Reservations Training 12/14/2022

What are your main responsibilities when working on the phone?

- Make as many sales (reservations) as possible ($10,000 per day minimum as a team, $15,000 is our goal).
- Follow the script always. Text Daniel if a change should be made.
- You can add other information to the promo code box like Apt 123 or Gate Code #1234, so you don't have to remember or write it down.
- Take care of customers the first time, so they don't call again.
- Be fast, but careful not to make mistakes.
- Be professional, don't use profanity or be impatient or rude with customers.
- Answer the phone professionally, "Airport Shuttle, this is _____. We go door to door anywhere in Arizona or Texas 24/7. How can I help you?"

Drivers depend on reservations in order to work, and take care of their families. The company has lots of bills (75%) and also fixed expenses, so if we don't book a lot, we actually lose money and can't grow. That means on a $100 reservation, the company only makes $25 not including vehicle purchases.

Time management is very important when you're on the phone. Try to fix problems and get them off the phone as soon as possible. Customers don't like waiting, and you aren't available for other calls if you're on the phone for too long or talking to people other than customers. **Each call should only take about 3 minutes if someone is actually making a reservation.** Definitely not a good idea to call other phone people, because now two people are unavailable, and calls are being burned.

Text Maggie if you have a question. Most of the time you should be able to solve the problem yourself without relying on a Manager. Managers do not call customers; the only way to reach a manager is via email.

What does <u>Order Status</u> in RideBits mean?

- **Unconfirmed** – just a quote, usually no card unless it's an existing customer
- **Confirmed** – a reservation with a card and the confirmation email sent
- **Canceled** – was confirmed, now canceled and cancellation email sent
- **Completed** – not used

Trip Status is different from Order Status. Drivers modify Trip Status. Reservations normally only makes changes to Order Status. Trip Completed under Trip Status is only when a customer is picked up and dropped off. It's not used for no shows. Canceled trips are not No Shows; no shows should say Confirmed under Order Status and No Show under Trip Status.

Who charges cards?

You, management or anyone on the phone, normally right away when you end the call, especially if it's a last minute booking. Make sure everything looks correct before you charge it to prevent more than one charge. If you don't remember, someone else will charge the card. You want to do it right away, because all shuttle reservations are prepaid and it prevents cancellations, or the awkward situation of them wanting a refund when their card wasn't charged, and we still have to collect the booking fee. **Make sure that the add-ons like No Sharing, Non-Stop, Bags, etc are on both trips if it's a round trip before charging.**

Who is considered management?

Daniel, President and Maggie, Vice President – short text please (661) 448-0515
Oscar, Owner – sometimes helps Daniel and Maggie if on vacation.

Can I work from home?

Not unless Maggie says it's okay. No one else can give you permission. We want to make sure you know what you are doing first (booking a lot without making mistakes), and that there are no attendance problems.

What do I do with the phone when I leave?

Plug it in and turn it off. Otherwise, it will ring all day and night instead of forwarding calls.

How do I clock in and clock out?

Send Maggie (661) 448-0515 a text "clock in 9:03 am" or "clock out 5:21 pm" Maggie is the only person you will talk to about scheduling, hours and attendance.

How do I get paid?

Complete the agreement, W-9 and direct deposit paperwork emailed to you via Hellosign or Dropbox Sign. Takes 5 business days for Wells Fargo to verify the name on your account and 2 days to send your direct deposit, so do it right away, not on the day before payday. Works with any bank. If the routing or account numbers are wrong it will create a 5 day delay in you being paid, so double check the numbers.

What is the pay?

$15 to $17 per hour base plus a sales bonus every two weeks. Pay is every two weeks on Friday at 5 pm. Cutoff is the Sunday before at midnight. Total hours are due to Maggie on Monday morning. The bonus is approximately an additional $5 per hour if you qualify by creating at least $150 per hour in new reservations.

Do I need to do the City of Dallas or PHX driver application?

Yes, it gives us piece of mind since you handle credit card and other confidential information. The City of Dallas or PHX will do your background check.

Do drivers call customers?

Not before their pickup. Customers will receive a call or text from their driver when they land. Drivers cannot confirm, cancel or make changes to reservations. We usually email customers the driver's name and phone number between 5-7pm MST the night before. This is so they can request an ETA or contact the driver if it's an emergency.

Who assigns trips to drivers?

