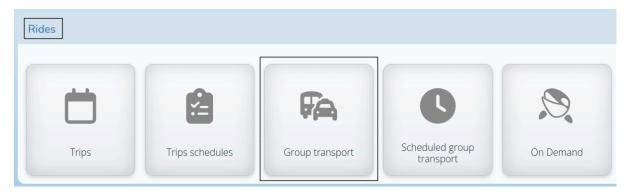
Group transport manual

Create group transport
Trip information
Asset location
Add relation
Individual transports
Import relations
Memos & notes
<u>Products</u>
<u>Attachments</u>
Finish booking
Group transport trip overview
<u>Filters</u>
Active filters
Print current list
Edit existing trip
Trip information
Asset location
<u>Individual transports</u>
Add relation
Import relations
Paired company
Memos & notes
<u>Products</u>
Schedule booking
<u>Attachments</u>
Review existing rides
Generate invoice
Finish booking
View booking history
Create similar booking
Group transport schedules
<u>Filters</u>
Planning list

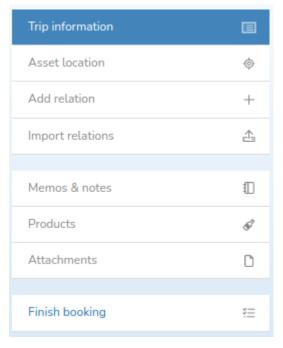


On the T-Agenda dashboard, click on the "Group transport" tile.

The overview of current trips appears.

Create group transport

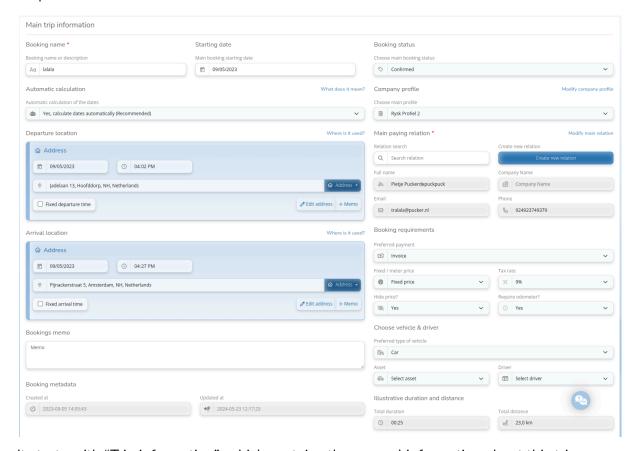
Click on the button "+ Create group transport". The "Create group transport" form appears.



On the left you will see the different categories of information that can be entered about this group trip.



Trip information



It starts with "Trip information", which contains the general information about this trip.

Booking name: Give the group trip a name.

Starting date: When does this trip start?

Automatic calculation: By default, the dates and times are calculated automatically. This is also recommended. But it is possible to do this manually. Then select "No, I will set dates manually".

Departure location: From where does the trip start?

Date of departure: Choose the date when the trip starts.

Departure time: Choose the time when the trip starts.

Fill-in location: On the right, change "Address" to "Trainstation" or "Airport" when necessary. Fill in the flight number if it is an airport. Type part of the address until the correct suggestion appears, then click it.

Fixed departure time: Place a checkmark here if it is a fixed departure time.

Departure memo: Remarks or comments about the departure location.

Arrival location: Where does the trip end?

Fill-in location: On the right, change "Address" to "Trainstation" or "Airport" when necessary. Fill in the flight number if it is an airport. Type part of the address until the



correct suggestion appears, then click it. The arrival date and time are calculated automatically if you have not changed this option previously.

Fixed arrival time: Place a checkmark here if it is a fixed arrival time.

Arrival memo: Remarks or comments about the arrival location.

Booking memo: Comments about this trip.

Booking status: Choose the status in which this trip is created.

Company profile: Choose the company profile, which is used to create invoices.

Main paying relation: Who is going to pay for this trip?

Search relation: Type part of the name of the relation and click the appropriate suggestion. The fields "Full name", "Company name", "Email" and "Phone" are filled in. If relation information needs to be changed, you must do this in the 'Relations' component.

Booking requirements: What are the requirements of this trip?

