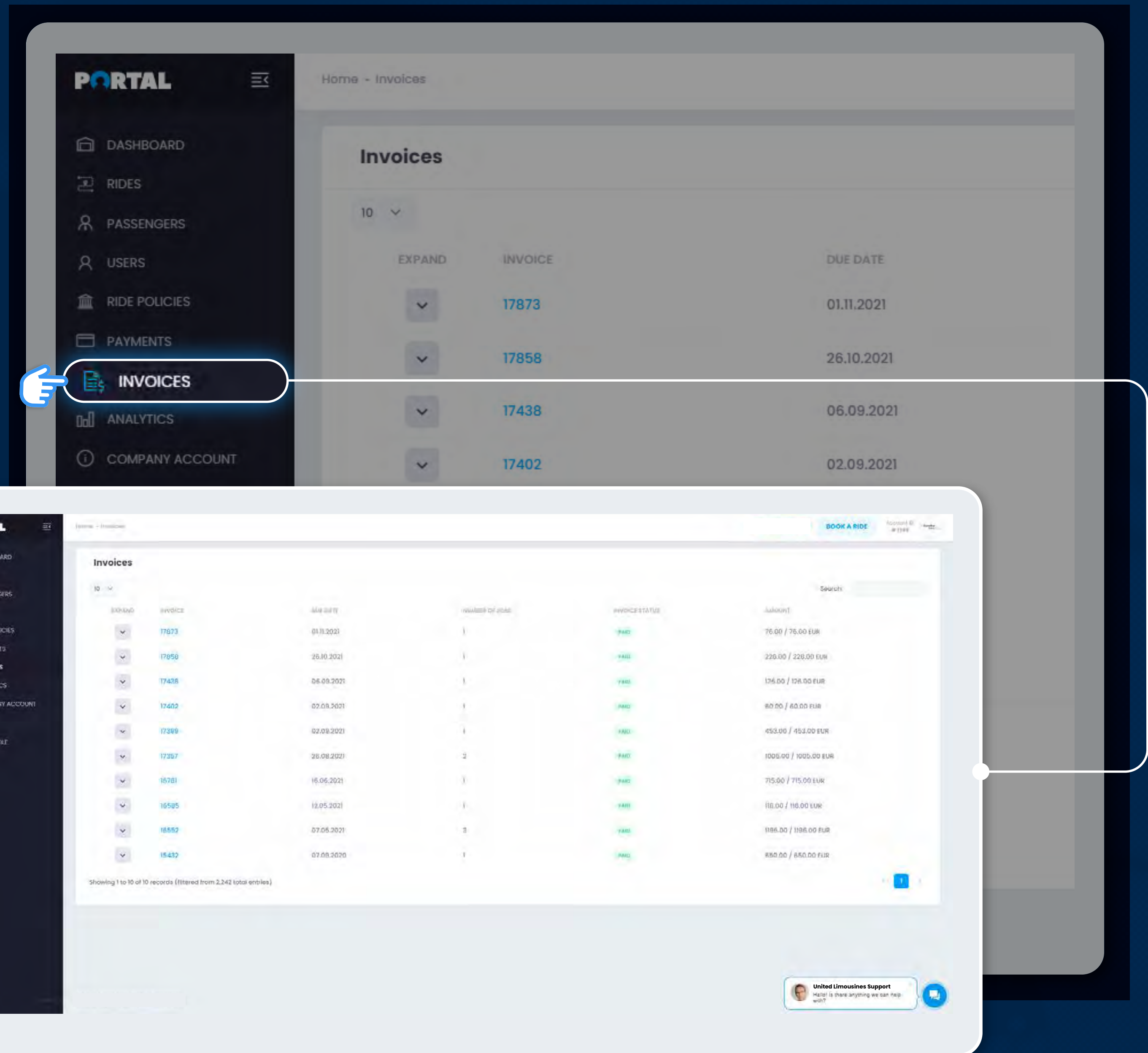
In the **Invoices tab**, you can view and download your invoices.

The invoices are listed in descending order, from the latest one, but you can search them based on the invoice number or keyword in the **Search** field.

In the invoices preview, you can also see how many bookings were paid by that invoice.

If you click the arrow in the **Expand** column, you will see the exact rides on that invoice and their shortened details.