Arizona – Jeff 602-762-2736 (text only please) and Dan 602-762-2737 evenings
Texas – Wayne 602-818-8437 (text only please) and Dan 602-762-2737 evenings

Should you ever call dispatchers?

No, but you can send a text **"3pm pending"** for last minute reservations.

Should you ever call drivers?

No, but you can send the driver a text if their customer calls **"Customer called, please text them your ETA"**. You can also text the customer the driver's name and phone number, so they can contact them directly.

When do you send an Updated Confirmation?

Send updated confirmations when you make changes to dates, times, addresses, phone numbers, prices and emails. Not necessary for flights unless you change the time.

Do you need to ask permission to book anything?

No, definitely not. It doesn't matter what anyone says, book everything unless it's blocked in RideBits. The only way for something to be blocked is if Maggie does it through the software. Local managers are not allowed to block anything. Customers are impatient and won't book on a call back or after being placed on hold. It's better to book it and make changes later if necessary. Don't even think of calling someone to get permission and call the customer back; it doesn't work.

Where do I enter reservations for new customers?

https://airportshuttleofphoenix.com/firstname

Use your portal at the link above. Please do not enter new reservations internally in

RideBits by creating a customer and then a reservation. It creates a big mess, because the ads don't think that the call you just received resulted in a sale.

You book for two companies. Here are the links to their websites.

Airport Shuttle of Phoenix – https://airportshuttleofphoenix.com
Texas Shuttle – https://texasshuttle.com

You can learn a lot just by reading through the website and customer emails.

Where do I make changes to reservations?

Arizona – https://airportshuttlephoenix.ridebitsapp.com/
Texas – https://texasshuttle.ridebitsapp.com/

How do I find reservations?

Calendar – click on Calendar, click All, and ask the customer the pickup date, time and name on the reservation.

Search Box – enter the customer's last name or confirmation number in the top right. If there is an extra space before or after the name or confirmation, it won't work; sometimes happens when you copy and paste.

Reservations – click on Reservations, search reservations, and enter the first and last name. Entering both helps you filter more.

Making a Reservation for an Existing Customer

You can make reservations for existing customers with cards already on file by opening their previous reservation and clicking "copy trip". If it's a return trip, click the return trip box, and it will automatically flip the pickup and drop off addresses. This is the fastest way to make reservations for existing customers. Make sure you send the confirmation email, since the software won't send the confirmation email automatically when you make a reservation internally.

How do I change the date and time?

Click Edit trip details, change the date and time and click update. Be really careful about AM/PM. For example, you change 11 am to 12 and leave it AM, the driver will show up at 12 am midnight, not 12 pm noon.

How do I change the vehicle and number of passengers?

Click Edit trip details, change the number of passengers. If you change the number of passengers, you will also have to change the vehicle type if it doesn't match, update, and apply rates again. Changing the vehicle, changes the price, but it will not update automatically. Make sure you do the same thing to the 2nd trip if this is a round trip.

How do I change the miles?

If you change the address, you can click the arrows in a circle to update the miles if there aren't multiple stops. Otherwise, click Edit trip details, open Google maps to get the correct miles with multiple stops, update, and apply rates again. Make sure you do the same thing to the 2nd trip if this is a round trip.

How do I change the order status?

You can open the reservation and change the order status on the right or click Edit trip details, change the order status and then update.

Anytime you change the order status, make sure you send the correct email. For example, if you copy a reservation for an existing customer, it will automatically say confirmed, but it does not automatically send a confirmation email. If it's just a quote, make sure you change the order status back to unconfirmed.

If you switch from Unconfirmed to Confirmed, make sure you add the card, change the order status to Confirmed, and send a Confirmation email. You can add the card under Billing actions and Add Credit Card. Reservations without a card cannot be confirmed.

Never change Unconfirmed to Canceled, or Confirmed back to Unconfirmed unless the confirmation email was never sent. **The process is always Unconfirmed (just a quote, no card) to Confirmed (an actual reservation) to Canceled, not backwards.**

Completed under order status is not used. Completed under trip status is ok.

How do I change flight information?

Click edit trip details, enter the airline and flight with the correct formatting and click update. Make sure the flight matches what's under verify, and verify the flight. If it doesn't match, click the little box to change the flight and verify again.

Make sure the flight time makes sense with the pickup time.

If it's the wrong flight number or the airline or flight number is missing, please send the Airline or Flight Number is missing email. Check that it wasn't already sent first.

