



RouteMatch
Software™

User's Guide

RouteMatch Web Portal

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RouteMatch™ Web Portal

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Atlantic Center Plaza
1201 West Peachtree Street NW
Suite 3300
Atlanta, GA 30309
Tel: 404-876-5160
Fax: 404-898-1145

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The RouteMatch Web Portal

The RouteMatch Web Portal grants web-based access to paratransit customers, facility users, providers, internal users, and fixed-route customers. Users can log in to the portal to access customer profile information, request transportation services, view and edit trip reservations, view up-to-date fixed-route data, and download other important information. Users access the system with their web browser through an internet connection. Web Portal users are updated on the status of their applications, reservations, or report information via email or the My Trip Reservations area of the portal. The Web Portal is used in conjunction with the Self-Service Management Console so you may need to refer to that chapter in the RouteMatch **user's guide** for further information.


Accessing the Web Portal

A user may open the Web Portal through a link or URL provided by your agency. Many agencies will commonly provide a link on their website. Once the user starts the application, they can place an icon directly on their desktop for ease of use.

The Customer and Facility User Portal

The customer and facility user portal allows its users to make trip reservations and review all their reservations made in the past. Most items entered in the Web Portal must be approved in the Self-Service Management Console.

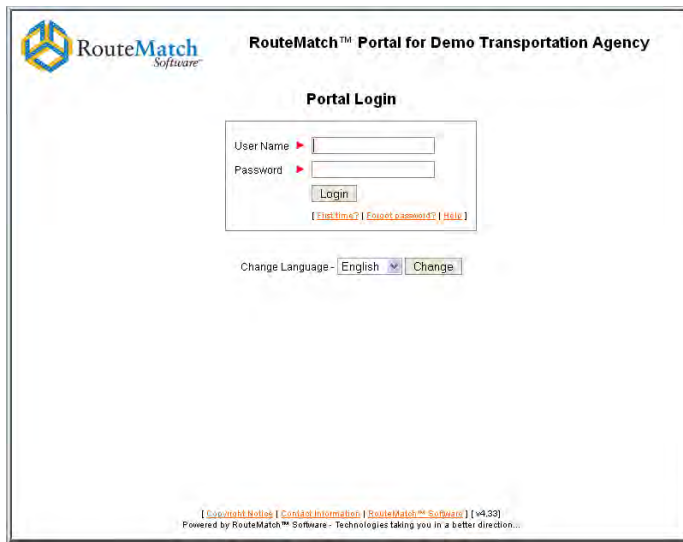
The Customer and Facility User Portal Tool Bar

Help	Open a new window containing the online Web Portal help.
Portal Home	Return to the home page of the Web Portal.
Logout	Log out of the Web Portal.
Make Trip Reservation	Begin the process of reserving a trip.
My Trip Reservations	Review a list of the user's current trip reservations.
Account History	View a list of the user's previously taken trips.
Update Login Info	Change the user's login credentials.
Update Portal Preference	Change the language of the portal and turn trip request notification emails on or off.
Update Customer Info	Change the user's personal information.
Language Select 	Change the language of the portal.

First Time Using the Web Portal

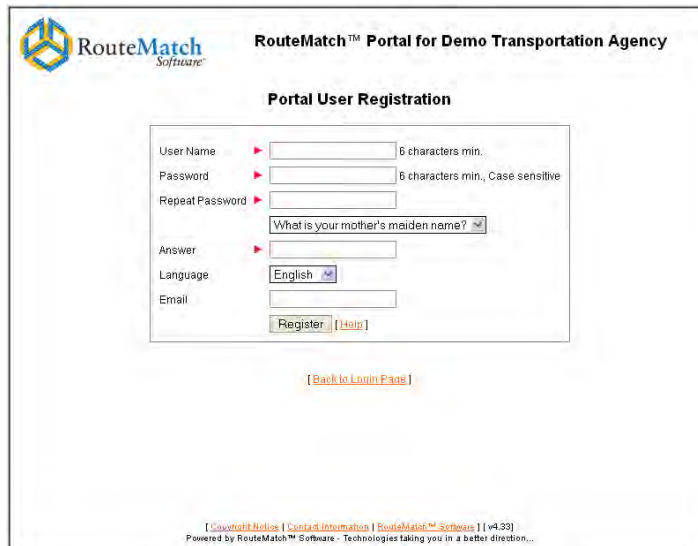
When one of your users opens the Web Portal for the first time, they will need to complete the following steps to create a new Web Portal login:

1. The user will need to be provided with a link to the Web Portal. Many agencies include a Web Portal link on their web page.
2. When the user first opens the Web Portal, they will be presented with the main login page. On this page, the user can change the language of the portal by making a selection from the drop-down list if needed.



The image shows the 'RouteMatch™ Portal for Demo Transportation Agency' login page. It features the RouteMatch Software logo in the top left. The main heading is 'Portal Login'. Below this, there is a form with two input fields: 'User Name' and 'Password', each with a red arrow icon to its left. A 'Login' button is positioned below the password field. Under the 'Login' button, there are two links: '[First Time?]' and '[Forget password? | Help]'. Below the login form, there is a 'Change Language' section with a dropdown menu currently set to 'English' and a 'Change' button. At the bottom of the page, there is a footer with links: '[Contact Us | Contact Information | RouteMatch™ Software] [v4.33]' and the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

3. Before the customer can access the portal, they must first create an account by clicking the **First Time?** link located directly below the **Login** button. This will open the Portal User Registration page.



The image shows the 'RouteMatch™ Portal for Demo Transportation Agency' user registration page. It features the RouteMatch Software logo in the top left. The main heading is 'Portal User Registration'. Below this, there is a form with several input fields: 'User Name' (with a red arrow icon and a note '6 characters min.'), 'Password' (with a red arrow icon and a note '6 characters min., Case sensitive'), 'Repeat Password' (with a red arrow icon), 'What is your mother's maiden name?' (with a dropdown menu), 'Answer' (with a red arrow icon), 'Language' (with a dropdown menu currently set to 'English'), and 'Email'. A 'Register' button is positioned below the email field. To the right of the 'Register' button is a link '[Login]'. Below the registration form, there is a link '[Back to Login Page]'. At the bottom of the page, there is a footer with links: '[Contact Us | Contact Information | RouteMatch™ Software] [v4.33]' and the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

4. Have the user fill out the following information:
 - a. A user name for their Web Portal account (Required). They will have to remember this in order to log in to the portal.
 - b. A password for their account (Required). This will also need to be remembered.
 - c. Have them re-enter the password to confirm it (Required).
 - d. They must select a question from the drop-down that will be asked if they forget their password (Required).
 - e. They will also have to enter the answer to this question (Required).
 - f. They can also select a language for the Web Portal from the drop-down. English is the default.
5. When they have entered all the necessary information, they click the **Register** button. If their registration is successful, they will be presented with the following screen:

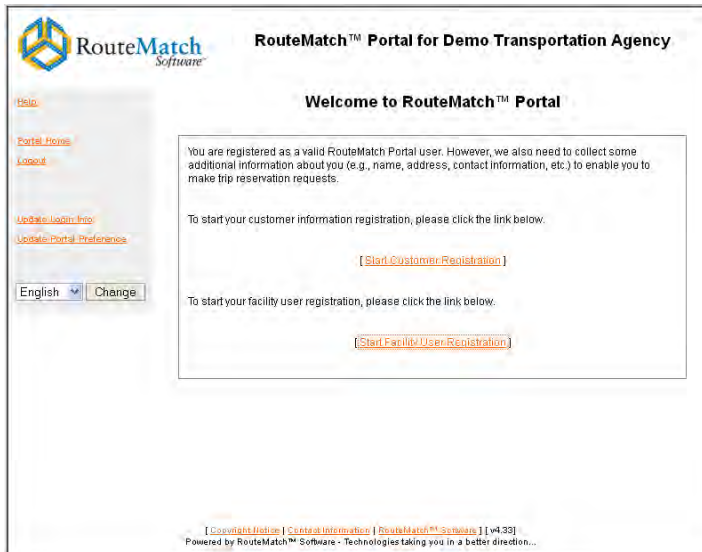


6. When they click the **Enter Portal Content Area** link, the main Web Portal home page will open.

How to Register as a Customer or Facility User

In order for a user to register as a customer or facility user for your transit agency, they need to complete the following steps:

1. When they first log in to the Web Portal, they are prompted to register as a customer or facility user.



The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' with a 'Welcome to RouteMatch™ Portal' message. It informs the user that they are registered but need to provide additional information for trip reservations. Two registration links are provided: '[Start Customer Registration]' and '[Start Facility User Registration]'. The left sidebar contains links for Help, Portal Home, Logout, Update Login Info, and Update Portal Preferences, along with a language dropdown set to English.

