

ITNRides 2.0 User Manual

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Welcome to ITNRides

What is ITNRides?

ITNRides 2.0 is web-based software to power community mobility programs. Specifically designed for nonprofit, community-based transportation for older adults and people with special needs, *ITNRides* benefits from ITNAmerica's 25+ years of experience supporting more than 1.3 million rides. The software contains a 178-field research database with access to pre-made reports. Customized reports are available by request. *ITNRides* 2.0 software is built on the Salesforce platform with routing algorithms donated by Esri, the world's leading geographic information systems provider.

What is ITNRides Used For?

- Coordinate Rides
- Collect Information about Riders and Drivers
- Bill for Rides and Membership
- Communicate with Riders and Drivers Through Email
- Portals for Riders, Drivers, and Businesses to Access their Accounts
- Track fundraising and community outreach efforts

Who Has Access to ITNRides?

Site leaders and staff, riders (or a designated representative), and drivers all have access to parts of ITNRides 2.0. A set number of licenses are included in your ITNCountry or ITN Affiliation contract, though more can be purchased as needed.

The Importance of Research Information

Since its inception, ITN has been a research-based organization. This means that we do things because the research supports it, and the information we gather from riders and drivers across the country continually helps us to refine and improve our services and programs.

All information is kept confidential in that it is never linked to the rider or driver's name, and it is always considered with the larger block of data. The privacy of our riders and drivers is of the utmost importance to us, and we make sure that the information is secure.

We are not the only ones who benefit from the data we collect. ITNAmerica has partnered with the CDC on a number of research projects to better understand the transition someone makes as they stop driving, and their ability to access other transportation in their communities.

Connecting to ITNRides

ITNRides on the Salesforce Platform

ITNRides 2.0 is built on the web-based Salesforce platform, the world leader in Customer Relationship Management software. The Salesforce software does a lot of what we need ITNRides to do- it tracks customers and volunteers, tracks payments due and made, and helps with marketing and fundraising. To create ITNRides 2.0, we combined this functionality with a custom-made application that provides state-of-the-art algorithms for rides coordination.

When using ITNRides 2.0 you will be using both the functionality that is a part of "native" Salesforce (functionality that is built in to the original Salesforce software), and the functionality that is part of the custom app we built. The screens will look different depending on which part you are in. Most of your time when coordinating rides will be spent in the custom screens, while working with donors and community outreach will primarily be done in native salesforce screens.

Password Requirements

Your password will need to- have at least 8 characters, use 1 letter and 1 number, have 1 special character (something like a question mark or exclamation point).

User Portals

The user portals are how staff, riders, drivers and others connect to ITNRides. Each type of user has a Portal, and users can access different functionality depending on their role.

Here are the links for the portal login pages:

- Staff: <https://itnrides.force.com/sitestaff/s/login/>
- Riders: <https://itnrides.force.com/rider/s/login/>
- Drivers: <https://itnrides.force.com/driver/s/login/>

Staff Portal

The staff portal is how most users at sites will access ITNRides 2.0. Using the staff portal you can:

- Accept or decline rider applications
- Accept or decline driver applications

- Edit rider or driver information
- Book rides or accept request rides
- Manage/Edit rides
- View Daily Rides List
- Assign rides to drivers
- Send drivers ride information
- Check rider and driver balances
- Process rider payments
- Accept donations
- Track community outreach activities

Rider Portal

The rider portal is designed to give riders (or their designated representative) access to their accounts. They can:

- edit some of their personal information (some must be changed by staff)
- View scheduled rides
- request rides
- view their account balance
- make payments or donations

Business Portal

The Business Portal allows community organizations, businesses, and healthcare providers who are supporting your service to access their accounts and make payments online.

Driver Portal

The driver portal is designed to give drivers easy access to their account, and to make communication with the rides coordination office easier.

In the driver portal they can:

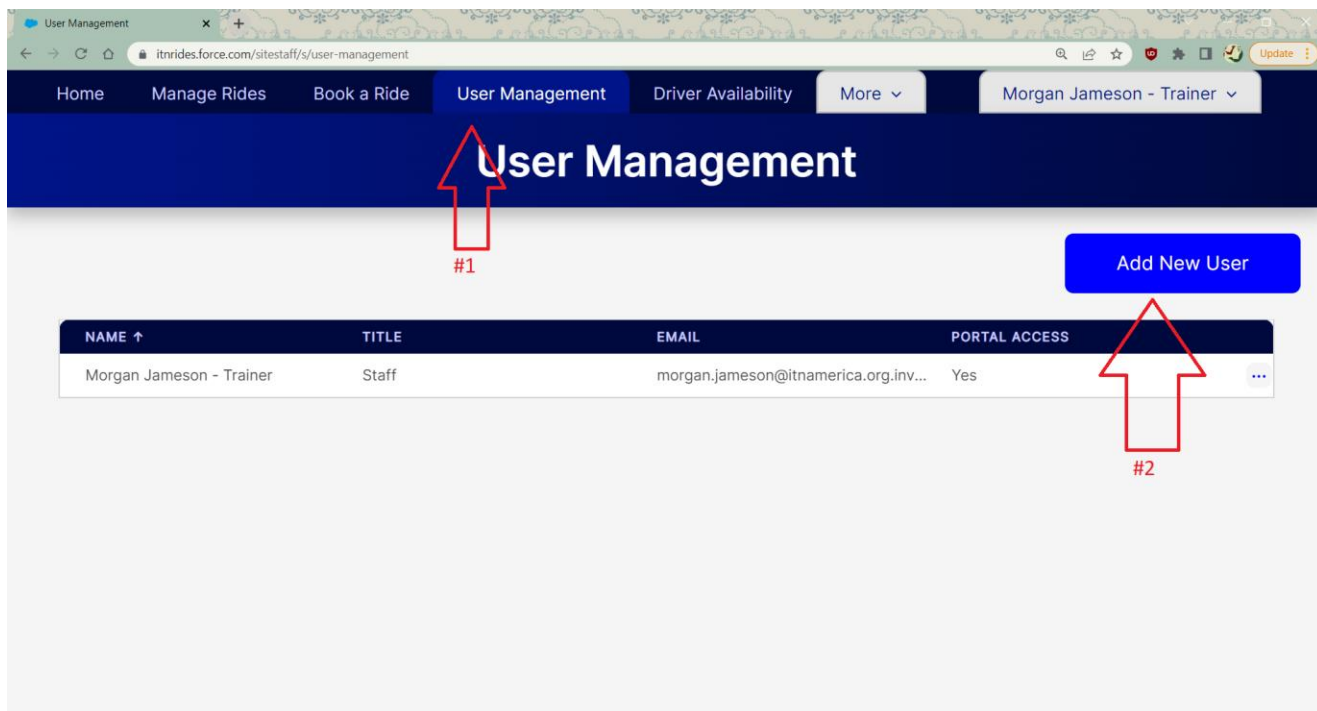
- View their rides
- Update their availability
- Edit some of their personal information
- Make choices about their volunteer credits (if applicable)
- Make donations
- Select rides they would like to volunteer for (if site has this feature selected)

User Management

Each site has a set number of staff licenses. To add additional licenses, please contact ITNAmerica.

Adding a New Staff User

1. Navigate to the user management screen by clicking the User Management Tab. A list of your currently registered staff will be displayed.
2. Click on the blue “Add New User” button at the top right-hand side.



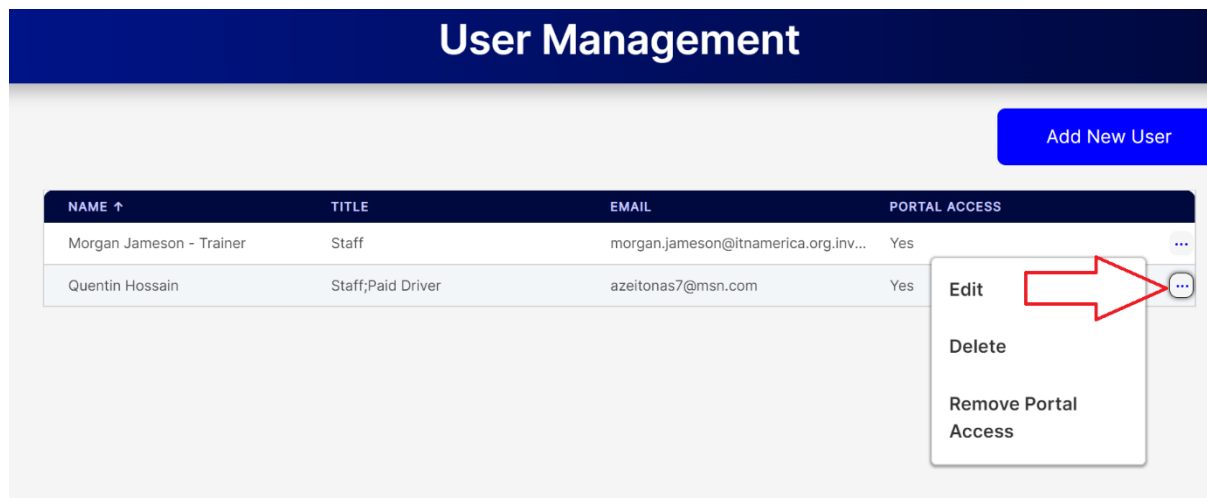
3. A form will pop up to fill out. The following fields are required:
 - ? First Name
 - ? Last Name
 - ? Grant Portal Access? (This should be yes if you want them to have access to the site staff portal to schedule rides)
 - ? Email Address
 - ? Type- A person can be more than one type (they may be a paid driver and a staff person)
4. Once you have entered the person's information, click Save.

5. A green box will appear to let you know your new staff person has been added successfully, and their name will now appear in the User Management list.

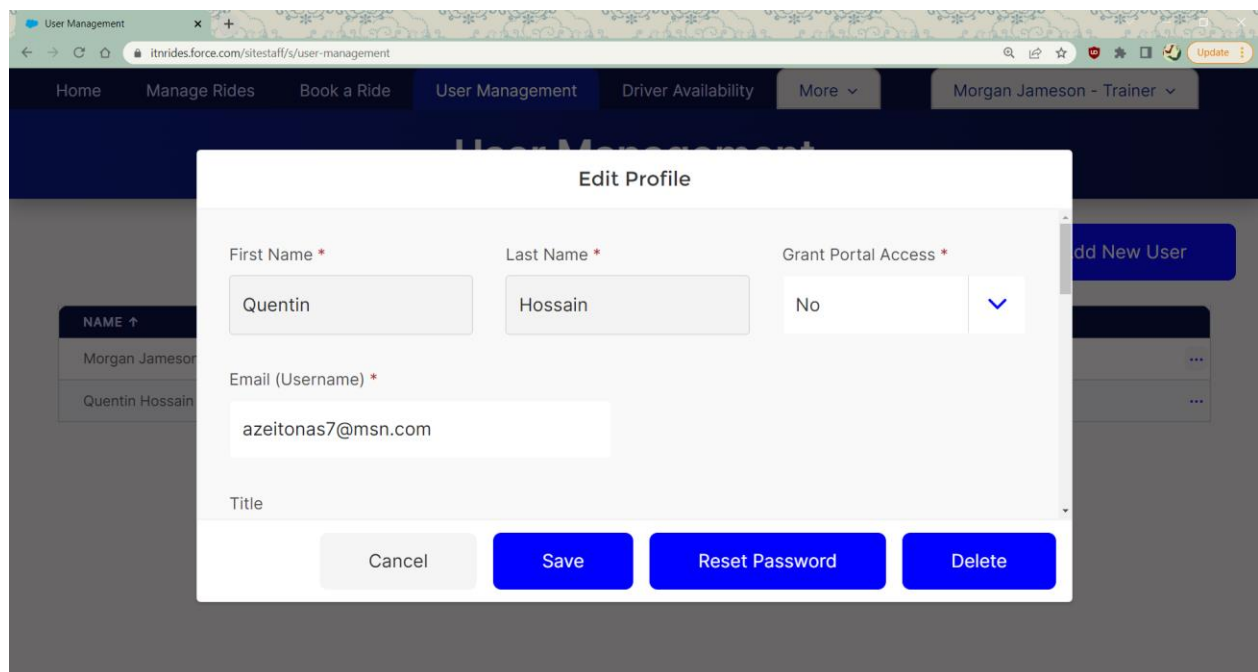
Editing or Deleting Staff Users

You can update information, delete a staff person, reset a password, or remove access to the portal from the User Management tab.

1. Find the person you need to update on the User Management List. Click on the 3 dots that the right hand side of the row their name is in.



2. Select Edit to change their information or reset their password.



3. Select Delete to remove them from the system.
4. Select Remove Portal Access to remove their access but leave them in the system.

Site Settings

Sites can control some of their settings through the site staff portal. They can change their rates and hours, and add messages that riders and drivers will see when they log into the portals. Changing these settings will change the calculations on the back end of ITNRides 2.0, so it is very important that only authorized people make changes to these settings.

Rates and Hours

1. Click the more tab in the navigation bar at the top of the page, and select “Settings”.

The screenshot shows the ITNRides 2.0 site staff portal. The navigation bar at the top includes links for Home, Manage Rides, Book a Ride, User Management, User Profile, and Driver Availability. A 'More' dropdown menu is open, showing options like Rides, Opportunities, Accounts, Contacts, Reports, MassMailer List View, MassMailer Outreach, MassMailer Template Builder, MassMailer Outreach Wizard, Batch Check Entry, Campaign, Cases, and Settings. The 'Settings' option is highlighted with a red arrow. The main content area displays the 'Ride Rates and Times' section, which includes fields for Time Zone (GMT-06:00 Central Standard Time (America/Chicago)), Pick-up Charge (3.00), Mileage Charge (2.25), Extra Stop Charge (2.00), and Stop Time Limit (min) (15). Fields with a red asterisk indicate required settings.

2. The site setting page for Rates and Times will open.
3. Settings with a small red asterisk are required, but may be set to \$0.00 or 0.

Home Manage Rides Book a Ride User Management User Profile Driver Availability More

ITNA Test Affiliate Staff

Site Settings

Save Settings

Time Zone *

(GMT-06:00) Central Standard Time (America/Chicago)

Ride Rates and Times

Pick-up Charge * 3.00

Mileage Charge * 2.25

Minimum Charge * 8.00

Extra Stop Charge * 2.00

Stop Time Limit (min) * 15

Hourly Charge * 20.00

After Hours Pick-up Charge * 5.00

After Hours Start Time * 09:00 PM

After Hours End Time * 07:00 AM

Same Day Cut-off * 02:00 PM

Same Day Mileage Charge * 4.50

Same Day Minimum Charge * 10.00

Cancellation/No Show Fee * 10.00

Ride Share Discount (%) * 20

Default Load Time (min) * 5

Default Ride Share Addl Time (min) * 10

4. Press Ctrl+S or scroll to the top of the page and click on “Save Settings” to save any changes you have made.

Messages for Portals

To adjust the messages that drivers and riders see on the portal homepages, navigate to the site contact account to see the current message and make changes.

1. Navigate to the site’s account page by clicking on Accounts under the More tab.

User Management

Home Manage Rides Book a Ride User Management Driver Availability More

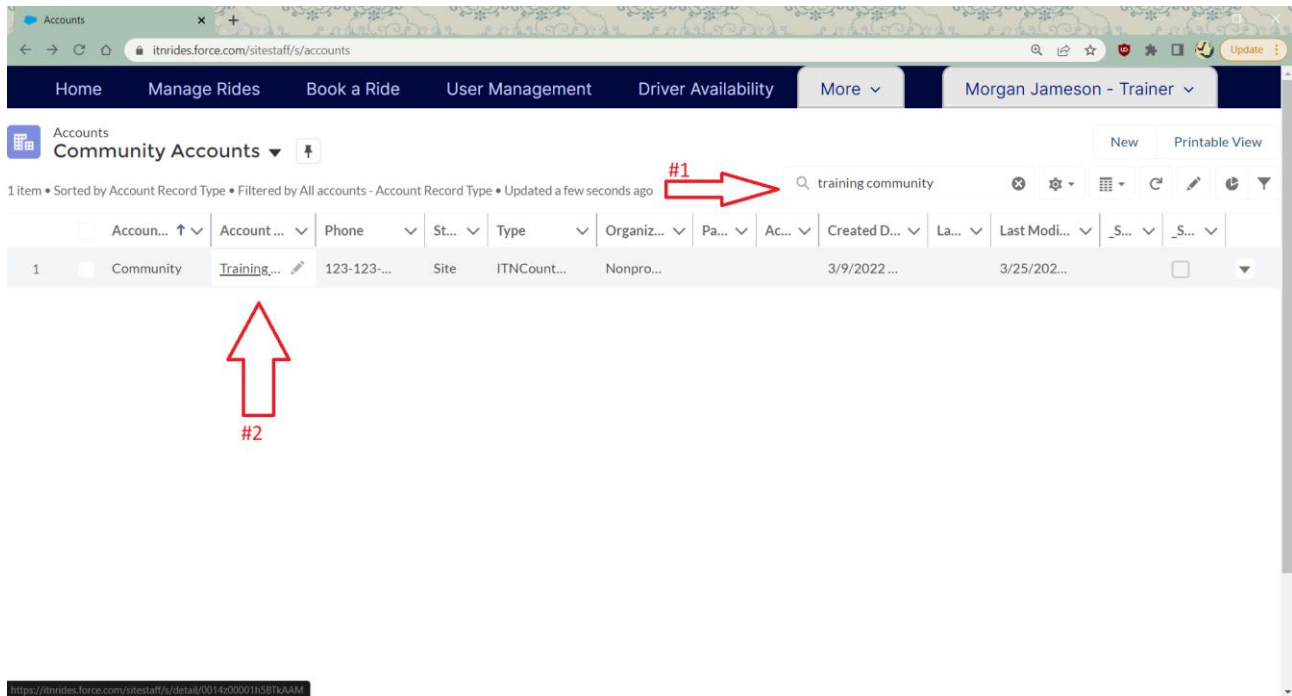
Morgan Jameson - Trainer

User Management

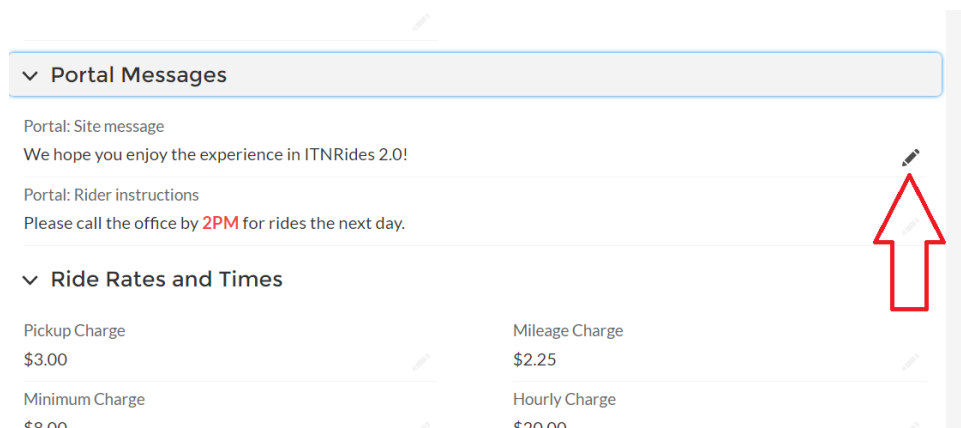
Add New User

NAME ↑	TITLE	EMAIL
Morgan Jameson - Trainer	Staff	morgan.jameson@itna
Quentin Hossain	Staff;Paid Driver	azeitonas7@msn.com

2. Search for the site's name, and click on it in the list. This will open the site's account page, and details about the site settings and contact info.








3. The Portal Messages can be changed on this screen. The fields for entering the messages are in the fourth category down, under General, Contact Information, and Address Information. The fields are rich text fields, so you can adjust font size, colors, and other things to make your message stand out. To change the messages, click on the pencil at the right of the line. (The pencil will appear light gray at first, but will darken when you hover over it).



4. The Portal site message can be changed, to show for both riders and drivers.






▼ Portal Messages

Portal: Site message

Salesforce Sans 12 B I U     

We hope you enjoy the experience in ITNRides 2.0!

Portal: Rider instructions






Salesforce Sans 12 B I U     

Please call the office by **2PM** for rides the next day.

5. The Rider Instructions can also be changed, these will show for riders only. Make sure your rider instructions reflect the information you have entered in the rates and hours settings.






▼ Portal Messages

Portal: Site message

Salesforce Sans 12 B I U     

We hope you enjoy the experience in ITNRides 2.0!

Portal: Rider instructions

Salesforce Sans 12 B I U     

Please call the office by **2PM** for rides the next day.

The Home Page

Dashboard

When you first log-in to the staff portal, it will automatically open to the dashboard. This dashboard is where you will find the most important reports that you will check on a regular basis.

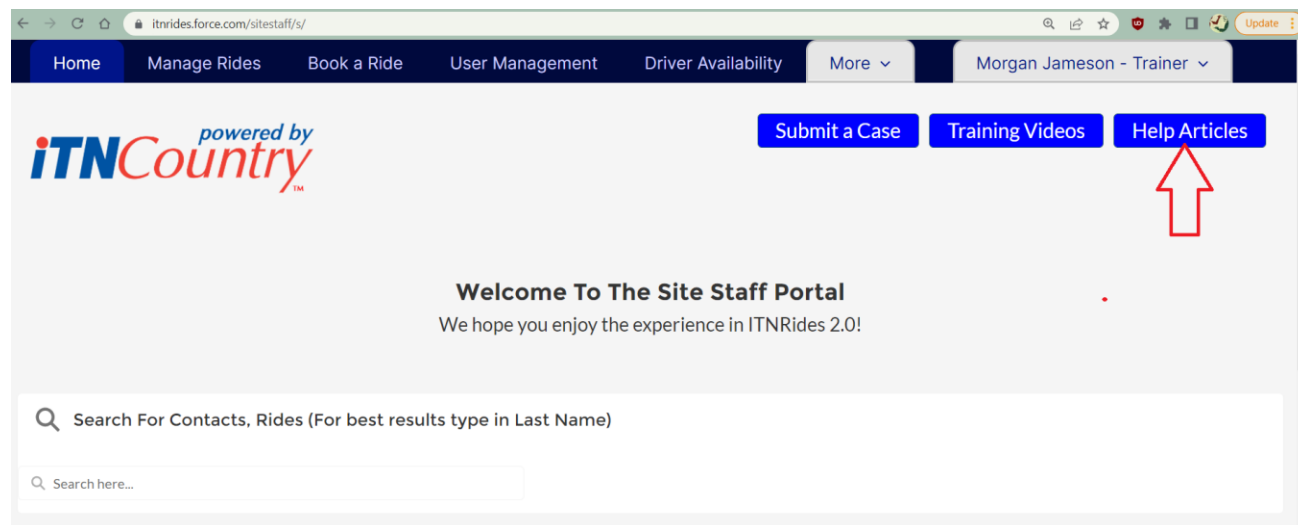
Navigation

The tabs that you will use the most are along the top of the page. To access additional options click on More, and a drop-down will appear with additional choices.

How to Get Help

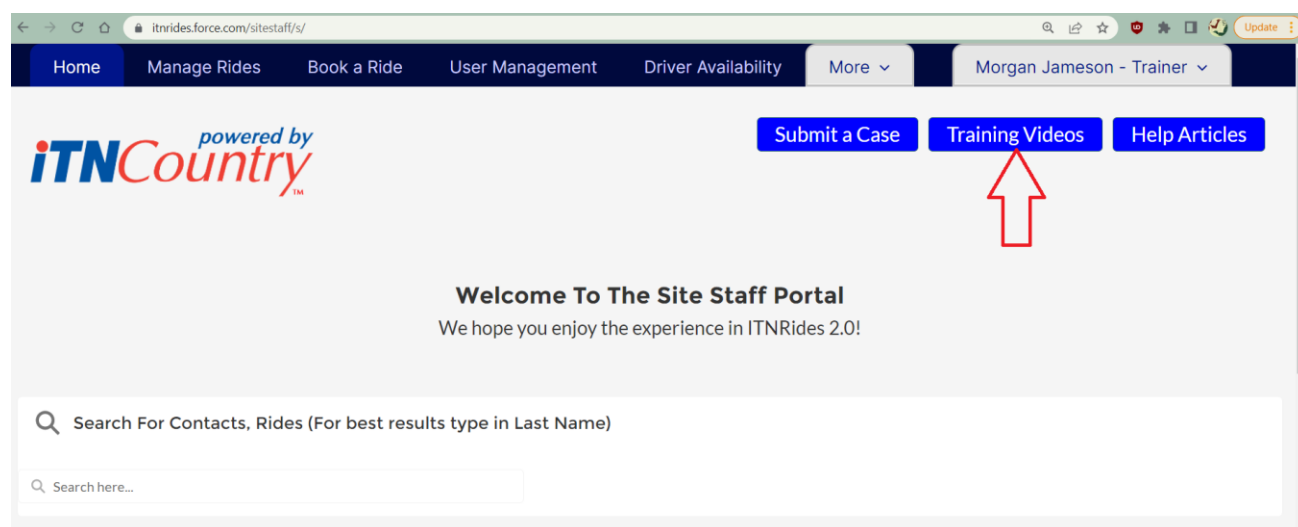
Manual and Help Articles

This manual contains all the tasks you will need to do in ITNRides 2.0, and is available by topics, or can be downloaded in its entirety from the Online Learning Center. To access the instructions from in ITNRides, click on Help Articles at the top right of the Home Page.



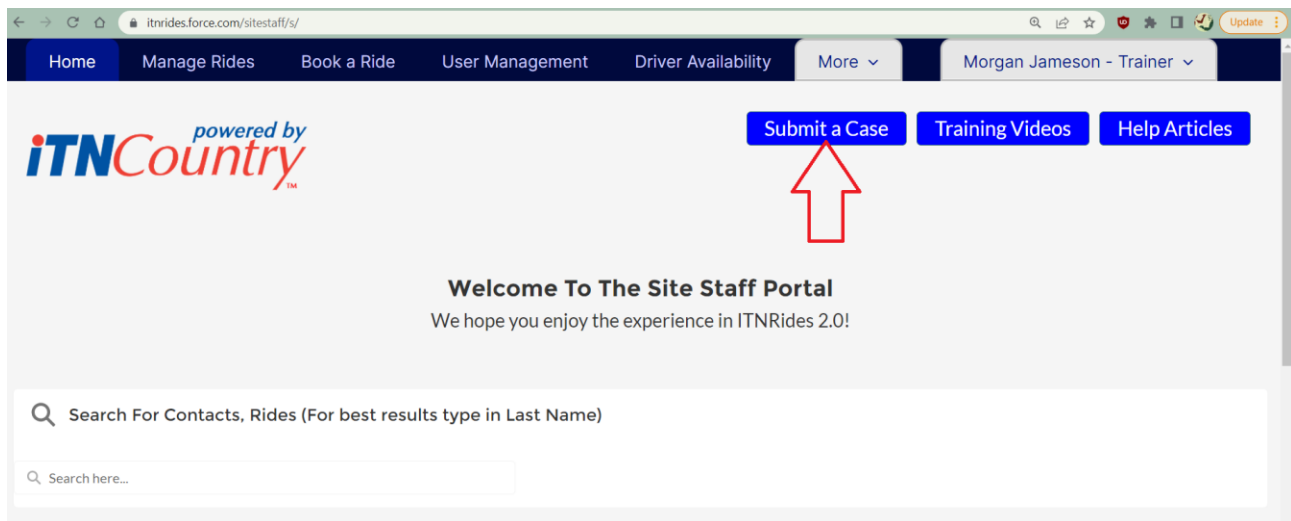
Training Videos in the Online Learning Center

The Online Learning center also contains videos that show each task being completed in the software, with verbal instructions to follow along. ITNAmerica recommends watching these videos during training, and then using the manual as a reference the first few times you work with the software.



Help Desk/Cases

Cases are the Help Desk, and you can submit tickets to things that you cannot find the answer to in the manual or Online Learning Center. This is also where you can report errors or bugs.



Entering People

Contact Types and Definitions

Riders (and their Emergency Contacts), Drivers, and Community Contacts are entered through the online applications. The following are the types of contacts that are available to choose from in ITNRides.

Someone can be classified as more than one contact type. (For example, a person can be both a Board Member and a Donor).

- Rider
- Paid Driver
- Staff (ITN/TTP/ITNC)
- Volunteer Driver
- Emergency Contact
- Board Member
- Committee Leader
- Committee Member
- Community Contact
- Council of Advisors
- Donor
- Employee
- Executive Director
- Foundation Program Officer
- Foundation Staff
- Foundation Trustee
- ITNAmerica Staff
- Media
- Political

- Relative
- Research Contact
- Volunteer
- Volunteer (ITN/TTP/ITNC)
- Newsletter Request

Entering Riders and their Emergency Contacts

All riders and their associated Emergency Contacts must be entered through the online application. If your rider needs to complete the application on paper, the information is entered online by a staff person once they submit the paper application. The application for your site can be found on your website or the landing page on the ITNCountry.org website.

Rider Application and Activation

1. Click on the membership application button on the landing page on the site's website.
2. Complete all required information. Please note, most of the questions on the application are required.
3. If the application cannot be completed in one sitting, save the application by clicking on "Save and Complete Later" at the top of the page. To return to the application, click on the applications button as you did when you began to enter it, and select "Open a Saved Application".
4. An email is sent to the site every time an application is submitted. New applications can be found in the New Riders and Drivers Report the day after they are entered through the application. The information is transmitted immediately, though, so the rider can be found by typing their name into the search box on the home page or searching the All Contacts list under Contacts.

The screenshot shows the ITNCountry Staff Portal interface. At the top, there is a navigation bar with links: Home, Manage Rides, Book a Ride, Uncovered Rides, User Management, Driver Availability, and a More dropdown. On the right of the navigation bar is a user profile for Minnie Jameson. Below the navigation bar, there are three buttons: Submit a Case, Training Videos, and Help Articles. The main content area features the ITNCountry logo and a welcome message: "Welcome To The Site Staff Portal". Below this is a search bar with the placeholder text "Search For Contacts, Rides (For best results type in Last Name)". A red circle highlights the search bar and the dropdown menu that appears below it, showing a "Contact" option. Below the dropdown, there is a table with two rows, both labeled "MOCK RIDER". At the bottom of the page, there is a section titled "Quick Links to Reports:".