Preferred payment: What is the preferred payment? Cash, credit/debit card or invoice.

Fixed / meter price: Is the price fixed or on the meter?

Tax rate: What is the tax rate?

Hide price: Should the price be hidden?

Require odometer: Is the odometer required?

Choose vehicle & driver: What is the preferred type of vehicle, the driver and the vehicle?

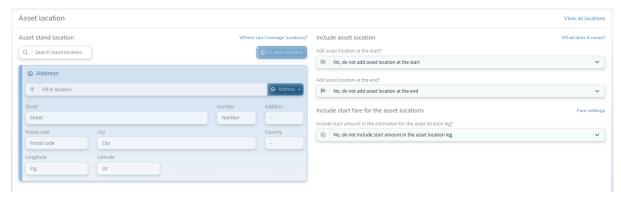
Preferred type of vehicle: Choose the type of vehicle, car, bus or touringcar.

Asset: Select the vehicle.

Driver: Choose the driver.

Illustrative duration and distance: What is the estimated duration and distance of the trip? This data is calculated.

Asset location



Search stand location: Type part of the stand location until the correct suggestion appears. Then click here.



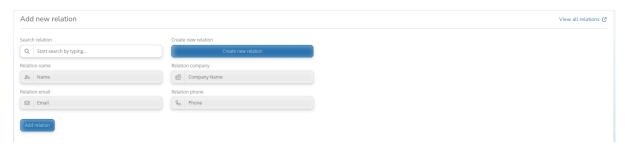
Or use the "Use asset location data" button to use the stand location of the selected vehicle.

Add asset location at the start?: Do you want to add the vehicle's stand location at the start of the trip? Choose this here.

Add asset location at the end?: Do you want to add the vehicle's stand location at the end of the trip? Choose this here.

Include start fare for the asset location: Do you want to add the start fare to the vehicle location trip, then choose "Yes, add start amount in the asset location leg".

Add relation

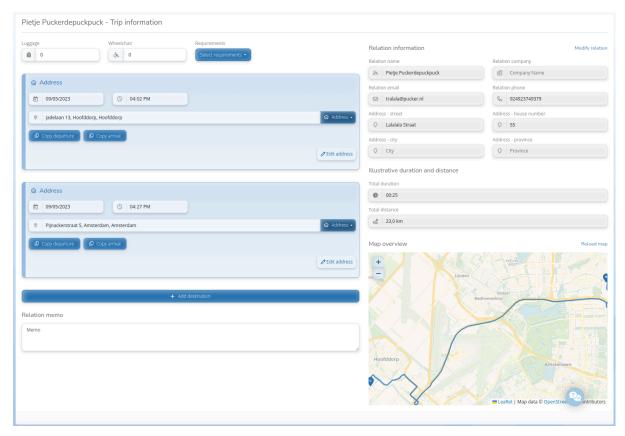


Start search by typing...: Type part of a relation name until the correct suggestion appears. Then click here.

Add relation: Click to add this relation to the group trip. Then fill in the form that appears. Enter the information as in "Ride information".



Individual transports



Every relation from this group trip appears in this list. Click on the name of the relation to view or change this individual trip.

Click the trash can icon next to the name to remove the relation from the group trip.

Luggage: How much luggage does this relation have?

Wheelchair: Does this relation have a wheelchair?

Supplies: Select the other requirements for this relation from the list.

Date of departure: When does this trip start?

Departure time: What time does this trip start?

Fill-in location: Type part of the address. If this address is the same as the address on the

"Trip information" tab, click "Copy departure".

Date of arrival: This is being calculated.

Arrival time: This is being calculated.

Fill-in location: Type part of the address. If this address is the same as the address on the "Trip information" tab, click on "Copy arrival".

Add destination: If this trip has more destinations, click on this.

Relation memo: Comments about this relation.

Relation information: Information about this relation. To change this information you need to go to the "Relation" component.



Illustrative duration and distance: What is the estimated duration and distance of the trip? This data is calculated.