2. To become a registered customer for your agency, the user must complete the following steps:
 - a. Have them click the **Start Customer Registration** link.



The screenshot displays the 'Customer Registration' form. It includes input fields for First name, Middle init. (marked as optional), Last name, Sex (a dropdown menu), Phone (with a 1000-900-0000 placeholder), Phone ext., Email, and Mobility requirement (a dropdown menu with 'Ambulatory' selected). There is also a 'Select Address' button. A 'Submit' button is at the bottom of the form. The footer contains copyright information and the version number v4.33.

- b. The customer will need to fill out the following fields:
- First name
 - Middle initial (Optional)
 - Last name
 - Sex
 - Phone number. Be sure they also enter the phone extension if appropriate.
 - Email address
 - Mobility type. These are defined in the Settings module of the main RouteMatch application under Customer Options.
- c. In order for a customer to add an address, they must perform an address search. They can do this by completing the following steps:

The screenshot displays the RouteMatch™ Portal for Demo Transportation Agency. On the left, a sidebar contains links: [Help](#), [Portal Home](#), [Logout](#), [Update User Info](#), [Update Portal Preferences](#), and a language selector showing 'English' with a 'Change' button. The main content area is titled 'Search Address' and includes the instruction 'Enter as much information as possible. Partial match is supported.' Below this, there are input fields for 'Common Name', 'Address', 'Address (cont)', 'City', 'State' (a dropdown menu currently showing 'GA - Georgia'), and 'Zip'. A 'Search' button is positioned below the 'Zip' field. At the bottom of the form area, there is a link: [\[Back to Previous Page \]](#). The footer of the page contains copyright information: 'Copyright Notice | Contact Information | RouteMatch™ Software | v4.33' and the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

- i. They start by clicking the **Select Address** link.
- ii. On the next screen, they must enter search criteria. They can search for their **actual address, the address's common name, the zip code, etc.**

- iii. When they click the **Search** button, their search results will display in the next screen.

- i. From the list of search results, have the customer click the **Select** button to their address. The address will now appear in the customer record screen.

- d. The customer can now click the **Submit** button and the new customer record is created. This record will have to be approved in the Self-Service Management Console.

3. To become a facility user, the user must complete the following steps:
 - a. Have the user click the **Start Facility User Registration** link.
 - b. On the next page, the user **must enter the facility's** corresponding internal ID and password. This information is defined in the Settings module of the main RouteMatch application under the Self-Service Management Console options and will need to be provided to the user by your agency.

The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' interface. On the left is a sidebar with navigation links: Home, About, Why Use RouteMatch, Get RouteMatch, Get a Demo, and Contact Us. The main content area is titled 'Facility User Registration' and contains a form with two input fields: 'Facility Internal ID' and 'Password', followed by a 'Submit' button. At the bottom of the sidebar, there is a language selector showing 'English' and a 'Change' button. The footer contains copyright information for 2013 and a version number of v1.33.

- c. When they click the **Submit** button, they will be added as a user of this facility.
4. After the record is approved, customers and facility users will be able to make trip reservations through the portal.

How to Log in to the Web Portal

After a user has registered for the Web Portal, they log in by completing the following steps:

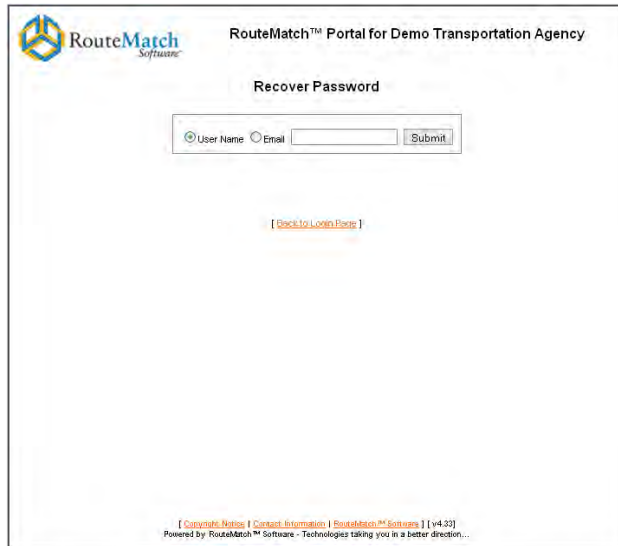
The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' interface. The main content area is titled 'Portal Login' and contains a form with two input fields: 'User Name' and 'Password', followed by a 'Login' button. Below the login button is a link that says 'Forgot your password? Click here!'. At the bottom of the page, there is a language selector showing 'English' and a 'Change' button. The footer contains copyright information for 2013 and a version number of v1.33.

1. After navigating to the Web Portal, the user is presented with the login page. From here, they will need to enter their user name.
2. Then, they enter their password and click the **Login** button.

How to Recover a Password

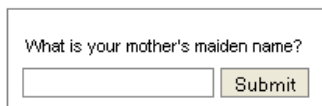
If a user forgets their Web Portal password, they can recover it by completing the following steps:

1. From the login screen, they will need to click the **Forgot password?** link. This will display the Recover Password screen.



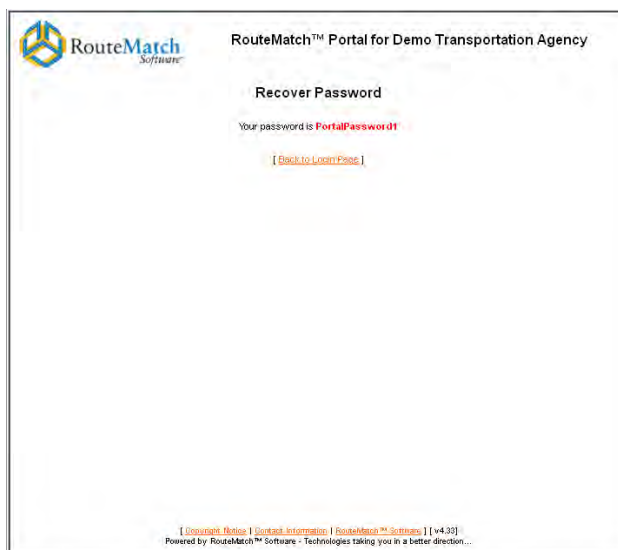
The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' with a 'Recover Password' section. It features two radio buttons: 'User Name' (selected) and 'Email'. A text input field is positioned to the right of the 'Email' button. A 'Submit' button is located to the right of the input field. Below the input field is a link that says '[Back to Login Page]'. At the bottom of the page, there is a footer with links for 'Copyright Notice', 'Contact Information', and 'RouteMatch™ Software', along with the version number '[v4.33]' and the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

2. On this screen, the user will need to enter their user name or email address and click the **Submit** button.
3. They are then presented with their password recovery question which was specified when they first registered for the portal. The user will need to enter the correct answer to this question.



