

Corporate and Travel Agency Account Setup

Use this procedure to setup any Corporation, School or Travel Agency account.

1. Click Customers on the left side in RideBits
2. Click Corporate accounts
3. On the bottom left, click the New button in blue
4. Fill in the top 4 boxes, don't touch Rate groups or Rate adjustments:
 - a. Name - the name of the company not a person
 - b. Contact name – the name of the primary contact for the account
 - c. Contact phone – the phone number for the primary contact
 - d. Contact email – the email for the primary contact

Now that the corporate account is setup, the next step is to create a customer with payment information and link it to the corporate account.

If you don't already have a quote or reservation for the business, follow these steps:

1. Click Customers on the left side in RideBits
2. Click New customer
3. Fill in the person's name, phone and email that made the reservation
4. Choose the Company account you just created from the list
5. Click Create Customer
6. Click Edit Billing Info
7. Enter the card information, number, security code and expiration

If you already have quotes in the system that the company wants to confirm, then click Link Orders under customer and enter the number of the quote or confirmation number to link them.

Now you can see all of the customer's quotes and confirmations listed under the customer after you linked them. You can now charge the card since the customer with the credit card is linked to the quotes. Make sure you manually change them to order status confirmed and send the confirmation email since the system won't do it automatically like it does on your portal.

Make sure you use business rates anytime it's a corporate account, company, travel agent, school or government. It costs a little more, but it allows us to pay the travel agent 10%, manually remove the tax for schools and government, and offer a more lenient cancellation policy for company accounts of free cancellation for 2 or more hours as long as the driver isn't en route.