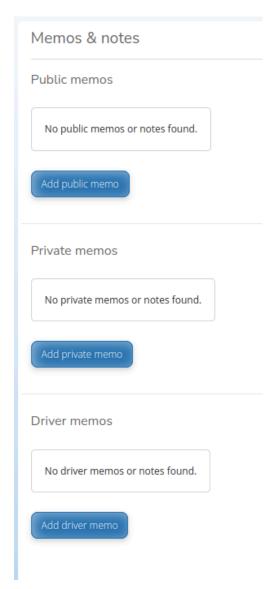
Import relations



Import multiple relations from a relation category.

Click the checkbox of the relevant category and click "Import relations".

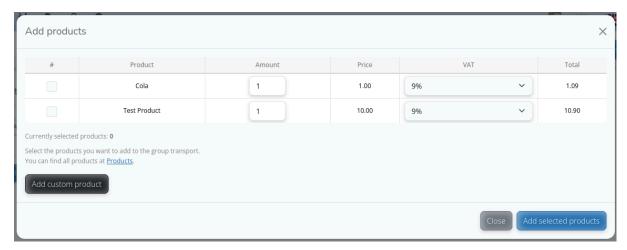
Memos & notes



Take notes for public, private or for the driver. Click the appropriate button to add a memo. Type the memo and click "Add".

Products



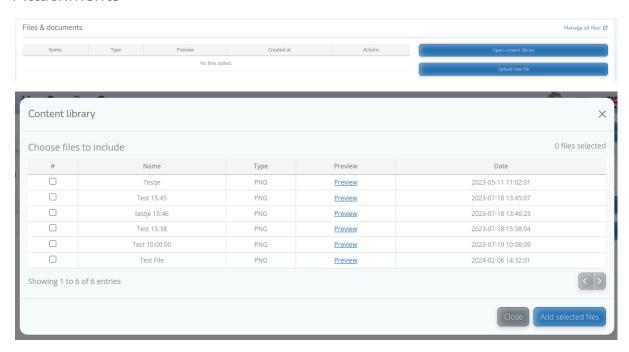


Click "Add product" to add a product. Click the checkbox of the product you want to add. Choose the quantity and change the VAT if necessary.

Click "Add custom product" if the product is not listed. Then type a name for the new product. Type a price and adjust the VAT if necessary.

Click "Add selected products" when you're done.

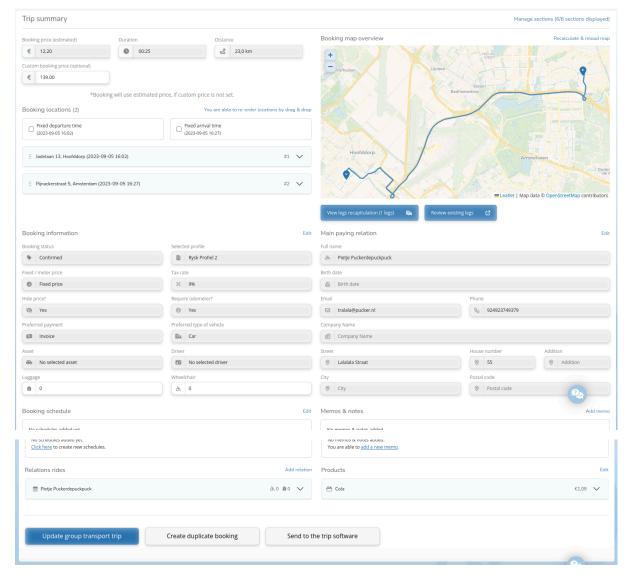
Attachments



Add any attachments to the group trip here. Click "Open content library" on the right. Check the appropriate attachments and click "Add selected files". Click "Upload new file" to open the component files with the file upload form. (This opens a new tab.)



Finish booking



Is everything filled in correctly? Check this here. Click "Create group transport trip" to create the trip.

Group transport trip overview

Filters



Use the filters above the table to filter this list.

Click the date and time filter and choose the period you want to display. The list is adjusted immediately.

Click the status filter and select the status you want to filter by. The list is adjusted immediately.

Click on the driver filter and choose the driver you want to filter by. The list is adjusted immediately.

Click on the vehicle filter and choose the vehicle you want to filter on. The list is adjusted immediately.

Click on the place filter and choose the place you want to filter on. The list is adjusted immediately.