The screenshot shows a single text input field with the question 'What is your mother's maiden name?' above it. A 'Submit' button is located to the right of the input field.

4. When they enter the correct answer and click the **Submit** button, their password will display on the next screen.



The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' with a 'Recover Password' section. It displays the message 'Your password is PortalPassword1' in red text. Below the message is a link that says '[Back to Login Page]'. At the bottom of the page, there is a footer with links for 'Copyright Notice', 'Contact Information', and 'RouteMatch™ Software', along with the version number '[v4.33]' and the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

Reserving a Trip

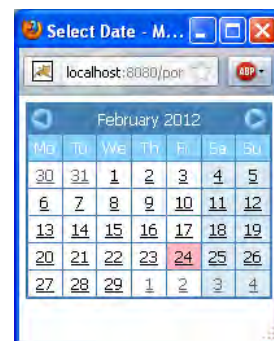
After a customer or facility user has registered in the Web Portal and they are approved in the Self-Service Management Console, they will have the ability to make trip reservations.

How a Customer Reserves a Trip

After logging in to the Web Portal, the customer will complete the following steps:

1. From the main portal page, the customer will click the **Make Trip Reservation** button on the side tool bar.
2. On the Make Trip Reservation page, they must select whether this is a one-way or a round trip.

3. They must also select whether this is a one time or a recurring trip.
4. Have them click the **Next** button after making these selections.
5. On the next page, they must first select a date for the trip. They have the option to enter the date by hand in the mm/dd/yyyy format or click the calendar button and make a selection from the window that displays.



6. If this is a recurring trip, the customer must also select the date of when the recurrence ends and on what days of the week the trips take place.
7. For their initial trip, the customer must select the time they need to be picked up and the time of their appointment from the corresponding drop-down lists.
8. If this is a round trip, the customer must also select the time they need to be picked up after their appointment and the time they need to be at their destination.
9. After the necessary information has been entered, the customer must then click the **Next** button.
10. On the next page, have the customer select the addresses of their origin (where they are picked up) and their destination (where they are dropped off). To do this, they must perform two address searches by completing the following steps:

The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' interface. The main heading is 'Trip Reservation for Facility' with a sub-header 'Step 3 of 4'. On the left, there is a sidebar with links: 'Help', 'Portal Home', 'Logout', 'Make Trip Reservation', 'Show Reservations', 'Update Login Info', 'Update Portal Preferences', and a language selector set to 'English' with a 'Change' button. The main form area contains the following fields:

- Origin:** A dropdown menu with 'Select origin' selected, and links for 'Use home' and 'Use facility'.
- Destination:** A dropdown menu with 'Select destination' selected, and links for 'Use home' and 'Use facility'.
- Mobility requirement:** A dropdown menu with 'Ambulatory' selected, and a link for 'Help'.
- # of Guests:** A dropdown menu with '0' selected.
- # of Attendants:** A dropdown menu with '0' selected.
- Comments:** A large text area for additional information.

At the bottom of the form, there is a 'Next' button and a link for 'Previous page | Start over'. The footer contains copyright information: 'Copyright Notice | Contact Information | RouteMatch™ Software | (v4.33) Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

- a. They will start by clicking the **Select Origin** link. If this address is the customer's home, they may click the **Use Home** link to automatically fill in that information. If this address is a facility, the customer can click the **Use Facility** link.
 - b. On the next screen, they must enter search criteria. They can search for the actual address, the address's common name, the zip code, etc.
 - c. When they click the **Search** button, their search results will display in the next screen.
 - d. From the list of search results, they can select their address by clicking the **Select** button. The address will now appear in the customer record screen.
 - e. Have the customer repeat these steps for the address of their destination as well.
11. Have the customer select their mobility requirement from the drop-down list.
 12. Have the customer select the number of guests and attendants who will be accompanying them on the trip from the drop-downs.
 13. If the customer would like to add any extra information to this trip that is not covered in the other fields, they may do so in the **Comments** field.

14. When the customer clicks the **Next** button, they are taken to the trip verification screen.

Make Trip Reservation
Step 4 of 4

Please verify, then click the Submit button.

Trip date	03/16/2012	[Edit]
Initial trip		[Edit]
Pick up time	9:30 AM	
Drop off time	10:00 AM	
Return trip		[Edit]
Pick up time	11:15 AM	
Origin	Briarhill Lane Ne Atlanta GA 30324	[Edit]
Destination	[Walmart] 4467 STATE HWY 280 SMYRNA GA 30082	
Mobility requirement	Ambulatory [Help]	[Edit]
# of Guests	1	
# of Attendants	2	
Comments	One of the guests will be in the wheelchair.	

Submit

15. If any mistakes were made, the customer can click the **Edit** link next to the wrong entry and fix the mistake.
16. If all the information displayed on this screen is correct, have the customer click the **Submit** button. The next screen loads with **this trip's reservation number** displayed. The customer should take note of this number.

**RouteMatch**
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RouteMatch™ Portal for Demo Transportation Agency

[Help](#)
[Portal Home](#)
[Logout](#)
[Make Trip Reservation](#)
[My Trip Reservations](#)
[Recent History](#)
[Update Login Info](#)
[Update Portal Preferences](#)
[Update Customer Info](#)
English  [Change](#)

Make Trip Reservation

Your trip reservation confirmation code is **317-318**

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17. Before this trip can be scheduled, you must approve it in the Self-Service Management Console.

How a Facility User Reserves a Trip

Facility users are able to make trip reservations on behalf of Web Portal customers who use their facility. The facility user must be logged in to the Web Portal in order to reserve a trip.

1. From the main portal page, the facility user must click the **Make Trip Reservation** button on the side tool bar.
2. On the next screen, the user must enter **the customer's** first name, last name, and their ID number. All three of these are required and must be entered correctly. The ID number may be **the customer's social security number or your agency's internal ID number** for this customer. The **customer's** internal ID number will need to be supplied to the facility user.

RouteMatch™ Portal for Demo Transportation Agency

Trip Reservation for Facility

First name: Jack
Last name: Sprett
ID: SSN (xxxx-xxxx) 1234
Submit

English Change

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3. On the Make Trip Reservation page, the facility user must select whether this is a one-way or a round trip.

RouteMatch™ Portal for Demo Transportation Agency

Trip Reservation for Facility
Step 1 of 4

Trip reservation for **Jack Sprett**

Is this a one way or round trip?
☐ One way
☒ Round trip

Is this a one-time or recurring trip?
☒ One time
☐ Recurring

Next

English Change

[Copyright Notice | Contact Information | RouteMatch™ Software] [v4.33]
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4. They must also select whether this is a one time or a recurring trip.
5. Have them click the **Next** button after making these selections.
6. On the next page, the facility user must first select a date for the trip. They have the option to enter the date by hand in the mm/dd/yyyy format or they can click the calendar button and make a selection from the window that displays.

RouteMatch™ Portal for Demo Transportation Agency

Trip Reservation for Facility
Step 2 of 4

Trip reservation for **Jack Spratt**

Start date: 03/02/2012 (MM/DD/YYYY)
Earliest date: 2012-03-01
Last date: 2012-05-30

End date: 03/16/2012 (MM/DD/YYYY)

Day of week: ☐ Mon ☐ Tue ☒ Wed ☒ Thu ☐ Fri ☐ Sat ☐ Sun
No service on Saturdays
No service on Sundays

Initial trip

What time do you need to be picked up?: 9:45 AM

What time is your appointment?: 10:15 AM
Please select at least one time field.

Return trip

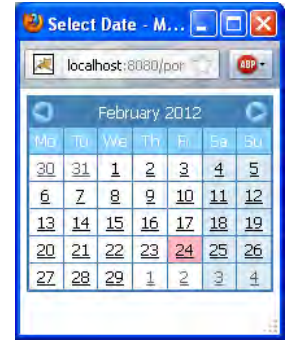
What time do you need to be picked up?: 11:00 AM

What time do you need to be at destination?: 11:15 AM
Please select at least one time field.