5. Open the Contact record for the new member, and click the pencil next to Rider Status to open the form for editing. (The pencil will be grayed out until you hover over it).

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More ▾

Contact Mock Rider + Follow

Phone 999-999-7777 Account Name Mock and Mock2 Rider - PTA Rider Status Active Driver Status

DETAIL RELATED RECORDS

Contact Type Rider Title

▼ Contact Details

Name Mock Rider Gender Female

Preferred Name Birthdate 1/1/1947

Account Name Mock and Mock2 Rider - PTA Primary Affiliation Community Playground


Family Account ☒ Contact ID CPG-00094714

Rider Status Active Driver Status

Account Balance (\$24.01) Email Manifest ☒

Minimum Rider Balance \$100.00 Primary Language English

Membership Type Other Language



6. The membership type will default to individual or family, based on what was entered on the application. If the member is another membership type (Ride Services, Volunteer, or Scholarship), update the membership type.

▼ Contact Details

* Name Salutation --None-- First Name Mock Last Name Rider Suffix Preferred Name

Account Name Mock and Mock2 Rider - PTA

Membership Type **Membership - Family**


Gender Female Birthdate 1/1/1947 Primary Affiliation Community Playground

Contact ID CPG-00094714 Driver Status --None-- Email Manifest ☒

Primary Language English Other Language --None--

Internal Notes

Cancel Save



7. Change the rider status from Admin Inactive to Active and save.

▼ Contact Details

*Name

Salutation: --None--

First Name: Mock

*Last Name: Rider

Suffix:

Preferred Name:

Account Name: Mock and Mock2 Rider - PTA

Family Account: ☒

Rider Status: **Active** (indicated by a red arrow)

--None--

✓ Active

Admin Inactive

Gender: Female

Birthdate: 1/1/1947

Primary Affiliation: Community Playground

Contact ID: CPG-00094714

Driver Status: --None--

Email Manifest: ☒

Primary Language: English

8. You can now apply payments to the account and book rides for the member!

Family Accounts

A family account is used when two people who live at the same address sign up for rides that will be billed to the same account.

1. Select Family Membership instead of individual on the application.
2. One person will be entered as Family Member #1, and the other as Family Member #2.
3. Follow all of the steps to enter an individual member for each family member.
4. Activate both individuals' accounts in ITNRides 2.0 after the applications are submitted, making sure their membership types are set to Family Membership (this should be automatic).

Changing a Single Membership to a Family Account

1. Pull up the contact record of the existing single rider. Change the Membership Type to Family.

Community Playground

Contact ID: CPG-00049273

Driver Status: --None--

Email Manifest: ☒

Primary Language: English

Other Language: --None-- (indicated by a red arrow)

Membership Type: **Membership - Family** (indicated by a red arrow)

Internal Notes:

2. Click to open the Account page for the rider, which is labelled PTA.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability

Contact
Mock Rider

Phone: 999-999-7777 Account Name: Mock Rider - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Rider Title:

▼ Contact Details

Name: Mock Rider Gender: Female

Preferred Name: Birthdate: 1/1/1947

Account Name: Mock Rider - PTA Primary Affiliation: Community Playground

Family Account: ☐ Contact ID: CPG-00094714

Rider Status: Active Driver Status:

Account Balance: (\$24.01) Email Manifest: ☒

Minimum Rider Balance: \$100.00 Primary Language: English

Membership Type: Other Language:

Membership - Business

3. Edit the Account to add the name of the second rider. The account name follow the pattern of “Mary and Bob Smith- PTA”. Check off the Family Account box next to the account name and save.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability MORE Minnie Jameson

Account
Mock Rider - PTA

+ Follow New Contact New Organization Edit

Primary Contact: Mock Rider Account Balance: (\$24.01) Account Balance (inc. booked rides 30d): (\$24.01)

DETAILS RELATED LISTS

Account Name: Mock and Mock2 Rider - PTA Family Account: ☒

Primary Contact: Mock Rider Search Accounts...

Most Recent Monthly Balance Date: Contact Mail To:

▼ Transportation Account

Account Balance: (\$24.01) Total Ride Charges:

Account Balance (inc. booked rides 30d): (\$24.01) Refundable Credit: (\$24.01)

Non-Refundable Credit: \$0.00

▼ Billing Information

Preferred Payment Method: --None-- Credit Card Expiration Year:

Credit Card Type: Credit Card Expiration Month:

4. Click on the Primary Contact at the top to return to the existing single rider’s Contact Record.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability

Account
Mock and Mock2 Rider - PTA

Primary Contact Mock Rider	Account Balance (\$24.01)	Account Balance (inc. booked rides 30d) (\$24.01)
-------------------------------	------------------------------	--

DETAILS RELATED LISTS

Account Name Mock and Mock2 Rider - PTA	Family Account <input checked="" type="checkbox"/>
Primary Contact Mock Rider	Parent Account
Most Recent Monthly Balance Date	Contact Mail To

Transportation Account

Account Balance (\$24.01)	Total Ride Charges
Account Balance (inc. booked rides 30d)	Refundable Credit (\$24.01)
	Non-Refundable Credit \$0.00

- You'll see that the checkbox for Family Account is now checked off.
- Open the online application (or have the new family member enter their information through the online application), being sure to list the existing member when asked for the name of the 1st Family Member.

Please complete one form per rider

Type of Membership: ☐ Individual ☒ Family

Is this application is for: ☐ 1st Family Member ☒ 2nd Family Member

Name of 1st Family Member

Person completing this form is: ☒ Rider ☐ Family Member ☐ Other

- Complete the application for the new family member. Once the application is submitted, pull up the Contact Record for the new rider. Make sure to change the Membership Status to Family and the Rider Status to Active.

Contact Details

*Name
Salutation: --None--
First Name: Mock2
*Last Name: Rider
Suffix:
Preferred Name:
Account Name: Mock2 Rider - PTA
Family Account: ☒
Rider Status: Active
Account Balance: \$0.00
Minimum Rider Balance: \$100.00
Membership Type: Membership - Family
Internal Notes:
Description:

Gender: Male
Birthdate: 1/9/1952
Primary Affiliation: Community Playground
Contact ID: CPG-00096130
Driver Status: --None--
Email Manifest: ☒
Primary Language: English
Other Language: --None--

Cancel Save

8. Save the new rider's contact record, and you can now book rides for the new Family Account Member.

Changing a Family Membership to a Single Membership

1. Pull up the Contact Record for the Rider that will be closed, and set the rider's status to Closed.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability

Contact Family1 Example

Phone: Account Name: Family1 and Family2 Example - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Rider Title: 1

Contact Details

Name: Family1 Example Gender: Female
Preferred Name: Birthdate: 1/1/1951
Account Name: Family1 and Family2 Example - PTA Primary Affiliation: Community Playground
Family Account: ☒ Contact ID: CPG-00092789
Rider Status: Active Driver Status:
Account Balance: \$0.00 Email Manifest: ☒
Minimum Rider Balance: \$100.00 Primary Language: English
Membership Type: Membership - Family Other Language:
Internal Notes:
Description:

Portal Access

Site Portal Access: Business Portal Access

Committee Leader

▼

▼ Contact Details

* Name

Salutation

--None--

First Name

Family1

* Last Name

Example

Suffix

Preferred Name

Account Name

Family1 and Family2 Example - PTA

Family Account

☒

Rider Status

Active

--None--

✓ Active

Admin Inactive

Suspended

Closed

Internal Notes

Description

Gender

Female

Birthdate

1/1/1951

Primary Affiliation

Community Playground

Contact ID

CPG-00092789

Driver Status

--None--

Email Manifest

☒

Primary Language

English

Other Language

--None--

Cancel

Save

- The click on the Account listed under Account Name. Uncheck the Family Account box, and remove the rider that is being closed from the Account Name. (In this example we are removing Family1 and converting this to an individual account for Family2). If needed, change the primary contact on the account to the remaining rider. These options are all right at the top of the page. After making the changes, save the Account Record.

Account: Family1 and Family2 Example - PTA

Primary Contact: Family1 Example

Account Balance: \$0.00

Account Balance (inc. booked rides 30d): \$0.00

DETAILS RELATED LISTS

*Account Name: Family1 and Family2 Example - PTA

Family Account: Family2 Example

Primary Contact: Family2 Example

Parent Account: Search Accounts...

Recent Monthly Balance Date: Contact Mail To:

Transportation Account

Account Balance: \$0.00

Account Balance (inc. booked rides 30d): \$0.00

Total Ride Charges: \$0.00

Refundable Credit: \$0.00

Non-Refundable Credit: \$0.00

Billing Information

Preferred Payment Method: --None--

Credit Card Type: --None--

Last 4 Credit Card Number:

Credit Card Expiration Year:

Credit Card Expiration Month:

Cancel Save

3. Navigate to the remaining rider's Contact Record. You will see that the Account (PTA) associated with the account is now changed to the new name you just entered.

Home Manage Rides Book a Ride Uncovered Rides User Management Drive

Contact: Family2 Example

Phone: Account Name: Family2 Example - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Rider Title:

Contact Details

Name: Family2 Example

Preferred Name:

Account Name: Family2 Example - PTA

Family Account:

Rider Status: Active

Account Balance: \$0.00

Minimum Rider Balance: \$100.00

Membership Type: Membership - Family

Internal Notes:

Description:

Portal Access

Site Portal Access: https://itriderforce.com/sites/staff/s/accounts/account/0014z000010mseAAA/family2-example-pta

Business Portal Access:

Gender: Male

Birthdate: 1/2/1948

Primary Affiliation: Community Playground

Contact ID: CPG-00092791

Driver Status:

Email Manifest: ☒

Primary Language: Spanish

Other Language: English

4. On the remaining Contact Record, change the Membership Type to Individual and Save.

▼ Contact Details

* Name

Salutation: --None--

First Name: Family2

* Last Name: Example

Suffix:

Preferred Name:

Account Name: Family2 Example - PTA

Gender: Male

Birthdate: 1/2/1948

Primary Affiliation: Community Playground

Contact ID: CPG-00092791

Driver Status: --None--

Email Manifest: ☒

Primary Language: Spanish

Other Language: English

Membership Type: **Membership - Individual**

Description:

Cancel Save

Entering Drivers

All drivers are entered through the application on the site's landing page on the ITNCountry.org website. These applications will import the person's information into the ITNRides 2.0 software, so it is recommended that you only have a paid driver complete this application after an initial screening to help limit the number of unneeded applications submitted.

Volunteer Application

1. Click on the volunteer driver application button on the landing page on the site's website.
2. Complete all required information. Please note, most of the questions on the application are required.
3. If the application cannot be completed in one sitting, save the application by clicking on "Save and Complete Later" at the top of the page. To return to the application, click on the applications button as you did when you began to enter it, and select "Open a Saved Application".
4. An email is sent to the site every time an application is submitted. New applications can be found in the New Riders and Drivers Report. This report is updated nightly, so the new contact will show up the day after they enter their application. The New Riders and Drivers report can be found on the homepage. The contact is added to the system as soon as the application is submitted, so you do not have to wait for them to show up on the report to activate them.
5. Select the new driver you want to activate from the report list or by entering their name in the search box on the homepage. The driver's status will be inactive.

Search box

Search For Contacts, Rides (For best results type in Last Name)

example driver

Search Results

▼ Contact

EXAMPLE DRIVER

Quick Links to Reports:

Ride Management Reports	Contact Management Reports	Financial Reports
Daily Overview Daily Overview Rpt - Today Daily Overview Rpt - Tomorrow	All Drivers Report All Riders Report New Riders and Drivers	Account Receivable Aging Report

- Once you have opened the Driver Contact page, scroll down to the “Driver Details” section and click on the pencil next to Service Area (Miles). This will open the entire page for editing. Enter the number of miles the driver is willing to driver (from their own address) in this field. The system will only allow drivers to be assigned to rides within this distance from their address.

Emergency Contact 1 Phone
1234567896

Emergency Contact 1 Email

Emergency Contact 2 Phone

Emergency Contact 2 Email

▼ Driver Details

Willing to load/transport wheelchair ☒

Will Transport Animals ☐

Primary Vehicle
2020 Ford Escape

Default Vehicle
V-007357

Default Start Location
LC-036913

Languages Spoken

Occupied Miles Pref

Occupied Miles Recipient

Occupied Miles Recipient Text

Service Area (Miles)
25

Driver License Expiration Date
1/7/2028

Last background check

Default End Location
LC-036913

Languages Spoken - Other

Unoccupied Miles Pref

Unoccupied Miles Recipient

Unoccupied Miles Recipient Text

▼ Driver Schedule

Can work on Sundays ☐

Can work early mornings ☐

Can work on Saturdays ☐

Can work at night ☐

Start/Hire Date

Available start date

Max driving hours per day

Max driving days per week

Additional availability information

7. Scroll down to the section of the page that says “Driver Default Schedule- displays on Driver Portal”. In this section, enter the regular weekly schedule for the volunteer. You can enter up to two time slots for each day of the week. Click Save.

You can enter up to 2 start and end times per day. This example has the driver scheduled for Tuesdays from 8am to 3pm.

8. Scroll back to the top of the page, and click on “Related Records”.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

Minnie Jameson

Contact Example Driver

+ Follow Driver Availability Driver Manifest New Account Adjustment

Phone (207) 456-9871 Account Name Example Driver - PTA Rider Status Driver Status Active

DETAILS RELATED RECORDS

Contact Type Volunteer Driver Title

▼ Contact Details

Name Example Driver Gender Female

Preferred Name Birthdate 1/7/1982

Account Name Example Driver - PTA Primary Affiliation Community Playground

Family Account Contact ID CPG-00079231

☐ Rider Status Driver Status

9. Scroll down to Vehicles. Some drivers will have entered a vehicle when completing the application. If the driver did not enter the vehicle, and gave you the information during their interview or training, you will enter it now. Even if the driver has entered the vehicle, you need to adjust the mobility aids and special needs matching information.

Calendar - Morgan Jameson ITN's Phone Directory Contact Example Driver

itrides.force.com/stestaff/s/contact/0034c00002oo3uGAAQ/example-driver?tabset=1535e=2

Opportunities (0) New

Organization Affiliations (1) New

Affiliation: Affiliation Name	Account Name	Affiliation: Record Type	Key Role
AF-074075	Community Playground	Site	Member

View All

Routes (1)

Route Number
RT-006180

View All

Vehicles (1) New

Vehicle Number	Default Vehicle Checkbox	Make	Model
V-007357	<input checked="" type="checkbox"/>	Ford	Escape

View All

ITN Locations (1) New

ITN Location Number	Default Address	Physical Street	Physical City
LC-036913	<input checked="" type="checkbox"/>	4 Stillwater Drive	Westbrook

View All

https://itrides.force.com/stestaff/s/contact/related/0034c00002oo3uGAAQ/Vehicles_2

10. If no vehicle has been entered, click "New" to enter a new vehicle. This will open a form for you to fill out.

Routes (1)			
Route Number	RT-006180		
View All			

Vehicles (1)			
Vehicle Number	Default Vehicle Checkbox	Make	Model
V-007357	<input checked="" type="checkbox"/>	Ford	Escape
View All			

ITN Locations (1)			
ITN Location Number	Default Address	Physical Street	Physical City
LC-036913	<input checked="" type="checkbox"/>	4 Stillwater Drive	Westbrook
View All			

11. Complete the form with as much information as you have, be sure to complete the Accessibility section to ensure correct matching when creating routes. Be sure to check full-size vehicle if the vehicle could comfortably sit a larger person. (Many riders check off they need a full size vehicle and this must be checked on the car to be able to match the driver with the rider). Not all fields are required, and some programs may not use sections tracking things like car maintenance.

New Vehicle

Vehicle Owner
Example Driver

Vehicle Year

Make

Model

Vehicle Color

Site Access

Default Vehicle Checkbox

Vehicle General Condition

Accessibility

Number of doors

Has Trunk

License Plate Number

Vehicle Code
--None--

Number of Seats

Modesty For Capacity
1

Driver Allows Animals

Cancel Save & New Save

12. If a vehicle was entered when the application was submitted, click on the vehicle to open the record and scroll down to the Accessibility section to fill in the information necessary for generating routes. Be sure to check full-size vehicle if the vehicle could comfortably sit a larger person. (Many riders check off they need a full size vehicle and this must be checked on the car to be able to match the driver with the rider).

2020

Make

Ford

Model

Escape

Vehicle Color

blue

Site Access

0014z00001sk8UAAC

Default Vehicle Checkbox

☒

Vehicle General Condition

good

▼ Accessibility

Number of doors

4

Has Trunk

☒

High vehicle

☒

Low vehicle

Wheelchair access

☐

▼ Documentation

Registration Number

Agent

Registration Expiration Date

Cancel Save

13. Check that the vehicle is checked off as the Default Vehicle (the checkbox is just above the Accessibility section).

Vehicle Owner

Example Driver

License Plate Number

ME12345

Vehicle Year

2020

Make

Ford

Model

Escape

Vehicle Color

blue

Site Access

0014z00001sk8UAAC

Default Vehicle Checkbox

☒

Vehicle General Condition

good

▼ Accessibility

Number of doors

4

Has Trunk

☒

High vehicle

☒

Low vehicle

Wheelchair access

☐

▼ Documentation

Registration Number

Agent

Registration Expiration Date

Cancel Save

14. Return to the driver's Contact Record page, and enter their weekly availability schedule. This is the set schedule that will show on the driver portal. You will need to scroll about halfway down the Contact Record page to find this section. It is labelled- Driver Default Schedule- displays on Driver Portal. You can enter up to 2 timeslots per day.

Additional availability information

▼ Driver Default Schedule - displays on Driver Portal

Day 1 Day

Sunday

Day 1 Start Time A

Day 1 Start Time B

Day 2 Day

Monday

Day 2 Start Time A

8:00:00 AM

Day 2 Start Time B

Day 3 Day

Tuesday

Day 3 Start Time A

Day 3 Start Time B

Day 4 Day

Wednesday

Day 4 Start Time A

Day 4 Start Time B

Day 5 Day

Thursday

Day 1 End Time A

Day 1 End Time B

Day 2 End Time A

4:30:00 PM

Day 2 End Time B

Day 3 End Time A

Day 3 End Time B

Day 4 End Time A

Day 4 End Time B

15. Return to the top of the page, and click the pencil next to the Driver Status field.

Contact
Example Driver

Phone (207) 456-9871	Account Name <u>Example Driver - PTA</u>	Rider Status	Driver Status Active
-------------------------	---	--------------	-------------------------

DETAIL
RELATED RECORDS

Contact Type Volunteer Driver	Title ¹
----------------------------------	--------------------

▼ Contact Details

Name Example Driver	Gender Female
Preferred Name	Birthdate 1/7/1982
Account Name <u>Example Driver - PTA</u>	Primary Affiliation ¹ <u>Community Playground</u>
Family Account <input type="checkbox"/>	Contact ID CPG-00079231
Rider Status	Driver Status Active
Account Balance ¹ \$0.00	Email Manifest <input checked="" type="checkbox"/>
Minimum Rider Balance \$100.00	Primary Language English
	Other Language

16. Change the account status from Admin Inactive to Active and save.

Committee Leader

▼ Contact Details

* Name Salutation --None-- First Name Example * Last Name Driver Suffix Preferred Name	Gender Female
Account Name 	Birthdate 1/7/1982
Family Account <input type="checkbox"/>	Primary Affiliation ¹
Rider Status --None--	Contact ID CPG-00079231
Account Balance ¹ \$0.00	Driver Status Active
Minimum Rider Balance \$100.00	Email Manifest <input checked="" type="checkbox"/>
Internal Notes	Primary Language English
	Other Language --None--

Cancel
Save

17. Now you can assign rides to the driver!

Paid Driver Application

In the near future we will introduce an online application for paid drivers. This has not launched yet, and this section will be updated when that application is introduced. The paid driver application is similar to the volunteer application, but includes work history and leaves out demographic information that can't be considered when hiring.

1. Click on the paid driver application button on the landing page on the site's website.
2. Complete all required information. Please note, most of the questions on the application are required.
3. If the application cannot be completed in one sitting, save the application by clicking on "Save and Complete Later" at the top of the page. To return to the application, click on the applications button as you did when you began to enter it, and select "Open a Saved Application".
4. After submitting the application, check your email and verify yourself by clicking the link in the automated email. Once this verification is done, the application will be uploaded into ITNRides 2.0.
5. An email is sent to the site every time an application is submitted. New applications can be found in the New Drivers Report. Click.... to open this report.
6. Select the new driver you want to activate from the report list. The driver will show as an active member, and the account must be activated to match this. Change the account status from Admin Inactive to Active and save.
7. Ask the driver to log into the driver portal and submit their schedule.
8. Now you can assign rides to the driver!

Entering Donors and Other Community Contacts

Donors and other community contacts are entered through the Contacts application. This application contains many field that are not required. The only required fields are:

- Contact Type
- First Name
- Last Name
- City
- State
- Phone (at least one of the following- home, work, or mobile)

Enter a Contact - donor, board member, committee member, etc.

Page: [1](#) [2](#) [3](#) [4](#) [5](#)

Page 1

Community Playground: 12 Stillwater Drive, Westbrook

Contact Type: (Use Ctrl key to select multiple types.) *

Please select...

Board Member

Committee Leader

Committee Member

Job title: (if applicable)

Title:

First Name: *

These required fields are all on the first page of the Contact entry form. The next 4 pages capture other information that you may be interested in having on some contacts, but will not apply to all contacts and is not required.

Entering Addresses

Addresses are entered as part of the member or driver application, through ITN Locations (under the More menu), or when you are booking rides. Always check to see if an address is in the system before adding it. This can be easily checked by entering it as a destination on the ride booking screen. New addresses will be checked against the GIS system we use, and only valid addresses will save. If there is an issue with the address, the system will not let you save. The easiest way to enter a general address is through the ride booking screen. If the location will be participating in a ride subsidy program like Ride & Shop or Healthy Miles, it should be entered through ITN Locations.

Naming Addresses for Easy Searching

When entering an address for a ride, you can type in the street address or the business name. If you have named addresses as you enter them, it will make for easy searching. This is helpful because many of your riders may know the name of the place they are requesting a ride to, but not the exact street address.

Apartment and Suite Numbers

Suites and Apartment numbers are handled differently depending on how they are entered. Addresses connected to people are primarily entered through the applications, which have Address 1 and Address 2 boxes. When those boxes are present, apartment and suite numbers should go in the Address 2 box. On the Add a Ride Screen, the Add New Address screen only has one Address box, so apartment and suite numbers should be entered in that line, along with the street address. Be sure to add any location notes or business names that will make finding the location easier for drivers.

Entering Addresses Through the Ride Booking Screen

1. Begin entering an address in the end location box of the ride booking screen, if no match is found in the system you will see “Create New Address” underneath the box you are typing in.

The screenshot shows the 'Ride 1' booking screen. At the top, there are tabs for 'Ride 1' and 'Add Ride 2 +'. Below these are fields for 'Riders' (set to 1), 'Appointment time' (with a clock icon), and 'Bill to'. The main section contains 'Start Location' (set to 'No Start Location') and 'End Location'. The 'End Location' input field contains the text '265'. Below this input field, a button labeled '+ Create new address' is visible. A red arrow points from this button towards the right.

2. Click on “Create New Address” and the New Address drawer will open for you to enter the information.

This screenshot shows the 'New Address' drawer that appears after clicking the 'Create new address' button. The drawer is a dark blue overlay on the right side of the screen. It contains several input fields: 'Address *' (with a red asterisk indicating it is required), 'Building Name', 'Business Name', 'City *', 'State *' (with a dropdown arrow), and 'Zip Code *'. There is also a 'Location Notes' field at the bottom. A red arrow points from the 'Create new address' button in the previous screenshot to the 'Address' field in this drawer.

3. Enter the address, including any Suite # or Apt # in the Address box.

> New Address

* Required

Address *

Building Name

4. Be sure to add the Building or Business Name if applicable, as this will make it much easier to search for the address in the future.

> New Address

* Required

Address *

Building Name

Business Name

City *

State *

Zip Code *

5. Save the address, and you will see a green box showing that it has been successfully added. The pop-up will close and then you will return to the Add a Ride Screen.

Location successfully saved.

Bill to

Pick up: Before

Pick up time: --:-- --

Ride Notes

Entering Addresses Through ITN Locations

1. Open ITN Locations by navigating to the “More” Menu on the homepage and choosing ITN Locations.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

Minnie Jameson

Submit a Case Training Videos Help Articles

powered by
ITN Country

Welcome To T

Search For Contacts, Rides (For best results type in Last Name)

Search here...

Quick Links to Reports:

Ride Management Reports	Contact Management Reports	Financial Reports
Daily Overview	All Drivers Report	AR – Riders below Minimum

2. Click on new in the upper right hand corner.

Home

Manage Rides

Book a Ride

Uncovered Rides

User Management

Driver Availability

More

Minnie Jameson

ITN Locations

Recently Viewed

30 items • Updated a few seconds ago

ITN Location Number

1

LC-021524

2

LC-021162

3

LC-021765

4

LC-022037

5

LC-021626

6

LC-036919

7

LC-036912

8

LC-021984

9

LC-021774

10

LC-036916

11

LC-021783

12

LC-021782

Search this list...

New

3. A popup form will open for you to fill out. Fill your site name in first, and then scroll down to Address Details.

New ITN Location

Information

ITN Location Number

Site

Community Playground

Location Lat/Long

Latitude

Longitude

Address Details

Building Name

Physical Street

Physical City

Physical Zip/Postal Code

Location Notes

Contact

Search Contacts...

Default Address

Account

Search Accounts...

Business Name

Physical Sub Address

Physical State/Province

Physical Country

Cancel

Save & New

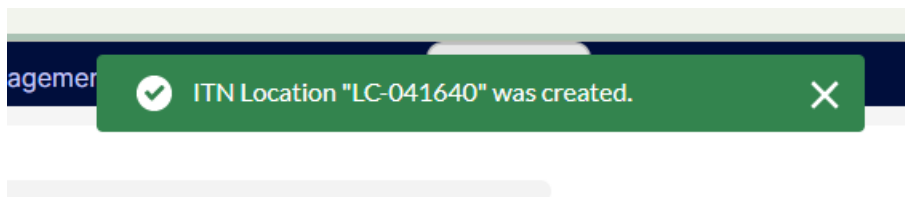
Save

4. Enter the address details, being sure to include building and business name if applicable. This form has a separate box for a sub address, so apartment numbers and suites should be entered there. Include any location notes that will be helpful to your drivers.

The screenshot shows a web form titled "New ITN Location". A red circle highlights the "Address Details" section. The form includes the following fields:

- Longitude (empty)
- Address Details section:
 - Building Name (empty)
 - Business Name (filled with "Walgreens")
 - Physical Street (filled with "465 Main Street")
 - Physical Sub Address (empty)
 - Physical City (filled with "Westbrook")
 - Physical State/Province (filled with "ME")
 - Physical Zip/Postal Code (filled with "04092")
 - Physical Country (empty)
- Location Notes (filled with "Located in the middle of a rotary, you may need to go around to get to the entrance driveway.")
- Ride Subsidies at this Location section:
 - Ride Discount Type (dropdown menu, currently showing "--None--")
 - Ride Subsidy Type (dropdown menu, currently showing "--None--")

5. Complete the ride subsidies portion, if applicable (more details in the Rides Services, Ride & Shop, and Healthy Miles instructions sections). Do not fill out anything under ESRI Error Codes or System Information. Save the address. If the address is valid, the longitude and latitude will be saved, and a new ITN Location will be created.



Entering Other Types of Accounts

The programming for how to enter these accounts is still in flux, and these instructions will be updated if changes are made.

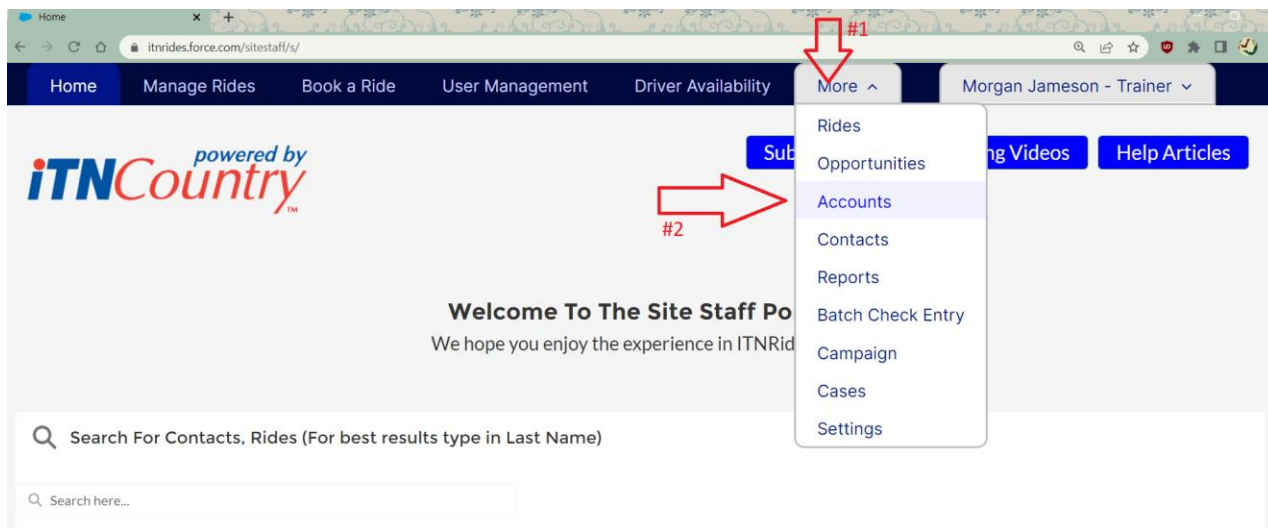
Ride Services Accounts

Ride Service accounts are used when your organization is providing transportation services for another organization. For more information on how Rides Service Agreements work, see the Online Learning Lesson ITN Programs: Rides Service Agreements.