Home Pickups – The airport recommends customers to be there 2 hours before their flight takes off. For trips to the airport it's generally 2 hours plus drive time. You can estimate drive time at 1 minute per mile plus 10 minutes for picking up or dropping off.

Airport Pickups – the pickup time is generally 30 minutes after they land for check bags, 45 minutes for international and 15 minutes for no check bags. People will difficulty walked may need an extra 15 minutes. Drivers should wait outside the airport until the customer is ready to be picked up.

How do I cancel a reservation?

Add a note if no driver was available or customer wasn't picked up with 30 minutes of pickup time. Change the order status to canceled, send the cancellation email to record the date and time they canceled. This gives them the opportunity to request a refund or reschedule when they know their new travel date.

The email and payment history will show if their refund was already processed or the cancellation email was already sent. It's not necessary to send the cancellation email over and over again. If they don't see it, double check that their email is correct at the top of the reservation. If it's correct it's probably in their junk of spam folder.

If this was a round trip, make sure you ask the customer if they wanted to cancel the second trip too. Otherwise, we will send a driver for no reason and the customer will claim they already canceled it.

Remove the driver if assigned. Send the driver a text that they canceled, so they don't try to pick them up. If Arizona, text Jeff and Dan "John's 3 pm

canceled if you have anything else for them to do" If Texas, text Wayne and Dan the same thing.

Customers cannot cancel, change, or make a reservation with a driver. They have to call during office hours or send us an email after hours.

How do customers get a refund?

- Send the cancellation email if you haven't done it already. All they have to do is reply to the email and say "Refund".
- It's free to reschedule using the same reservation as long as the driver isn't en route or already arrived. Payments never expire. Requesting a refund is not free and depends on the date and time the cancellation email was sent.
- Never promise anyone a full refund unless there was no driver available or it's a duplicate reservation.
- COVID and other reasons do not change the cancellation policy.
- In the rare situation that they don't have an email, text Stephy "please refund XYZ123".

How do I refund a customer if Maggie gives you access?

- Open the reservation, look at the date and time the first cancellation email was sent and make sure the refund processed email wasn't already sent, determine the percentage they get back based on the cancellation policy above.
- Copy the payment code from Braintree at the bottom of the reservation, paste it into Braintree after logging in, and search for the payment.
- Click on the payment, look to make sure it hasn't already been refunded.
- Open the calculator on your computer or phone, enter the payment amount and multiply by the percentage they get back.
  - .70 (70% for greater than 48 hours)
  - .60 (60% for between 24 hours and 48 hours)
  - .50 (50% for between 4 hours and 24 hours)
  - No refunds if less than 4 hours or the driver is en-route or arrived.
- For example, more than 48 hours, payment amount is $100 X .70 = $70 refund.
- Click refund and enter the correct amount, then refund them.
- Don't issue a full refund if it's not a duplicate reservation or no driver was available.
- We issue full refunds if it's more than 30 minutes after their pickup time and they

don't get picked up. If they get picked up and the driver was late, there is no refund.

Do local managers ever call customers?

Sometimes to solve a problem or prevent a bad review. The only way for a customer to request a refund is via email. They can also reply to the cancellation email or confirmation if they need to talk with a manager. Email prevents miscommunication. It's okay to give out Jeff, Wayne or Dan's work number if it's a problem you can't solve and it doesn't have anything to do with a refund. Never give out Maggie or Daniel's number.

What is the cancellation policy?

> 48 hours = 70% refund, 30% booking fee
24-48 hours = 60% refund
4-24 hours = 50% refund
< 4 hours, driver is en route or arrived = no refund
Full refunds are only issued on duplicate reservations or no driver available

We have to stick to the cancellation policy that they agreed to when they booked. The full cancellation policy is in the quote email, confirmation email, cancellation email, in the book process online, and on the website.

How do I charge more than one card?

Enter the reservation the normal way, charge the card by going to Billing Actions, Apply Payment, change the amount, and charge the partial amount on the first card.

Then click Customer, edit Billing Info, enter the new card, update, and go back to the reservation, click Billing Actions, Apply Payment, and charge the remaining amount. Repeat if necessary for a third card.

What do I do if someone wants a Taxi?

Ask them if it's going to be more or less than 10 miles. If it's less give them the number for Yellow Cab (480) 888-8888. It will be cheaper on short trips. We do not accept cash. If it's more than 10 miles, just book it the normal way with Taxi pricing. If they think it's too much, tell them all the taxis charge the same amount and quote them shuttle rates if available. Advertising costs a lot, so never refer customers to other companies except in this one situation. You are not an information booth.