Next

[Start over]

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7. If this is a recurring trip, the user must also select the date of when the recurrence ends and on what days of the week the trips take place.
8. For the initial trip, the facility user must select the time the customer needs to be picked up and the time of their appointment from the corresponding drop-down lists.
9. If this is a round trip, the user must also select the time the customer needs to be picked up after the appointment and the time they need to be at their destination.
10. After the necessary information has been entered, the facility user can then click the **Next** button.

11. On the next page, have the facility user select **the addresses of the customer's** origin (where they are picked up) and their destination (where they are dropped off). To do this, the facility user will have to perform two address searches by completing the following steps:

The screenshot shows the 'Trip Reservation for Facility' page, Step 3 of 4. The page title is 'RouteMatch™ Portal for Demo Transportation Agency'. The main heading is 'Trip Reservation for Facility' with 'Step 3 of 4' below it. The sub-heading is 'Trip reservation for Jack Spratt'. The form includes the following fields and options:

- Origin:** [Select origin] | Use home | Use facility
- Destination:** [Select destination] | Use home | Use facility
- Mobility requirement:** Ambulatory [Help]
- # of Guests:** 0
- # of Attendants:** 0
- Comments:** [Text area]

Navigation links at the bottom: [Previous page] [Start over]

Footer: Copyright Notice | Contact Information | RouteMatch™ Software | [v4.33]
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- They will start by clicking the **Select Origin** link. If this address **is the customer's home**, they may click the **Use Home** link to automatically fill in that information. If this address is the facility, the user can click the **Use Facility** link.
 - On the next screen, the facility user must enter search criteria. For example, they can search for the **actual address, the address's common name, the zip code, etc.**
 - When they click the **Search** button, their search results will display in the next screen.
 - From the list of search results, **they can select the customer's** address by clicking the **Select** button. The address will now appear in the customer record screen.
 - Have the facility user **repeat these steps for the address of their customer's destination.**
12. Have them select the customer's mobility requirement from the drop-down list.
13. Have the facility user select the number of guests and attendants who will be accompanying the customer on the trip from the drop-downs.
14. If the user would like to add any extra information to this trip that is not covered in the other fields, they may do so in the **Comments** field.

15. When the facility user clicks the **Next** button, they are taken to the trip verification screen.

Make Trip Reservation

Step 4 of 4

Please verify, then click the Submit button.

Trip date	03/16/2012	[Edit]
Initial trip		[Edit]
Pick up time	9:30 AM	
Drop off time	10:00 AM	
Return trip		[Edit]
Pick up time	11:15 AM	
Origin	Briarhill Lane Ne Atlanta GA 30324 [Walmart]	[Edit]
Destination	4467 STATE HWY 280 SMYRNA GA 30082	
Mobility requirement	Ambulatory [Help]	[Edit]
# of Guests	1	
# of Attendants	2	
Comments	One of the guests will be in the wheelchair.	

16. If any mistakes were made, the facility user can click the **Edit** link next to the wrong entry and fix the mistake.
17. If all the information displayed on this screen is correct, have the user click the **Submit** button. The next screen **loads with this trip's reservation** number displayed. The facility user should take note of this number.

The image is a screenshot of a web application interface for 'RouteMatch Software'. The top header area contains the 'RouteMatch Software' logo on the left and the text 'RouteMatch™ Portal for Demo Transportation Agency' on the right. Below the header, the main content area is divided into two sections. On the left is a vertical sidebar with a light gray background, containing a list of navigation links: 'Home', 'Portal Home', 'Logout', 'Make Trip Reservation', 'My Trip Reservations', 'Account History', 'Update Login Info', 'Update Portal Preferences', and 'Update Customer Info'. The links 'Make Trip Reservation', 'My Trip Reservations', and 'Update Portal Preferences' are highlighted with a green underline. The main content area on the right has a white background and features the heading 'Make Trip Reservation' in bold black text. Below this heading, a message states: 'Your trip reservation confirmation code is 317-319'. At the bottom of the page, there is a language selector showing 'English' with a dropdown arrow and a 'Change' button. The footer contains a line of text with links: '[Copyright Notice] [Contact Information] [RouteMatch™ Software] [v4.23]', followed by the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

18. Before this trip can be scheduled, you must approve it in the Self-Service Management Console.

Other Features of the Customer and Facility User Portal

How to View a Customer's Currently Reserved Trips

A customer can view a list of their currently reserved trips by completing the following steps:

1. From the portal home screen, the customer clicks the **My Trip Reservations** link.
2. On the My Trip Reservations screen, a list of the customer's currently reserved trips will display.

My Trip Reservations

Start date ▶ 03/02/2012 End date ▶ 03/16/2012 MM/DD/YYYY Search

[\[Past 1 Year \]](#) [\[Past 1 Month \]](#) [\[Past 7 Days \]](#) [Yesterday](#) [Today](#) [Next 7 Days](#)]

[\[Printer-friendly Page \]](#)

Reservation # 332 (Reserved)

Cancel

Trip date 2012-03-08 (Pick up time 09:30 AM) (Drop off time 11:45 AM)

Origin Briarhill Lane Ne Atlanta GA 30324

Destination 4467 STATE HWY 280 SMYRNA GA 30082

Reservation # 333 (Reserved)

Cancel

Trip date 2012-03-08 (Pick up time 09:15 AM) (Drop off time 09:45 AM)

Origin Briarhill Lane Ne Atlanta GA 30324

Destination 1071 VILLA RICA RD MARIETTA GA 30064

Reservation # 334 (Reserved)

Cancel

Trip date 2012-03-08 (Pick up time 10:45 AM) (Drop off time 11:45 AM)

Origin 1071 VILLA RICA RD MARIETTA GA 30064

Destination Briarhill Lane Ne Atlanta GA 30324

3. The customer may need to enter a new start and/or end date at the top of the screen.
4. The customer can now click the **Printer-friendly Page** link to display the list formatted for printing.

Reservation # 332 (Reserved)
Trip date 2012-03-08 (Pick up time 09:30 AM) (Drop off time 11:45 AM)
Origin Briarhill Lane Ne Atlanta GA 30324
Destination 4467 STATE HWY 280 SMYRNA GA 30082
Reservation # 333 (Reserved)
Trip date 2012-03-08 (Pick up time 09:15 AM) (Drop off time 09:45 AM)
Origin Briarhill Lane Ne Atlanta GA 30324
Destination 1071 VILLA RICA RD MARIETTA GA 30064
Reservation # 334 (Reserved)
Trip date 2012-03-08 (Pick up time 10:45 AM) (Drop off time 11:45 AM)
Origin 1071 VILLA RICA RD MARIETTA GA 30064
Destination Briarhill Lane Ne Atlanta GA 30324

5. The customer can also cancel trips on this screen by clicking the **Cancel** button next to the desired trip entry. Click the **OK** button on the screen that appears to remove the trip from the list.

How to View Customer Account History

A Web Portal customer can view a list their previously taken trips by completing the following steps:

1. After logging into the Web Portal, the customer can then click on the **Account History** link.
2. From the Account History screen, the customer must select a date span of the trip records they would like to view.
3. Then they need to click the **Search** button.
4. A list of the customer's previously taken trips will now display in the main section of the screen.

How to View Facility User Trip Reservations

A facility user can view a list of their current trip reservations by completing the following steps:

1. After logging into the Web Portal, the user clicks on the **Show Reservations** link on the side tool bar.
2. On the Trip Reservations for Facility screen, a list of the user's currently reserved trips will display.