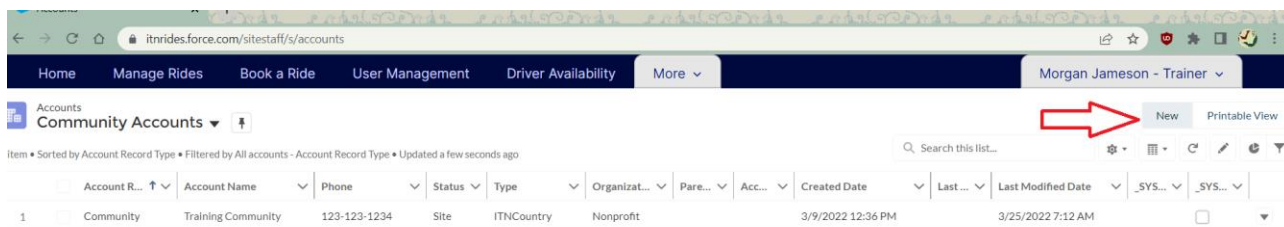
Ride Service Sponsors

The Rides Service Sponsor is the organization that will be paying for the rides.

1. From the home page, click on the “More” tab and choose Accounts.



2. Click on “New” at the top , right hand side of the screen.



3. Choose Ride Program Sponsor, and click Next.

New Account

Select a record type

- ☐ Organization/Company
An Account representing an organization or company
- ☐ Individual
An Account representing a Personal Transportation Account
- ☒ Ride Program Sponsor
An Account representing a Ride Services organization, Ride&Shop, or HealthyMiles
- ☐ Scholarship
An Account representing a Road Scholarship fund

Cancel Next

4. Enter the Account name. This should be the name of the organization paying for the rides.

New Account: Ride Program Sponsor

General

* Account Name
Ride Services Manual Example

Account Record Type
Ride Program Sponsor

Parent Account
Search Accounts...

Type
--None--

Ride Discount Type
--None--

Site
Search Accounts...

Program Type
--None--

Discount Rate per Ride

Ride Subsidy Type
--None--

Subsidy Cap Amount

Cancel Save & New Save

5. Select your site from the Site field.

New Account: Ride Program Sponsor

General

* Account Name <input type="text" value="Ride Services Manual Example"/>	Account Record Type Ride Program Sponsor
Parent Account ⓘ <input type="text" value="Search Accounts..."/>	Type <input type="text" value="--None--"/>
Ride Discount Type ⓘ <input type="text" value="Ride Purpose"/> <small>View all dependencies</small>	Site ⓘ <input type="text" value="ITNStCharles"/>
Program Type <input type="text" value="Ride Services"/> <small>View all dependencies</small>	Discount Rate per Ride <input type="text"/>
Ride Subsidy Type ⓘ <input type="text" value="Whole Ride"/> <small>View all dependencies</small>	Subsidy Cap Amount <input type="text"/>

gan Test Ride Services 222-456-9874 ITNC Prosp... iaafi 3/17/2022 12:1

6. Select the Ride Discount Type- Location, Ride Purpose, none, or both.

New Account: Ride Program Sponsor

General

* Account Name
Ride Services Manual Example

Parent Account ⓘ
Search Accounts...

Ride Discount Type ⓘ
--None--
 ✓ --None--
 Location
 Ride Purpose
 Ride Purpose & Location
[View all dependencies](#)

Account Record Type
Ride Program Sponsor

Type
--None--

Site ⓘ
Search Accounts...

Discount Rate per Ride

Subsidy Cap Amount

Cancel Save & New Save

- a. Location should be used if the program will pay for rides to a specific location.
 - b. Ride purpose should be used if the program will pay for a certain type of rides (medical rides for example).
 - c. Both should be used if the program is paying for a certain type of rides to a specific location.
 - d. None can be selected if the program is paying for all of (or a portion of all of) the rides for their members.
7. Select the Program Type. Choose Ride Services from the drop down.

des Book a Ride User Management Driver Availability More X TNA Tes

New Account: Ride Program Sponsor

General

* Account Name
Ride Services Manual Example

Parent Account ⓘ
Search Accounts... 🔍

Ride Discount Type ⓘ
--None-- ▾
[View all dependencies](#)

Program Type
--None--
✓ Ride Services
Ride & Shop
Healthy Miles

Account Record Type
Ride Program Sponsor

Type
--None-- ▾

Site ⓘ
Search Accounts... 🔍

Discount Rate per Ride

Subsidy Cap Amount

Cancel Save & New Save

Morgan Test Ride Services 222-456-9874 ITNC Prosp... iaafi 3/17/2022 12:16 PM

8. Select the ride subsidy type- Flat rate or Whole ride.

New Account: Ride Program Sponsor

Program type
Ride Services

View all dependencies

Ride Subsidy Type ⓘ

Whole Ride

--None--
Flat Rate
✓ Whole Ride

Discount rate per ride

Subsidy Cap Amount

Subsidy Flat Rate Amount

Available Chosen

View all dependencies

Cancel Save & New Save

Organ Test Ride Services 222-456-9874 ITNC Prosp... iaffi 3/17/2022 12

9. If applicable, fill in Subsidy cap amount and/or subsidy flat rate amount.

Book a Ride User Management Driver Availability More

New Account: Ride Program Sponsor

View all dependencies

Program Type
Ride Services

Discount Rate per Ride

View all dependencies

Ride Subsidy Type ⓘ
Whole Ride

Subsidy Cap Amount

View all dependencies

Ride Service Up Charge ⓘ

Subsidy Flat Rate Amount

Program Ride Purpose ⓘ

Available Chosen

Cancel Save & New Save

organ Test Ride Services 222-456-9874 ITNC Prosp... iaafi 3/17/2022 12:16

10. If applicable, add the Ride Service Up charge. This is a percentage to be added per ride to bring the ride closer to the true cost.

Book a Ride User Management Driver Availability More ✕ ITN

New Account: Ride Program Sponsor

[View all dependencies](#)

Program Type
Ride Services ▼

[View all dependencies](#)

Ride Subsidy Type ⓘ
Whole Ride ▼

[View all dependencies](#)

Ride Service Up Charge ⓘ

Discount Rate per Ride

Subsidy Cap Amount

Subsidy Flat Rate Amount

Program Ride Purpose ⓘ

Available Chosen

Cancel Save & New Save

organ Test Ride Services 222-456-9874 ITNC Prosp... iaafi 3/17/2022 12:16

11. If you have selected a ride purpose-based program, add the purposes you would like to include under Program Ride Purpose. Highlight the purpose in the left box, and then click the arrow to move it to the chosen box.

Book a RideUser ManagementDriver AvailabilityMore

New Account: Ride Program Sponsor

Ride Subsidy Type

Whole Ride

View all dependencies

Ride Service Up Charge

View all dependencies

Program Ride Purpose

Available

Ch/Syn-SocCh/Syn-WorkCh/Syn-WorshipCon-General

Chosen

Con-Banking

View all dependencies

Subsidy Cap Amount

Subsidy Flat Rate Amount

New Section

Description

Cancel

Save & New

Save

Morgan Test Ride Services222-456-9874ITNC Prosp...iaffi3/17/2022 12:16 PM

12. Add contact information for the participating organization.

New Account: Ride Program Sponsor

Contact Information

Primary Contact

Search Contacts...

Phone

Website

Fax

Email

Address

Mailing Address

Mailing Country

United States

Mailing Street

Cancel Save & New Save

Morgan Test Ride Services 222-456-9874 ITNC Prosp... iaffi 3/17/2022 12

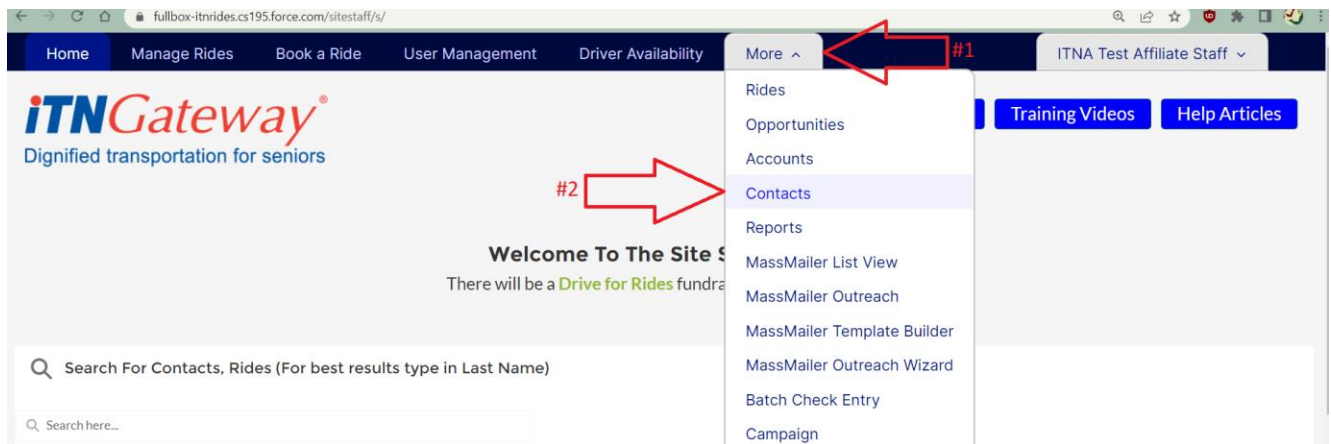
13. Click Save, and your new Ride Services Account has been created!

14. *If the program is location based, see Adding a Location to a Ride Program Account to link the location to the account.*

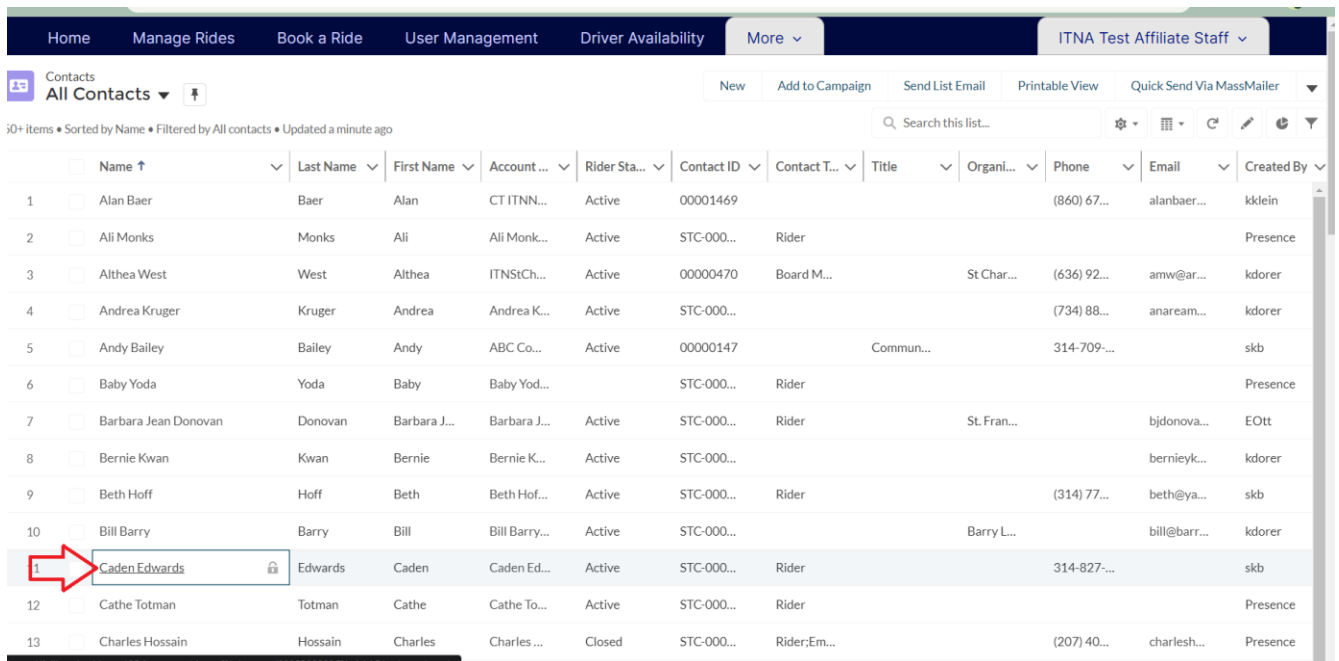
Ride Service Riders

The Ride Service Riders must have the Ride Service Sponsor added as a Bill To.

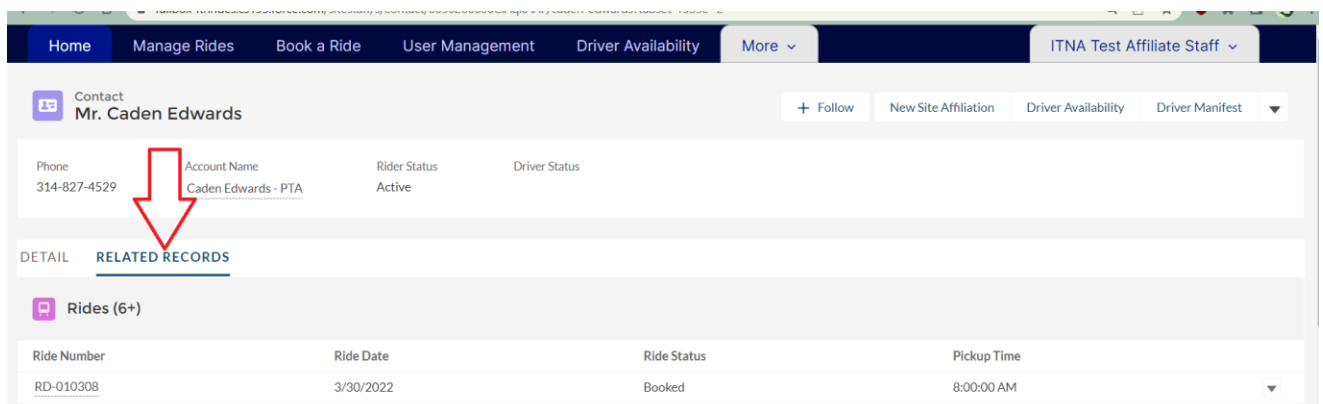
1. The riders should be entered as normal through the online application. If the rider is getting a special membership rate due to being a Ride Services Member, the membership type should be changed when the rider is activated.
2. From the Home screen, select the More tab and click on Contacts in the dropdown.



3. Search for, or select from the list, the contact you want to make a Ride Services rider. Click on the person's name to open their contact record.



4. Once in their contact record, click on the Related Records Tab..



5. Scroll down to Organization Affiliations, and click on the New button.

The screenshot shows a web browser window with the URL `fullbox-itnrides.cs195.force.com/sitestaff/s/contact/0030200000CjAqkAAf/caden-edwards?tabset=1535e=2`. The page displays contact information for Caden Edwards, including a car trade and a credit transfer. Below this, there are sections for Relationships (0), Organization Affiliations (2), Routes (0), Vehicles (0), and ITN Locations (1). The 'Organization Affiliations' section is highlighted, and a red arrow points to the 'New' button in the top right corner of this section's header.

Affiliation: Affiliation Name	Account Name	Affiliation: Record Type	Key Role
AF-026144	ITNS:Charles	Site	Member
AF-026145	Caden Edwards - PTA	Bill To	

6. Select Bill To, and then click Next.

The 'New Affiliation' dialog box is shown. It has a title bar with a close button. The main content area has the heading 'New Affiliation' and a label 'Select a record type'. There are three radio button options: 'Bill To' (selected), 'General', and 'Site'. The 'Bill To' option has a description: 'Creates a 'Bill To' for a Member'. The 'General' option has a description: 'This links a person to a business account, NOT to a Site.'. The 'Site' option has a description: 'Connects all riders, drivers, and contacts to a Site.'. At the bottom right, there are two buttons: 'Cancel' and 'Next'. A red arrow labeled '#1' points to the 'Bill To' radio button, and another red arrow labeled '#2' points to the 'Next' button.

7. Make sure the status is set to Current, and then search for the name of the Ride Services Account under the Organization field.

The screenshot shows a web application window titled "New Affiliation: Bill To". At the top, there is a header bar with two rows of data: "Car Trade" with "Caden Edwards - PTA" and "\$750.00", and "Credit Transfer" with "Caden Edwards - PTA" and "\$100.00". The main form area is titled "Affiliation Information". It contains several fields: "Record Type" (set to "Bill To"), "Status" (a dropdown menu set to "Current"), "Start Date" (a date picker), and "End Date" (a date picker). Below these are two search fields: "* Organization" (containing "Morgan's Fun Retirement Palace") and "* Contact" (containing "Caden Edwards"). There is also a "Primary Affiliation" checkbox (unchecked) and a "Description" text area. At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save". A red arrow labeled "#1" points to the "Status" dropdown, and another red arrow labeled "#2" points to the "* Organization" search field.

8. Click Save and the Ride Services Program will now be one of the Bill To's linked to the riders account.

This screenshot is identical to the one above, showing the "New Affiliation: Bill To" form. In this version, a red arrow points directly to the "Save" button at the bottom right of the form.

9. If the Ride Services account will be the primary bill to (if all rides will be billed to the ride services account), change the default bill to on the customer record by switching back to the Detail tab.

Home Manage Rides Book a Ride User Management Driver Availability More ITNA Test Affiliate Staff

Contact Mr. Caden Edwards + Follow New Site Affiliation Driver Availability Driver Manifest

Phone: 314-827-4529 Account Name: Caden Edwards - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Available Chosen: Rider

Paid Driver Staff (ITN/TTP/ITNC)

10. Check off the Ride Services Participant check box in the Ride Info section.

022 Car Trade Caden Edwards - PTA \$750.00

Contact: Caden Edwards

Address Information

Ride Info

Willing to Ride Share: ☒ Ride Share Wait Window: 10 Load Time: 10 Customer notes: Likes to talk

Additional Rider: ☐ Ride Services Participant: ☒ Eligible for Road Scholarship: ☐

Billing Info

Requested paper bill: Yes

Default Bill To: Morgan's Fun Retirement Palace

App completed by: --None--

Mail To: Vicki Clark - PTA

Default Bill To Text: Caden Edwards - PTA

Additional Bill To: Morgan's Fun Retirement Palace

11. Scroll down to the Billing Info section, and change the Default Bill To to the Ride Services account.

022 Car Trade Caden Edwards - PTA \$750.00

Contact: Caden Edwards

fullbox-itnrides.cs195.force.com/sites/s/contact/00302000000CIAqkAAF/caden-edwards

> Address Information

▼ Ride Info

Willing to Ride Share ☒

Ride Share Wait Window 10

Load Time 10

Customer notes Likes to talk

Additional Rider ☐

Ride Services Participant ☒

Eligible for Road Scholarship ☐

▼ Billing Info

Requested paper bill Yes

Default Bill To Morgan's Fun Retirement Palace

App completed by --None--

Mail To Vicki Clark - PTA

Default Bill To Text Caden Edwards - PTA

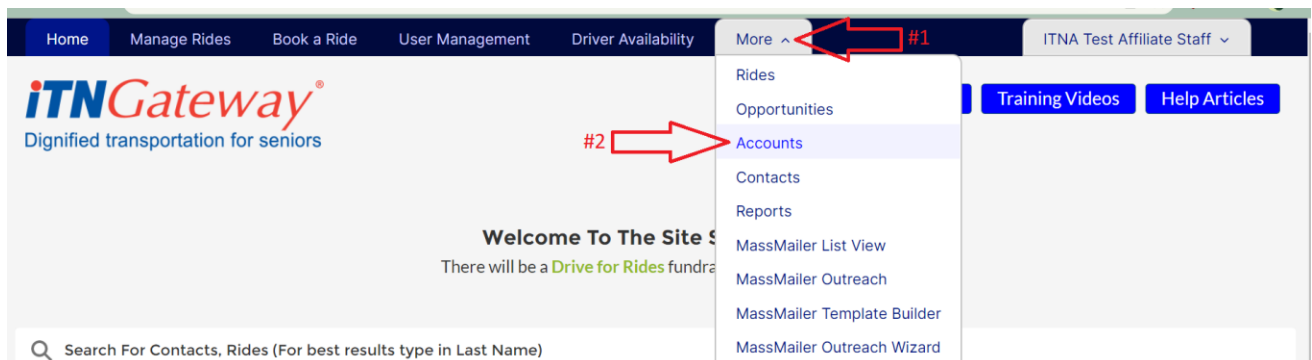
Additional Bill To Morgan's Fun Retirement Palace

Cancel Save

Road Scholarship Accounts

Road Scholarship Sponsors/Community Road Scholarships

1. From the Home Screen, click on the More tab, and choose Accounts.



2. Click on the New button near the top of the screen. A pop-up box with options will open.

Home

Manage Rides

Book a Ride

User Management

Driver Availability

More

ITNA Test Affiliate Staff

Accounts

All Accounts

50+ Items • Sorted by Account Record Type • Filtered by All accounts • Updated a few seconds ago

Search this list...

	Account Record T...	Account Name	Phone	Status	Type	Parent Acco...	Accoun...	Created Date	Last Activity	Last Mod
1	Scholarship	Fried Foundation Road Scholarship		ITNC Prosp...				2/18/2022 2:40 PM		3/31/2...
2	Scholarship	Patil Road Scholarship Fund		ITNC Prosp...				2/18/2022 2:43 PM		3/28/2...
3	Scholarship	SKB Foundation		ITNC Prosp...	Foundation		iaffi	3/10/2022 10:49 AM		3/11/2...
4	Scholarship	Morgan's Scholarship Fund	555-777-4444	ITNC Prosp...			iaffi	3/17/2022 12:32 PM		3/18/2...
5	Scholarship	O'Fallon Scholarship Fund	(207) 517-5787	ITNC Prosp...	Govt - State		iaffi	3/24/2022 9:51 AM		3/25/2...
6	Ride Program Sponsor	ABC Company	314-709-0642	Prospect	ITNCountry	ITNStCharles		9/30/2021 9:30 AM		1/13/2...
7	Ride Program Sponsor	Regeneron - test		ITNC Prosp...	Healthcare			1/10/2022 11:20 AM		2/24/2...

3. Select Scholarship and click Next.

×

list...

New Account

Select a record type

☐ Organization/Company
An Account representing an organization or company
 ☐ Individual
An Account representing a Personal Transportation Account
 ☐ Ride Program Sponsor
An Account representing a Ride Services organization, Ride&Shop, or HealthyMiles
 ☒ **Scholarship**
An Account representing a Road Scholarship fund

#1

#2

Cancel

Next

ITNC Prosp...

iaffi

4. Enter the name of the Scholarship Fund in the Account Name field. You can also choose to add an Abbreviated Name below the account name, but this is not required.

New Account: Scholarship

General

* Account Name
Scholarships R Us

Account Record Type
Scholarship

Abbreviated Name

Type
--None--

Site
ITNStCharles

Membership/Affiliate Status
Active

Description

Description
Scholarship Fund for low-income riders. Open to all residents of St Charles County that meet income guidelines.

Contact Information

Cancel Save & New Save

5. Select your site from the Site field.

New Account: Scholarship

General

* Account Name
Scholarships R Us

Account Record Type
Scholarship

Abbreviated Name

Type
--None--

Site
ITNStCharles

Membership/Affiliate Status
Active

Description

Description
Scholarship Fund for low-income riders. Open to all residents of St Charles County that meet income guidelines.

Contact Information

Cancel Save & New Save

6. Set the Membership/Affiliate Status as active.

New Account: Scholarship

General

* Account Name: Scholarships R Us

Account Record Type: Scholarship

Abbreviated Name:

Type: --None--

Site: ITNStCharles

Membership/Affiliate Status: **Active**

Description

Description: Scholarship Fund for low-income riders. Open to all residents of St Charles County that meet income guidelines.

Contact Information

Buttons: Cancel, Save & New, Save

- Use the Description box to add a description of the scholarship account.

New Account: Scholarship

General

* Account Name: Scholarships R Us

Account Record Type: Scholarship

Abbreviated Name:

Type: --None--

Site: ITNStCharles

Membership/Affiliate Status: Active

Description

Description: Scholarship Fund for low-income riders. Open to all residents of St Charles County that meet income guidelines.

Contact Information

Buttons: Cancel, Save & New, Save

- Add contact information for the Scholarship Account. If the scholarship account is not linked to an outside organization, use the contact information for your office. **All scholarship accounts must be linked to a Primary Contact. Use one of your staff users if there is not a primary contact from an outside organization.**

New Account: Scholarship

Contact Information

Primary Contact ?

Website

Phone ?

Email

Fax

Address

Mailing Address

Mailing Country

Mailing Street

Mailing City

Mailing State/Province

Buttons: Cancel, Save & New, Save

- Do not fill out anything under the Transportation Account section or the System Information section.

New Account: Scholarship

Mailing City

Mailing State/Province

Mailing Zip/Postal Code

Transportation Account Leave this blank

Account Balance

Open Balance

Close Balance

System Information Leave this blank

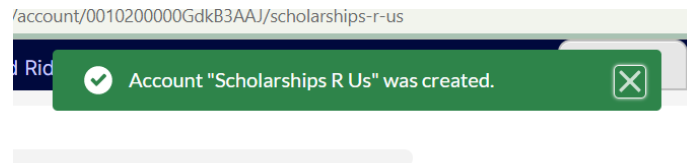
Parent Account ?

Account Owner

Site ID

Buttons: Cancel, Save & New, Save

- Click Save, and your Road Scholarship account has been created!

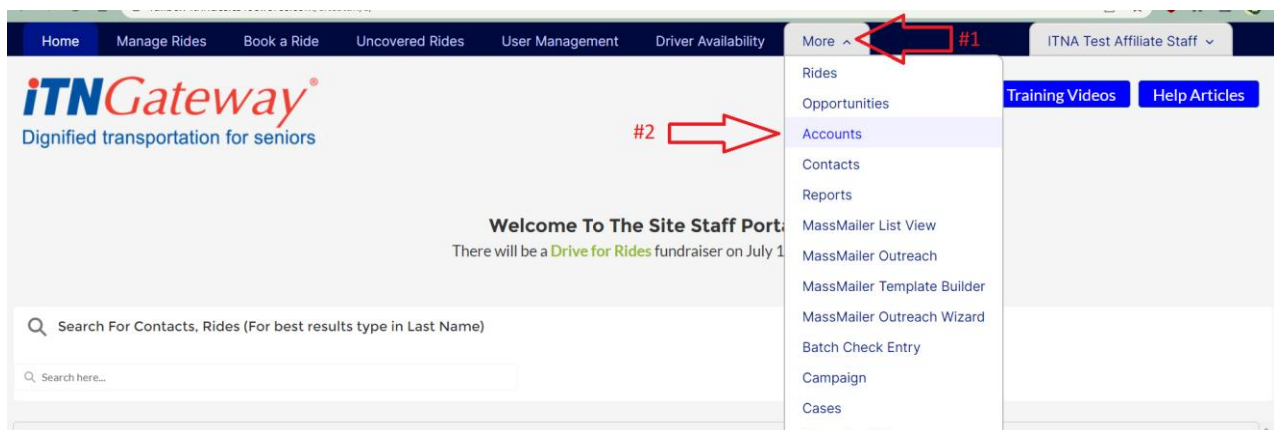


Road Scholarships for Riders

Road Scholarships can be awarded to riders individually, or as a batch of awards made at the same time to multiple riders.

Awarding an Individual Scholarship

1. From the Home Screen, click on the More tab and choose Accounts from the drop-down.



2. On the Accounts screen, use the search box to locate the scholarship account the award is coming from, or choose the scholarship account from the list.

Home	Manage Rides	Book a Ride	Uncovered Rides	User Management	Driver Availability	More	ITNA Test Affiliate Staff
Accounts							
All Accounts							
50+ Items • Sorted by Account Record Type • Filtered by All accounts • Updated a few seconds ago							
Account Record T...	Account Name	Phone	Status	Type	Parent Acco...	Accoun...	Created Date
1	Scholarship	Fried Foundation Road Scholarship	ITNC Prosp...				2/18/2022 2:40 PM
2	Scholarship	Patil Road Scholarship Fund	ITNC Prosp...				2/18/2022 2:43 PM
3	Scholarship	SKB Foundation	ITNC Prosp...	Foundation		iaff	3/10/2022 10:49 AM
4	Scholarship	Morgan's Scholarship Fund	ITNC Prosp...			iaff	3/17/2022 12:32 PM
5	Scholarship	O'Fallon Scholarship Fund	(207) 517-5787	ITNC Prosp...	Govt - State	iaff	3/24/2022 9:51 AM
6	Scholarship	Scholarships R Us	(207) 517-5787	ITNC Prosp...		iaff	4/21/2022 9:15 AM
7	Scholarship	Uncovered Road Scholarship Fund	(207) 517-5787	ITNC Prosp...		iaff	4/21/2022 12:42 PM
8	Ride Program Sponsor	ABC Company	314-709-0642	Prospect	ITNCountry	ITNSTCharles	9/30/2021 9:30 AM

3. Click on the "Scholarship Awarded" Quick Action button to open the form to award a scholarship.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More ITNA Test Affiliate Staff

Account Scholarships R Us + Follow Scholarship Awarded Edit Change Record Type

Account Record Type	Type	Website	Primary Contact	Phone
Scholarship			ITNA Test Affiliate Staff	(207) 517-5787

DETAILS RELATED LISTS

General

Account Name Scholarships R Us Account Record Type Scholarship

Abbreviated Name Type

Site ITNSTCharles

Membership/Affiliate Status Active

Description

- Fill in the Amount box, and the Recipient Box. Edit the Statement Comment if you would like to. Click Save.

