



## Booking Rides and Scheduling Drivers

### Special notes for **Booking Rides**

- Rider not displaying on Book a ride – Check the following:
  - Membership Status = Active
  - Rider Status active = Active
  - Bill to (Primary) is the rider's PTA or a designated Business Account
- Ensure that you have the correct Bill To – if you don't it will need to be added using the New Bill to Affiliation quick action button

**Scheduling Drivers** – A driver must have availability to have a route and a driver must have a route for Generate Routes to Succeed

Four ways to adjust availability:

1. **Default Availability** on the Contact record
2. **Update Availability** (Quick Action Button) – allows updating one day at a time. Existing availability can be increased, but NOT decreased
3. **Driver Availability** (Quick Action Button) – update or delete driver availability for multiple days for current and next week. Currently does not allow changes for today or tomorrow.
4. Least preferable – **Availabilities** Related Record on contact. Use this to delete or reduce availability for today or tomorrow. REMOVE a driver from rides before deleting or reducing availability.

AFTER all drivers for the day have availability:

1. **Generate Routes**
2. **Check the Batch Job Routing History Report** (can be found on homepage) – this is an important step (keep the page open on separate tab on your desktop and refresh to see if the batch Succeeded or Failed).