The screenshot displays the 'RouteMatch™ Portal for Demo Transportation Agency' interface. On the left is a sidebar with navigation links: [Help](#), [Forgot Home](#), [Logout](#), [View Trip Reservation](#), [Show Reservations](#), [Update Location](#), and [Update Trip Reservation](#). Below these is a language selector showing 'English' with a dropdown arrow and a 'Change' button. The main content area is titled 'Trip Reservations for Facility'. It features search filters for 'Start date' (03/02/2012), 'End date' (03/09/2012), and a 'Keyword' field, with a 'Search' button. Below the filters are links for '[Past 1 Year]', '[Past 1 Month]', '[Past 7 Days]', '[Yesterday]', '[Today]', and '[Next 7 Days]', along with a '[Print/Export/Save Page]' link. The results section lists two reservations, both marked as '(Reserved)'. Reservation # 341 has a trip date of 2012-03-08, pick-up at 09:15 AM, drop-off at 09:45 AM, origin at 4467 STATE HWY 280 SMYRNA GA 30082, and destination at 1 E Main St N Hampton GA 30228. Reservation # 342 has a trip date of 2012-03-08, pick-up at 10:30 AM, drop-off at 11:00 AM, origin at 1 E Main St N Hampton GA 30228, and destination at 4467 STATE HWY 280 SMYRNA GA 30082. Each reservation entry has a 'Cancel' button to its right. At the bottom of the page, there is a footer with links for '[Copyright Notice]', '[Contact Information]', and '[RouteMatch™ Software]', followed by '[v4.33]' and the text 'Powered By RouteMatch™ Software - Technologies taking you in a better direction...'.

3. The user may need to enter a new start and/or end date at the top of the screen.
4. The user can also enter a keyword when performing a trip search.

5. The user can now click the **Printer-friendly Page** link to display the list formatted for printing.

Trip Reservations for Facility	
Reservation #	341 (Reserved)
Name	Jack Spratt
Trip date	2012-03-08 (Pick up time 09:15 AM) (Drop off time 09:45 AM)
Origin	4467 STATE HWY 280 SMYRNA GA 30082
Destination	1 E Main St N Hampton GA 30228
Mobility requirement	Ambulatory
Comments	
Reservation #	342 (Reserved)
Name	Jack Spratt
Trip date	2012-03-08 (Pick up time 10:30 AM) (Drop off time 11:00 AM)
Origin	1 E Main St N Hampton GA 30228
Destination	4467 STATE HWY 280 SMYRNA GA 30082
Mobility requirement	Ambulatory
Comments	

6. The user can also cancel trips on this screen by clicking the **Cancel** button next to the desired trip entry. They click the **OK** button on the screen that appears to remove the trip from the list.

How to Update User Info and Preferences

A user can make changes to various parts of their Web Portal login by completing the following steps:

- After logging into the Web Portal, the user can click one of the following options:
 - Update Login Info** – From here, the user can change their login password, their recovery phrase/answer, and their email address.
 - Update Portal Preference** – From here, the user can change the language of the portal and activate an option that sends a notification email whenever they request a trip.
 - Update Customer Information** – From here, the user can change several parts of their personal information including their name, sex, phone number, mobility requirement, etc.
- The user now has the option to make changes to the information displayed on the screen.
- If the user makes any changes, they must click the **Update** or **Submit** button to save the changes.

The Provider Portal

The provider Web Portal allows its users to view and print the manifest of trips assigned to that provider. Provider users can also complete trip verification from within the portal itself or by downloading a comma separated value (.csv) excel file.

How to Create a Provider User

A provider user is created in the settings of the main RouteMatch application under the System Options. To create a provider user, complete the following steps:

1. Open and log in to the RouteMatch TS software.
2. Navigate to the Settings module and expand the System Options.
3. Open the Users sub form.
4. From the Users/Groups window, click the **New User** button. This opens the User Properties button.
5. Fill out the information for this user.
6. To make this a provider user, open the **Type** drop-down and select Provider User.

7. Assign the appropriate groups to this user.



Note

It is not advisable to add a provider user to the Admin group.

8. When you have entered all the necessary information for this new provider user, click **Save and Return** on the tool bar. The new provider user can now access the provider Web Portal.

How to View and Print the Trip Manifest

To bring up the trip manifest and print it, the provider user must complete the following steps:

1. The user starts by logging in to the provider Web Portal.
2. From the main portal screen, they click the **Manifest** link located in the main section of the window or on the side tool bar. This will open the manifest screen.

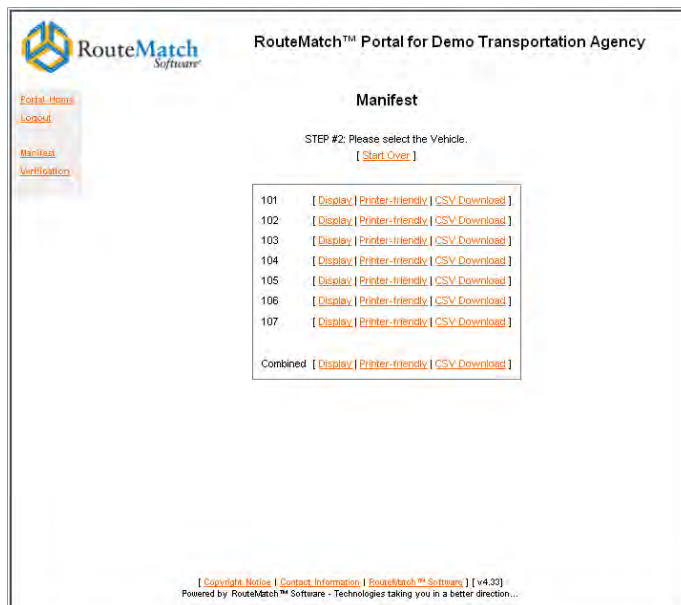


3. Next, the provider user will need to select what type of manifest they want to see. They have the option to view the Stops or Trips manifest.



4. They then select which date's manifest they want to see. They have the option to enter the date in the mm/dd/yyyy format or they can click the calendar button and make a selection from the window that displays.
5. The user can now click the **Submit** button.

6. After submitting, they will need to select a vehicle. For each vehicle, there are three options for how the user can view the manifest:



- **Display** – View the manifest in the web browser.



- | Driver Manifest | | | | | | | | | |
|---------------------------------|---------------|--|---------------------|---------------------|------------------------|--------------------|--|--|--|
| Date: | | 02/29/2012 | | | | | | | |
| Vehicle # | | Run: 101 | | | | | | | |
| Run | Unassigned | | | | | | | | |
| Stop Time | Rider | Address | Confirmation # | Request Time | Validation Information | | | | |
| 2012-02-29 08:45 AM
Pick up | Dyer, Andy | 1075 FAYETTEVILLE RD
ATLANTA GA 30316 | 186 | 2012-02-29 09:00 AM | Stop Time [|] Cancellation [] | | | |
| | | | | | Odometer [|] No Show [] | | | |
| Customer Pay \$ | Guests 0 | Attendants 0 | Mobility Ambulatory | Funding Source | Community Care | | | | |
| Assistance Need | Comment | | | | | | | | |
| Run | Unassigned | | | | | | | | |
| Stop Time | Rider | Address | Confirmation # | Request Time | Validation Information | | | | |
| 2012-02-29 07:58 AM
Drop off | Dyer, Andy | 2300 TALMADGE RD
HAMPTON GA 30228 | 186 | 2012-02-29 09:00 AM | Stop Time [|] Cancellation [] | | | |
| | | | | | Odometer [|] No Show [] | | | |
| Customer Pay \$ | Guests 0 | Attendants 0 | Mobility Ambulatory | Funding Source | Community Care | | | | |
| Assistance Need | Comment | | | | | | | | |
| Run | Unassigned | | | | | | | | |
| Stop Time | Rider | Address | Confirmation # | Request Time | Validation Information | | | | |
| 2012-02-29 10:35 AM
Pick up | Church, David | 3697 STATE HWY 20
HAMPTON GA 30228 | 178 | 2012-02-29 09:00 AM | Stop Time [|] Cancellation [] | | | |
| | | | | | Odometer [|] No Show [] | | | |
| Customer Pay \$ | Guests 0 | Attendants 0 | Mobility Ambulatory | Funding Source | Medicaid | | | | |
| Assistance Need | Comment | | | | | | | | |