Primary Contact Phone

#1

Scholarship Awarded

* Amount \$50.00

* Close Date 4/21/2022

Scholarship From Scholarships R Us

* Recipient Mary Bailey

Account Name Scholarships R Us

Statement Comments Road Scholarship grant, courtesy of

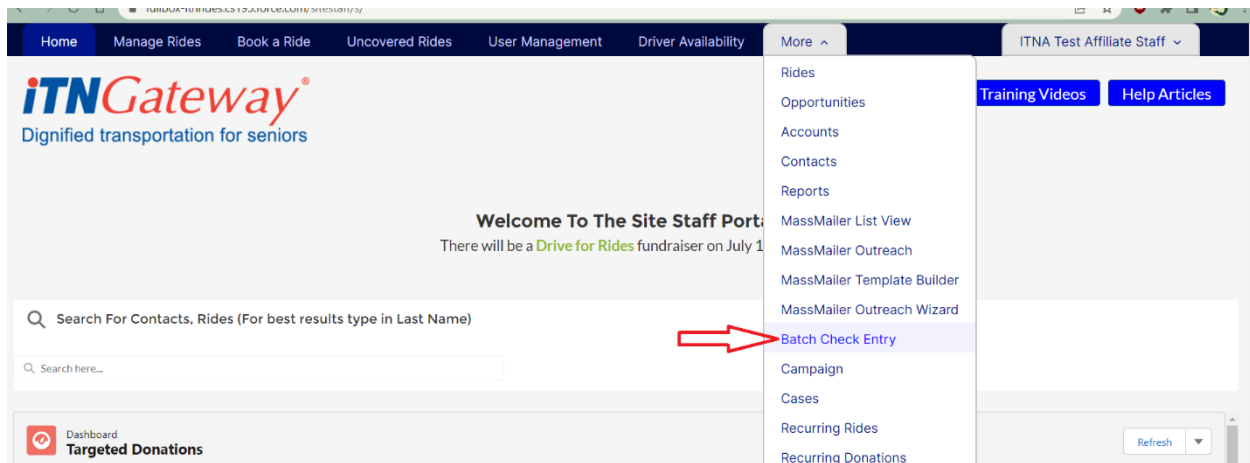
#2

#3

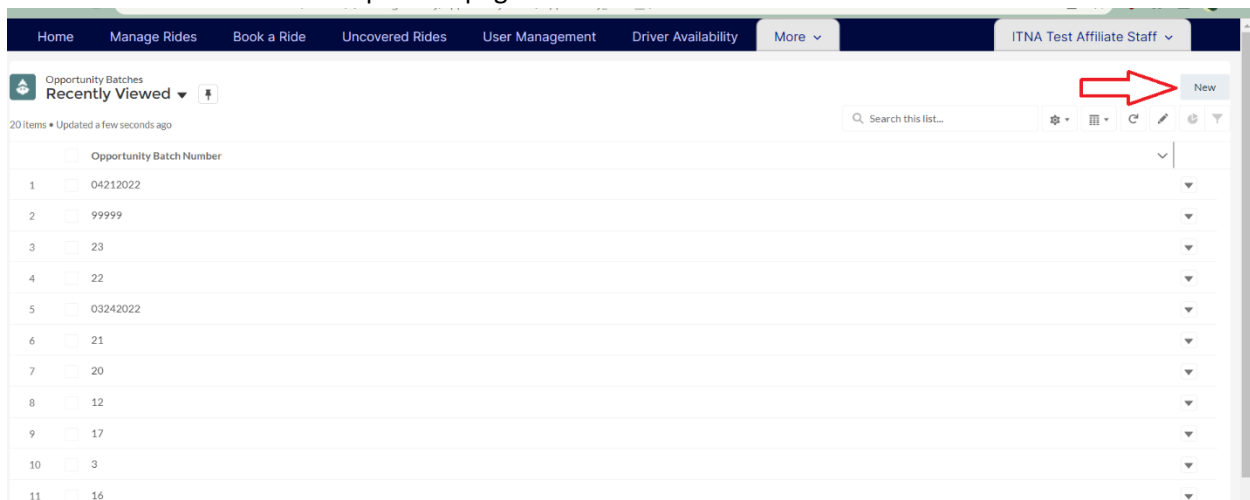
Cancel Save

Awarding Multiple Scholarships as a Batch

- From the Home Screen, click on the More tab and choose Batch Check Entry.



2. Click on New at the top of the page to create a new batch.



3. Fill in the Batch Date, Batch Status, Opportunity Count (this is the number of scholarships you will be awarding), and Total Batch Amount (total of all the scholarships).

New Opportunity Batch

Information

* Opportunity Batch Number **#1**

04042022

* Batch Date

4/21/2022

Site

* Batch Status

In Progress **#2**

Opportunity Count

3 **#3**

Opportunity Count Subtotal

Total Batch Amount

300.00 **#4**

Batch Subtotal

Opportunity Batch Number

System Information

Owner

ITNA Test Affiliate Staff

Cancel

Save & New

Save **#5**

- The Opportunity Batch record will open. Click on “Scholarship Awarded” to open the form to award each individual scholarship.

Home
Manage Rides
Book a Ride
Uncovered Rides
User Management
Driver Availability
More
ITNA Test Affiliate Staff

Opportunity Batch
04042022

New Cash Payment
Scholarship Awarded
Edit

DETAILS

Opportunity Batch Number
04042022

Site
ITNSiCharles

Opportunity Count
3

Total Batch Amount
300.00

Opportunity Batch Number
26

Created By
ITNA Test Affiliate Staff, 4/21/2022 1:41 PM

RELATED LISTS

Batch Date
4/21/2022

Batch Status
In Progress

Opportunity Count Subtotal

Batch Subtotal

Last Modified By
ITNA Test Affiliate Staff, 4/21/2022 1:41 PM

Owner
ITNA Test Affiliate Staff

- Enter the Amount, Scholarship From, and the Recipient (the rider receiving the scholarship). Then click Save.

61

✕

Scholarship Awarded

* Amount **#1**

* Close Date

Scholarship From **#2**

Scholarships R Us
 ✕

* Recipient ⓘ **#3**

Mary James
 ✕

Account Name ⓘ

🔍

Statement Comments ⓘ

#4

Cancel

Save

- Repeat steps 5 and 6 to award each individual scholarship.

Ride & Shop and Healthy Miles Accounts

- Create a new Ride Program Sponsor Account by going to More and selecting Accounts. Use the “New” quick action button at the top right of the page to open the form for creating a new Account.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More ▾ Minnie Jameson ▾									
<div>Accounts</div> <div>Community Accounts ▾ ⓘ</div> <div>Items • Sorted by Account Record Type • Filtered by All accounts - Account Record Type • Updated 22 minutes ago</div> <div> <input type="text" value="Search this list..."/> ⚙️ 📄 🔍 🔧 📄 </div>									
<input type="checkbox"/>	Account Record...	Account Name	Phone	Status	Type	Organizat...	Parent A...	Account ...	Created Date
1	<input type="checkbox"/>	Community	Community Playground	(207) 857-9001	Site	Affiliate	Other		7/20/2021 1:58 PM
2	<input type="checkbox"/>	Community	The Kiannector	207-604-1366	Site	ITNCountry			4/15/2022 2:52 PM
<div> <div>8/11/2022</div> <div>9/12/2022 2:45 PM</div> <div>9/12/2022 4:08 PM</div> </div> <div> <div>⌵</div> <div>⌵</div> <div>⌵</div> </div>									

- Select Ride Program Sponsor.

ITNCountry 4/15/2022 2:52 PM

New Account

Select a record type

- ☐ Organization/Company
An Account representing an organization or company
- ☐ Individual
An Account representing a Personal Transportation Account
- ☒ Ride Program Sponsor
An Account representing a Ride Services organization, Ride&Shop, or HealthyMiles
- ☐ Scholarship
An Account representing a Road Scholarship [fund](#)

Cancel Next

3. On the pop-up form fill out the following fields:
 - a. Account Name- Name the Account with the name of the organization sponsoring rides.
 - b. Check off the Active Program Participant box.
 - c. Choose the program type- Healthy Miles or Ride & Shop
 - d. Choose the ride discount type. Healthy Miles and Ride & Shop have to be location based, so choose either Location or Ride Purpose and Location.
 - e. Site- fill in our site name in this field.
 - f. Ride Subsidy Type- choose Discount.
 - g. Fill in the Ride Subsidy for the Customer and Site.
 - h. Choose a ride purpose if that is applicable.

New Account: Ride Program Sponsor

General

Account Name ^a Example Healthy Miles ^b

Parent Account ^c Search Accounts...

Program Type ^d Healthy Miles

Ride Discount Type ^f Ride Purpose & Location

Ride Subsidy Type ^f Ride Discount

Ride Service Up Charge

Discount Rate per Ride

Program Ride Purpose ^h

Available: Med-Dialysis, Med-Endocrinolo..., Med-General

Chosen: Med-Eyecare ^g

Active Program Participant ^b ☒

Account Record Type ^e Ride Program Sponsor

Site ^g Community Playground

Subsidy Cap Amount

Subsidy Flat Rate Amount

Ride Subsidy - Customer \$3.00

Ride Subsidy - Site \$3.00

Cancel Save & New Save

- i. You must enter a primary contact, but this can be one of your staff rather than someone at the location.

New Account: Ride Program Sponsor

Med-GI

Contact Information

Primary Contact ⁱ Minnie Jameson

Phone

Email

Address

Mailing Address

Mailing Country United States

Mailing Street

Mailing City

Mailing State/Province --None--


Mailing Zip/Postal Code

Membership

Cancel Save & New Save

4. The rest of the information on the form can be left blank. Click Save.


New Account: Ride Program Sponsor

MEMBERSHIP LINK CODE 

Transportation Account

Account Balance

Open Balance

Account Balance (inc. booked rides 30d) 

Close Balance

Total Ride Charges

Fundraising


In-Kind Contributions

System Information

Account Owner
Minnie Jameson

Site ID

Current Site Affiliations ID



Cancel Save & New Save


5. The Account Record for the new Healthy Mile or Ride & Shop Account will open.
6. *If the address giving the discount does not already exist in your database, follow these steps. If the address already exists in the database, see step 8.* Click on related lists, and go to ITN Locations. Click the New button to add the location participating in the program. One account can have multiple locations, just add each one here.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Account Example Healthy Miles + Follow Edit Change Record Type

Account Record Type	Type	Website	Primary Contact	Phone
Ride Program Sponsor			Minnie Jameson	

DETAILS RELATED LISTS

- Transportation Account Items (0) New
- Opportunities (0) New Account Donation
- ITN Locations (Account) (0) New 
- Recurring Donations (0) New
- Affiliated Contacts (0) New
- Rides (Site) (0) New
- Notes & Attachments (0) Upload Files

7. On the pop-up form that opens, complete the following field:
 - a. Contact: Use the same contact you used when setting up the account.
 - b. Site: Enter your site name.
 - c. The Account Name: Should be filled in automatically.

- d. Enter the address details. Be sure to enter the building/business name to make the address easily searchable.

New ITN Location

Information

ITN Location Number

Site: Community Playground

Location Lat/Long

Latitude

Longitude

Account: Example Healthy Miles

Address Details

Building Name: Maine Mall Eye Care

Physical Street: 510 Maine Mall Rd

Physical City: South Portland

Physical State/Province: ME

Physical Zip/Postal Code: 04106

Physical Country

Location Notes

Buttons: Cancel, Save & New, Save

- e. Ride Discount Type- location or ride purpose and location
- f. Ride Subsidy Type- choose ride discount
- g. Program Ride Purpose- choose ride purpose if applicable
- h. Ride Subsidies for Customer and Site- fill in the \$ amounts, making sure they match what you entered when you set up the account.
- i. Then click Save.

New ITN Location

Ride Subsidies at this Location

Ride Discount Type: Ride Purpose & Location

Ride Subsidy Type: Ride Discount

Program Ride Purpose

Available: Med-Endocrinology, Med-Eyecare (selected), Med-General, Med-GI

Chosen

Ride Subsidy - Customer: \$3.00

Ride Subsidy - Site: \$3.00

ESRI Error Codes

Geocode Matching Score

Geocode Error Description

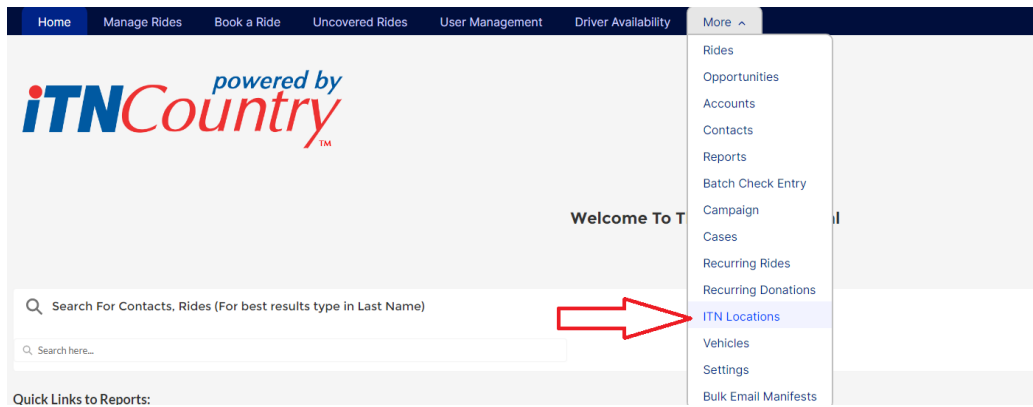
Geocode Status: --None--

System Information

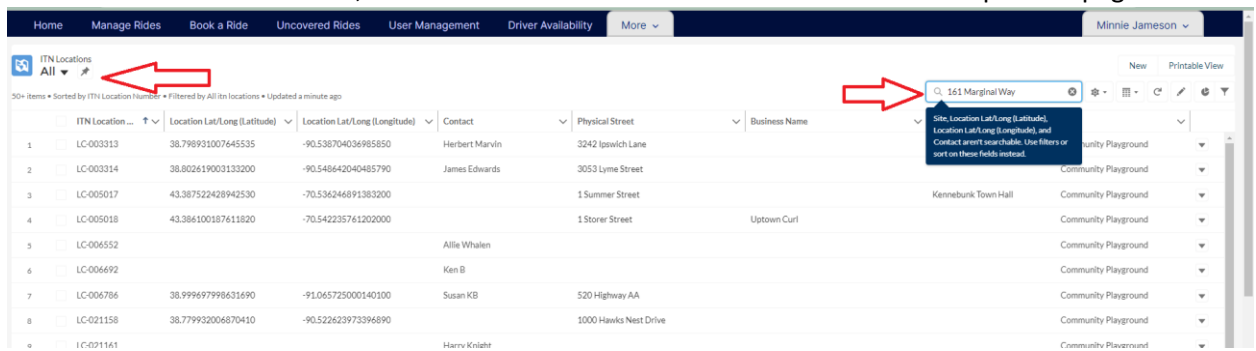
Owner: Minnie Jameson

Buttons: Cancel, Save & New, Save

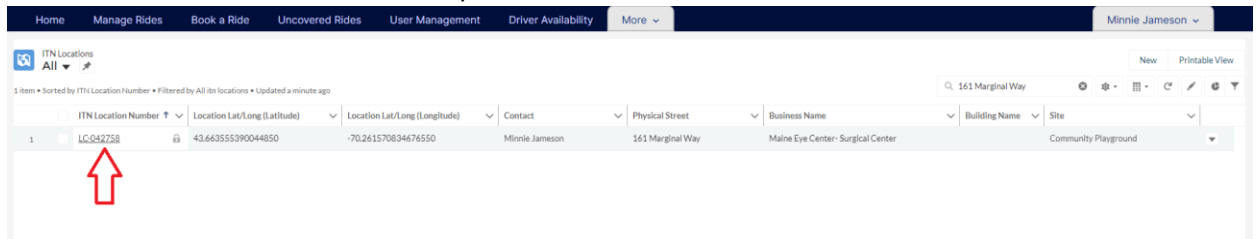
8. *If the location you want to associate with the account has already been entered in the system, open the Location Record by choosing ITN Locations under the More menu.*



9. Make sure the list is set to All, and then search for the address in the box at the top of the page.



10. Click on the ITN Location Number to open the Location Record.



11. Go to the Account Name and Add the Healthy Miles or Ride & Shop Account you created in that field. Click the little pencil to make the field editable.

ITN Location

Physical Street
161 Marginal Way
 Physical City
Portland
 Physical State/Province
ME

DETAILS RELATED

ITN Location Number
LC-042758
 Contact

Minnie Jameson
 ×

 Default Address
☐
 Account

Example Healthy Miles
 ×

Site

Community Playground
 ×

 Location Lat/Long
 Latitude

43.66355539004485

 Longitude

-70.26157083467655

Address Details
 Building Name
 Physical Street

161 Marginal Way

 Physical City

Portland

 Physical Zip/Postal Code

04101

 Business Name

Maine Eye Center- Surgical Center

 Physical Sub Address
 Physical State/Province

ME

 Physical Country

Cancel Save

12. Scroll down to Ride Subsidies at this Location, and complete the following fields:

- Ride Subsidy Type- choose Ride Discount
- Ride Discount Type- choose Location or Location and Ride Purpose
- Fill in the Ride Subsidies for the Customer and the Site.
- Choose the Program Ride Purpose if applicable.
- Then click Save.

13. All rides booked to this location will now receive the Ride & Shop or Healthy Miles subsidy.

Working with Accounts

View Balances and Look Up and Edit Information

Riders

1. On the Home page, type the rider's name into the search box. The rider's name will appear below as a Contact.

Ride Management Reports	Contact Management Reports	Financial Reports
Daily Overview	All Drivers Report	AR - Riders below Minimum
Daily Overview Rpt - Today	All Riders Report	Account Receivable - All Riders
Daily Overview Rpt - Tomorrow	New Riders and Drivers	Driver Occ. & Unocc. credits

2. Click on the name to open their Contact Record.
3. The quick information bar at the top of the page lists the rider's phone number and status.
4. The Contact Record page lists all the information about the rider, and you can edit any field that has a little pencil graphic next to it. (The pencils are grayed out until you hover over them, so they can be hard to see at first).

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Contact Example Rider + Follow Update Availability Driver Availability Manifest: Email Tomorrow

Phone: 207-123-4567 Account Name: Example Rider - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Rider Title:

▼ Contact Details

Name: Example Rider Gender: Female

Preferred Name: Birthdate: 6/15/1945

Account Name: Example Rider - PTA Primary Affiliation: Community Playground

Family Account: Contact ID: CPG-00079230

Rider Status: Active Driver Status:

Account Balance: \$3.99 Email Manifest: ☒

Minimum Rider Balance: \$100.00 Primary Language: English

Membership Type: Membership - Individual Other Language:

Internal Notes:

Description:

▼ Portal Access

Site Portal Access: Business Portal Access:

5. The first column contains two tabs- Details and Related.
 - a. Details are the personal details of the rider and their contact information.
 - b. Related shows their ride history, relationships to other accounts, and payments or donations.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Contact Example Rider + Follow Update Availability Driver Availability Manifest: Email Tomorrow

Phone: 207-123-4567 Account Name: Example Rider - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Rides (6+)

Ride Number	Ride Date	Ride Status	Origination
RD-213433	7/27/2022	Requested	16 Stillwater Drive Westbrook, ME
RD-213434	7/27/2022	Requested	790 Main St Westbrook, ME
RD-213452	7/21/2022	Posted	16 Stillwater Drive Westbrook, ME
RD-213453	7/21/2022	Posted	790 Main St Westbrook, ME
RD-209938	7/7/2022	Posted	16 Stillwater Drive Westbrook, ME
RD-209939	7/7/2022	Posted	669 Main St Westbrook, ME

View All

Recurring Rides (0)

Availabilities (0)

Opportunities (6+)

Viewing Customer Accounts (Charges and Payments)

1. Open up the contact record for the rider.
2. Click on the Account in the contact record. The Personal Transportation Account will open.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Contact **Nancy Swirlthy** + Follow Update Availability Driver Availability Driver Manifest

Phone Account Name Nancy Swirlthy - PTA Rider Status Admin Inactive Driver Status

DETAIL RELATED RECORDS

Contact Type Rider Title

▼ Contact Details

Modal: Nancy Swirlthy - PTA

Primary Contact Nancy Swirlthy Account Balance \$0.00

Account Balance (inc. booked rides) \$0.00

No related lists to display

Gender Female Birthdate 3/25/1942 Primary Affiliation Community Playground Contact ID CPG-00049261 Driver Status Email Manifest ☒ Primary Language English Other Language

Account Balance \$0.00 Minimum Rider Balance \$100.00 Internal Notes

3. Click on related list, and the first item is Transportation Account Items.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Account **Nancy Swirlthy - PTA** + Follow Edit New Contact New Organization

Primary Contact Nancy Swirlthy Account Balance \$0.00 Account Balance (inc. booked rides 306) \$0.00

DETAILS RELATED LISTS

Transportation Account Items (6+) New

Transportation Account Item Number	Amount	Type	Date
TAI-006085	\$0.00	Ride Charge	7/30/2022
TAI-006086	\$0.00	Ride Charge	8/6/2022
TAI-006087	\$0.00	Ride Charge	8/13/2022
TAI-006088	\$0.00	Ride Charge	8/20/2022
TAI-006089	\$0.00	Ride Charge	8/27/2022
TAI-006090	\$0.00	Ride Charge	9/3/2022

View All

Rides (Site) (0) New

Recurring Rides (2) New

Recurring Rides Number	Status	Start Date	End Date
RR-000023	Active	6/25/2022	10/31/2022
RR-000022	Active	6/25/2022	10/31/2022

View All

4. Click on View All for the full list.

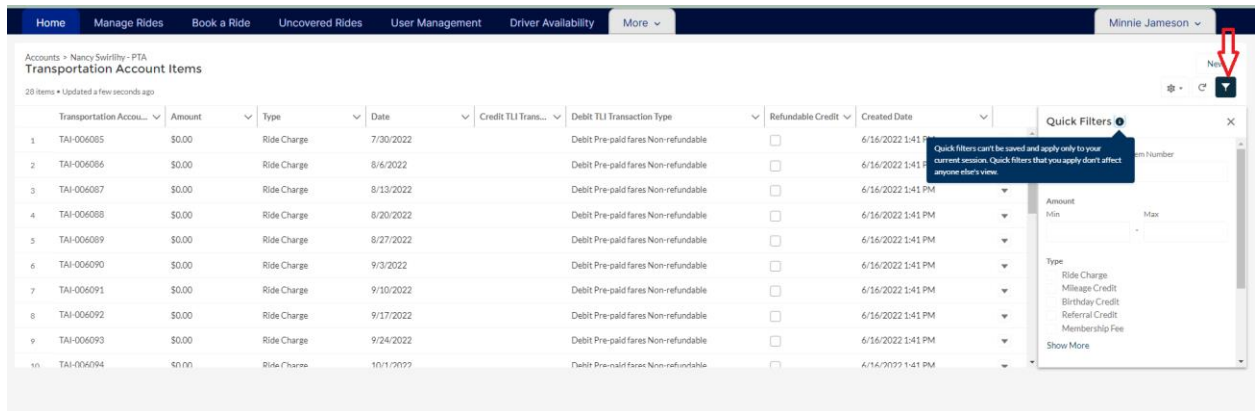
DETAILS RELATED LISTS

Transportation Account Items (6+) New

Transportation Account Item Number	Amount	Type	Date
TAI-006085	\$0.00	Ride Charge	7/30/2022
TAI-006086	\$0.00	Ride Charge	8/6/2022
TAI-006087	\$0.00	Ride Charge	8/13/2022
TAI-006088	\$0.00	Ride Charge	8/20/2022
TAI-006089	\$0.00	Ride Charge	8/27/2022
TAI-006090	\$0.00	Ride Charge	9/3/2022

View All

5. Click on the filter to filter by transaction type.



Accounts > Nancy Swirrlity - PTA
Transportation Account Items
28 items • Updated a few seconds ago

Transportation Account	Amount	Type	Date	Credit TLI Trans...	Debit TLI Transaction Type	Refundable Credit	Created Date
1 TAI-006085	\$0.00	Ride Charge	7/30/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
2 TAI-006086	\$0.00	Ride Charge	8/6/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
3 TAI-006087	\$0.00	Ride Charge	8/13/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
4 TAI-006088	\$0.00	Ride Charge	8/20/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
5 TAI-006089	\$0.00	Ride Charge	8/27/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
6 TAI-006090	\$0.00	Ride Charge	9/3/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
7 TAI-006091	\$0.00	Ride Charge	9/10/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
8 TAI-006092	\$0.00	Ride Charge	9/17/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
9 TAI-006093	\$0.00	Ride Charge	9/24/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM
10 TAI-006094	\$0.00	Ride Charge	10/1/2022		Debit Pre-paid fares Non-refundable	<input type="checkbox"/>	6/16/2022 1:41 PM

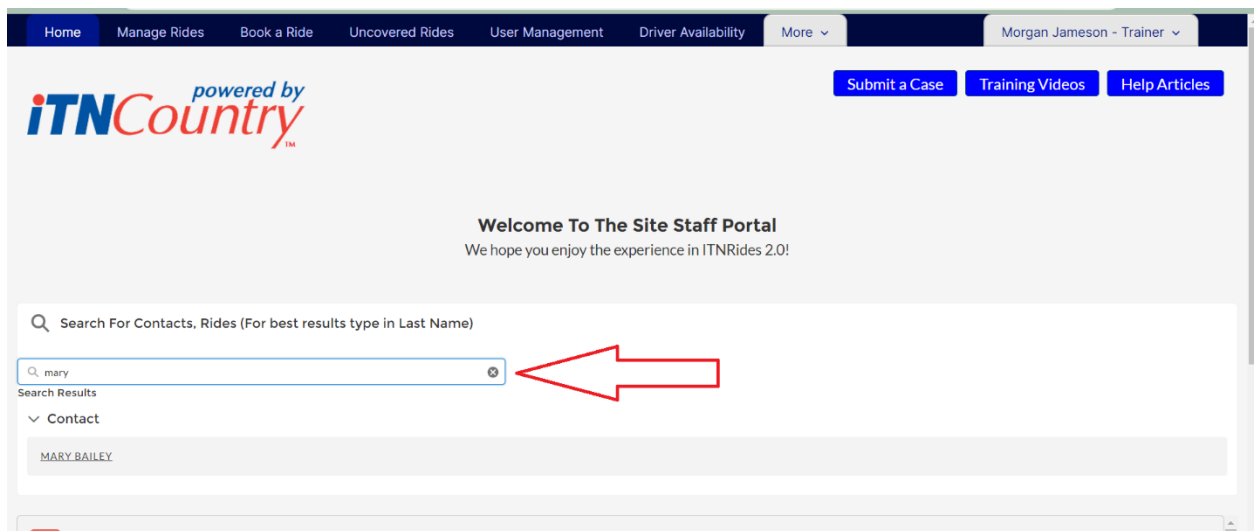
Quick Filters: Quick filters can't be saved and apply only to your current session. Quick filters that you apply don't affect anyone else's view.

Quick Filters:

- Amount: Min, Max
- Type: Ride Charge, Mileage Credit, Birthday Credit, Referral Credit, Membership Fee, Show More

Drivers

1. On the Home page, type the driver's name into the search box. The driver's name will appear below as a Contact.



Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Morgan Jameson - Trainer

Submit a Case Training Videos Help Articles

powered by
ITN Country

Welcome To The Site Staff Portal
We hope you enjoy the experience in ITNRides 2.0!

Search For Contacts, Rides (For best results type in Last Name)

Search: mary

Search Results

▼ Contact

MARY.BAILEY

2. Click on the name to open their account page.
3. The quick information bar at the top of the page lists the driver's phone number and status.
4. The Account page lists all the information about the driver, and you can edit any field that has a little pencil graphic next to it.

5. The first column contains two tabs- Details and Related.
 - a. Details are the personal details of the rider and their contact information.
 - b. Related shows their ride history, relationships to other accounts, and payments or donations.

Quick Action Buttons

Quick action buttons are found at the top right on the pages for Contacts and Accounts, and these are the best way to accomplish many tasks.

Quick Action Buttons for Contacts

Button Name	Description
Update Availability	This button is used to add or update related driver's availability.
Driver Availability	This button open driver's availability page on the Site staff portal.
New Affiliation	This button creates new affiliation record for record type Site on the conatct.
New Bill to Affiliation	This button creates new affiliation record for record type Bill to from contact
New Account Adjustment	This button creates a new opportunity record for Account adjustment record type from contact.
Manifest: Email Today	"Driver Manifest" are sent for today in the Site Portal by using this button.
Manifest: Email Tomorrow	"Driver Manifest" are sent for tomorrow in the Site Portal by using this button.
Manifest: Email/Edit Tomorrow	"Driver manifests" for tomorrow(next day) can be send using this and before sending the manifests you can edit them. This button is used for site staff portal.

Manifest: Email/Edit: Today	"Driver manifests" for same day (today) can be send using this and before sending the manifests you can edit them.This button is used for site staff portal.
Manifest: Email Today: Internal	Driver manifests" for same day (today) can be send using this and before sending the manifests you can edit them.This button is used for native salesforce.
Manifest: Email Tomorrow: Internal	"Driver manifests" for tomorrow(next day) can be send using this and before sending the manifests you can edit them. This button is used for native salesforce.
New Car Donation	This button creates car donation records on the contact.
New Car Trade	This button create new opportunity for record type car trade.
New Cash or CC Payment	This button create new opportunity for record type Cash Payment.
New Recurring Donation	Creates a new Recurring Donation child record.
Transfer Credit Flow	This button is used to make money transfers members for same site or different site, transfer to site, transfer to road scholarship.

Quick Action Buttons for Accounts

Button Name	Description
Monthly Statement	This button generates Monthly Statements for the related account on Site Staff Portal.
Monthly Statement: Internal	This button generates Monthly Statements for the related account in native salesforce.
New Affiliation	Creates new Affiliation child record.
New Credit Transfer	
New Donation	This button creates new donation record from the related account.
New Grant	This button creates new grant record from the related account.
Scholarship Awarded	
New Contact	This button creates New Contact.
New Recurring Donation	This button creates New Recurring Donation.