What do I do if a customer is using profanity directed at me?

You are allowed to hang up on an abusive customer and block their number. Try to help them first if possible, but don't let them ruin your day or waste huge amounts of time.

Common Errors

Cell Phones

- We want cell phones, not land lines whenever possible. Drivers will text customers on land lines, or call their home when they are at the airport and not know it's the wrong phone number.
- Phone numbers need to be changed under customer and passenger. If you don't change both, the customer will call back, and the driver will be confused.
- Use proper formatting like 480-123-4567 so drivers can call or text customers from the RideBits Go app, not 4801234567, 480 123 4567 or anything else. Phone numbers won't be clickable by drivers if the formatting is incorrect.
- Definitely send an updated confirmation after you update both numbers.

AM/PM

- 12 am is midnight; 12 pm is noon.
- It's very frustrating for drivers and customers when the time is incorrect.
- This is why we verify flights to make sure the pickup time makes sense.
- Pay special attention to trips in the early morning (12 am to 4 am)
- If you change a time from 11 am to 12, make sure you also change AM to PM or it will change the pickup time to 12 am midnight.

Email

- Correct the email under customer and passenger. If you don't change both, the customer will call back. If you double checked that their email is correct, it's probably in their junk or spam folder.
- If the customer doesn't have an email, use airportshuttlephoenix@gmail.com or texasshuttlereservations@gmail.com
- Definitely send an updated confirmation after you update both emails.

Correct Formatting

Capitalize the first letter of words except for emails. **Mary Stevens, not mary stevens**.

Avenue is abbreviated "Ave"	Loop is "Lp"
Road is "Rd"	North is "N"
Street is "St"	South is "S"
Place is "Pl"	West is "W"
Circle is "Cir"	East is "E"

Address

- RideBits will verify addresses for you. You can also search by business name and city in RideBits, or do a Google search to get the address.
- If you change an address later, make sure you type it into Google and search to get the correct address and formatting. Don't assume what the customer is saying is always correct. Wave and Google Maps won't work for drivers if incorrect.
- Sometimes RideBits will change the address by leaving off the street number or the street address completely. This is okay for pricing, just write down the correct address, or put it in the notes, and fix it later.

Flights

- Use the RideBits formatting for airlines. "(AA) American Airlines" not "American".
- Flight numbers are just numbers not letters "1234" or "123" not "WN1234" or BCGD2X.
- Won't verify flights for you or drivers if they are not formatted correctly.
- Flights won't verify in RideBits if it's more than a week.
- Use Google search instead, WN1234, search to get the correct landing time and make sure the pickup time matches. Ridebits is not always reliable.

Pricing

Here is a list of things that change prices. You will have to "Apply Rates" again when you make changes. Send an Updated Confirmation if the price changed.

- **Zip code missing** – won't trigger flat rates, add zip code from Google maps, recalculate miles and apply rates again.
- **Address changed** – miles don't automatically update, click on the arrows in a circle to change, or edit manually for multiple stops after using Google Maps to get total miles. Ridebits doesn't know if a road it closed, so use Google Maps and manually update the miles under trip details, then apply rates again.
- **RideBits error** – door to door not showing, apply rates to fix.
- **Time changed** – extra if between 10 pm and 6 am. More from 12 am to 4 am.
- **Holidays or Special Events** (NASCAR, Superbowl, Spring Training, Christmas)
- **Tip percentage** – minimum 10%, if they want to tip cash, they can do 10% and give extra. Normal tip is 15%. Can't remove it or driver pay would be too low.
- **Tax percentage** – don't remove, not a sales tax. Not included in driver pay. Represents other taxes, airport tolls and regulatory fees.
- **Add-ons** – you can add No Sharing or Non-Stop if the customer wants a guarantee. 95% of our trips are no sharing and non-stop.
- **Discounts** – everyone that books a round trip gets 10% off.
- **Promo Codes** – The only promo codes that create discounts are for unique situations like
  - "REBOOK" for people that already received a refund and decided to rebook.
  - "5STAR" for people who did the 4 positive reviews only.
  - Both of them give the customer an extra 10% which is a total of 20% off.
  - ONLINE and NEWCUSTOMER are expired promo codes.
  - NONSTOP gives people a free non-stop upgrade on their first trip. Don't add the non-stop option, just type free non-stop in the notes.