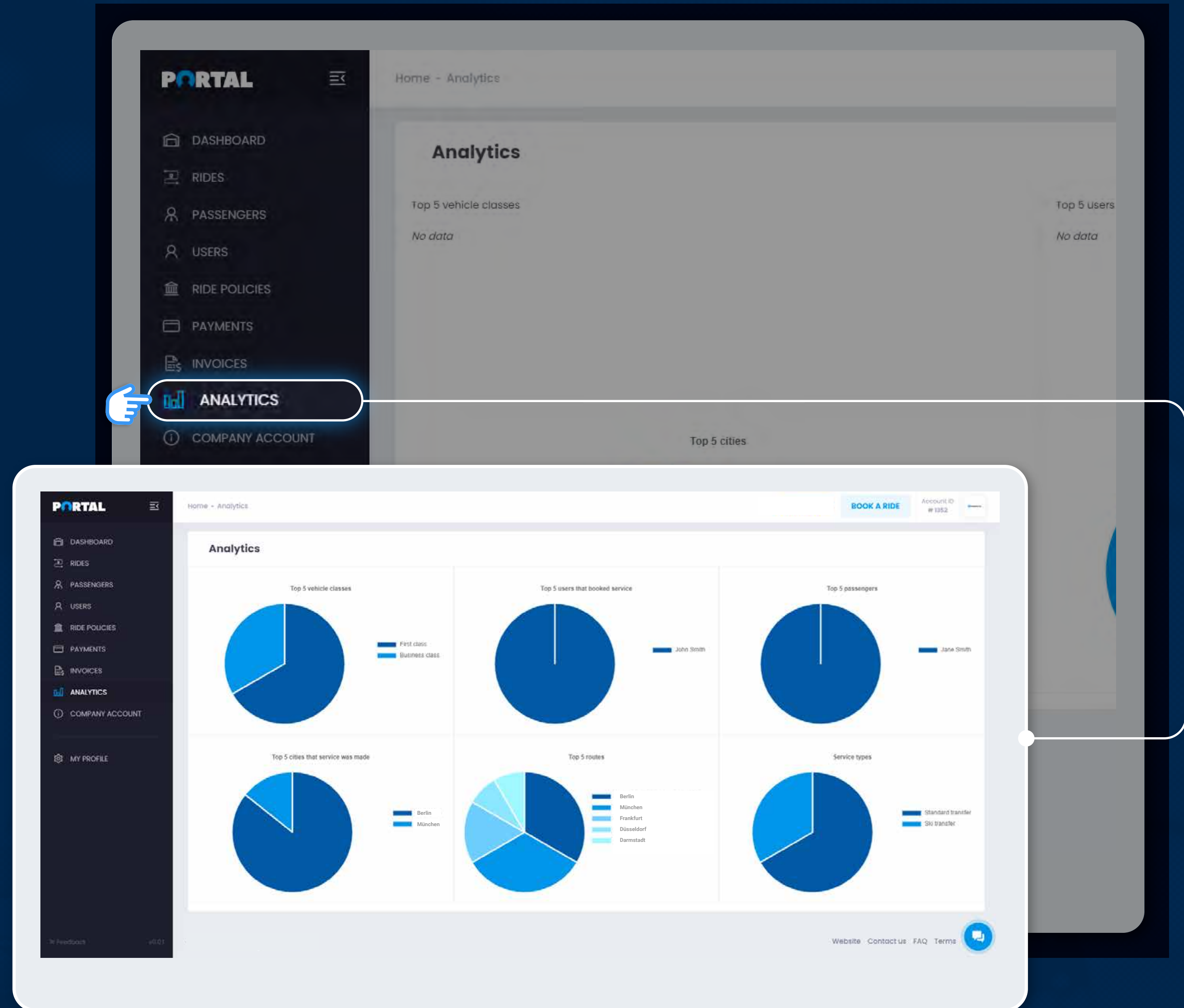
If you wish to download a **PDF file** of a certain invoice, simply click the **Invoice number**. This action will open the document in a separate tab. Then simply download it from your browser.