New Organization	This button creates New Organization record.
------------------	--

Closing Accounts

When a rider is no longer riding with you, or a driver is no longer driving, the account should be closed. This will stop the rider or driver from being scheduled, and will remove them from most reports. You will still be able to access information for closed accounts, and they can be re-opened at any time as needed.

Closing an Account with a PTA Balance

1. Navigate to the rider's Contact Record, and note the balance of the account.

The screenshot displays the 'Contact' record for 'Example Rider' in the ITNRides system. The top navigation bar includes links for Home, Manage Rides, Book a Ride, Uncovered Rides, User Management, Driver Availability, and a More dropdown. The contact summary shows Phone: 207-123-4567, Account Name: Example Rider - PTA, Rider Status: Active, and Driver Status. Below this, the 'DETAIL' tab is selected, showing a list of fields for the rider's information. The 'Account Balance' field is circled in red and shows a value of \$4.00. Other fields include Name, Preferred Name, Account Name, Family Account, Rider Status, Minimum Rider Balance, Membership Type, Internal Notes, Description, Title, Gender, Birthdate, Primary Affiliation, Contact ID, Driver Status, Email Manifest, Primary Language, and Other Language.

2. Select the quick action button “New Account Adjustment” under the arrow near the top right. (This option is equivalent to the non-cash transactions from ITNRides 1.5). This provides several options for zeroing out the rider's balance.

Calendar - Morgan Jameson - C... | Home - Cense... | #117Nides 2.0 Newsletter - US... | Contact: Example Rider

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

Minnie Jameson

+ Follow Update Availability Driver Availability Manifest: Email Tomorrow Manifest: Email Today Manifest: Email Edit Today Edit New Bill To Affiliation New Site Affiliation MassMailer Verify Send Via MassMailer Quick Send Via MassMailer New Account Adjustment New Car Trade New Car Donation

Example Rider

Phone: 207-123-4567 Account Name: Example Rider - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Rider Title:

Contact Details

Name: Example Rider Gender: Female

Preferred Name: Birthdate: 6/15/1945

Account Name: Example Rider - PTA Primary Affiliation: Community Playground

Family Account: Contact ID: CPG-00079230

Rider Status: Active Driver Status:

Account Balance: \$400 Email Manifest: [X]

Minimum Rider Balance: \$100.00 Primary Language: English

Membership Type: Other Language:

Internal Notes:

Description:

Portal Access

Site Portal Access: [X] Business Portal Access: [X]

- Complete the pop-up form that opens, selecting the appropriate Transaction Type from the drop-down list. Then click Save.

Title

New Account Adjustment

Credit Adjustment to Account

Debit Adjustment to Account

Happy Birthday

Occupied Mileage Reimbursement

Referral "Thank You"

Refund of Customer Account Balance

Returned payment from customer PTA...

Returned payment from non-customer

*Close Date: 8/11/2022

Account Name: Example Rider - PTA

Cancel Save

Primary Language

(Account Adjustment Screen with Transaction Types Menu open)

New Account Adjustment

Amount: \$4.00

* Close Date: 8/11/2022

* Transaction Type: Refund of Customer Account Balance

Account Name: Example Rider - PTA

Statement Comments:

Cancel Save

(Account Adjustment Screen Filled In Example)

4. Once you Save the Adjustment, the screen will return to the Contact Record. The balance will appear the same, as financial transactions are processed overnight. Change the Rider Status from Active to Closed, and click Save. The account is now closed.

Home
Manage Rides
Book a Ride
Uncovered Rides
User Management
Driver Availability

Contact

Example Rider

Phone

207-123-4567

Account Name

Example Rider - PTA

Rider Status

Active

Driver Status

DETAIL

RELATED RECORDS

Contact Type

Rider

Title

▼ Contact Details

Name

Example Rider

Gender

Female

Preferred Name

Birthdate

6/15/1945

Account Name

Example Rider - PTA

Primary Affiliation

Community Playground

Family Account

☐

Contact ID

CPG-00079230

Rider Status

Active

Driver Status

Account Balance

\$4.00

Email Manifest

☒

Minimum Rider Balance

\$100.00

Primary Language

English

Membership Type

Other Language

Internal Notes

Description

▼ Portal Access

Site Portal Access

☐

Business Portal Access

☐

Once you click the pencil, the screen becomes editable.

Committee Leader

▼

▼ Contact Details

* Name

Salutation

--None--

First Name

Example

* Last Name

Rider

Suffix

Preferred Name

Account Name

Example Rider - PTA

Family Account

☐

Rider Status

Active

--None--

✓ Active

Admin Inactive

Suspended

Closed

Internal Notes

Description

wascriptvoid(0);

Gender

Female

Birthdate

6/15/1945

Primary Affiliation

Community Playground

Contact ID

CPG-00079230

Driver Status

--None--

Email Manifest

☒

Primary Language

English

Other Language

--None--

Cancel

Save

#1

#2

- Once you close the account, you must also cancel the recurring membership charge if applicable. Go to the Related Records, and under Opportunities, find the Pledged Membership Charge. Change the Stage from Pledged to Closed/Lost.

DETAIL RELATED RECORDS

Rides (6+)

Ride Number	Ride Date	Ride Status	Origination
RD-290730	5/25/2023	Booked	45 Eastern Promenade Portland, ME
RD-290731	5/25/2023	Booked	18 Free St Portland, ME
RD-290665	5/24/2023	Canceled	45 Eastern Promenade Portland, ME
RD-290729	5/24/2023	Canceled	18 Free St Portland, ME
RD-290664	5/23/2023	Canceled	45 Eastern Promenade Portland, ME
RD-290728	5/23/2023	Canceled	18 Free St Portland, ME

View All

Recurring Rides (2)

Recurring Rides Number	Origination	Destination	Pickup Time
RR-000407	18 Free St Portland, ME	45 Eastern Promenade Portland, ME	3:00:00 PM
RR-000408	45 Eastern Promenade Portland, ME	18 Free St Portland, ME	6:00:00 AM

View All

Availabilities (0)

Opportunities (6+)

Opportunity Name	Account Name	Amount	Stage
Membership 09/26/2023	TA	\$50.00	Pledged
Donation 01/04/2023	TA	\$500.00	Posted
Payment on Account 12/19/2022	TA	\$105.98	Posted
Payment on Account 12/19/2022	TA	\$50.00	Posted
Payment on Account 11/20/2022	TA	\$109.54	Posted

Click on the Opportunity Name to open the record.

DETAILS RELATED LISTS

Opportunity Name: Sally Wagon Membership 09/26/2023

Account Name: [REDACTED]

Primary Contact: [REDACTED]

Amount: \$50.00

Description:

Transaction Type: Account Charge for Annual Membership

Close Date: 9/26/2023

Type: Membership - Individual

Stage: **Pledged**

Member Information

Membership Start Date: [REDACTED]

Membership End Date: [REDACTED]

Payment Information

Payment Type: Credit Deduction


Payment Amount Received: \$0.00

Cancel Save

- Click Save, and the Account is fully closed.

Closing an Account with No PTA Balance

- Navigate to the rider's Contact Record.
- Change the Rider Status from Active to Closed, and click Save. The account is now closed.

Home	Manage Rides	Book a Ride	Uncovered Rides	User Management	Driver Availability
<div>  <div> Contact Example Rider </div> </div>					
Phone 207-123-4567	Account Name <u>Example Rider - PTA</u>	Rider Status Active	Driver Status		
<div> DETAIL RELATED RECORDS </div>					
Contact Type Rider		Title ⓘ			
<div> ▼ Contact Details </div>					
Name Example Rider		Gender Female			
Preferred Name		Birthdate 6/15/1945			
Account Name <u>Example Rider - PTA</u>		Primary Affiliation ⓘ <u>Community Playground</u>			
Family Account <input type="checkbox"/>		Contact ID CPG-00079230			
Rider Status Active		Driver Status			
Account Balance ⓘ \$4.00		Email Manifest <input checked="" type="checkbox"/>			
Minimum Rider Balance \$100.00		Primary Language English			
Membership Type		Other Language			
Internal Notes					
Description					
<div> ▼ Portal Access </div>					
Site Portal Access <input type="checkbox"/>		Business Portal Access <input type="checkbox"/>			

Once you click the pencil, the screen becomes editable.

Committee Leader

▼

▼ Contact Details

* Name

Salutation

--None--

First Name

Example

* Last Name

Rider

Suffix

Preferred Name

Account Name

Example Rider - PTA

Family Account

☐

Rider Status

Active

--None--

✓ Active

Admin Inactive

Suspended

Closed

Internal Notes

Description

wascriptvoid(0);

Gender

Female

Birthdate

6/15/1945

Primary Affiliation

Community Playground

Contact ID

CPG-00079230

Driver Status

--None--

Email Manifest

☒

Primary Language

English

Other Language

--None--

Cancel

Save

#1

#2

- Once you close the account, you must also cancel the recurring membership charge if applicable. Go to the Related Records, and under Opportunities, find the Pledged Membership Charge. Change the Stage from Pledged to Closed/Lost.

DETAIL RELATED RECORDS

Rides (6+)

Ride Number	Ride Date	Ride Status	Origination
RD-290730	5/25/2023	Booked	45 Eastern Promenade Portland, ME
RD-290731	5/25/2023	Booked	18 Free St Portland, ME
RD-290665	5/24/2023	Canceled	45 Eastern Promenade Portland, ME
RD-290729	5/24/2023	Canceled	18 Free St Portland, ME
RD-290664	5/23/2023	Canceled	45 Eastern Promenade Portland, ME
RD-290728	5/23/2023	Canceled	18 Free St Portland, ME

View All

Recurring Rides (2)

Recurring Rides Number	Origination	Destination	Pickup Time
RR-000407	18 Free St Portland, ME	45 Eastern Promenade Portland, ME	3:00:00 PM
RR-000408	45 Eastern Promenade Portland, ME	18 Free St Portland, ME	6:00:00 AM

View All

Availabilities (0)

Opportunities (6+)

Opportunity Name	Account Name	Amount	Stage
Membership 09/26/2023	TA	\$50.00	Pledged
Donation 01/04/2023	TA	\$500.00	Posted
Payment on Account 12/19/2022	TA	\$105.98	Posted
Payment on Account 12/19/2022	TA	\$50.00	Posted
Payment on Account 11/20/2022	TA	\$119.54	Posted

Click on the Opportunity Name to open the record.

DETAILS RELATED LISTS

* Opportunity Name: Sally Wigton Membership 09/26/2023

Account Name: [Redacted]

Primary Contact: [Redacted]

Amount: \$50.00

Description:

Transaction Type: Account Charge for Annual Membership

* Close Date: 9/26/2023

Type: Membership - Individual

* Stage: Pledged

Member Information

Membership Start Date: [Redacted]

Membership End Date: [Redacted]

Payment Information

Payment Type: Credit Deduction

Payment Amount Received: \$0.00

Cancel Save

- Click Save, and the Account is fully closed.

Drivers

- Enter the driver's name in the search bar at the top of the dashboard page.
- Select the contact record for the driver and click to open.

3. Check with the driver about what they would like to do with any accumulated credits. They can keep credits in their account for future use, even if you set them to closed status. Other options for their credits include:
 - a. Donation of the credits to the organization to increase sustainability
 - b. Donation of the credits to a scholarship fund to help low-income riders
 - c. Gift the credits to a specific individual (rider or volunteer)
4. Change the driver status to closed and click save.

▼ Contact Details

* Name

Salutation
--None--

First Name
Charles

* Last Name
Haze

Suffix

Preferred Name

Account Name
Charles Haze - PTA

Gender
Male

Birthdate
2/3/1978

Primary Affiliation
Community Playground

Contact ID
CPG-00049274

Family Account
☐

Rider Status
--None--

Account Balance
\$105.66

Minimum Rider Balance
\$100.00

Membership Type
--None--

Internal Notes

Driver Status
Active

--None--

✓ Active

Admin Inactive

Temporarily Inactive

Closed

Booking Rides

Standard Rides

Riders can request rides through their portal, but many will call to book rides if given the option. You will have a ride reservation slip that you can use to capture all the pertinent information if you are not able to enter the ride into the system while talking with the rider.

ITN Ride Reservation

Customer Name: _____ Date/Day of Ride: _____ Appointment Time: _____ AM
PM

Name & Address of Pickup Location: _____

Name & Address of First Destination: _____

Name & Address of Additional Destinations: _____

Phone #: _____ Ride Purpose: _____ Doctor's Name: _____ # of Riders: _____

Notes: _____

☐ A-RIDE Pickup Time: _____
☐ B-RIDE Pickup Time: _____
☐ NO B-Ride
☐ Data entered into ITNRides
☐ Recurring Ride

A Ride ID #: _____ B Ride ID #: _____

Dispatcher: _____

Ride 1:

Ride 1 is the initial ride you are entering for the rider, usually from their home to another location. (The rider does not have to be picked up at home, but most are).

1. Click the “Book a Ride” tab at the top of the page. This will open the Add New Ride screen.

Home Manage Rides **Book a Ride** User Management User Profile Driver Availability More ITNA Test Affiliate Staff

[Back to all rides](#) **Add new ride** [Save ride request](#)

Status Booked	Requested on	Ride coordinator ITNA Test Affiliate Staff	Customer Phone Number	Account Balance \$0.00
------------------	--------------	---	-----------------------	---------------------------

Scheduled ride for: 02/28/2022

Customer:

Purpose:

Ride 1 [Add Ride 2 +](#)

Riders:

Appointment time:

Bill to:

Start Location:

Pick up:


Pick up time:



Est. drop off:

2. The first box to fill in is the date. The date will default to the next day, but you can change it to any day. Type the date in the box or click on the calendar to open a calendar to select the date.

Scheduled ride for

Customer

02/28/2022 


February 2022  

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5
6	7	8	9	10	11	12

Clear Today


Add Ride 2 +



Appointment time

---:-- -- 

3. Enter the rider's name in the Customer field. As you type, the name should appear below. Click on the name to select the person. Once the person is selected, their information will begin to populate the fields below.

Customer

spires 

 Kathy Spires 

4. Choose the ride purpose. You can type into the box, or scroll through the list to find the purpose.

Purpose

grocery

^

Con-Grocery

Purpose

Select an Option

^

Ch/Syn-Soc

Ch/Syn-Work

Ch/Syn-Worship

Con-Banking

Con-General

5. If there will be more than one passenger taking the ride, change the number of riders in the “Riders” field using the plus and minus on either side of the box.

Status Booked	Requested on	Ride coordinator ITNA Test Affiliate Staff	Customer Phone Number
-------------------------	--------------	--	-----------------------

Scheduled ride for mm/dd/yyyy	Customer Kathy Spires	Purpose Select an Option
----------------------------------	--------------------------	-----------------------------

Customer Preferences ▾

Customer Notes

Ride 1 Add Ride 2 +

Riders - 1 +	Appointment time --:--	Bill to Kathy Spires - PTA
-----------------	---------------------------	-------------------------------

- Enter the appointment time if applicable. If you are used to typing in military times, you can still do so, but the system will convert it to the 12 hour time, changing it automatically to PM if it is 13-19 for hours. You can also use the arrow buttons to select AM or PM when typing in the time, with up entering AM and down entering PM.

Customer Preferences ▾

Customer Notes

Ride 1 Add Ride 2 +

Riders - 1 +	Appointment time 09:00 AM	Bill to Kathy Spires - PTA
-----------------	------------------------------	-------------------------------

Start Location 1001 Green Gables Circle, Wentzville	Pick up	Pick up time	Est. drop off
--	---------	--------------	---------------

- If needed, adjust the Bill To for the ride. This should only be adjusted if someone other than the rider's account is billed for the ride. Click on the down arrow to see any other Bill To's that are connected to the customer's account. This is often used for Ride Services accounts.

Customer Preferences ▾

Customer Notes


Ride 1 Add Ride 2 +

Riders: − +

Appointment time: 09:00 AM ⌚

Bill to: Kathy Spires - PTA

Kathy Spires - PTA



8. The rider's home address will be auto-filled in the start location box. Change this if they will be picked up somewhere else. Enter any notes needed in locations notes. (Example- please go to the side door.)

Riders: − +

Appointment time: 09:00 AM ⌚

Bill to: Kathy Spires - PTA ▾

Start Location

1001 Green Gables Circle, Wentzville
Apt 304

Location Notes ▾

End Location

No End Location


Location Notes ▾

Pick up: Before ▾

Pick up time: --:-- -- ⌚

Est. drop off: --:-- --

Ride Notes



9. Enter the rider's destination in the End Location field. You can type in the address, or the address name (if you have saved names with addresses you entered). If the ride is to a new location, you can enter a new address at this time. (See Entering an Address). Once you enter an address, you can also enter any applicable location notes that would help the driver.

Start Location
1001 Green Gables Circle, Wentzville
Apt 304

Location Notes ^

End Location

schnucks

1900 1st Capitol Drive, St. Charles
Schnucks

3029 Highway K, O'Fallon
Schnucks

+ Create new address

+ Add a stop

Pick up
Before

Ride Notes

10. Enter the pick up time in the Pick-Up Time field. The box to the left will be set to Before as the option, leave this alone. The estimated drop off time box will automatically fill in. If you are used to typing in military times, you can still do so, but the system will convert it to the 12 hour time, changing it automatically to PM if it is 13-19 for hours. You can also use the arrow buttons to select AM or PM when typing in the time, with up entering AM and down entering PM.

Bill to

Kathy Spires - PTA

Pick up

Before

Pick up time

08:30 AM

Est. drop off

08:53 AM

Ride Notes

11. Enter any special notes for the ride. Examples of things that would go in this box: a note about the appointment the rider is going to, a rider request for the ride (like calling when you arrive).

Bill to

Kathy Spires - PTA ▼

Pick up Before ▼ ✓

Pick up time 08:30 AM 🕒

Est. drop off 08:53 AM

Ride Notes

This is Kathy's first ride with us.

12. You can see the estimate of the charge for this ride by clicking on the **i** in the Estimated Fare box. This will open the option, click calculate to see the estimated charge. Click the **i** again to close the box.

+ Assign a driver

Load time (min) − 10 + Addl RS time (min) − 15 +

Discount / additional charges

☐ Rideshare ☐ No charge rider ☐ Same day

Staff notes

Estimated fare #1 ➡ i

#2 ➡ Calculate

Ride 1 (1 stop)

Estimated distance 20.34 mi

Rate \$ 2.25

Total \$ 48.76

Number 0

13. Use the Discount/Additional Charges checkboxes to select any that apply to the ride. These include

Load time (min) − 10 + Addl RS time (min) − 15 +

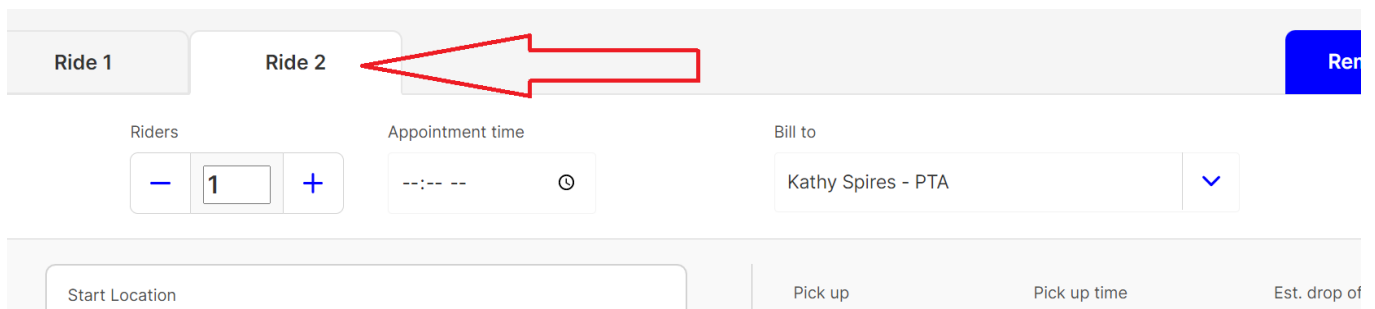
Estimated fare i

Discount / additional charges

☐ Rideshare ☐ No charge rider ☐ Same day ☐ After hours ☐ Hourly

Number of hours 0

- a. Rideshare- There will be two or more people sharing the ride and getting a rideshare discount
 - b. No charge rider- There will be an additional rider in the car that you will not charge for (example: a personal care aide) If using this, make sure you have adjusted the number of riders (Step 5)
 - c. Same Day- Ride was booked on the same day it is occurring (Generally costs more if you charge for rides)
 - d. After Hours- This ride occurs after regular operating hours (Generally costs more if you charge for rides)
 - e. Hourly- The driver will be staying with the rider and waiting for them over a series of stops. If this box is checked, an hourly fee applies in addition to any ride charges.
14. If you are taking the person home as well, move on to entering Ride 2. Ride 2 must be entered before saving Ride 1, or the form will reset.



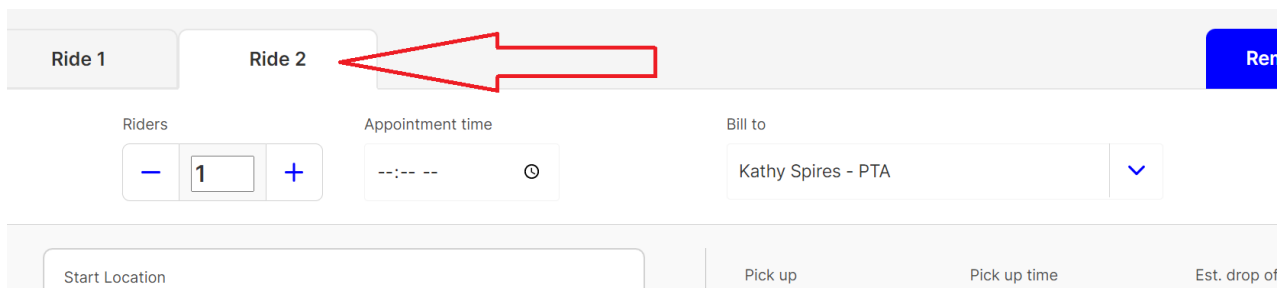
The screenshot shows a form with two tabs: "Ride 1" and "Ride 2". A red arrow points to the "Ride 2" tab. Below the tabs, there are three sections: "Riders" with a minus button, a box containing "1", and a plus button; "Appointment time" with a time selection interface showing "--:-- --" and a clock icon; and "Bill to" with a dropdown menu showing "Kathy Spires - PTA" and a downward arrow. At the bottom, there are fields for "Start Location", "Pick up", "Pick up time", and "Est. drop of".

15. If it is a one way ride, press Ctrl+S to save or scroll to the top of the page and click on "Save Ride Request."
16. A green box stating "Ride Successfully Saved" will show at the top of the screen.

Ride 2

Ride 2 is usually the rider returning home from their first trip.

1. Click on the "Ride 2" tab to begin entering the second/return trip.



This screenshot is identical to the one above, showing the "Ride 1" and "Ride 2" tabs with a red arrow pointing to "Ride 2". The form fields for "Riders", "Appointment time", "Bill to", and the bottom section are the same.

2. The purpose will auto-fill to "Home/Return". Adjust this if the ride purpose is different.

Booked	ITNA Test Affiliate Staff	\$0.00
--------	---------------------------	--------

Scheduled ride for 02/28/2022	Customer Kathy Spires	Purpose Home/Return
----------------------------------	--------------------------	------------------------

Customer Preferences ▾

Customer Notes

Ride 1

Ride 2

Remove Ride

3. The start location and the end location from Ride 1 will have reversed, adjust this if required.

<p>Riders</p> <p>1</p>	<p>Appointment time</p> <p>--:-- --</p>	<p>Bill to</p> <p>Kathy Spires - PTA</p>
------------------------	---	--

<p>Start Location</p> <p>1900 1st Capitol Drive, St. Charles Schnucks</p> <p>Location Notes ▾</p>	<p>Pick up</p> <p>After</p>	<p>Pick up time</p> <p>--:-- --</p>	<p>Est. drop off</p> <p>--:-- --</p>
<p>End Location</p> <p>1001 Green Gables Circle, Wentzville Apt 304</p> <p>Location Notes ▾</p>	<p>Ride Notes</p>		

4. Enter a time in the pick-up time field. The box to the left will be set to after, leave this as it is. If you are used to typing in military times, you can still do so, but the system will convert it to the 12 hour time, changing it automatically to PM if it is 13-19 for hours. You can also use the arrow buttons to select AM or PM when typing in the time, with up entering AM and down entering PM. If the rider would prefer an early driver to waiting for pick-up, this can be toggled to "Before".

<p>Riders</p> <p>1</p>	<p>Appointment time</p> <p>--:-- --</p>	<p>Bill to</p> <p>Kathy Spires - PTA</p>
------------------------	---	--

<p>Start Location</p> <p>0 1st Capitol Drive, St. Charles Schnucks</p> <p>Location Notes ▾</p>	<p>Pick up</p> <p>After</p>	<p>Pick up time</p> <p>10:30 AM</p>	<p>Est. drop off</p> <p>10:53 AM</p>
<p>End Location</p> <p>1 Green Gables Circle, Wentzville 304</p> <p>Location Notes ▾</p>	<p>Ride Notes</p>		

5. If any of the “Discount/Additional Ride Charge” boxes were checked on the first ride, they will be checked on the second ride. Adjust this is necessary.

6. Press Ctrl+ S or scroll to the top of the page and Save the ride.

Ride Purposes

ITNRides 2.0 has an extensive list of ride purposes to choose from when booking a ride. Collecting this information helps with research, and you can pull reports to show you what percentage of the rides you are doing fit into each category. This is incredibly helpful when writing grants.

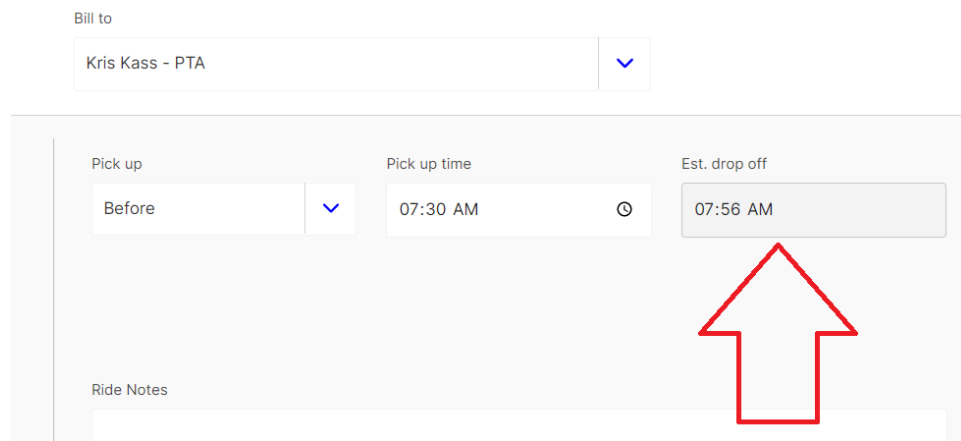
The ride purpose groups in ITNRides are:

- Church/Synagogue- This category is used for any religious-based trips, be it for a religious service, volunteering with a religious organization, or attending a religious social event.
- Consumer- This category is for rides to business or service destinations like the bank, grocery store, hairdresser, or mall. There is also a general consumer ride for things that may not fit into one of the other purposes.
- Educational- Educational rides are to destinations where the rider can expect to learn things. It might be a class, a cultural event, or to see a speaker.
- Employment- This type is for paid or volunteer work related rides.
- Errand- This ride purpose is for when the transportation service also offers errand service, like picking up grocery orders or prescriptions with the rider not accompanying the driver.
- General- This category is for hourly service rides that don't fit another category, personal business, or unknown ride purposes.
- Home/Return- This ride purpose is for returning a rider home from their destinations. These rides usually make up 50% of all rides given.

- Inter-modal- These are rides to other types of transportation- buses, airports, trains, or ferries.
- ITN- Even though your service may not be named ITN, this category is for if riders are being given a ride to a meeting about or to volunteer for your organization.
- Medical- This is the biggest category, and many specialties are listed. This category includes traditional medical appointments as well as things like acupuncture, adult day care, vaccinations, and mental health appointments for counseling and social work.
- Professional Services- This category is for appointments with professionals providing services like accountants and lawyers. This category also includes veterinarians.
- Recreations- This category is for rides to recreation activities. It includes dining out, exercise, games (use this one for casinos), museums, or seeing a show.
- Social- These are for rides to specifically interact with others. It includes Community Affairs (this might be a local meeting or social event), funerals, nursing home visits, general visits, and hospital visits.

Pick-Up and Drop-Off Times

When you enter a pick-up time, the drop-off time box will auto-fill with the time the rider should arrive at their location. While this is just an estimate, it is good to double check this box to ensure you have planned for the rider to arrive on time if they have an appointment.



The screenshot shows a form with the following fields:

- Bill to:** A dropdown menu showing "Kris Kass - PTA" with a blue checkmark icon.
- Pick up:** A dropdown menu showing "Before" with a blue checkmark icon.
- Pick up time:** A text field showing "07:30 AM" with a clock icon.
- Est. drop off:** A text field showing "07:56 AM". A large red arrow points to this field.
- Ride Notes:** A text area below the time fields.

