DISPATCH GUIDE

# Adding & Managing Trips

A trip is a ride booked for a rider. Dispatch can book new trips and cancel existing ones from the Trips screen. This guide shows how to book an anonymous trip, add a return trip, edit an existing trip, and cancel a trip.

| ROLE | WHERE | COVERS |
| --- | --- | --- |
| Dispatch | Trips › Add Order | Book · Edit · Cancel |

## 1. Open the New Trip screen

**Step 1.** Make sure your role is set to **Dispatch** using the **Role** drop-down at the top left of the screen.

**Step 2.** In the left-side menu, select **Trips**.

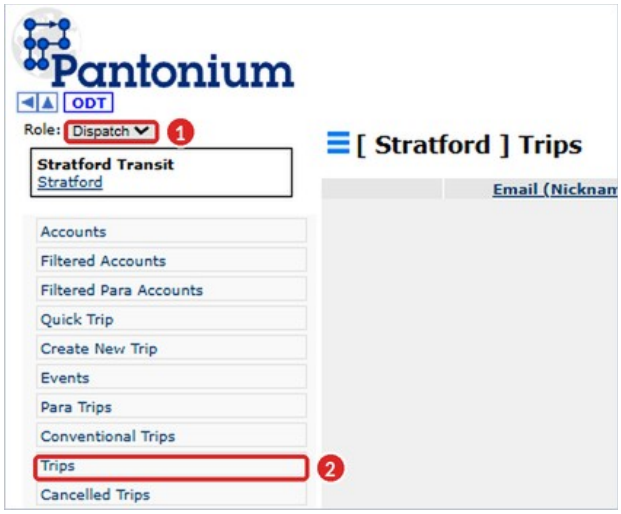



**Figure 1:** *Select the Dispatch role (1), then Trips in the left menu (2)*

**Step 3.** Click **Add Order** at the top right of the Trips screen.




**Figure 2:** *The Add Order button on the Trips screen*

## 2. Choose who the trip is for

The **New Trip** screen opens. Choose one of the options below.

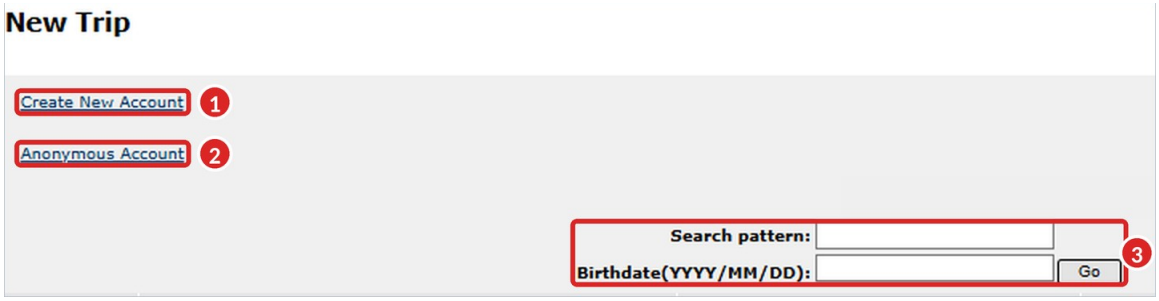



**Figure 3:** *Options on the New Trip screen*

| # | Option | What it does |
|---|---|---|
| 1 | **Create New Account** | Creates a new rider account first, then books the trip for that rider. |
| 2 | **Anonymous Account** | Books a trip without a rider account. This is the option covered in this guide. |
| 3 | **Search pattern** | Finds an existing rider by email, username, nickname, account ID, external ID or birth date, so you can book the trip on their account. |

> NOTE To learn how to create a rider account, see the **Adding & Managing Riders** guide. That process is not repeated here.

## 3. Book an anonymous trip

### Nickname and requested time

**Step 1.** Click **Anonymous Account**.

**Step 2.** Optional: enter a **Nickname** to tell this trip apart from others in the system. If left blank, the trip is saved as an anonymous trip.