- The screenshot shows a Microsoft Excel spreadsheet with the following data:


	A1	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	ACTUAL	VehicleID	Interval	Start Time	End Time	CarSeat	CarRunID	RunName	RunStart	RunEnd	DriverID	DriverName	DriverStar	DriverEnd	DriverCon	IDType
1	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							
2	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
3	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
4	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
5	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
6	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
7	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
8	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
9	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
10	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
11	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
12	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
13	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
14	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
15	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
16	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
17	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
18	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
19	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
20	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
21	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
22	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T
23	***** UN	6	101	6:50	23:36	0	12675 Unassigned	6:50	23:36							T

- © 2012 RouteMatch Software

How Providers Complete Verification through the Web Portal

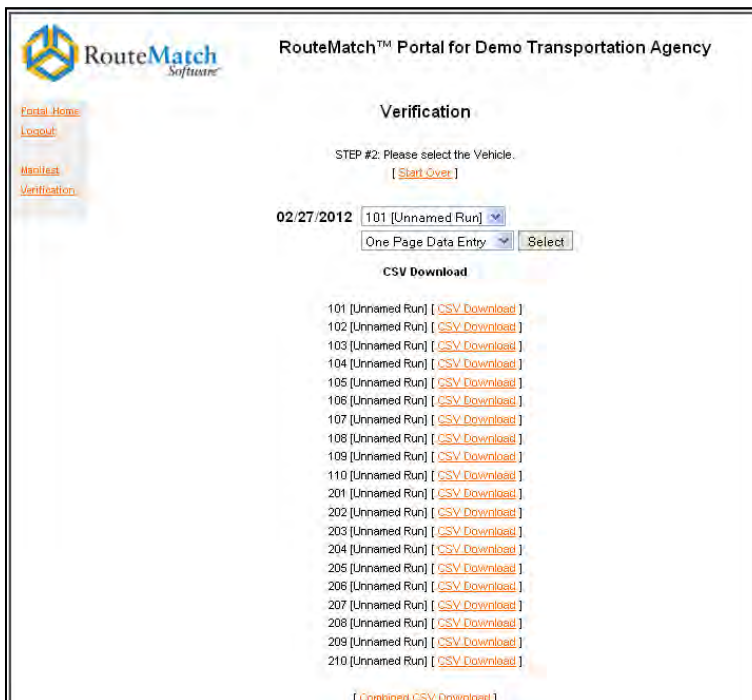
Provider users are able to carry out trip verification in the Web Portal.

1. The user starts by logging in to the provider Web Portal.
2. They then click the **Verification** link located in the main section of the screen or on the side tool bar. This will open the verification screen.



The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' with a 'Verification' heading. On the left is a sidebar with links: Portal Home, Logout, Homefeed, and Verification. The main content area displays 'STEP #1: Please select the Date of Verification.' Below this is a date input field containing '02/27/2012' and a 'Submit' button. At the bottom, there is a footer with copyright information and the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

3. From here, the provider user needs to enter or select a date to verify and then click the **Submit** button.



The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' with a 'Verification' heading. The sidebar is the same as in the previous screenshot. The main content area displays 'STEP #2: Please select the Vehicle.' with a '[Start Over]' link. Below this, the date '02/27/2012' is shown next to a dropdown menu currently set to '101 [Unnamed Run]'. There is also a 'One Page Data Entry' dropdown and a 'Select' button. A section titled 'CSV Download' lists 20 unnamed runs (101 to 210), each with a '[CSV Download]' link. At the bottom, there is a '[Combined CSV Download]' link.

4. On the next page, the user has two options for completing verification. They can either carry out verification from within the web browser or download a .csv file.

5. In order for the provider to carry out verification from within the web browser, they must complete the following steps:
 - a. From the first drop-down box on the Verification screen, the user must select a run to verify.
 - b. Then, they need to choose to view the verification screen in a single page or in multiple pages. They do this by making a selection from the second drop-down box.

02/29/2012

101 [Unnamed Run] ▼

One Page Data Entry ▼

Select

- c. The provider will then click the **Select** button. The next screen will allow the user to complete trip verification from within the web browser.
- d. Trip verification entails looking at the information for each trip and making sure it is correct. The provider user will probably need to make edits to this screen to reflect what actually happened when the trips were carried out.

RouteMatch™ Portal for Demo Transportation Agency

Verification
[\[Start Over \]](#) [\[Select Another Vehicle \]](#)

	Run Start	First Pickup	Last Dropoff	Run End
Time	12:00 AM			11:59 PM
Odometer	0	0	0	0

Name	Confirm #	Vehicle	Cancelled	No Show	Cust. Pay	Add. Cost	Origin / Destination	Est. Dist.	FU/DO Time	Odometer	Guests	Attendants
Dyer, Andy	186	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	1075 FAYETTEVILLE RD ATLANTA GA 30316 2300 TALMADGE RD HAMPTON GA 30228	28.48	07:58 AM 08:45 AM	0 0	0 ▼	0 ▼
Chambers, Alex	174	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	568 LAKE MIRROR RD ATLANTA GA 30348 543 MEANS ST ATLANTA GA 30318	13.2	08:34 AM 09:51 AM	0 0	0 ▼	0 ▼
Church, David	178	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	3697 STATE HWY 20 HAMPTON GA 30228 1009 SOMERTON PL CUMMING GA 30040	75.36	08:04 AM 10:35 AM	0 0	0 ▼	0 ▼
Munoz, Pablo	283	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	3040 MCINNIS FERRY RD ALPHARETTA GA 30004 1377 BROCKETT PL CLARKSTON GA 30021	28.71	12:53 PM 02:15 PM	0 0	0 ▼	0 ▼
Harris, Elise	194	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	1588 DAK RD SNELLVILLE GA 30078 5000 BEDLINGTON CIR STONE MOUNTAIN GA 30088	16.85	01:54 PM 02:30 PM	0 0	0 ▼	0 ▼
Cane, Allen	188	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	4158 US HWY 23 BUFORD GA 30515 1095 LAKEVIEW WAY JONESBORO GA 30238	52.72	01:26 PM 03:04 PM	0 0	0 ▼	0 ▼
Dyer, Andy	187	101 [Unnamed Run] ▼	No ▼	No ▼	\$0.0 \$0.0	\$0.0	2300 TALMADGE RD HAMPTON GA 30228 1075 FAYETTEVILLE RD ATLANTA GA 30316	24.88	03:52 PM 04:45 PM	0 0	0 ▼	0 ▼

- e. If they are viewing the verification data in multiple pages, they can use the **Change Page** drop-down and button to switch to a different page.
- f. When the edits have been made, the provider can click the **Update** button to submit this information to your agency.

6. In order for the provider to download a .csv file for verification, they must complete the following steps:
 - a. On the Verification page, the provider selects the **CSV Download** link next to the appropriate run. This opens Microsoft Excel with the verification information loaded automatically.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Customer	Customer	Customer	CarSeat	Funding	SchedObj	SchedObj	Reservat	TripDate	StatusID	MDCFare	StopArriv	PickupArrive
2				0	6	30311	186	186	20120229	0	0		
3				0	4	30399	178	178	20120229	0	0		
4				0	9	30416	174	174	20120229	0	0		
5				0	9	30350	283	283	20120229	0	0		
6				0	6	30332	168	168	20120229	0	0		
7				0	3	30351	194	194	20120229	0	0		
8				0	6	30382	187	187	20120229	0	0		
9				0	3	30342	265	265	20120229	0	0		
10				0	9	30364	259	259	20120229	0	0		
11				0	9	30441	260	260	20120229	0	0		
12				0	3	30329	266	266	20120229	0	0		

- b. The provider can now verify the trips they carried out and return the verification form to your agency.