Recurring Rides

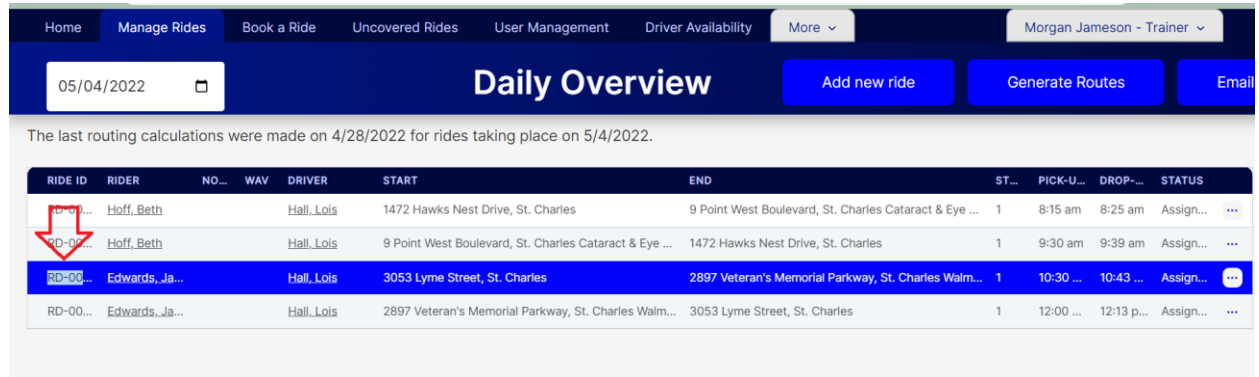
Helpful Hints for Setting Recurring Rides:

- If you have had rides data migrated to the ITNRides system, don't use a migrated ride as a seed ride to set up recurring rides. Enter a new ride as a seed ride to avoid bugs.
- Set the recurrence for the first time you want the ride to recur, the recurring ride should start with the second ride.
- Set your end date at least 1 day after you want the last ride to occur. If the last ride is on Tuesday, set the end date for Wednesday.

- You can set up to 30 recurring rides at one time. You will have to reset each recurring ride after that many occurrences, so rides that take place more often will need to be reset more often. There is a recurring rides report to help keep track of this.

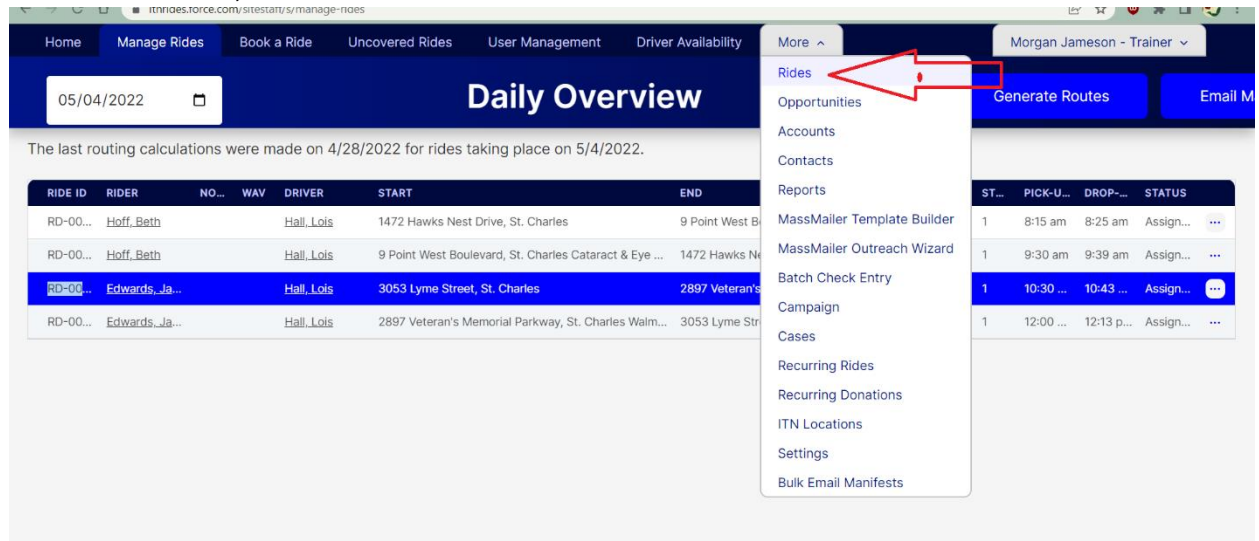
Setting Up a Recurring Ride

- Create an initial ride that will become the seed ride for the recurring ride (set up Ride 1 and Ride 2).
- On the Manage Rides/Daily Overview, highlight the ride ID for Ride 1 and copy it. (You can also write it down if you prefer). The ride ID will copy even if the entire number is not visible.



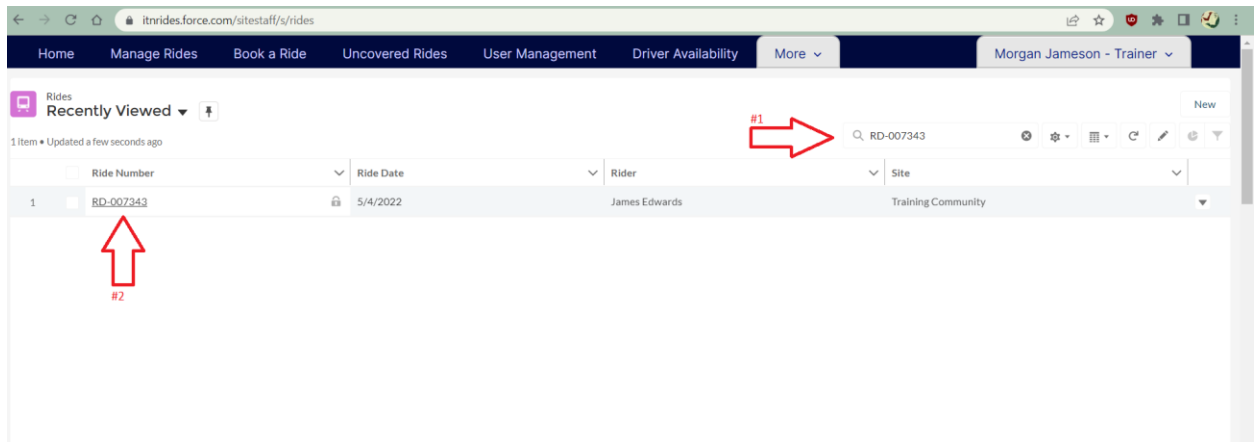
RIDE ID	RIDER	NO...	WAV	DRIVER	START	END	ST...	PICK-U...	DROP-...	STATUS
RD-00...	Hoff, Beth			Hall, Lois	1472 Hawks Nest Drive, St. Charles	9 Point West Boulevard, St. Charles Cataract & Eye ...	1	8:15 am	8:25 am	Assign...
RD-00...	Hoff, Beth			Hall, Lois	9 Point West Boulevard, St. Charles Cataract & Eye ...	1472 Hawks Nest Drive, St. Charles	1	9:30 am	9:39 am	Assign...
RD-00...	Edwards, Ja...			Hall, Lois	3053 Lyme Street, St. Charles	2897 Veteran's Memorial Parkway, St. Charles Walm...	1	10:30 ...	10:43 ...	Assign...
RD-00...	Edwards, Ja...			Hall, Lois	2897 Veteran's Memorial Parkway, St. Charles Walm...	3053 Lyme Street, St. Charles	1	12:00 ...	12:13 p...	Assign...

- From the More tab, click on Rides.

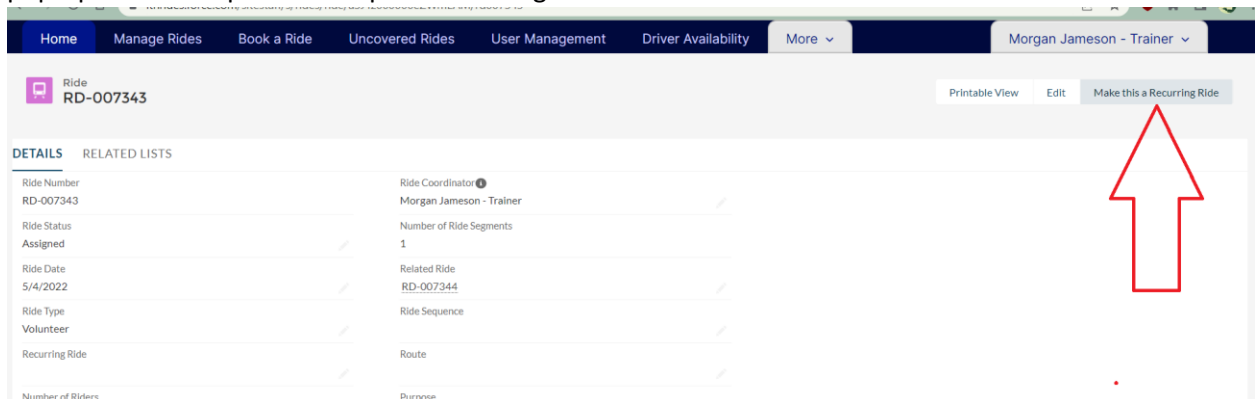


RIDE ID	RIDER	NO...	WAV	DRIVER	START	END	ST...	PICK-U...	DROP-...	STATUS
RD-00...	Hoff, Beth			Hall, Lois	1472 Hawks Nest Drive, St. Charles	9 Point West B	1	8:15 am	8:25 am	Assign...
RD-00...	Hoff, Beth			Hall, Lois	9 Point West Boulevard, St. Charles Cataract & Eye ...	1472 Hawks N	1	9:30 am	9:39 am	Assign...
RD-00...	Edwards, Ja...			Hall, Lois	3053 Lyme Street, St. Charles	2897 Veteran's	1	10:30 ...	10:43 ...	Assign...
RD-00...	Edwards, Ja...			Hall, Lois	2897 Veteran's Memorial Parkway, St. Charles Walm...	3053 Lyme Str	1	12:00 ...	12:13 p...	Assign...

- Paste the Ride ID (or type it in the box) to search the list.
- Click on the Ride Number to open the ride record.



6. Click the “Make this a Recurring Ride” quick action button at the top right of the page. A pop-up form will open to set up the recurring ride.



7. Set an end date for the ride. Recurring rides can be set for up to 6 months, if a ride will recur for longer than 6 months the ride will need to be set up every 6 months. You can also enter a total number of rides to be scheduled if you know the number of occurrences (up to 75 occurrences or 6 months), but don't have the dates mapped out.

Uncovered Rides User Management Driver Availability More

Make this a Recurring Ride

Parent Ride RD-007343	Member James Edwards
Origination 3053 Lyme Street St. Charles, MO	Destination 2897 Veteran's Memorial Parkway St. Charles, MO
* Start Date 5/4/2022	End Date 12/30/2022
Pickup Time 10:30 AM	Number of Riders 1
Total Number of Rides to Schedule ⓘ	
Frequency Weekly	
Weekly Ride Monday <input type="checkbox"/>	Weekly Ride Sunday <input type="checkbox"/>
Weekly Ride Wednesday <input type="checkbox"/>	Weekly Ride Tuesday <input type="checkbox"/>
	Weekly Ride Thursday <input type="checkbox"/>

Cancel Save

8. Set up the frequency and days schedule.

Uncovered Rides User Management Driver Availability More

Make this a Recurring Ride

St. Charles, MO St. Charles, MO

* Start Date 5/4/2022 End Date 12/30/2022

Pickup Time 10:30 AM Number of Riders 1

Total Number of Rides to Schedule 1

Frequency Weekly

Weekly Ride Sunday ☐

Weekly Ride Monday ☐

Weekly Ride Wednesday ☒

Weekly Ride Friday ☐

Monthly Week Number --None--

Weekly Ride Tuesday ☐

Weekly Ride Thursday ☐

Weekly Ride Saturday ☐

Monthly Day of Week --None--

Cancel Save

9. Click Save. Click on the Ride ID that shows up in the green box to open the recurring ride record.

itnrides.force.com/sitestaff/s/rides/ride/a314z00000eZWmEAM/rd007343

Home Manage Rides Book a Ride Uncovered Rides

Recurring Ride RR-000010 was created.

Morgan Jameson - Trainer

Printable View Edit Make this a Recurring Ride

Ride RD-007343

DETAILS RELATED LISTS

Ride Number RD-007343	Ride Coordinator Morgan Jameson - Trainer
Ride Status Assigned	Number of Ride Segments 1
Ride Date	Related Ride

10. Click "Create Rides Now" to add the rides to the schedule. A pop-up will open to show you the recurrence, verify it is right and then click "Next". A new pop-up will tell you how many rides were created. Click "Finish".

itnrides.force.com/sitestaff/s/detail/a1P4z000009m6Y1EAI

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

Morgan Jameson - Trainer

Recurring Ride RR-000010

Edit Create Rides Now Clone

DETAILS RELATED

Recurring Rides Number RR-000010	Parent Ride RD-007343
Status Active	Member James Edwards
	Bill To James Edwards - PTA

Recurring Ride Details

The image displays two sequential screenshots of a software interface for creating recurring rides. The top screenshot shows a dialog box titled "Create Rides Now" with a close button (X) in the top right corner. Below the title, it says "Schedule recurring rides based on the information below:". There are two input fields: "Frequency Description" containing "Every week on Wednesday, starting on or after 2022-05-04, no later than 2022-10-24." and "Parent Ride" containing "RD-007343". A blue "Next" button is at the bottom right, with a red arrow pointing to it. The bottom screenshot shows the same dialog box after the process is complete. It displays the message "25 rides were created." and has "Previous" and "Finish" buttons at the bottom right. A red arrow points to the "Finish" button. The "Parent Ride" label is visible in the top left of the dialog box.


11. Repeat this process for Ride 2.

Segmented Rides


A segmented ride is when the rider needs to stop somewhere for a short period of time before traveling on to their final destination. A good example of this is when a rider is coming home from a doctor's appointment, they may plan to stop at the pharmacy on the way home.


1. On the book a ride screen, begin entering the rider's information as normal- Name, Bill To, Appointment Time.
2. For the ride purpose field, use the purpose that most closely matches the overall purpose for the ride, we cannot enter different purposes for individual segments.
3. Use the address of the first stop as your end location for Ride 1.

Start Location
1001 Green Gables Circle, Wentzville
Apt 304

Location Notes 


End Location
777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E

Location Notes 


Pick up
Before 


Pick up time
01:30 PM

Ride Notes



4. Enter the initial pick-up time.


Pick up
Before 

Pick up time
01:30 PM 


Est. drop off
02:00 PM

Ride Notes

Suit 129F



5. Click on the plus sign under the destination box, next to Add a Stop. A second set of start and end location boxes will open beneath the first.

+ Add a stop 

+ Assign a driver

Load time (min)
- 10 +

Addl RS time (min)
- 15 +

Estimated f

— 1 +

02:00 PM

⊙

Kathy Spires -

○

Start Location

1001 Green Gables Circle, Wentzville
Apt 304

Location Notes ▼

📍

End Location

777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E

Location Notes ▼

Pick up

Before

Ride Notes

○

Start Location

777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E

Location Notes ▼

📍

End Location

No End Location

Location Notes ▼

Pick up

Ride Notes

— Remove this stop

6. The start location will auto-fill with the end location entered for the first segment, and you can now enter the next stop in the next End Location box.

📍

End Location

777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E

Location Notes ▼

Ride Notes

○

Start Location

777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E

Location Notes ▼

📍

End Location

No End Location

Location Notes ▼

Pick up

Ride Notes

— Remove this stop

7. Enter the pick-up time based on how long the person is planning to be at their first stop.

1001 Green Gables Circle, Wentzville
Apt 304
Location Notes ▼

End Location
777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E
Location Notes ▼

Start Location
777 S New Ballas Road, St. Louis
Ballas Medical Office Center, Advanced Injury Care, Suit 129E
Location Notes ▼

End Location
2920 Highway K, O'Fallon
Walgreens
Location Notes ▼

Before ▼ 01:30 PM 02:00 PM

Ride Notes

Pick up ▼ 02:15 PM 02:38 PM

Ride Notes

— Remove this stop

8. After entering all stops for Ride 1 and Ride 2, save the ride by hitting Ctrl+s or scrolling to the top of the page and clicking “Save Ride Request”.
9. When viewing a segmented ride on the Daily Overview, the initial pick-up and last drop-off address will be shown. Intermediate stops where the driver waits for the passenger will not be shown. The number of stops will be listed in the Stops column.

Rides Requested Through the Rider Portal

Rides requested on the rider portal will show up on the Daily Overview with a “Requested” status. Click on the three dots at the end of the ride’s row to accept or decline the ride.

Home Manage Rides Book a Ride User Management User Profile Driver Availability More ▼ ITNA Test Affiliate Staff ▼

03/03/2022 Daily Overview Add new ride Generate Routes

The last routing calculations were made on 2/25/2022 for rides taking place on 2/25/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP ↑	DROP-OFF	STATUS
RD-008155	Adri Miller						0			Requested
RD-008156	Adri Miller						0			Requested
RD-007527	Edwards, Caden				3053 Lyme Street, St. Charles	300 1st Capitol Drive, ST. Charles St. Joseph Hospital	1	1:30 pm	1:41 pm	Booked
RD-007528	Edwards, Caden				300 1st Capitol Drive, ST. Charles St. Joseph Hospital	3053 Lyme Street, St. Charles	1	4:00 pm		Requested

Accept ride
Decline Ride
View ride record
Edit ride
Copy Ride

When you accept the ride, the status will change to “Booked”. When the ride is declined, the rider will be sent an email to let them know their request cannot be met.

The Daily Overview

Click on Manage Rides to see the Daily Overview, which lists all the rides for the day. This list will show you the following information for each ride:

- Ride ID
- Rider Name
- Driver Name (if assigned)
- High vehicle- yes or no

- Wheelchair vehicle required- yes or no
- Start location
- End location
- # of stops
- Pick-up Time
- Drop off Time
- Ride Status

If you hover over the rider or driver name, their phone number will appear.

Click on the three dots at the left of the ride for options to Edit Ride, View Ride, and Copy Ride. Use Edit Ride to make changes to rides that have already been entered.

To see the drivers available for the day, click on Available Drivers, near the bottom left of the screen.

Calendar - Morgan Jameson - ITN America - 3d-RideReservations - Manage Rides - Lightning Action Buttons

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

08/03/2022 Daily Overview Add new ride Generate Routes

The last routing calculations were made on 7/19/2022 for rides taking place on 7/21/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-216986	Knight, Nancy				2215 Bolton St., St. Charles	2897 Veterans Memorial Parkway, St Charles Walmart	1	10:00 am	10:10 am	Assigned
RD-207337	Gazzano, Grace				708 Nacional CT, Salinas	680 E romie Ln, Salinas Action Physical Therapy	1	11:00 am	11:18 am	Booked
RD-216987	Knight, Nancy				2897 Veterans Memorial Parkway, St Charles Walmart	2215 Bolton St., St. Charles	1	1:00 pm	1:10 pm	Declined

Available Drivers

Editing/Changing Rides

1. To make a change to a ride that is already booked, click Manage Rides from the top navigation bar to open the Daily Overview.

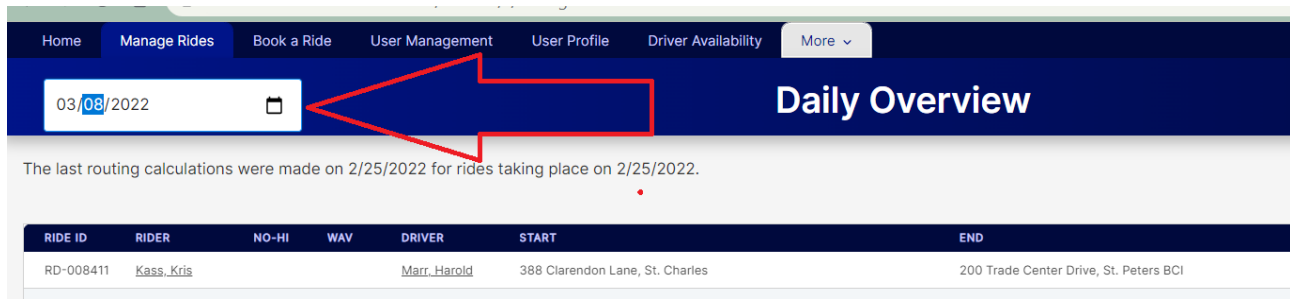
Home Manage Rides Book a Ride User Management User Profile Driver Availability More

03/08/2022 Daily Overview Add new ride


The last routing calculations were made on 2/25/2022 for rides taking place on 2/25/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP
RD-008411	Kass, Kris			Marr, Harold	388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1	7:30 am
RD-008417	Whitt, Lillie			Duble, Victor	5 Percheron Place, St. Peters Apt 0	115 Piper Hill Drive, St. Peters Seniors and Co Adult Day Services	1	8:00 am
RD-008415	Rabbit, Tara			Marr, Harold	2211 Bolton Street, St. Charles	2897 Veteran's Memorial Parkway, St. Charles Walmart	1	8:30 am

2. Navigate to the day of the ride by entering the date or clicking on the calendar.



Home Manage Rides Book a Ride User Management User Profile Driver Availability More ▾

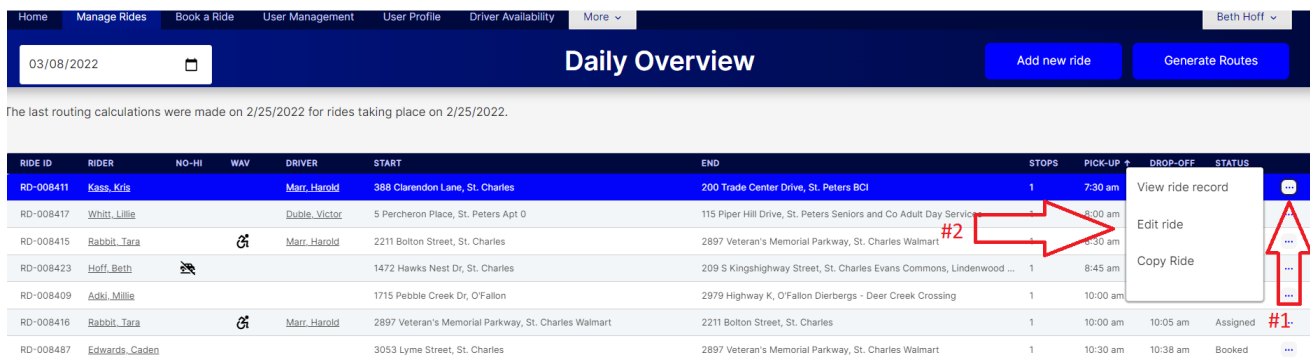
03/08/2022 

Daily Overview


The last routing calculations were made on 2/25/2022 for rides taking place on 2/25/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END
RD-008411	Kass, Kris			Marr, Harold	388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI

3. Find the ride you want to edit, and click on the three dots on the far right-hand side of the row for that ride. Choose Edit ride from the menu that pops up when you click on the dots.






Home Manage Rides Book a Ride User Management User Profile Driver Availability More ▾ Beth Hoff ▾

03/08/2022 

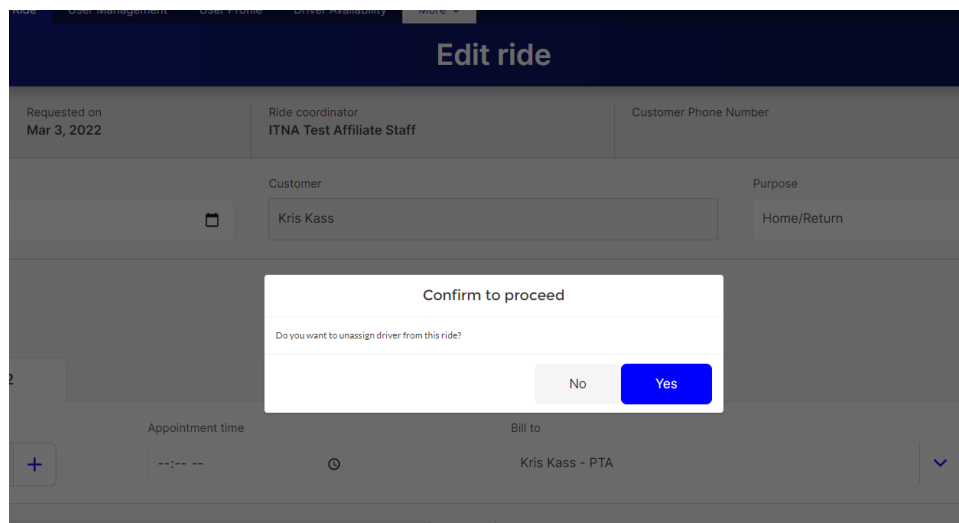
Daily Overview

[Add new ride](#) [Generate Routes](#)

The last routing calculations were made on 2/25/2022 for rides taking place on 2/25/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-008411	Kass, Kris			Marr, Harold	388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1	7:30 am		
RD-008417	Whitt, Lillie			Duble, Victor	5 Percheron Place, St. Peters Apt 0	115 Piper Hill Drive, St. Peters Seniors and Co Adult Day Service		8:00 am		
RD-008415	Babbitt, Tara			Marr, Harold	2211 Bolton Street, St. Charles	2897 Veteran's Memorial Parkway, St. Charles Walmart		8:30 am		
RD-008423	Hoff, Beth				1472 Hawks Nest Dr, St. Charles	209 S Kingshighway Street, St. Charles Evans Commons, Lindenwood ...	1	8:45 am		
RD-008409	Adki, Millie				1715 Pebble Creek Dr, O'Fallon	2879 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1	10:00 am		
RD-008416	Babbitt, Tara			Marr, Harold	2897 Veteran's Memorial Parkway, St. Charles Walmart	2211 Bolton Street, St. Charles	1	10:00 am	10:05 am	Assigned
RD-008487	Edwards, Caden				3053 Lyme Street, St. Charles	2897 Veteran's Memorial Parkway, St. Charles Walmart	1	10:30 am	10:38 am	Booked

4. The Ride Booking form will open, and you can make any changes that you need to make to the ride information. Remember to save after making your changes, by hitting Ctrl+S or scrolling to the top of the screen and clicking the "Save Ride Request" button.
5. If a driver has already been assigned to the ride, the driver will be removed when you save the changes. The driver can be re-assigned from the Manage Rides screen. A pop-up will appear to warn you before removing the driver.



Edit ride

Requested on: Mar 3, 2022

Ride coordinator: ITNA Test Affiliate Staff

Customer Phone Number

Customer: Kris Kass

Purpose: Home/Return

Confirm to proceed

Do you want to unassign driver from this ride?

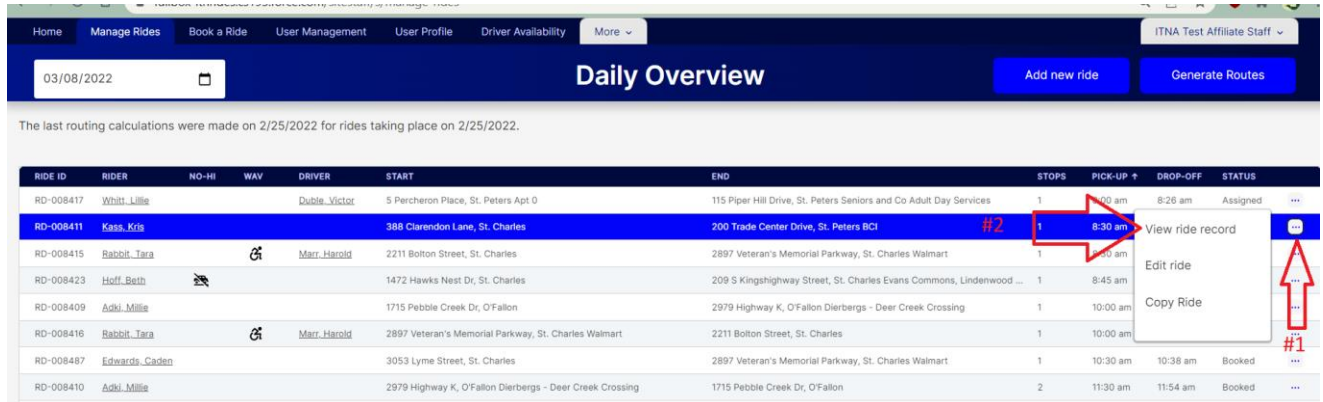
No Yes

Appointment time: ---:--

Bill to: Kris Kass - PTA

Cancelling Rides

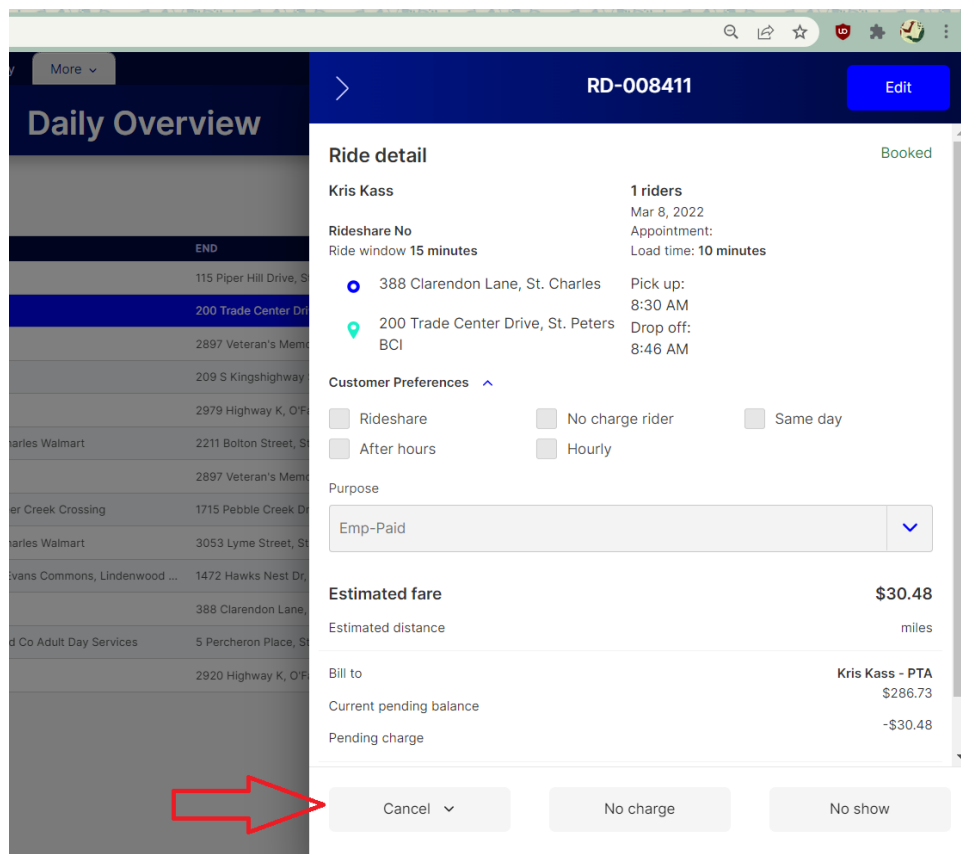
1. Find the ride you want to cancel on the Daily Overview.
2. Click on the three dots at the end of the line for that ride, and choose View Ride Record.