**Step 3.** Click **Requested Time** to open the Request Time window.




**Figure 4:** *Nickname (1) and Requested Time (2)*

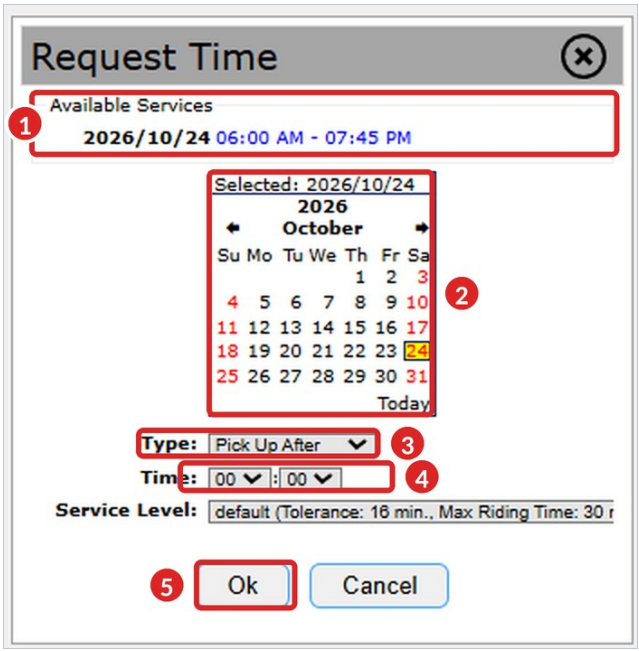



**Figure 5:** *The Request Time window*

| # | Field | What to do |
|---|---|---|
| 1 | **Available Services** | Shows the service hours for the selected date. Book within these hours. |
| 2 | **Date** | Select the date of the trip on the calendar. |
| 3 | **Type** | Choose how the time is used, e.g. Pick Up After. |
| 4 | **Time** | Select the hour and minutes of the trip. |
| 5 | **Ok** | Click Ok to return to the New Trip screen. |

## Trip details

After the requested time is set, the rest of the trip form appears.

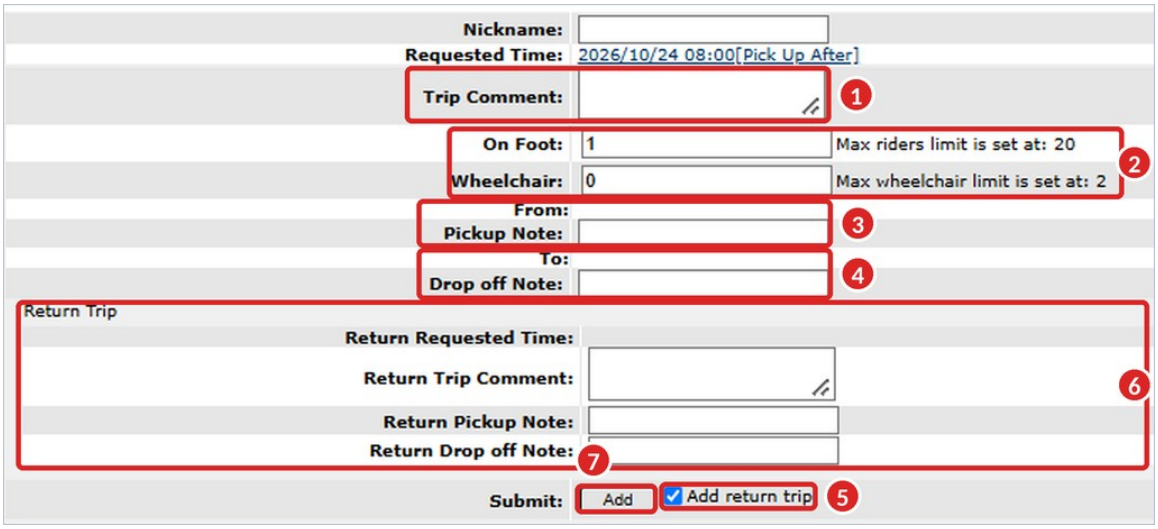



**Figure 6:** *Completing the trip details*

| # | Field | What to do |
|---|---|---|
| 1 | **Trip Comment** | Optional. A comment shown on the driver's tablet when the driver picks up the rider. |
| 2 | **On Foot / Wheelchair** | Enter the number of riders travelling on foot and in a wheelchair. The maximum allowed is shown beside each field. |
| 3 | **From / Pickup Note** *required* | **From** – click to choose the pickup stop (see below). **Pickup Note** – optional, shown to the driver at the pickup stop. |
| 4 | **To / Drop off Note** *required* | **To** – click to choose the drop-off stop. **Drop off Note** – optional, shown to the driver at the drop-off stop. |
| 5 | **Add return trip** | Optional. Tick to book a return trip for the same rider at the same time. |
| 6 | **Return Trip** | Set the Return Requested Time and, if needed, a Return Trip Comment, Return Pickup Note and Return Drop off Note. |
| 7 | **Add** | Click Add once all details are complete. |

> NOTE **Return trip:** takes the rider back to where they started. For example, if the trip is booked from Stop A to Stop B, the return trip is from Stop B to Stop A.

