DISPATCH GUIDE

Manual Assignment

Manual assignment lets Dispatch place a trip on a specific journey – for example when an unserved, late or VIP rider must meet a schedule, or must travel with a specific driver or vehicle. Because this overrides the Everrun Planner's optimization, a few preparation steps are needed first.

ROLE	WHERE	COVERS
Dispatch	Trips · Journeys · Manual Assignment	Prepare · Assign · Re-plan

The process at a glance:

1. Take the **trip** out of planning.
2. Take the **journey** out of planning.
3. Assign the trip to the journey on the **Manual Assignment** screen.
4. Put the journey back in planning once the new pickup stop is locked.

1. Take the trip out of planning

Step 1. Go to the **Trips** screen and find the trip you want to assign manually.

Step 2. Click the ▼ arrow next to the trip number and select **Unassign Trip**.

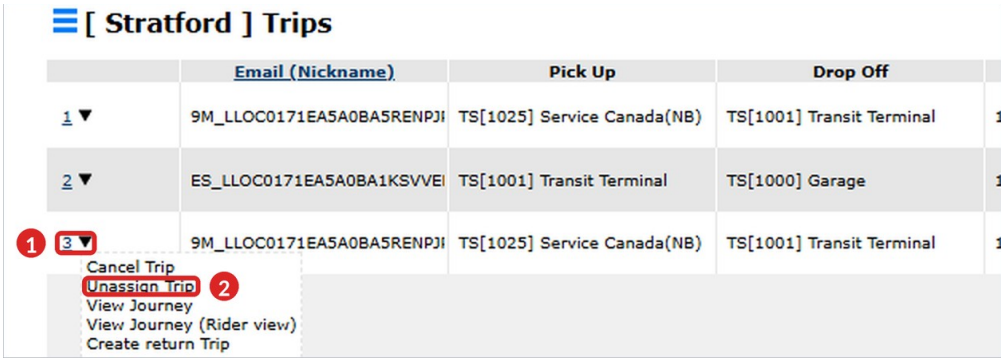


Figure 1: *Open the drop-down arrow (1), then select Unassign Trip (2)*

Step 3. Click **Ok** on both confirmation messages.

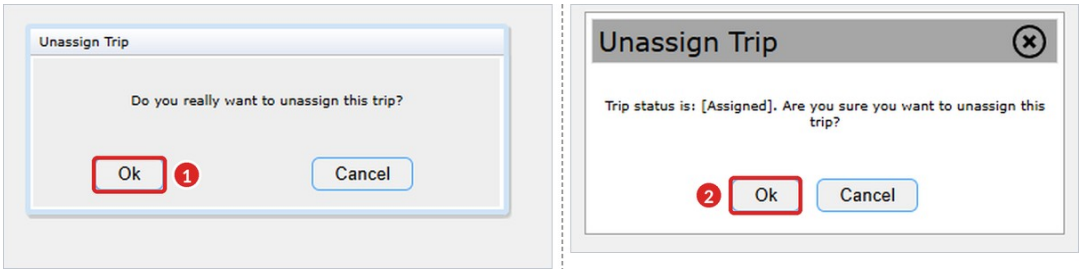


Figure 2: *Click Ok on the first (1) and second (2) confirmation*

Step 4. The trip row turns **yellow**. Its Status changes to **Not Assigned** and In Planning to **No**.

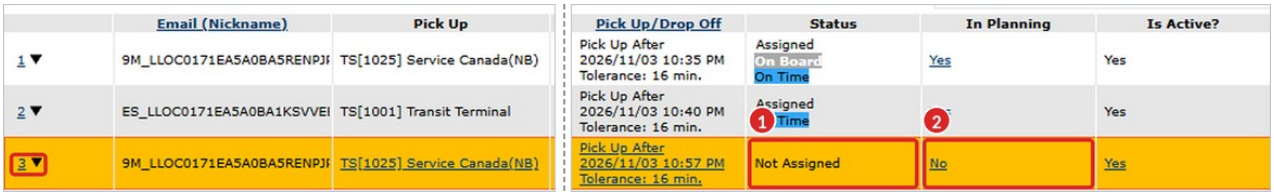


Figure 3: *The unassigned trip – Not Assigned (1) and out of planning (2)*

> **TIP** The trip drop-down is also available on other screens in Everrun. Use whichever is quickest for you.

2. Take the journey out of planning

A journey that is out of planning gets no new or rescheduled trips from the planner, but the driver still completes its current trips and any trips you assign manually. You can put it back in planning later.

Step 1. Go to the **Journeys** screen. Click the ▼ arrow next to the journey number and select **Out of Planning**.



Figure 4: *Open the drop-down arrow (1), then select Out of Planning (2)*

Step 2. A confirmation message explains that the journey and its trips will be taken out of planning. Trips already on the journey keep their current assignment. Click **Ok**.