The last routing calculations were made on 2/25/2022 for rides taking place on 2/25/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-008417	White, Lillie			Quinn, Victor	5 Percheron Place, St. Peters Apt 0	115 Piper Hill Drive, St. Peters Seniors and Co Adult Day Services	1	8:00 am	8:28 am	Assigned
RD-008411	Kass, Kris				388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1	8:30 am		Assigned
RD-008415	Rabolt, Tara			Marr, Harold	2211 Bolton Street, St. Charles	2897 Veteran's Memorial Parkway, St. Charles Walmart	1	8:30 am		Assigned
RD-008423	Hoff, Beth				1472 Hawks Nest Dr, St. Charles	209 S Kingshighway Street, St. Charles Evans Commons, Lindenwood ...	1	8:45 am		Assigned
RD-008409	Adki, Mille				1715 Pebble Creek Dr, O'Fallon	2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1	10:00 am		Assigned
RD-008416	Rabolt, Tara			Marr, Harold	2897 Veteran's Memorial Parkway, St. Charles Walmart	2211 Bolton Street, St. Charles	1	10:00 am		Assigned
RD-008487	Edwards, Caden				3053 Lyme Street, St. Charles	2897 Veteran's Memorial Parkway, St. Charles Walmart	1	10:30 am	10:38 am	Booked
RD-008410	Adki, Mille				2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1715 Pebble Creek Dr, O'Fallon	2	11:30 am	11:54 am	Booked

3. A Ride information drawer will open on the left side of your screen showing the ride details.



Daily Overview

RD-008411 Edit

Ride detail Booked

Kris Kass 1 riders
Mar 8, 2022
Appointment:
Load time: 10 minutes

Rideshare No
Ride window 15 minutes

388 Clarendon Lane, St. Charles Pick up: 8:30 AM
200 Trade Center Drive, St. Peters BCI Drop off: 8:46 AM

Customer Preferences

☐ Rideshare ☐ No charge rider ☐ Same day
☐ After hours ☐ Hourly

Purpose
Emp-Paid

Estimated fare \$30.48

Estimated distance miles

Bill to Kris Kass - PTA
Current pending balance \$286.73
Pending charge -\$30.48

Cancel No charge No show

4. Choose the cancel button at the bottom of the screen, and select the cancellation reason from the drop-down.

Overview

Ride detail Booked

Kris Kass **1 riders**

Rideshare No **Mar 8, 2022**

Ride window 15 minutes **Appointment:**

Load time: 10 minutes

Pick up:

Drop off:

Customer Preferences

☐ Illness

☐ Weather - Site Decision

☐ Weather - Customer

☐ Holiday

☐ Alternative Transportation

☐ None

☐ Cancel linked ride as well

☐ Short Notice

5. If there is a return ride to cancel as well, be sure to check the “Cancel Linked Ride as Well” option. If you click the “Short Notice” box, the rider will be charged the no show fee, if applicable for your site.

Overview

Ride detail Booked

Kris Kass **1 riders**

Rideshare No **Mar 8, 2022**

Ride window 15 minutes **Appointment:**

Load time: 10 minutes

Pick up:

Drop off:

Customer Preferences

☐ Illness

☐ Weather - Site Decision

☐ Weather - Customer

☐ Holiday

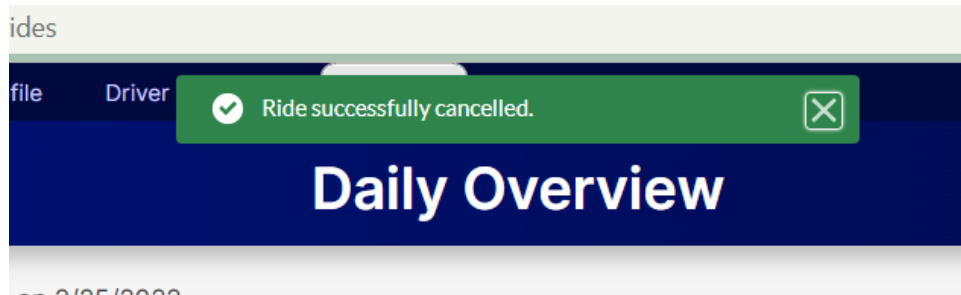
☐ Alternative Transportation

☐ None

☐ Cancel linked ride as well

☐ Short Notice

- Click confirm cancellation, and a green box will appear showing you that the ride has been successfully cancelled.



No Charge Rides

- Locate the ride on the Daily Overview (Manage Rides Tab). Click on the three dots at the end of the line, and select “View ride record”.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-008785	Gibson, Christo...				2122 O'Fallon Lake Dr., O'Fallon	1477 Hoff Industrial Drive, O'Fallon Permian Plastic	1	7:30 am		
RD-008789	Kass, Kris				388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1	7:30 am		
RD-008793	Edwards, Caden				3053 Lyme Street, St. Charles	300 1st Capitol Drive, St. Charles St. Joseph Hospital	1	9:00 am		
RD-008810	Adki, Millie				1715 Pebble Creek Dr, O'Fallon	2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1	9:30 am		
RD-008794	Edwards, Caden				300 1st Capitol Drive, ST. Charles St. Joseph Hospital	3053 Lyme Street, St. Charles	1	10:30 am		
RD-008811	Adki, Millie				2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1715 Pebble Creek Dr, O'Fallon	1	10:45 am	10:50 am	Booked

- The ride record drawer will open, displaying all the ride details. Click the “No Charge” button at the bottom of the drawer. The ride will automatically save and the drawer will close. You will see the green “Ride Successfully Saved” message at the top of the screen.

Ride detail

Booked

Christopher Gibson

314-555-1212

Rideshare No

Ride window 10 minutes

1 riders

Mar 11, 2022

Appointment:

Load time: 5 minutes

2122 O'Fallon Lake Dr., O'Fallon

1477 Hoff Industrial Drive, O'Fallon
Permian Plastic

Pick up:

7:10 AM

Drop off:

7:16 AM

Customer Preferences

Rideshare

No charge rider

Same day

After hours

Hourly

Purpose

Emp-Paid

Estimated fare

\$0.00

Estimated distance

miles

Bill to

Christopher Gibson - PTA

Current pending balance

\$268.02

Pending charge

-\$0.00

Cancel

No charge

No show

tatt/s/manage-rides

ent Driver Availability M Ride successfully saved.

Daily Overview

Add new ride

rides taking place on 2/25/2022.

START	END	STOPS
2122 O'Fallon Lake Dr., O'Fallon	1477 Hoff Industrial Drive, O'Fallon Permian Plastic	1
388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1
3053 Lyme Street, St. Charles	300 1st Capitol Drive, ST. Charles St. Joseph Hospital	1
1715 Pebble Creek Dr, O'Fallon	2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1
300 1st Capitol Drive, ST. Charles St. Joseph Hospital	3053 Lyme Street, St. Charles	1
2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1715 Pebble Creek Dr, O'Fallon	1
1472 Hawks Nest Dr, St. Charles	209 S Kingshighway Street, St. Charles Evans Commons, Lindenwood ...	1
200 Trade Center Drive, St. Peters BCI	388 Clarendon Lane, St. Charles	1
3301 Carriane Crossing St. Charles	1780 Zumhohl Road St. Charles Walgreens - St. Charles	1

No Show Rides

1. Locate the ride on the Daily Overview (Manage Rides Tab). Click on the three dots at the end of the line, and select "View ride record".

Home

Manage Rides

Book a Ride

User Management

Driver Availability

More

ITNA Test Affiliate Staff

03/11/2022

Daily Overview

Add new ride

Generate Routes

The last routing calculations were made on 2/25/2022 for rides taking place on 2/25/2022.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-008785	Gibson, Christo...				2122 O'Fallon Lake Dr., O'Fallon	1477 Hoff Industrial Drive, O'Fallon Permian Plastic	#1	7:10 am		<div>View ride record</div> <div>Edit ride</div> <div>Copy Ride</div>
RD-008789	Kass, Kris				388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1	7:30 am		
RD-008793	Edwards, Caden				3053 Lyme Street, St. Charles	300 1st Capitol Drive, ST. Charles St. Joseph Hospital	1	9:00 am		
RD-008810	Adki, Millie				1715 Pebble Creek Dr, O'Fallon	2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1	9:30 am		
RD-008794	Edwards, Caden				300 1st Capitol Drive, St. Charles St. Joseph Hospital	3053 Lyme Street, St. Charles	1	10:30 am		
RD-008811	Adki, Millie				2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1715 Pebble Creek Dr, O'Fallon	1	10:45 am	10:50 am	Booked

- The ride record drawer will open, displaying all the ride details. Click the “No Show” button at the bottom of the drawer. The ride will automatically save and the drawer will close. You will see the green “Ride Successfully Saved” message at the top of the screen.

Ride detail

Booked

Christopher Gibson

314-555-1212

Rideshare No

Ride window 10 minutes

1 riders

Mar 11, 2022

Appointment:

Load time: 5 minutes

2122 O'Fallon Lake Dr., O'Fallon

1477 Hoff Industrial Drive, O'Fallon Permian Plastic

Pick up: 7:10 AM

Drop off: 7:16 AM

Customer Preferences

Rideshare

No charge rider

Same day

After hours

Hourly

Purpose

Emp-Paid

Estimated fare

\$0.00

Estimated distance

miles

Bill to

Christopher Gibson PTA

Current pending balance

\$268.02

Pending charge

-\$0.00

Cancel

No charge

No show

tatt/s/manage-rides

ent Driver Availability M ✓ Ride successfully saved. X

Daily Overview

Add new ride

rides taking place on 2/25/2022.

START	END	STOPS
2122 O'Fallon Lake Dr., O'Fallon	1477 Hoff Industrial Drive, O'Fallon Permian Plastic	1
388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1
3053 Lyme Street, St. Charles	300 1st Capitol Drive, St. Charles St. Joseph Hospital	1
1715 Pebble Creek Dr, O'Fallon	2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1
300 1st Capitol Drive, St. Charles St. Joseph Hospital	3053 Lyme Street, St. Charles	1
2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1715 Pebble Creek Dr, O'Fallon	1
1472 Hawks Nest Dr, St. Charles	209 S Kingshighway Street, St. Charles Evans Commons, Lindenwood ...	1
200 Trade Center Drive, St. Peters BCI	388 Clarendon Lane, St. Charles	1
3301 Carriane Crossin Dr, St. Charles	1780 Zumhohl Road, St. Charles Walgreens - St. Charles	1

Working with Drivers

Paid vs Volunteer Drivers

Paid and Volunteer Drivers function the same in the ITNRides ride scheduling software. Volunteer drivers have the option of being able to select rides in their portal if your site has enabled this functionality. (*Instructions coming soon!*) You can tell if a driver listed on your schedule is a volunteer or paid driver by checking the Status column on the Daily Overview.

Updating Availability

Volunteer drivers can update their availability through the Driver Portal. They cannot adjust availability for today or tomorrow, however, and need to call the office to do so.

Staff can update any driver's availability. Pull up the driver's Contact Record. In the upper right and corner you will see the Quick Action buttons. The first two are Update Availability and Driver Availability.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Example Driver + Follow Update Availability Driver Availability Manifest: Email Tomorrow

Phone: (207) 456-9871 Account Name: Example Driver - PTA Rider Status: Driver Status: Active

DETAIL RELATED RECORDS

Contact Type: Volunteer Driver Title

Contact Details

Name: Example Driver Gender: Female

Preferred Name: Birthdate: 1/7/1982

Update Availability- this opens a pop-up form to allow you to add availability for any day, including the same day.

Assigning to Rides

Ride Matching Batch

1. Make sure your available drivers are accurate and that all available drivers are listed on the Manage Rides page.

The screenshot shows the 'Daily Overview' page for 07/22/2022. The top navigation bar includes links for Home, Manage Rides, Book a Ride, Uncovered Rides, User Management, Driver Availability, and More. A user dropdown menu shows 'Minnie Jameson'. Below the navigation bar, there's a date selector for 07/22/2022 and a calendar icon. The main heading is 'Daily Overview', followed by 'Add new ride' and 'Generate Routes' buttons. A message states: 'The last routing calculations were made on 7/19/2022 for rides taking place on 7/21/2022.' Below this is a table of rides with columns: RIDE ID, RIDER, NO-HI, WAV, DRIVER, START, END, STOPS, PICK-UP, DROP-OFF, and STATUS. The table lists six rides. Below the rides table is an 'Available Drivers' section with a dropdown arrow. It contains a table with columns: STATUS, NAME, START TIME, END TIME, CAP, HI, LO, WAV, TRUNK, ANIMALS, and an 'Assign' button. The table shows one driver, Roberts, Tasha, with two time slots: 8:00 am to 11:00 am and 2:00 pm to 4:00 pm.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-207817	Parson, Jane				238 Sells Ct, Marina	23625 Holman Hwy, Monterey CHOMP	1	9:00 am	9:21 am	Booked
RD-209849	Mohler, Cathy				1991 Bradbury St., Salinas	24600 Silver Cloud Court, Monterey Central Coast Language and ...	1	12:20 pm	12:53 pm	Booked
RD-207831	Parson, Jane				23625 Holman Hwy, Monterey CHOMP	238 Sells Ct, Marina	1	1:00 pm	1:21 pm	Booked
RD-209858	Mohler, Cathy				24600 Silver Cloud Court, Monterey Central Coast Language and ...	1991 Bradbury St., Salinas	1	1:30 pm	2:04 pm	Booked
RD-207837	Baker, Kate				5315 Carmel Valley Rd, Carmel	Mission between Ocean and 7th, Carmel Mission Bistro	1	5:00 pm	5:12 pm	Booked
RD-207842	Baker, Kate				Mission between Ocean and 7th, Carmel Mission Bistro	5315 Carmel Valley Rd, Carmel	1	7:00 pm	7:12 pm	Booked

STATUS	NAME	START TIME	END TIME	CAP	HI	LO	WAV	TRUNK	ANIMALS
Volunteer Driver	Roberts, Tasha	8:00 am	11:00 am	1					
		2:00 pm	4:00 pm						

2. Click on Generate Routes at the top of the page. The routes will be generated, with the system assigning the most efficient matching driver to each ride. The routing process can take up to 15-20 minutes to complete, it is not an immediate process.

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Generate Routes' button in the top navigation bar.


3. The message at the top of the screen will change to let you know when rides have been routed for the day.

This screenshot is identical to the previous ones, but with a red circle highlighting the message: 'The last routing calculations were made on 7/19/2022 for rides taking place on 7/21/2022.'

Manually Assigning Drivers

1. Open the Daily Overview by clicking on the Manage Rides tab.
2. Click the carrot next to Available Drivers to show the drivers with availability for the day.

RIDE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP ↑	DROP-OFF	STATUS
RD-008789	Kass, Kris				388 Clarendon Lane, St. Charles	200 Trade Center Drive, St. Peters BCI	1	7:30 am	7:46 am	Booked
RD-008793	Edwards, Caden				3053 Lyme Street, St. Charles	300 1st Capitol Drive, ST. Charles St. Joseph Hospital	1	9:00 am	9:11 am	Booked
RD-008810	Aoki, Mills				1715 Pebble Creek Dr, O'Fallon	2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1	9:30 am	9:35 am	Booked
RD-008794	Edwards, Caden				300 1st Capitol Drive, ST. Charles St. Joseph Hospital	3053 Lyme Street, St. Charles	1	10:30 am	10:42 am	Booked
RD-008811	Aoki, Mills				2979 Highway K, O'Fallon Dierbergs - Deer Creek Crossing	1715 Pebble Creek Dr, O'Fallon	1	10:45 am	10:50 am	Booked
RD-008787	Hoff, Beth				1472 Hawks Nest Dr, St. Charles	209 S Kingshighway Street, St. Charles Evans Commons, Lindenwood ...	1	3:00 pm	3:10 pm	Booked
RD-008790	Kass, Kris				200 Trade Center Drive, St. Peters BCI	388 Clarendon Lane, St. Charles	1	3:30 pm	3:46 pm	Booked
RD-008812	Morris, Edward				3301 Carriage Crossing, St. Charles	1780 Zumbuhl Road, St. Charles Walgreens - St. Charles	1	4:00 pm	4:13 pm	Booked
RD-008786	Olson, Christo				1477 Hoff Industrial Drive, O'Fallon Permian Plastic	2122 O'Fallon Lake Dr, O'Fallon	1	4:45 pm	4:51 pm	Booked
RD-008813	Morris, Edward				1780 Zumbuhl Road, St. Charles Walgreens - St. Charles	3301 Carriage Crossing, St. Charles	1	5:00 pm	5:14 pm	Booked
RD-008788	Hoff, Beth				209 S Kingshighway Street, St. Charles Evans Commons, Lindenwood ...	1472 Hawks Nest Dr, St. Charles	1	9:15 pm	9:20 pm	Booked

Available Drivers 






3. The driver list for the day will open. Drivers may have one or two available time periods. If the driver has two time periods available for the day, the second will show just underneath the first.

STATUS	NAME	START TIME ↑	END TIME	CAP	HI	LO	WAV	TRUNK	ANIMALS	
Volunteer Driver	Marr, Harold	7:00 am	12:00 pm							Assign
		3:00 pm	6:00 pm							
Board Member/Volunteer Driver	Duble, Victor	7:00 am	12:00 pm	2						Assign
		4:00 pm	6:00 pm							

4. Each driver row also indicated the following:
 - a. Status- Volunteer or Paid Driver
 - b. Name
 - c. Start Time- Time the driver is available to begin driving, the first ride assigned to the driver must be after the start time and provide the driver enough time to travel from their start location to the ride location.
 - d. End Time- The time the driver must finish driving. The last ride must conclude with enough time for the driver to reach their home location by this time.
 - e. Cap- Vehicle capacity or how many people can the vehicle hold.
 - f. Hi- Is this a high vehicle that some riders may have trouble getting into?
 - g. Lo- Is this a low vehicle that some riders may have trouble getting into?
 - h. WAV- Is this a wheelchair accessible vehicle?
 - i. Trunk- Does the vehicle have a trunk?
 - j. Animals- Is the driver willing to transport animals?

There will be an icon in the column if that particular condition is true for the driver/vehicle.

Available Drivers

STATUS	NAME	START TIME ↑	END TIME	CAP	HI	LO	WAV	TRUNK	ANIMALS	
Volunteer Driver	Marr, Harold	7:00 am	12:00 pm							Assign
		3:00 pm	6:00 pm							
Board Member/Volunteer Driver	Duble, Victor	7:00 am	12:00 pm	2						Assign
		4:00 pm	6:00 pm							

- To assign a driver to a ride, click on the ride, and then click assign next to the driver's name. The driver will be assigned to the ride.

[Home](#)
[Manage Rides](#)
[Book a Ride](#)
[Uncovered Rides](#)
[User Management](#)
[Driver Availability](#)
[More](#)

07/22/2022

Daily Overview

Add new ride

Generate Routes

The last routing calculations were made on 7/19/2022 for rides taking place on 7/21/2022.

RISE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-207817	Parson, Jane				238 Sells Ct, Marina	23625 Holman Hwy, Monterey CHOMP	1	9:00 am	9:21 am	Booked
RD-209849	Mohler, Cathy				1991 Bradbury St., Salinas	24600 Silver Cloud Court, Monterey Central Coast Language and ...	1	12:20 pm	12:53 pm	Booked
RD-207831	Parson, Jane				23625 Holman Hwy, Monterey CHOMP	238 Sells Ct, Marina	1	1:00 pm	1:21 pm	Booked
RD-209858	Mohler, Cathy				24600 Silver Cloud Court, Monterey Central Coast Language and ...	1991 Bradbury St., Salinas	1	1:30 pm	2:04 pm	Booked
RD-207837	Baker, Kate				5315 Carmel Valley Rd, Carmel	Mission between Ocean and 7th, Carmel Mission Bistro	1	5:00 pm	5:12 pm	Booked
RD-207842	Baker, Kate				Mission between Ocean and 7th, Carmel Mission Bistro	5315 Carmel Valley Rd, Carmel	1	7:00 pm	7:12 pm	Booked

Available Drivers

STATUS	NAME	START TIME ↑	END TIME	CAP	HI	LO	WAV	TRUNK	ANIMALS	
Volunteer Driver	Roberts, Tasha	8:00 am	11:00 am	1						Assign
		2:00 pm	4:00 pm							

- After assigning all the drivers, click on Generate Routes near the top of the page so that the system can calculate all of the mileage for the rides. This may cause some of the rides to be reassigned if the system thinks there is a more efficient driver it can schedule.

[Home](#)
[Manage Rides](#)
[Book a Ride](#)
[Uncovered Rides](#)
[User Management](#)
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[More](#)

07/22/2022

Daily Overview

Add new ride

Generate Routes

The last routing calculations were made on 7/19/2022 for rides taking place on 7/21/2022.

RISE ID	RIDER	NO-HI	WAV	DRIVER	START	END	STOPS	PICK-UP	DROP-OFF	STATUS
RD-207817	Parson, Jane				238 Sells Ct, Marina	23625 Holman Hwy, Monterey CHOMP	1	9:00 am	9:21 am	Booked
RD-209849	Mohler, Cathy				1991 Bradbury St., Salinas	24600 Silver Cloud Court, Monterey Central Coast Language and ...	1	12:20 pm	12:53 pm	Booked
RD-207831	Parson, Jane				23625 Holman Hwy, Monterey CHOMP	238 Sells Ct, Marina	1	1:00 pm	1:21 pm	Booked
RD-209858	Mohler, Cathy				24600 Silver Cloud Court, Monterey Central Coast Language and ...	1991 Bradbury St., Salinas	1	1:30 pm	2:04 pm	Booked
RD-207837	Baker, Kate				5315 Carmel Valley Rd, Carmel	Mission between Ocean and 7th, Carmel Mission Bistro	1	5:00 pm	5:12 pm	Booked
RD-207842	Baker, Kate				Mission between Ocean and 7th, Carmel Mission Bistro	5315 Carmel Valley Rd, Carmel	1	7:00 pm	7:12 pm	Booked

Available Drivers

STATUS	NAME	START TIME ↑	END TIME	CAP	HI	LO	WAV	TRUNK	ANIMALS	
Volunteer Driver	Roberts, Tasha	8:00 am	11:00 am	1						Assign
		2:00 pm	4:00 pm							

- Check to see if any rides were changed, and if desired switch the driver back by clicking on the ride and then clicking Assign next to the driver you want for the ride.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

07/22/2022 Daily Overview Add new ride Generate Routes

The last routing calculations were made on 7/19/2022 for rides taking place on 7/21/2022.

RI	DR	NO-MI	MIW	DRIVER	START	END	STORES	PICK-UP	DROP-OFF	STATUS
RD-207817	Parson, Jane				238 Sells Ct, Marina	23625 Holman Hwy, Monterey CHOMP	1	9:00 am	9:21 am	Booked
RD-209849	Mohler, Cathy				1991 Bradbury St., Salinas	24600 Silver Cloud Court, Monterey Central Coast Language and ...	1	12:20 pm	12:53 pm	Booked
RD-207831	Parson, Jane				23625 Holman Hwy, Monterey CHOMP	238 Sells Ct, Marina	1	1:00 pm	1:21 pm	Booked
RD-209858	Mohler, Cathy				24600 Silver Cloud Court, Monterey Central Coast Language and ...	1991 Bradbury St., Salinas	1	1:30 pm	2:04 pm	Booked
RD-207837	Baker, Kate				5315 Carmel Valley Rd, Carmel	Mission between Ocean and 7th, Carmel Mission Bistro	1	5:00 pm	5:12 pm	Booked
RD-207842	Baker, Kate				Mission between Ocean and 7th, Carmel Mission Bistro	5315 Carmel Valley Rd, Carmel	1	7:00 pm	7:12 pm	Booked

Available Drivers

STATUS	NAME	START TIME	END TIME	CAP	HI	LO	WAV	TRUNK	ANIMALS	
Volunteer Driver	Roberts, Tasha	8:00 am	11:00 am	1						Assign
		2:00 pm	4:00 pm							

Driver Selected Rides

Instructions Coming Soon!

Sending Manifests

- Make sure that you have assigned drivers to all rides and generated your routes for the day.
- Once you know that the routes have been generated successfully (see message at the top of the Manage Rides screen), you will open each driver for the day's Contact Record to send the manifests.
- Open the contact record for each driver in turn, and use the quick action button to send the manifest. You can send manifests for today or tomorrow, and there are also options to allow you to edit before sending if you need to add special notes for the driver.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Contact Example Driver

Phone (207) 456-9871 Account Name Example Driver - PTA Rider Status Active Driver Status Active

DETAIL RELATED RECORDS

Contact Type Volunteer Driver Title

Contact Details

Name Example Driver Gender Female

Preferred Name Birthdate 1/7/1992

Account Name Example Driver - PTA Primary Affiliation Community Playground

Family Account Contact ID CPG-00079231

Rider Status Driver Status Active

Account Balance \$43.19 Email Manifest

Minimum Rider Balance \$100.00 Primary Language English

Membership Type Other Language

Internal Notes

Description

Portal Access

Site Portal Access Business Portal Access

Manifest: Email Tomorrow

Manifest: Email/ Edit Tomorrow

Manifest: Email Today

Manifest: Email/ Edit Today

Edit

New Bill To Affiliation

New Site Attribution

MassHailer Verify

Send Via MassHailer

Quick Send Via MassHailer

New Account Adjustment

New Car Trade

New Car Donation

Finance

General Overview

One of the functions that ITNRides can be used for is financial management. The system can be used to bill for rides, manage customer accounts, calculate volunteer reimbursement or credits, process payments, track donations, and implement ITN Programs that allow third parties and community partners to help cover the cost of rides. Communities can use parts of the financial system even if they don't charge for rides, by tracking donations and grants in the system.

To make all of these things possible, all riders and drivers have a Personal Transportation Account associated with them in the system.

Personal Transportation Accounts

A Personal Transportation Account, or PTA, is like a transportation portfolio that tracks assets used to cover the cost of transportation. All riders and drivers will have a PTA, set up as an Account that is linked to their Contact Record. (This is automatically set up by the system when a new rider or driver is entered and will be created and used to track rides and mileage even if you don't charge for rides). Ride Sponsors participating in programs like Ride Services, Healthy Miles, Ride & Shop, and Road Scholarships will also have PTAs. PTAs use built in transactions to bill for rides and membership fees (if applicable), apply credits, and distribute the cost of rides amongst sponsors when those programs are in use. A monthly statement is generated for each rider and sponsor, and accounts are also viewable on the rider and driver portals.

Credits in a PTA are either *refundable* (cash paid into the system via cash, check or credit card payments) or *nonrefundable* (volunteer credits, car trade credits, birthday or referral credits). Both can be used for any charges in the system, but nonrefundable credits cannot be cashed out when an account is closed. The system is set up to use nonrefundable credits first, if there are any in a PTA.

Customization Options

Sites can customize many aspects of the charges that they want to apply in ITNRides. They decide if they would like to charge for rides, for a yearly membership fee, and if they want to reimburse their volunteers and at what rate per mile. Ride charges can be a flat rate, a tiered rate, or based on mileage. Extra charges or different rates can be set for same-day rides, or rides after a certain time (late-night rides for example). The screenshot below shows some of the customization options available in ITNRides.

Ride Rates and Times		
Pick-up Charge	Mileage Charge	Minimum Charge
3.00	2.00	7.00
Extra Stop Charge	Stop Time Limit (min)	Hourly Charge
0.00	0	0.00
After Hours Pick-up Charge	After Hours Start Time	After Hours End Time
0.00	06:00 PM ⓘ	08:00 AM ⓘ
Same Day Cut-off	Same Day Mileage Charge	Same Day Minimum Charge
12:00 PM ⓘ	0.00	0.00
Cancellation/No Show Fee	Ride Share Discount (%)	
0.00	0	
Default Load Time (min)	Default Ride Share Addl Time (min)	
5	8	
Membership Rates		
Member	Family	
0.00	50.00	

Opportunities and Other Terminology

Just like Personal Transportation Accounts, there are some aspects of the financial system that have specific terminology associated with them. Some of these are general finance terms, some are ITNAmerica terms, and some are Salesforce terms. See below for the terms and definitions that are used for finances in ITNRides. Several of these items will be explained in more detail later.

Opportunities: Opportunities refer to anything that has to do with money coming into the system. This is a Salesforce term. This includes payments from riders, donations, grants, and membership payments. Opportunities can have several stages:

- **Pledged:** Someone has stated they will be paying you a certain amount, but you don't have the payment yet.
- **Posted:** The payment has been received and applied to the correct account. Work related to the payment may be ongoing.
- **Closed:** All work related to the payment is over.
- **Lost:** The payment did not come in as expected.

Chargent: The credit card processor built into the ITNRides system, used to process manual credit card payments.

GL Posting Report/General Ledger: Finance report created monthly that categorizes and groups all the financial transactions in ITNRides to be entered into an official financial tracking system like Quickbooks.

Monthly Statement: A monthly report/bill that shows a rider or ride sponsor's charges and payments. One is generated for each rider and can be printed for mailing.

Posting Delay: The date in a month that the previous month closes, and rides and transactions will no longer be editable. After this date the Monthly Statements and the GL Posting Report for the previous month can be run.

TAls: Transaction Account Items are ride charges, payments, and account adjustments.

TLIs: Transaction Line Items are other charges in the system like membership charges.

Volunteer Statement: This is a yearly statement created for volunteer drivers showing their occupied and unoccupied mileage for the previous calendar year.