## Choose the pickup and drop-off stops

Clicking **From** or **To** opens the **Choose Stop** window.

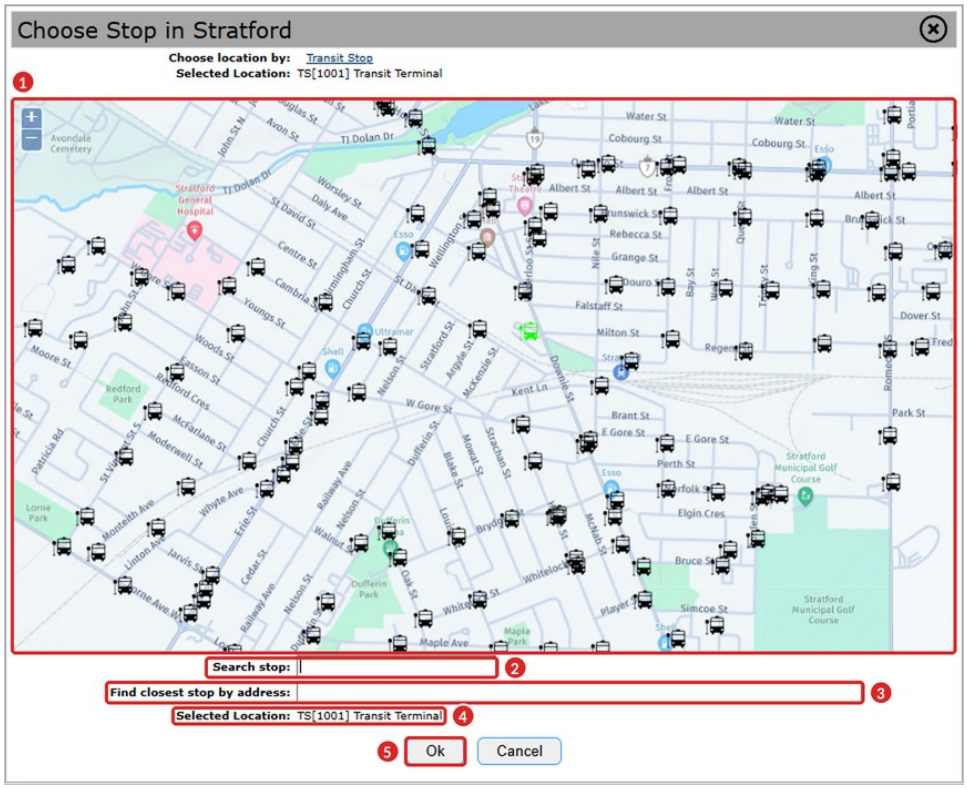



**Figure 7:** *The Choose Stop window*

| # | Field | What to do |
|---|---|---|
| 1 | **Map** | Click a stop on the map to select it. Use + and – to zoom. |
| 2 | **Search stop** | Or type the stop name to find it. |
| 3 | **Find closest stop by address** | Or enter an address to find the nearest stop. |
| 4 | **Selected Location** | Check that the correct stop is shown here. |
| 5 | **Ok** | Click Ok to return to the New Trip screen. |

**Step 4.** Repeat for the other stop, then click **Add**.

> **TIP** The new trip is added on the selected date. To see it on the **Trips** screen, select that date on the calendar in the left menu.

# 4. Edit an existing trip

Use this process to change a trip's date, time, pickup or drop-off location, number of riders, or comments. A trip can only be edited once it has been unassigned from its journey.

## Unassign the trip

**Step 1.** In the left-side menu, select **Trips**. To find a specific trip, search for the rider's email or username using the search box at the top right of the screen.

**Step 2.** Click the ▼ arrow next to the trip number, then select **Unassign Trip**. This removes the trip from the journey (vehicle) it was assigned to.




**Figure 8:** *Open the drop-down arrow (1), then select Unassign Trip (2)*

**Step 3.** The trip row turns **yellow** and its status changes from **Assigned** to **Not Assigned**.

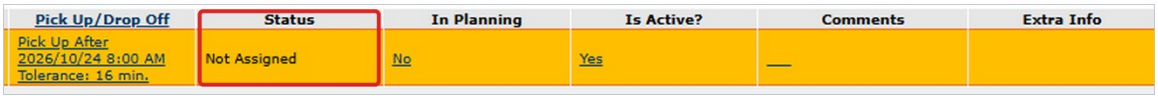



**Figure 9:** *An unassigned trip, highlighted in yellow*

## Edit the trip details

**Step 4.** **Double-click** the detail you want to change, enter the new value, then click the green tick to save (or the red cross to cancel).