The Internal User Web Portal

Internal users are able to create trips for customers and approve trip reservations made by other users. Internal users are created in the Self-Service Management Console.

How to Create an Internal User

To create an internal user in the Self-Service Management Console, complete the following steps:

1. Open and log in to the main RouteMatch application.
2. Navigate to the Self-Service Management Console and click the Web Trips tab.
3. Click the **New** button on the tool bar. This opens the Edit Web User screen.

The screenshot shows the 'Edit Web User' window. At the top, there's a 'User ID' field and a '* NEW *' button. Below that, the 'Access Level' section has two radio buttons: 'External User (Limited)' and 'Internal User (Enhanced)', with the latter selected. To the right are 'New Password' and 'Verify New Password' fields, followed by a 'Password Requirements >>' link. Below these are 'Recovery Phrase' and 'Recovery Answer' fields, and a 'Web Portal Email' field. The 'Associated With' section has two buttons: 'Select Facility...' and 'Select Customer...'. A section titled 'Specify Access To Sibling Facilities (Internal Users Only)' contains two large list boxes: 'Allow User To Access These Sibling Facilities' and 'Do Not Allow User To Access These Sibling Facilities', with navigation buttons (>, >>, <<, <) between them. At the bottom, it shows 'Created By: admin' and 'Created On: 04/30/2012', with 'Save' and 'Close' buttons.

4. From here, enter a user ID. The internal user will use this to log in to the Web Portal.
5. In the Access Level portion of the screen, select the Internal User option.
6. Enter a password for the user and verify it. They will also use this to log in to the Web Portal.
7. Enter a password recovery phrase for this user.
8. Enter the recovery answer for this user.
9. **Enter this user's** Web Portal email address.
10. Associate the internal user with a facility or another customer:
 - a. To associate this user with a facility, click the **Select Facility** button. From the screen that displays, select a facility name from the drop-down list and click **OK**.
You will also need to choose which sibling facilities this user has access to. To deny this customer access to an installation sibling, move the sibling from the left side of the screen to the right side.
 - b. To associate this user with another customer, click the **Select Customer** button. From the screen that displays, select a customer name from the drop-down list and click **OK**.
11. When all the necessary information has been added to this user, click the **Save** button.

This user will now be able to access the internal user Web Portal.

How to Add a Trip to a Customer

To create a trip reservation for a customer, complete the following steps:

1. Start by logging in to the Internal User Web Portal. This will display the Search Customer page.

The screenshot shows the 'RouteMatch™ Portal for Demo Transportation Agency' interface. On the left, there is a sidebar with a 'LOGOUT' link, a 'CUSTOMERS' section containing a 'Search Customer' link, and a 'TRIPS' section containing a 'List by Date' link. The main content area is titled 'CUSTOMERS - Search Customer' and contains several input fields: 'Last Name', 'First Name', 'M.I.', 'DOB' (with a calendar icon and '(mm/dd/yyyy)' placeholder), 'Internal ID', 'SSN', 'Phone' (with a dropdown for area code and a hyphen), 'Email', 'Status' (a dropdown menu currently showing 'Active Only'), and 'Search Limit' (a dropdown menu currently showing '25'). A 'Search' button is located at the bottom right of the search criteria section. Below the search criteria, there is a 'Search Result' section which is currently empty. At the bottom of the page, there is a footer with links for 'Copyright Notice', 'Contact Information', 'RouteMatch™ Software', and 'v4.33', along with the text 'Powered by RouteMatch™ Software - Technologies taking you in a better direction...'.

2. On this page, enter search criteria for the customer. You can search for the **customer's**:
 - a. Last name, first name, and middle initial
 - b. Date of birth
 - c. Internal ID number
 - d. Social security number
 - e. Phone number
 - f. Email address
 - g. Web Portal status

You can also set a limit on how many results the search will return.

3. After entering the search criteria, click the **Search** button. The results will display at the bottom of the screen.

The screenshot shows the 'Search Result' section of the portal. It contains a table with the following columns: 'Last Name, First Name', 'Phone', 'Internal ID', and 'DOB'. There are two rows of data:

Last Name, First Name	Phone	Internal ID	DOB
PUTMAN, JARED R.			
Putman, Shelby			

Each row has three links to its right: '[Enter Trip]', '[List Trips]', and '[Edit]'. Below the table, there is a link that says '[Add a new Customer with the information entered above]'.

- Click the **Enter Trip** link next to the correct customer record. This will open the Enter Trip Reservation screen.

If the customer you are looking for does not exist in the system, you can add them by clicking the link below the search results. The directions to do this are detailed below.

- Start the trip reservation by making this a demand response trip or a standing order trip.

- If this is a demand response trip, enter a date for the trip.
If this is a standing order trip, enter a start date and an end date for the standing order.
- Make this a one way or a round trip by making a selection from the drop-down list.
- Click the **Next** button.
- On the next screen, select an address for the customer's origin (where they are picked up). You have three options when doing this:

- Customer** – Select the customer's home address.
- Facility** – Select the address of the customer's associated facility.

- c. **Search** – Search for a geocoded address. Do this by completing the following steps:
 - i. Start by clicking the **Search** button. This will open the Search Address page.

- ii. Enter search criteria.
- iii. Click the **Search** button, the search results will display at the bottom of the screen.

Search Result		
Walmart	4467 STATE HWY 280 SMYRNA GA 30082	[Select]
Walmart	3509 STATE HWY 155 STOCKBRIDGE GA 30281	[Select]
Walmart	1071 VILLA RICA RD MARIETTA GA 30064	[Select]
Walmart	332 STATE HWY 138 JONESBORO GA 30238	[Select]

- iv. From the list of search results, you can select an address by clicking the **Select** link. The address will now appear in the customer record screen.

10. **Select an address for the customer's destination** (where they are dropped off). Follow the same instructions as when you selected the customer's origin.
11. If this trip is a standing order, select the days of the week for when the trips occur.

12. Enter trip information. If this is a round trip, you will need to complete these steps for the return trip as well.

Will Call: ☐ Yes ☒ No

Timing: ☒ Pick up ☐ Appointment ☐ Pickup w/ Appointment

Pickup Time: 12 : 00

Appointment Time: :

Mobility Type: Ambulatory

Load / Unload Time: 3 / 3 Initial value is based on Mob. Req. of Customer

Guests: 0 Ambulatory

Attendants: 0 Ambulatory

Car Seat Count: 0

Fare Type:

Billing Category:

Trip Type:

Trip Purpose: Medical

Outside Core Hours? ☐ Yes ☒ No

Isolate from Other Passengers? ☐ Yes ☒ No

Service Animal with Customer? ☐ Yes ☒ No

Comments:

Next

- If this trip is a will call, select the Yes option.
- Select a timing preference for this trip. Your choices are Pick up, Appointment, and Pickup with Appointment.
- If this trip has a pick up timing preference, select a pick up time from the drop-down.
If this trip has an appointment timing preference, select an appointment time from the drop-down.
If this trip has a pick up with appointment timing preference, select a pick up and an appointment time from the drop-downs.
- Select the customer's mobility type.**
- Select a number of **minutes for the customer's load/unload time**. This field automatically populates with **the selected mobility type's** default amount.
- Select the number of guests and attendants who will accompany the customer on their trip. You also need to select their mobility types.
- Select the car seat count for the trip from the drop-down.
- Select a fare type for the trip.
- Select a billing category for the trip.
- Select a trip type from the drop-down.
- Select a trip purpose from the drop-down.
- If this trip is outside your **agency's core hours**, select the Yes option.
- If this customer needs to be isolated from the other passengers on the vehicle, select the Yes option.