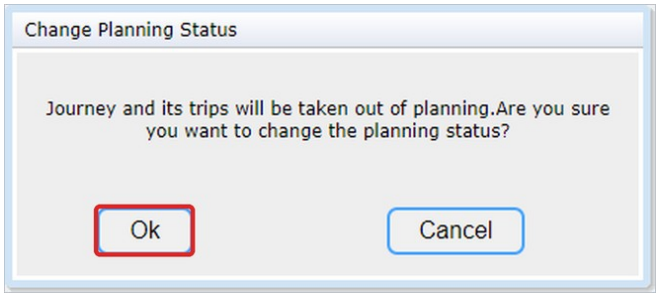


Figure 5: *The Change Planning Status confirmation*

Step 3. The journey row turns **yellow** and In Planning shows **No**.

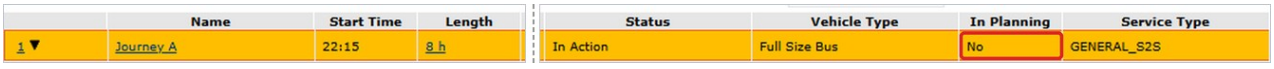


Figure 6: *An out-of-planning journey*

3. Assign the trip to the journey

Step 1. Select **Manual Assignment** in the left-side menu.

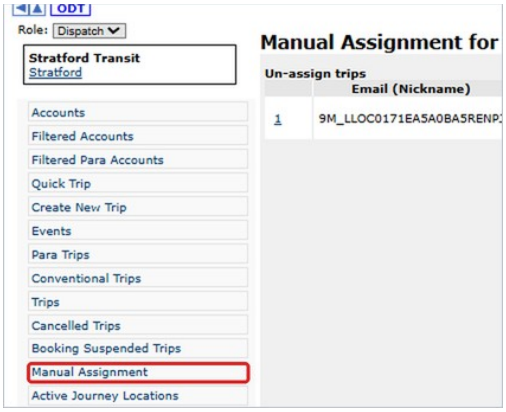


Figure 7: *Manual Assignment in the left menu*

Step 2. Under **Un-assign trips**, click the **number** of the trip you took out of planning.

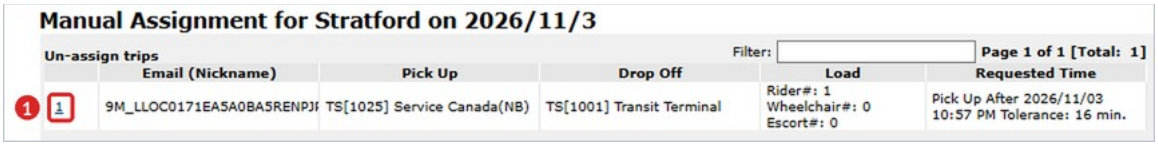


Figure 8: *Click the trip number (1)*

Step 3. The trip turns blue, and **Available Journeys** lists the out-of-planning journeys that can take it. Click the **number** of the journey you want.

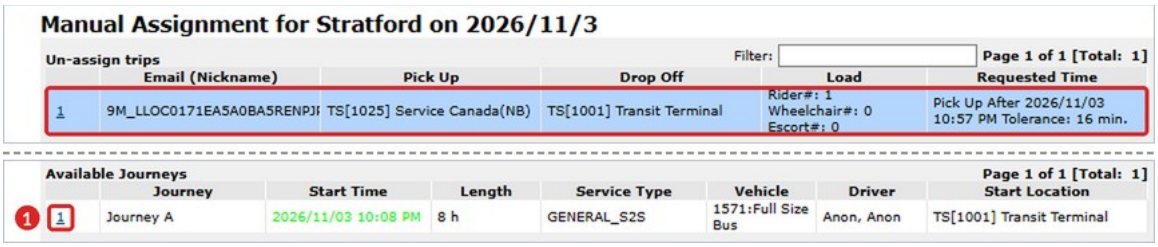


Figure 9: *The selected trip (top) and the journey to click (1)*

> **NOTE** Address, POI and PARA trips can only be assigned to journeys of a matching type, so only those journeys are listed.

Step 4. The right side of the screen shows the journey's details and its list of stops. The new trip's pickup and drop-off stops are highlighted at the end of the list.