Type in the "Search table" field to filter the typed text.

Click "Reset all filters" to return to default.

The number of trips displayed is 100 per page by default. To adjust this, click "100 per page" and choose the desired quantity.

Active filters

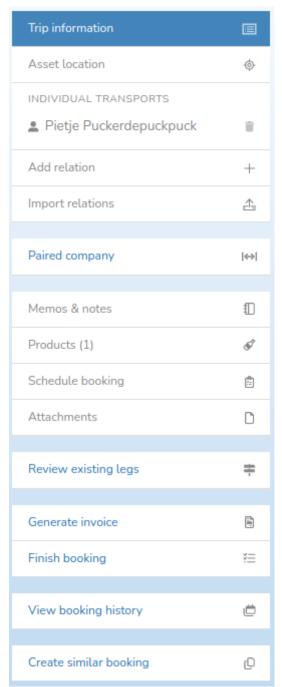
Under active filters you can see how many filters are currently active. Place your mouse cursor over this text to see the active filters. (This does not work on a touchscreen)

Print current list

Click the printer icon on the right. The browser opens the screen to start printing. Choose the right printer before printing.

Edit existing trip

Click the time of the trip you want to edit. (You can also click on \square at the end of the line.) The group transport form for the trip appears.

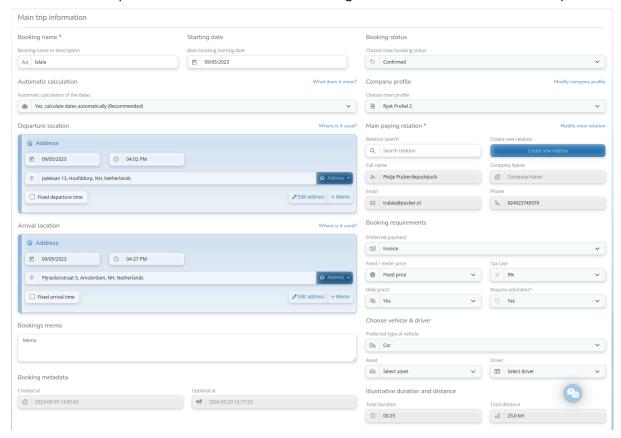


On the left you will see the different categories of information that can be entered about this group trip.



Trip information

It starts with "Trip information", which contains the general information about this trip.



Booking name: Give the group trip a name.

Starting date: When does this trip start?

Automatic calculation: By default, the dates and times are calculated automatically. This is also recommended. But it is possible to do this manually. Then select "No, I will set dates manually".

Departure location: From where does the trip start?

Date of departure: Choose the date when the trip starts.

Departure time: Choose the time when the trip starts.

Fill-in location: Type part of the address until the correct suggestion appears, then click it.

Check the box "Fixed departure time" if the arrival time should be calculated.

Departure memo: Remarks or comments about the departure location.

Arrival location: Where does the trip end.

Fill-in location: Type part of the address until the correct suggestion appears, then click it. The arrival date and time are calculated automatically if you have not changed this option previously.

Check the box "Fixed arrival time" if the departure time should be calculated.



Arrival memo: Remarks or comments about the arrival location.

Trip memo: Comments about this trip.

Trip status: Choose the status this trip will be changed to.

Company profile: Choose the company profile, which is used to prepare invoices.

Main paying relation: Who is going to pay for this trip?

Search relation: Type part of the name of the relation and click the appropriate suggestion. The fields "Full name", "Company name", "Email" and "Phone" are filled in. If relation information needs to be changed, you must do this in the 'Relations' component.

Booking requirements: What are the requirements of this trip?

Preferred payment: What is the preferred payment? Cash, credit/debit card or invoice.

Fixed / meter price: Is the price fixed or on the meter?

Tax rate: What is the tax rate?

Hide price: Should the price be hidden?

Require odometer: Is the odometer required?

Choose vehicle & driver: What is the preferred type of vehicle, the driver and the vehicle.

Preferred type of vehicle: Choose the type of vehicle, car, bus or coach.