Analytics

The **Analytics tab** provides you with an overview of the analytical data of your account:

- Top 5 vehicle classes booked
- Top 5 users (bookers)
- Top 5 passengers
- Top 5 cities
- Top 5 routes
- Top service types

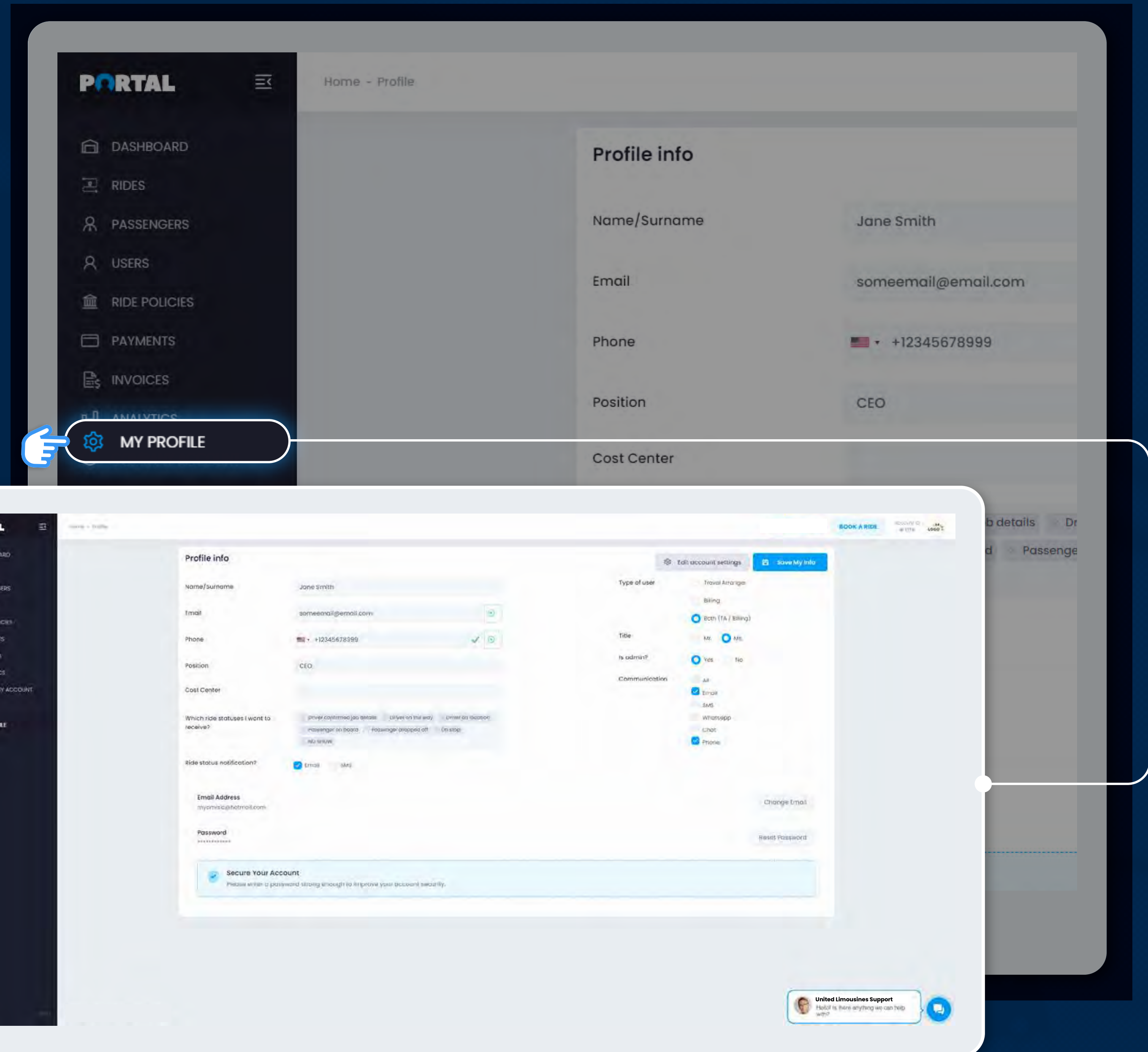


My profile

On this page, you can view and edit your **Profile info**:

- Set your personal information
- Reset your password
- Set your communication preferences
- Set ride status notification preferences

You are also able to add Notes/Instructions that will be sent with each booking you make.

