ITNRides Cheat Sheet
Commonly Used Quick Actions

On a Contact or Account Record, you will see some gray buttons in the upper right hand corner, click the down arrow to se all options. These are called quick action buttons, and let you easily complete tasks for that record.

Quick Actions for Contacts (Riders and Drivers)

- **Sending Manifests**- You will find options for sending manifests for today, tomorrow, two days out, and three days out. The options that say Edit and Send allow you to personalize the email you send to the driver.
- **Driver Availability**- Use *Update Availability* to add drivers for today or tomorrow, use *Driver Availability* to open the calendar view and make changes for future days.
- **New Bill To Affiliation**- Use this to add a Bill To for a rider.
- **New Account Adjustment**- Use this for credits and debits to accounts, to apply admin fees, for returned checks, for referral credits, and to move credits from refundable to non-refundable and vice versa.
- **Credit Transfer Flow**- Use this to transfer credits betwwen riders, drivers, and to road scholarship accounts.

There are also quick action buttons for **Car Donations**, **Car Trades**, **Payments**, and **Recurring Donations**.

Quick Actions for Accounts

- **Monthly Statements-** Produces a word document of all the rider monthly statements from the Site's Account page.
- **GL Posting**- Produces an Excel document detailing the previous month's financial information from the Site's Account page.
- **Volunteer Yearly Statement**- creates a Word document of the Volunteer Driver Statements for the previous calendar year from the Site's Account page.
- **New Donation**- Creates a donation opportunity from the Account (on Organization Account records).
- **New Grant**- Creates a new grant opportunity related to the Account (on Organization Account records).