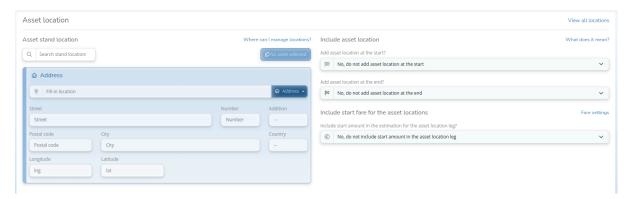
Asset: Select the asset.

Driver: Choose the driver.

Illustrative duration and distance: What is the estimated duration and distance of the ride.

This data is calculated.

Asset location



Where is the vehicle that will make the trip?

Search stand location: Type part of the stand location until the correct suggestion appears. Then click here.

Or use the "Use asset location data" button to use the stand location of the selected vehicle.

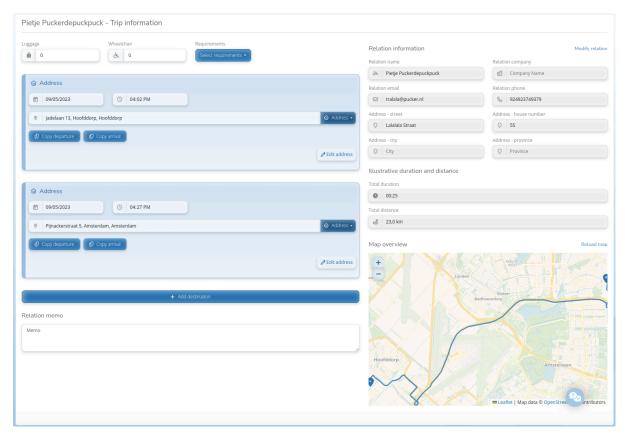


Add asset location at the start?: Do you want to add the vehicle's stand location at the start of the trip? Choose this here.

Add asset location at the end?: Do you want to add the vehicle's stand location at the end of the trip? Choose this here.

Include start fare for the asset location: Do you want to add the start fare to the vehicle location trip, then choose "Yes, add start amount in the asset location leg".

Individual transports



Every relation from this group trip appears in this list. Click on the name of the relation to view or change this individual trip.

Click the trash can icon next to the name to remove the relation from the group trip.

Luggage: How much luggage does this relation have?

Wheelchair: Does this relation have a wheelchair?

Requirements: Select the other requirements for this relation from the list.

Date of departure: When does this trip start? **Departure time**: What time does this trip start?

Fill-in location: Type part of the address. If this address is the same as the address on the

"Trip Information" tab, click "Copy departure".



Date of arrival: This is being calculated.

Arrival time: This is being calculated.

Fill-in location: Type part of the address and click the correct suggestion. If this address is

the same as the address on the "Trip information" tab, click "Copy arrival".

Add destination: If this trip has more destinations, click on this.

Relation memo: Comments about this relation.

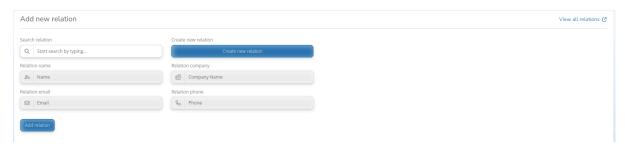
Relation information: Information about this relation. To change this information you need

to go to the "Relations" component.

Illustrative duration and distance: What is the estimated duration and distance of the trip?

This data is calculated.

Add relation



Start search by typing...: Type part of a relation name until the correct suggestion appears. Then click here.

Add relation: Click to add this relation to the group trip. Then fill in the above mentioned information on the form that appears.

Import relations

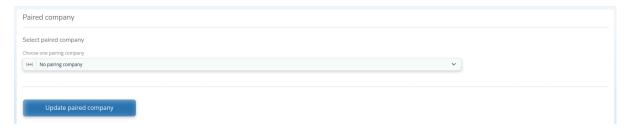


Import multiple relations from a relation category.

Click the checkbox of the relevant category and click "Import relations".



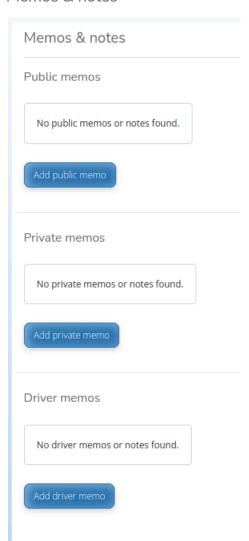
Paired company



Do you want to share this trip with a paired company?