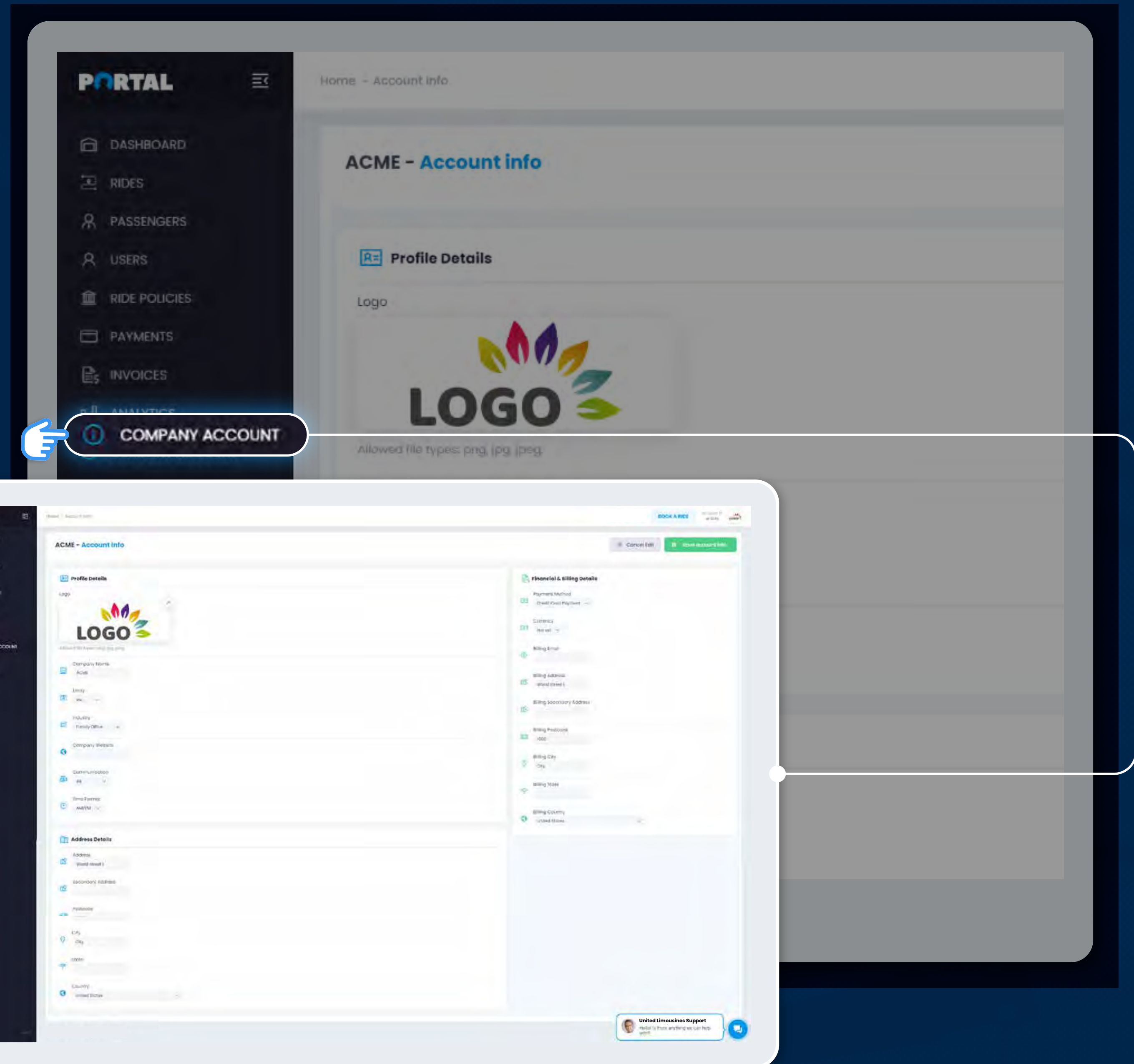


Company account

The Company account tab enables you to view and edit your company data, such as the company legal name and address, the industry your company is in, the overall preferred communication channel(s) with the United Limousines team, the financial and billing address (in case it is different from the company main address), the preferred currency you wish to be billed in, etc.

Some of the data will already be there when you activate your account, having been previously added by the United Limousines team upon creating your account. However, you are free to change or update all fields.

Simply click the **Edit profile** button in the upper right corner and amend or add data as per your preference.



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