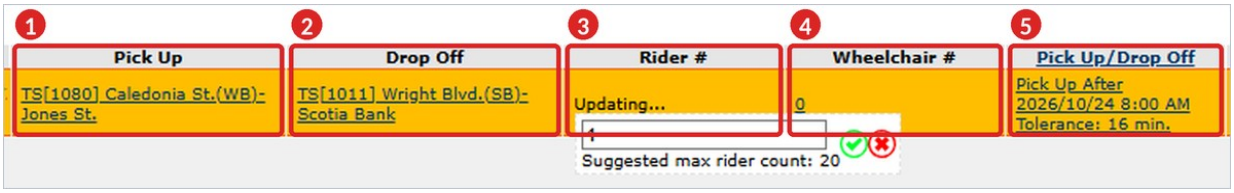



**Figure 10:** *Editable trip details (1–5)*

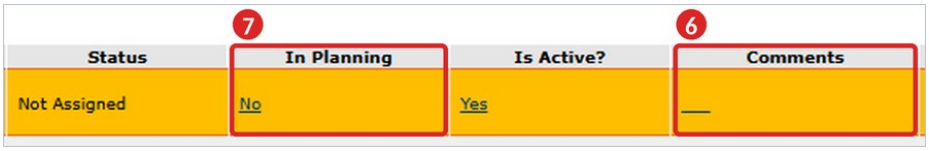



**Figure 11:** *Comments (6) and In Planning (7)*

| # | Field | What to do |
|---|---|---|
| 1 | **Pick Up** | Change the pickup stop. |
| 2 | **Drop Off** | Change the drop-off stop. |
| 3 | **Rider #** | Change the number of riders. The suggested maximum is shown below the field. |
| 4 | **Wheelchair #** | Change the number of wheelchair riders. |
| 5 | **Pick Up/Drop Off** | Change the trip date and time. |
| 6 | **Comments** | Add or change the trip comment. |
| 7 | **In Planning** | Set back to Yes after editing – see the next step. |

## Put the trip back in planning

**Step 5.** After editing, double-click **No** under **In Planning** and change the drop-down to **Yes**.

> **IMPORTANT** Always put an edited trip back in planning. Until **In Planning** is set to **Yes**, the planner will not assign the trip to a vehicle.

Once the planner assigns the trip to a journey, the yellow highlight is removed.

## 5. Cancel a trip

There are several ways to cancel a trip. The quickest is from the Trips screen:

**Step 1.** In the left-side menu, select **Trips** and find the trip you want to cancel.

**Step 2.** Click the ▼ arrow next to the trip number, then select **Cancel Trip**.




**Figure 12:** *Open the drop-down arrow (1), then select Cancel Trip (2)*

**Step 3.** A confirmation message appears. Click **Ok**.

**Step 4.** In the **Cancel Trip** window, enter a reason for the cancellation and click **Ok**.

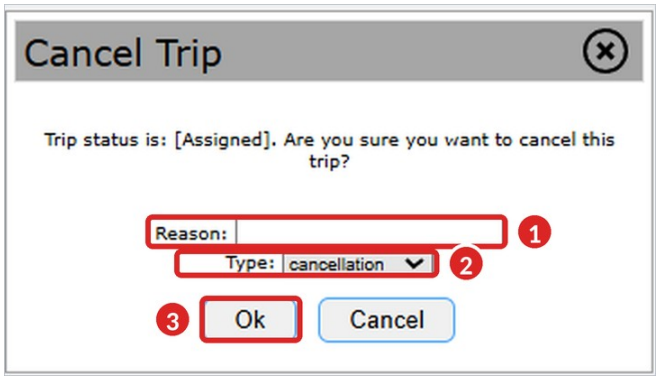



**Figure 13:** *The Cancel Trip window*

| # | Field | What to do |
|---|---|---|
| 1 | **Reason** *required* | Enter why the trip is being cancelled. |
| 2 | **Type** | Select the cancellation type (default: cancellation). |
| 3 | **Ok** | Click Ok. The trip is cancelled. |

Cancelled trips are listed on the **Cancelled Trips** screen, in the left-side menu.




**Figure 14:** *Cancelled Trips in the left menu*