Choose one pairing company: Which company do you want to share this trip with? Update paired company: Click this button to save the selected paired company.

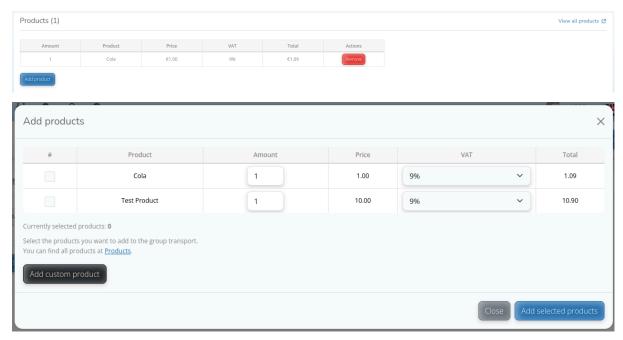
Memos & notes



Take notes for public, private or for the driver. Click the appropriate button to add a memo. Type the memo and click "Add".



Products

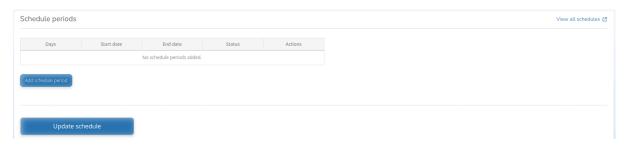


Click "Add product" to add a product. Click the checkbox of the product you want to add. Choose the quantity and change the VAT if necessary.

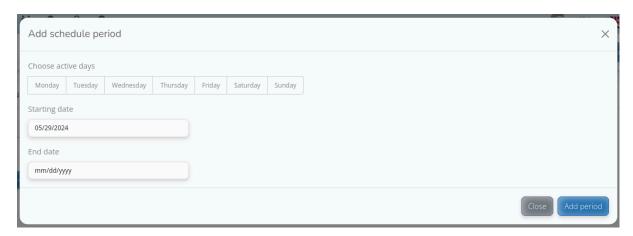
Click "Add custom product" if the product is not listed. Then type a name for the new product. Type a price and adjust the VAT if necessary.

Click "Add selected products" when you're done.

Schedule booking



If this group trip is run more often, you can schedule it here.

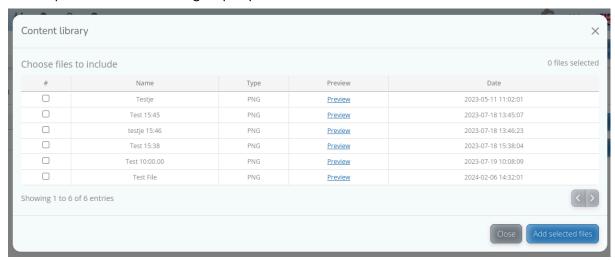


Click "Add schedule period". Choose on which days the trip will take place. Choose when this starts and when it ends. Click "Add period" when you're done. Click "Update schedule" to save the new schedule.

Attachments



Add any attachments to the group trip here.

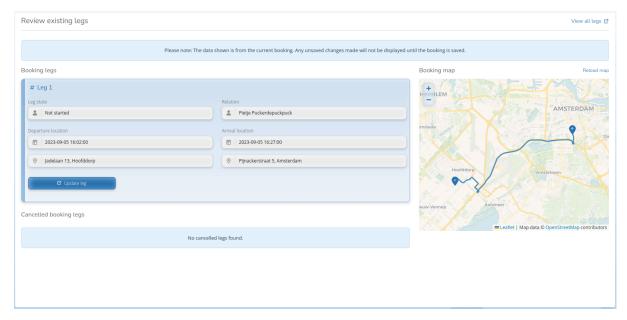


Click "Open content library" on the right. Check the appropriate attachments and click "Add selected files".

Click "Upload new file" to open the component files with the file upload form. (This opens a new tab.)