- n. If this customer will be accompanied by a service animal, select the Yes option.
 - o. If you need to add any extra information to this trip that is not covered in the other fields, you may do so in the **Comments** field.
13. If this is a round trip, be sure to fill in the information for the return trip too.
14. Click the **Next** button.
15. On the next screen, review all the trip information and make sure it is correct.

RouteMatch™ Portal for Demo Transportation Agency

Enter Trip Reservation

[#1: Select Date | #2: Enter Trip Info | #3: Review | #4: Summary] [[List Trips](#) | [Edit Customer](#)]

CUSTOMERS

[Search Customer](#)

TRIPS

[List by Date](#)

Name PUTMAN, JARED

Origin Briarhill Lane Ne Atlanta GA 30324

Destination 1 E Main St N Hampton GA 30228

Est. Dist. 0.0 mi.

First Date 03/15/2012

Last Date 03/30/2012

Recurrence MON WED FRI

First Trip

Will Call No

Pickup Time Same Day 12:00

Mobility Type Ambulatory

Load / Unload Time 3 / 3

Guests 1 Ambulatory

Attendants 0 Ambulatory

Car Seat Count 0

Fare Type Cash

Billing Category Test Category

Trip Type Education

Trip Purpose Medical

Outside Core Hours? No

Isolate from Other Passengers? No

Service Animal with Customer? No

16. Click the **Submit** button.

How to Review Trips in the Internal User Web Portal

The internal user can generate a list of approved and unapproved trips using two different methods.

List Trips by Customer

To generate a list of approved and unapproved trips for a customer, complete the following steps:

1. Complete a customer search. Instructions for this can be found earlier in this guide.
2. Click the **List Trips** link located next to the desired customer.
3. On this screen, enter the dates of the trips you would like displayed.
4. Click the **Submit** button.
5. A list of approved and unapproved trips will display in the window.

Trip Date	03/06/2012	[Edit]
Reservation	336	
Pickup / Appointment	01:00 - n/a	
Origin	1 E Main St N Hampton GA 30228	
Destination	Briarhill Lane Ne Atlanta GA 30324	
Guests / Attendants	1 / 0	
<hr/>		
Trip Date	03/07/2012	[Edit]
Reservation	336	
Pickup / Appointment	01:00 - n/a	
Origin	1 E Main St N Hampton GA 30228	
Destination	Briarhill Lane Ne Atlanta GA 30324	
Guests / Attendants	1 / 0	
<hr/>		
Trip Date	03/07/2012	[Edit]
Reservation	335	
Pickup / Appointment	n/a - 12:00	
Origin	Briarhill Lane Ne Atlanta GA 30324	
Destination	1 E Main St N Hampton GA 30228	
Guests / Attendants	1 / 0	

6. If a trip needs editing, click the **Edit** link next to a trip entry. If you would like to print this list, click the **For Printer** link to format it for printing.

List All Trips for a Date Range

To generate a list of all the trips you have entered into the system for a date range, complete the following steps:

1. Click the **List by Date** link on the side tool bar. This will display the List Trips by Date screen.

2. On this screen, enter the start date and end date for the trips you would like displayed.
3. Click the **Submit** button. You can also use the links below the date fields to show trips for today only, tomorrow, three days into the future, or one week into the future.
4. A list of approved and unapproved trips entered by you will display in the window.

Trip Date	03/07/2012	[Edit]
Name	PUTMAN, JARED	
Reservation	336	
Pickup / Appointment	01:00 - n/a	
Origin	1 E Main St N Hampton GA 30228	
Destination	Briarhill Lane Ne Atlanta GA 30324	
Guests / Attendants	1 / 0	
<hr/>		
Trip Date	03/07/2012	[Edit]
Name	PUTMAN, JARED	
Reservation	335	
Pickup / Appointment	n/a - 12:00	
Origin	Briarhill Lane Ne Atlanta GA 30324	
Destination	1 E Main St N Hampton GA 30228	
Guests / Attendants	1 / 0	
<hr/>		
Trip Date	03/08/2012	[Edit]
Name	PUTMAN, JARED	
Reservation	335	
Pickup / Appointment	n/a - 12:00	
Origin	Briarhill Lane Ne Atlanta GA 30324	
Destination	1 E Main St N Hampton GA 30228	
Guests / Attendants	1 / 0	

5. If a trip needs editing, click the **Edit** link next to a trip entry. On the Edit Trip screen, you can also cancel trips.
6. If you would like to print this list, click the **For Printer** link to format the list for printing.

The Fixed-Route Web Portal

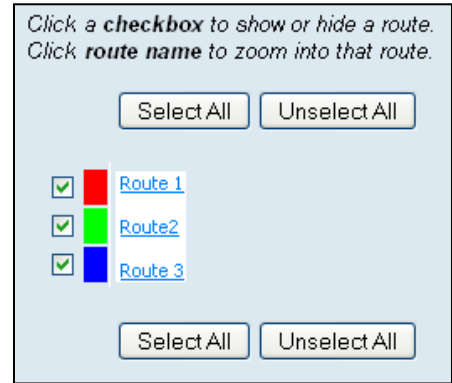
The fixed-route Web Portal allows your customers to view **your agency's** full route map and get real-time information on the location of your vehicles. The customer simply clicks the link provided or navigates to the **portal's URL** to view this information.

The Tool Bar

The fixed-route Web Portal has a tool bar on the side of the screen that allows the viewer to change the map display.

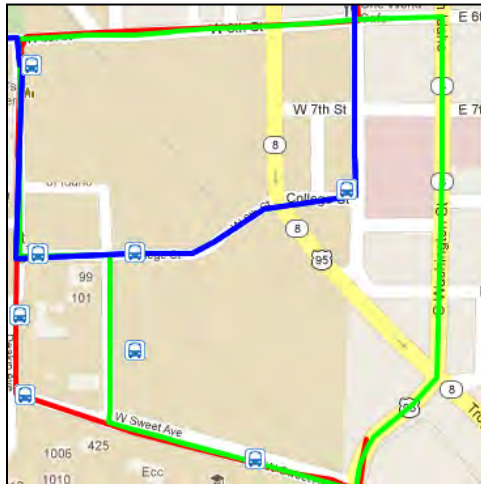
Customers can use the check boxes next to each route to toggle their map lines on and off. They can also select or unselect all of the routes at once.

If a customer clicks one of the route links, the map will zoom in to the selected route.

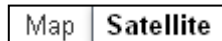


The Route Map


The map of the fixed-**route** Web Portal displays each of your agency's routes with colored lines. Each route gets a different color.

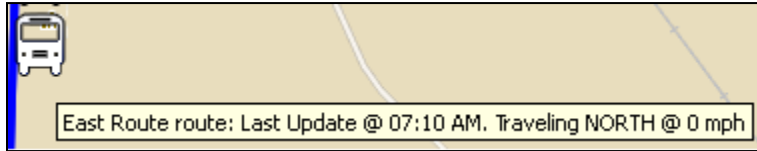


The customer has the option to change the map to a satellite view of the area by switching to the Satellite option in the top-right corner.



The Vehicle Icon

The location of your **agency's** vehicle is displayed with this icon: . A customer can hover their mouse over one of these icons to view what direction the vehicle is heading, how fast it is traveling, and what time this information was last updated.



As the vehicle moves through its route, the icon on the map will move to match the vehicle's **actual** location.



The Stop Icon

A customer can click on a **stop's** icon to pull up more information about the stop. The box that displays contains the **name of the stop's** route pattern, **the scheduled stop times**, and **the vehicle's estimated time** of arrival based on the onboard GPS information.