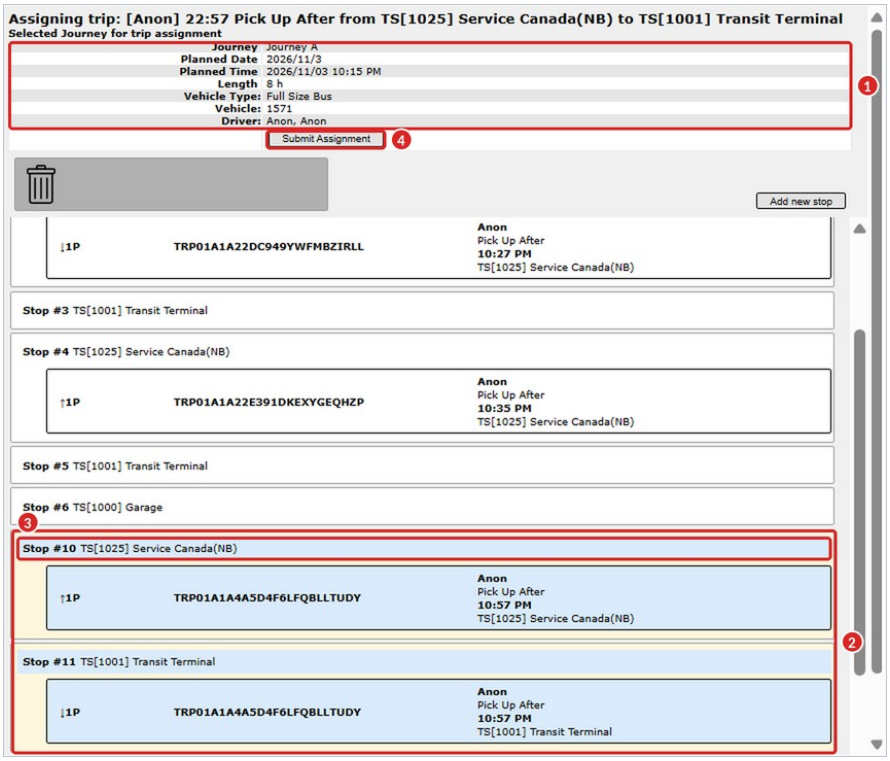


Figure 10: *The selected journey and its stops*

#	Field	What to do
1	**Journey details**	Check that this is the right journey, vehicle and driver.
2	**New trip's stops**	The pickup (↑) and drop-off (↓) stops for the trip you are assigning, highlighted in yellow.
3	**Stop header**	Click and hold the blue header of a stop, then drag it up or down to change its position.
4	**Submit Assignment**	Click once the stops are in the right order.

IMPORTANT **Locked stops:** when the driver is en route to a stop (Stop A), that stop and the one after it (Stop B) become **locked**. Locked stops cannot be moved in Manual Assignment, so place the new trip's stops after them.

This keeps the driver's immediate route from changing while they are driving, in line with driving laws.

Step 5. Drag the new **pickup** stop, then the new **drop-off** stop, to the positions where the vehicle should serve them. The pickup must come before the drop-off.

Step 6. Click **Submit Assignment**, then **Ok** on the confirmation message.

TIP To assign more trips, repeat steps 2–6 for each one.

> **NOTE** Always check where the trip was placed: open the journey from the **Journeys** screen and confirm the pickup and drop-off stops.

4. Put the journey back in planning

Once the trip is assigned, the journey can go back in planning – but only after the new pickup stop is locked.

> **IMPORTANT** A journey's **next two upcoming stops are locked** and cannot be moved. If you put the journey back in planning before the manually assigned pickup stop is locked, the planner may move the trip to another journey.

Step 1. Watch the journey until the manually assigned pickup stop becomes one of its next two stops.

Step 2. On the **Journeys** screen, click the ▼ arrow next to the journey number and select **Set in Planning**.

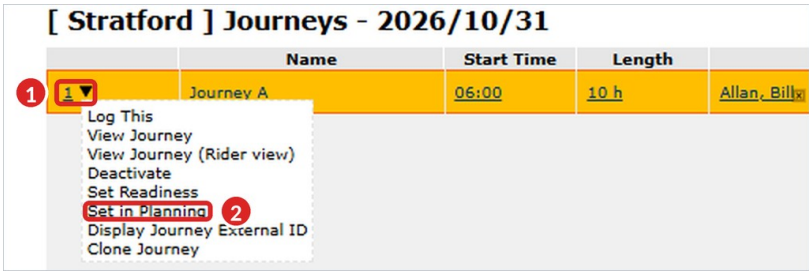


Figure 11: *Open the drop-down arrow (1), then select Set in Planning (2)*

> **NOTE** **Example:** the journey is at stop 1 and you added the manually assigned pickup as stop 4. Wait until the vehicle is en route to stop 3 – stop 4 is then locked – before putting the journey back in planning.

After the journey is back in planning, the planner may change the order of later (unlocked) stops to keep plans efficient.

5. Key points to remember

- A journey that is out of planning **will not** receive new trips from the planner.
- When an in-planning journey with trips is taken out of planning:
  - its trips stay on the journey and also count as out of planning, so the planner will not move them to other journeys;
  - the Driver app and Rider app carry on as usual;
  - it stays out of planning until Dispatch puts it back in planning.
- When the journey is put back in planning, all its trips go back in planning too. Unlocked trips may then be moved, for example by the Global Optimization feature.