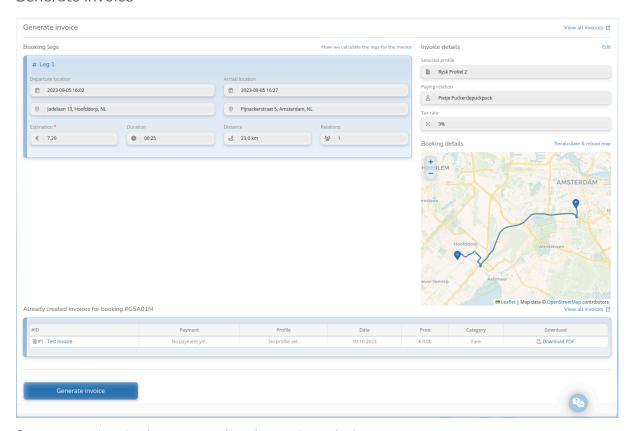


Review existing rides

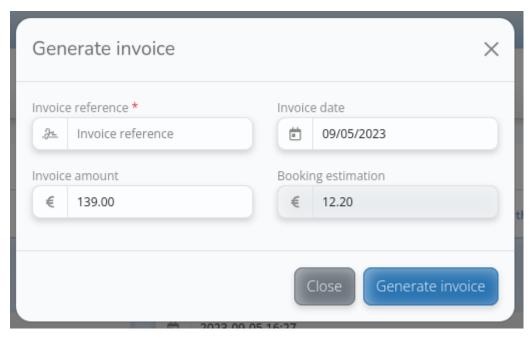


Here you can see the rides that are part of this group trip.

Generate invoice

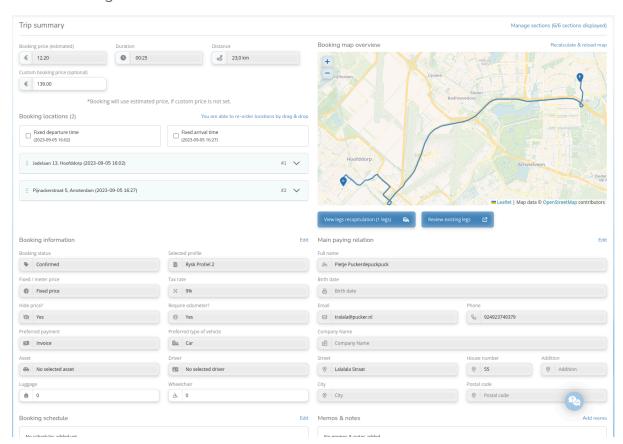


Generate an invoice here to send to the paying relation.

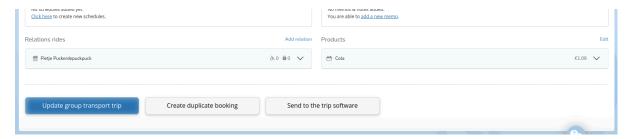


Click "Generate invoice". Enter an invoice name, an invoice date and the price. Then click on "Generate invoice".

Finish booking







Is everything filled in correctly? Check this here.



Click "View legs recapitulation" to view a recap of the legs. Click "Close" to close it.

Click "Update group transport trip" to save the changes. Would you like to copy this trip? Then click on "Create duplicate booking".

View booking history



Open the history of this group trip in a new tab.

Create similar booking

Make a copy of this group trip. This will open a new tab with a new group trip.



Group transport schedules



If group trips are to be ridden more often, these can be planned. Once you have done this while creating the trip, they will appear in the "Group transport schedules" list.

Filters

Use the filters above the table to filter this list.

Click the status filter and select the status you want to filter by. The list is adjusted immediately.

Type in the "Search table" field to filter the typed text.

Click "Reset all filters" to return to default.

By default, the number of schedules displayed is 100 per page. To adjust this, click "100 per page" and choose the desired quantity.

Planning list

Click on the trip name in the list to open the group trip in question.

Click on the paying relation name to go to this relation in the "Relations" component.

Click "x Bookings" to see an overview of the trips created by the scheduler.

Click "Delete" to delete the schedule. Confirm the popup by clicking "Delete" again. The current trips are not deleted.

Click "Change status" to change the status of the schedule to active or inactive.