TAls and TLIs

TAls (ride charges) are created when rides are booked, and the mileage for the ride is calculated. This allows the system to display the customer's balance with rides booked out for the next 30 days. When changes are made to rides, the TAls should automatically update, but if they do not you can go to the ride record and click recalculate TAls to refresh the calculations. All other financial transactions all post overnight, so changes made in the system will not immediately be visible. The PTA will adjust overnight.

TLIs also show up on rider statements and include things like membership charges.

The GL Posting Report

The GL Posting report is created at the end of each month, detailing all the financial transactions that took place throughout the month, and assigning them to categories for financial record keeping. The report incorporated the ITN Chart of Accounts, which all affiliates use, and which ITNCountry sites are welcome to use if they wish.

The report consists of 4 columns. A blank example is shown below. In a real report, amounts would show in the debit or credit columns for categories/accounts that had any applicable transactions during the month. If a site is using ITNs Chart of Accounts for its record keeping, this report makes monthly journal entries a simple act of transferring these amounts to the official record keeping system (like Quickbooks). If a site is using a different chart of accounts, they can use the category descriptions to decide what account each should correspond to.

To see the details of what each categorized amount includes, see 2 reports in ITNRides- TAls Posted by Timeframe and TLIs with Opps by Site. These two reports contain all the transactions that make up the GL Posting Report, and can be run after the month closes.

Debit	Credit	Account	Account Description
		1070.00	Clearing Acct. - Ops Receipts
		1510.00	Vehicles

1590.00	Capital Purchases
2012.00	Customer Account Refundable
2400.05	Prepaid Fares - Refundable
2400.10	Prepaid Fares - Non-refundable
2400.20	Road Scholarship Fund
4010.00	Ride Revenue - Paid Driver Fares
4020.00	Ride Revenue - Volunteer Driver Fares
4030.00	Ride Revenue - Miscellaneous
4050.00	Ride Revenue - 3rd Party Driver Fares
4100.00	Merchant Participation Revenue
4200.00	Membership Dues
4270.00	Donated Services
4280.00	Car Donation Revenue
4295.00	Equipment Donations
4320.00	Corporate Sponsorship
4330.00	Fundraising Event Donations
4333.00	Volunteer Giveback

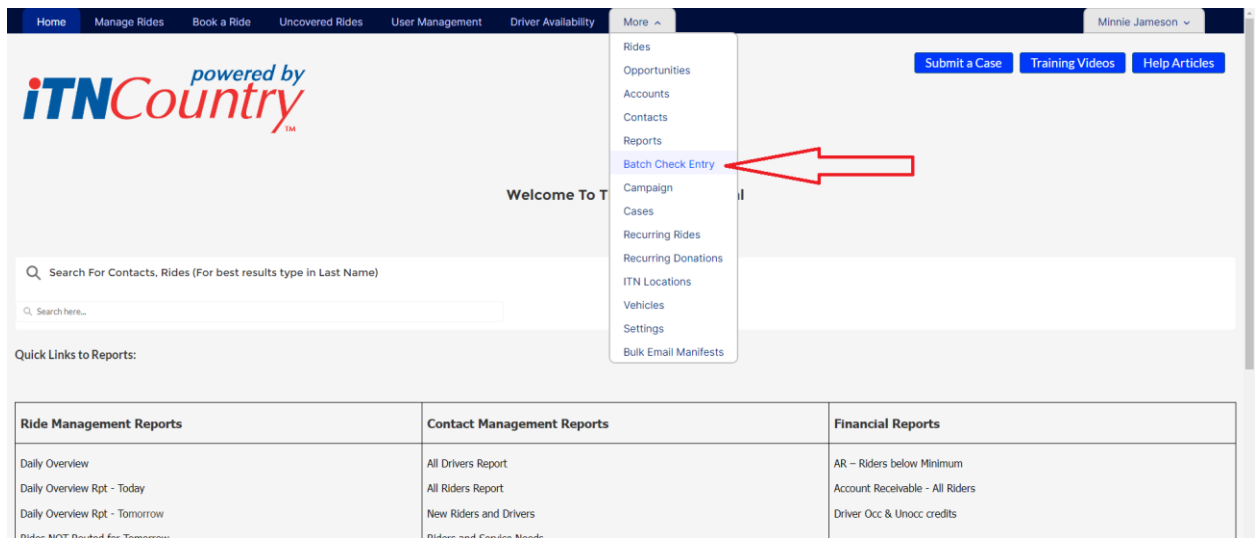
	4335.00	Contributions - Customer Donation
	4360.00	Donations
	4510.00	Private Grants
	4610.00	Public / Government Grants
	4820.00	Miscellaneous Income
	4900.00	Account Adjustments
	7170.00	Customer Birthday Credits
	7175.00	Customer Referral Credits
	7520.00	Occupied Miles Volunteers
	7530.00	Unoccupied Miles Volunteers
	7900.00	In-Kind donation offset
<hr/>		
	\$0.00	\$0.00
		TOTAL

Entering Payments and Donations

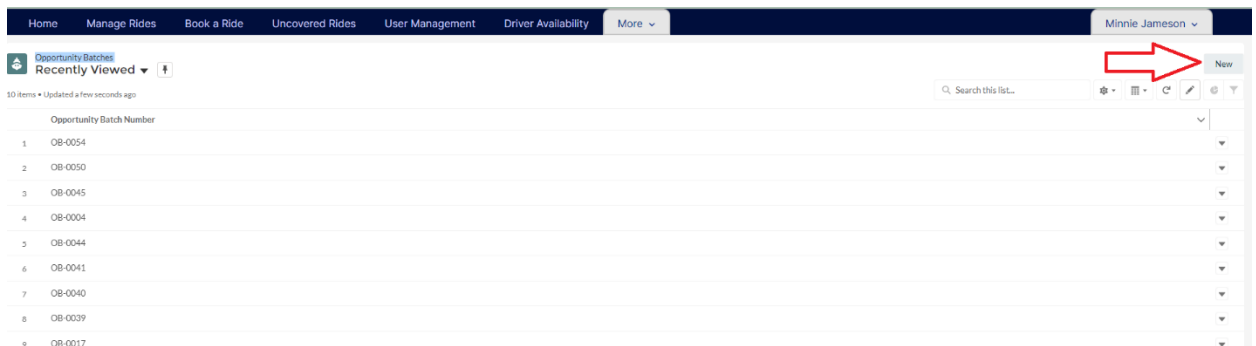
Opportunity Batches

Opportunity Batches allow you to enter payments and donations as a group, to match the deposits you make at the bank.

1. From the homepage, select the More menu and click on Batch Check Entry.



- The page that opens will list your Opportunity Batches. Click on the New button at the top right corner of the screen.



- A pop-up form will open to set up the Opportunity Batch. Enter the date, the Opportunity Count (# of payments/donations), and the total Batch amount (total deposit amount). Then click Save.

✕

New Opportunity Batch

Information

Opportunity Batch Number

Site

Opportunity Count
2

Total Batch Amount
200.00

System Information


Owner
Minnie Jameson

Batch Date
8/25/2022

Batch Status
In Progress

Opportunity Count Subtotal

Batch Subtotal



Cancel
Save & New
Save

4. When you click Save, the Opportunity Batch record page will open. To enter a payment or donation, click the New Cash Payment quick action button at the top.

Home
Manage Rides
Book a Ride
Uncovered Rides
User Management
Driver Availability
More
Minnie Jameson

Opportunity Batch
OB-0144
New Cash Payment
Scholarship Awarded
Edit

DETAILS
RELATED LISTS

Opportunity Batch Number
OB-0144

Site
Community Playground

Opportunity Count
2

Total Batch Amount
200.00

Created By
Minnie Jameson, 8/25/2022 2:00 PM

Batch Date
8/25/2022


Batch Status
In Progress

Opportunity Count Subtotal

Batch Subtotal

Last Modified By
Minnie Jameson, 8/25/2022 2:00 PM

Owner
Minnie Jameson



5. The payment pop-up form will open for you to fill out. Enter the amount, the close date (the date of the payment), the account name (the rider's PTA account), and the recipient (the rider).

8/25/2022

New Cash Payment

* Amount #1: \$100.00

* Close Date #2: 8/25/2022

* Account Name #3: Example Rider - PTA

* Recipient #4: Example Rider

Transaction Type: --None--

Check Number:

Statement Comments:

Cancel Save

6. If you want more information for the Recipient than is listed in the drop-down (like the account number to verify it is the right person, type the name in the box and hit enter to open a list view of matching contacts with more info. Click on the name in the list to select the person.

Account Results

Recipient: Example Rider

Accounts: 1 Result

ACCOUNT NAME	PRIMARY CONTACT ID	PHONE	PHYSICAL STREET	PHYSICAL CITY	PHYSICAL STATE/PROVINCE
Example Rider - PTA	CPG-00079230	207-123-4567	16 Stillwater Drive	Westbrook	ME

7. Choose the transaction type (donation, payment on account, or gift certificate purchase), and then choose the payment type (credit card or cash/check). Credit card should be chosen if you are importing a credit card payment made through an outside processor that is not linked to Salesforce. Credit card payments made through the customer portal are credited automatically, and if you are processing the card for the rider see Processing Customer Credit Card Payments Through the Staff Portal.

8/25/2022

New Cash Payment

* Amount: \$100.00

* Close Date: 8/25/2022

* Account Name: Example Rider - PTA

* Recipient: Example Rider - PTA

Transaction Type: Payment on Account

Payment Type: Cash/Check

Check Number:

Statement Comments:

Cancel Save

8. If entering a check, you can enter the check number, but it is not required. The Statement Comments field allows you to enter a comment that will show up with the payment on the customer's next statement. You can enter something like "Thank you for your payment!". Then click Save.

8/25/2022

New Cash Payment

* Amount: \$100.00

* Close Date: 8/25/2022

* Account Name: Example Rider - PTA

* Recipient: Example Rider - PTA

Transaction Type: Payment on Account

Payment Type: Cash/Check

Check Number: 1234

Statement Comments: Thank you for your payment!

Cancel Save

9. Once you click Save, the Opportunity Batch record will update with the Count Subtotal and the Batch Subtotal.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Opportunity Batch
OB-0144

New Cash Payment Scholarship Awarded Edit

DETAILS RELATED LISTS

Opportunity Batch Number OB-0144	Batch Date 8/25/2022
Site Community Playground	Batch Status In Progress
Opportunity Count 2	Opportunity Count Subtotal 1
Total Batch Amount 200.00	Batch Subtotal 100.00
Created By Minnie Jameson, 8/25/2022 2:00 PM	Last Modified By Minnie Jameson, 8/25/2022 2:27 PM
	Owner Minnie Jameson

10. Repeat steps 4-9 for each payment that is part of your deposit. Once all the payments have been entered, change the Batch Status to Closed. Then click Save.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Opportunity Batch
OB-0144

New Cash Payment Scholarship Awarded Edit

DETAILS RELATED LISTS

Opportunity Batch Number OB-0144	Batch Date 8/25/2022
Site Community Playground	Batch Status Closed
Opportunity Count 2	
Total Batch Amount 200.00	
Created By Minnie Jameson, 8/25/2022 2:00 PM	Last Modified By Minnie Jameson, 8/25/2022 2:30 PM
	Owner Minnie Jameson

Cancel Save

Processing Customer Credit Card Payments through the Staff Portal

1. Open the rider's Contact Record by searching for them on the Home Page or using the Contacts List.

itnrides.force.com/sitestaff/s/

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

Submit a Case Training Videos Help Articles

Minnie Jameson

powered by
ITN Country

Welcome To The Site Staff Portal

Search For Contacts, Rides (For best results type in Last Name)

Example

Search Results

▼ Contact

EXAMPLE RIDER

FAMILY2 EXAMPLE

FAMILY1 EXAMPLE

EXAMPLE DRIVER

Quick Links to Reports:

Ride Management Reports Contact Management Reports Financial Reports

2. Click on the Quick Action Button in the upper right of the Contact Record Page for New Cash or CC Payment. This is near the bottom of the list, so you have to click on the little arrow and scroll down the list for it.

itnrides.force.com/sitestaff/s/contact/0034e000020030cAAA/example-rider

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More

Minnie Jameson

Contact
Example Rider

+ Follow Update Availability Driver Availability Manifest: Email Tomorrow

Edit

New Bill To Affiliation

New Site Affiliation

MassHailer Verify

Send Via MassHailer

Quick Send Via MassHailer

New Account Adjustment

New Car Trade

New Car Donation

New Cash or CC Payment

Transfer Credit Flow

New Recurring Donation

Phone: 207-223-4567 Account Name: Example Rider - PTA Rider Status: Active Driver Status:

DETAIL RELATED RECORDS

Contact Type: Rider Title:

▼ Contact Details

Name: Example Rider Gender: Female

Preferred Name: Birthdate: 6/15/1945

Account Name: Example Rider - PTA Primary Affiliation: Community Playground

Family Account: Contact ID: CPG-00079230

Rider Status: Active Driver Status:

Account Balance: \$3.00 Email Manifest: ☒

3. Complete the form that shows up in the pop-up with the information for the payment. Anything you enter in the "Statement Comments" field will show up on the rider's next monthly statement.

New Cash or CC Payment

*** Amount**

*** Close Date**

*** Transaction Type** ⓘ

Payment on Account
▼

*** Recipient** ⓘ

Example Rider - PTA
×

Check Number

Statement Comments ⓘ

Cancel
Save

4. Save the payment. You will get a green box at the top of the screen saying “New Cash Payment Created”.
5. Next, you want to open the opportunity that was created, and process the payment. Click on “Related Records” and scroll down to Opportunities. The payment you just created should be the first one listed there.

The screenshot shows the iRides web application interface. At the top, there's a navigation bar with links like Home, Manage Rides, Book a Ride, etc. Below that, the 'Example Rider' profile is displayed. The 'RELATED RECORDS' tab is selected and circled in red. Under the 'Rides (6*)' section, a table lists rides with columns for Ride Number, Ride Date, Ride Status, and Origination. Below that, the 'Opportunities (5)' section is visible, and a modal window is open showing a 'Payment on Account' record for 08/10/2022. This modal is also circled in red. The modal contains fields for Opportunity Name, Amount (\$1.00), Close Date (8/10/2022), and Recipient (Example Rider - PTA).

6. Click on the Opportunity to open the record. Scroll all the way to the bottom to the section “Opportunity: Make a Payment”. Fill in all the billing and Payment Info, and then click Pay \$(amount). Then click Finish.

Site ID
00150000007V9AAV

Legacy ID

Opportunity Site ID
00150000007V9AAV

Opportunity: Make a Payment

Fill in all the billing and payment info, then click Pay, and then click Finish.

Billing Address	Payment Info
Street Address	Name on Card
Apt / Suite	Card Number
City	MM/YY
State	CVV
Zip Code	

#1 → Pay \$0.00

#2 → Finish

Entering Grants

Instructions Coming Soon!

Non-Cash Entries and Adjustments

1. Open the Contact for the Rider or Driver who's account you want to adjust.
2. Click on the "New Account Adjustment" quick action button at the top right of the page (circled in screenshot)
3. Enter the amount, and choose the transaction type from the dropdown list.
4. Save the adjustment.

Calendar - Morgan Jameson - Contact James Edwards

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Morgan Jameson - Trainer

Contact: James Edwards

Phone: 436-455-2025 Account Name: James Edwards - PTA Rider Status: Active Driver Status: Active

DETAIL RELATED RECORDS

Contact Type: Rider

▼ Contact Details

Name: James Edwards

Preferred Name: Jim

Account Name: James Edwards - PTA

Family Account: ☐

Rider Status: Active

Account Balance: (\$393.06)

Maximum Rider Balance: \$50.00

Internal Notes

Description

New Account Adjustment

* Close Date: 7/7/2022

Account Name: James Edwards - PTA

Credit Adjustment to Account

Debit Adjustment to Account

Happy Birthday

Occupied Mileage Reimbursement

Referral "Thank You"

Refund of Customer Account Balance

Returned payment from customer PTA...

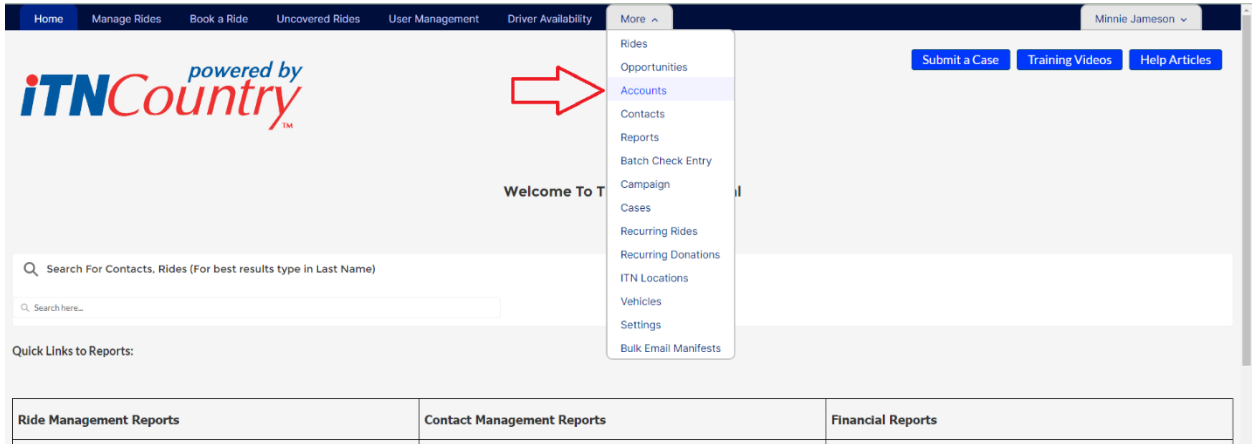
Amount is hidden by the expanded drop down, but the box is right above the transactions list.

Cancel Save

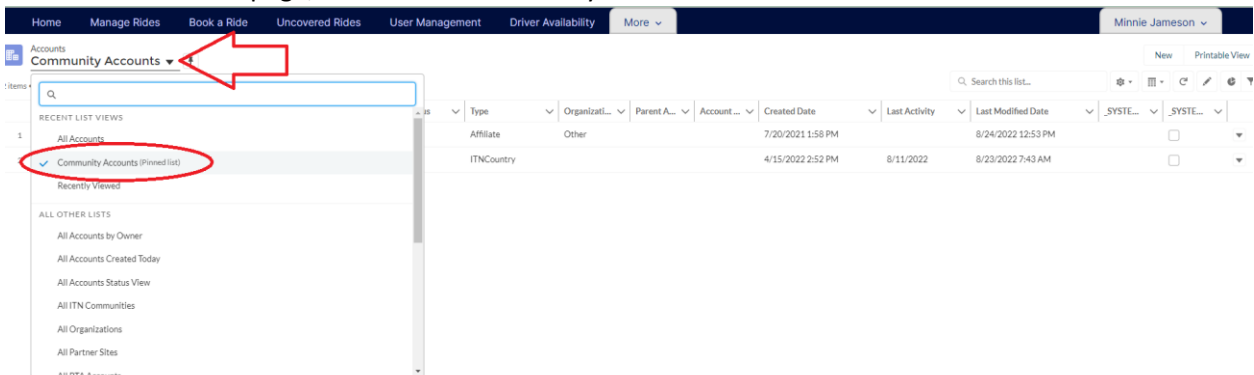
Financial Reporting and Statements

Rider Statements

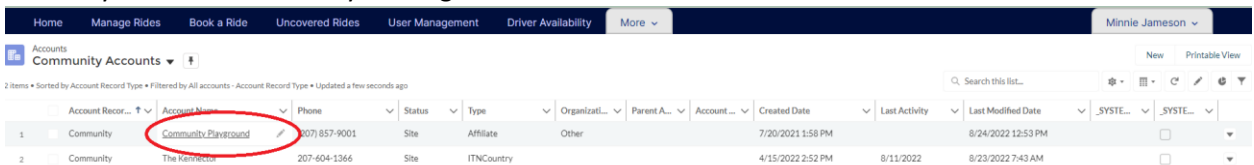
1. To view the rider statements, navigate to the site's account page. Under the More menu, click on Accounts.



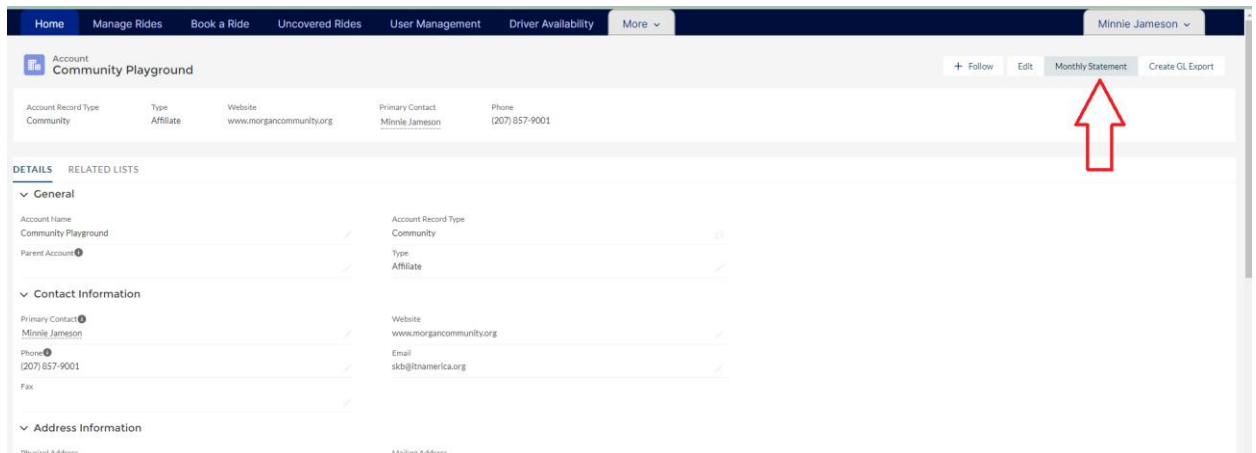
2. On the Accounts list page, choose the Community Accounts view if it is not the default.



3. Choose your site's account by clicking on the site's name.

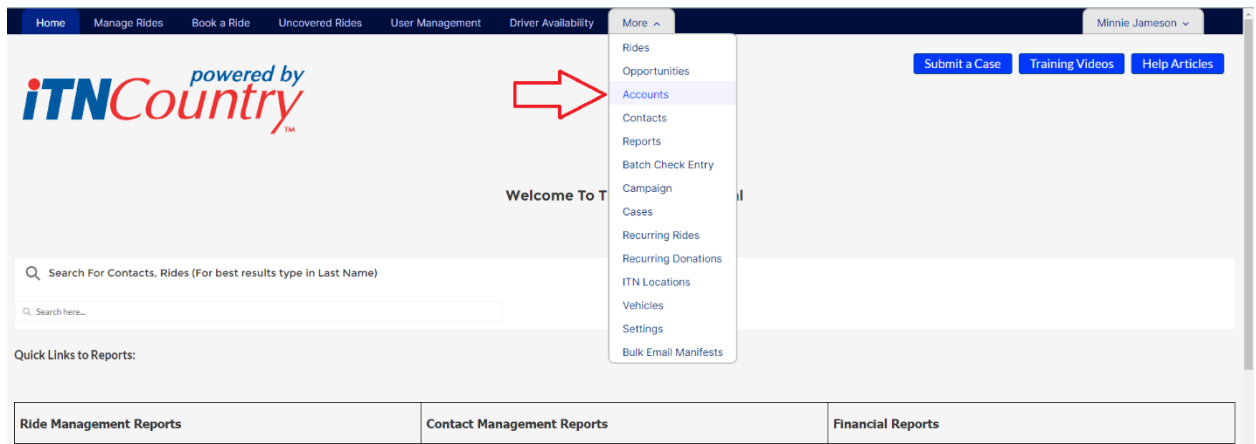


4. On the Account page, click the quick action button at the top right that says Monthly Statement. This will run the monthly statements for the last month, and download them as a Word document. You can edit the individual statements in the Word document.

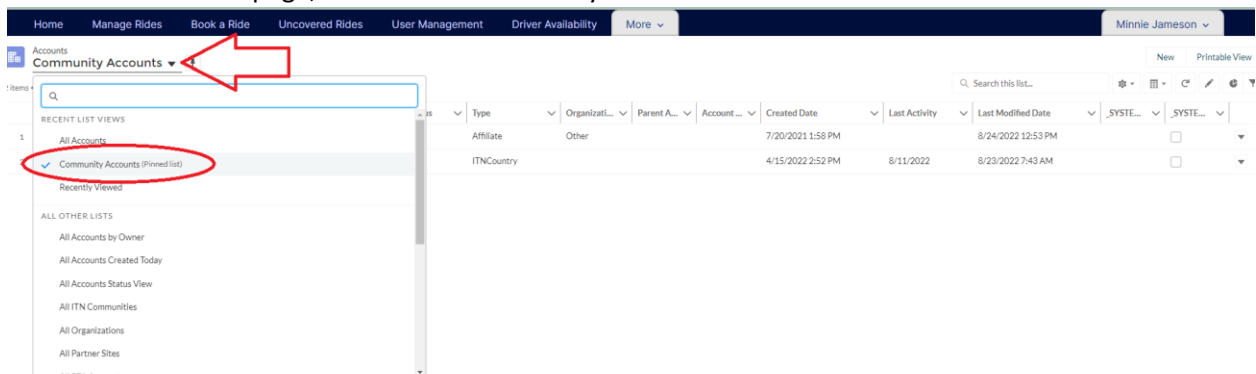


Monthly Posting Report

1. To view the monthly posting report, navigate to the site's account page. Under the More menu, click on Accounts.



2. On the Accounts list page, choose the Community Accounts view if it is not the default.



3. Choose your site's account by clicking on the site's name.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More									
<div>Accounts</div> <div>Community Accounts</div> <div>2 items • Sorted by Account Record Type • Filtered by All accounts - Account Record Type • Updated a few seconds ago</div> <div>Search this list...</div> <div>New Printable View</div>									
	Account Recor...	Account Name	Phone	Status	Type	Organizati...	Parent A...	Account ...	Created Date
1	Community	Community Playground	(207) 657-9001	Site	Affiliate	Other			7/20/2021 1:58 PM
2	Community	The Kennebec	207-604-1366	Site	ITNCountry				4/15/2022 2:52 PM
									8/11/2022
									8/23/2022 7:43 AM

- On the Account page, click the quick action button at the top right that says Create GL Export. This will download the monthly GL Posting report.

Home

Manage Rides

Book a Ride

Uncovered Rides

User Management

Driver Availability

More ▾

Account

Community Playground

+ Follow

Edit

Monthly Statement

Create GL Export

Account Record Type

Type

Website

Primary Contact

Phone

Community

Affiliate

www.morgancommunity.org

Minnie Jameson

(207) 657-9001

DETAILS

RELATED LISTS

General

Account Name

Community Playground

Parent Account ⓘ

Account Record Type

Community

Type

Affiliate

Contact Information

Primary Contact ⓘ

Minnie Jameson

Phone ⓘ

(207) 657-9001

Website

www.morgancommunity.org

Email

skb@tnamerica.org

Fax

Address Information

Physical Address

Mailing Address

Reports in ITNRides

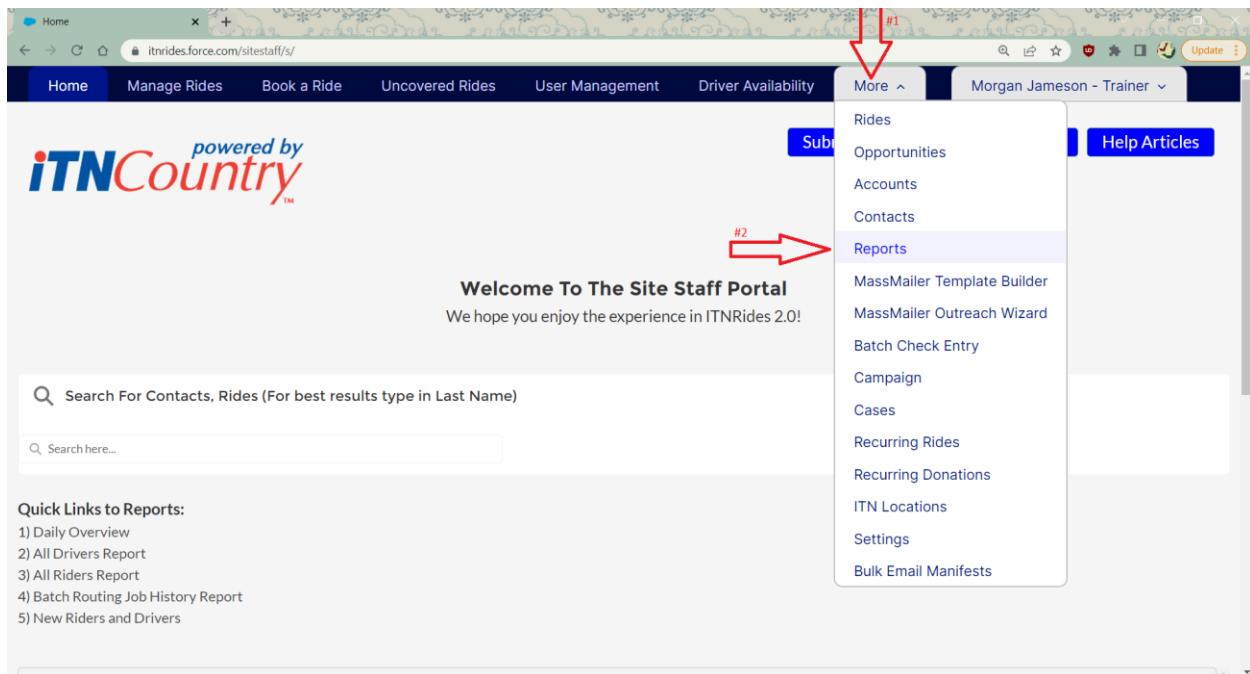
Pre-made Reports and What They Contain

ITNAmerica has created many reports that you will find useful in your day to day operations, for reporting to funders, applying for funding, and telling the story of the impact that your transportation service makes in the community. The reports that you are most likely to use on a regular basis will be listed on your home page of ITNRides, right under the search box.

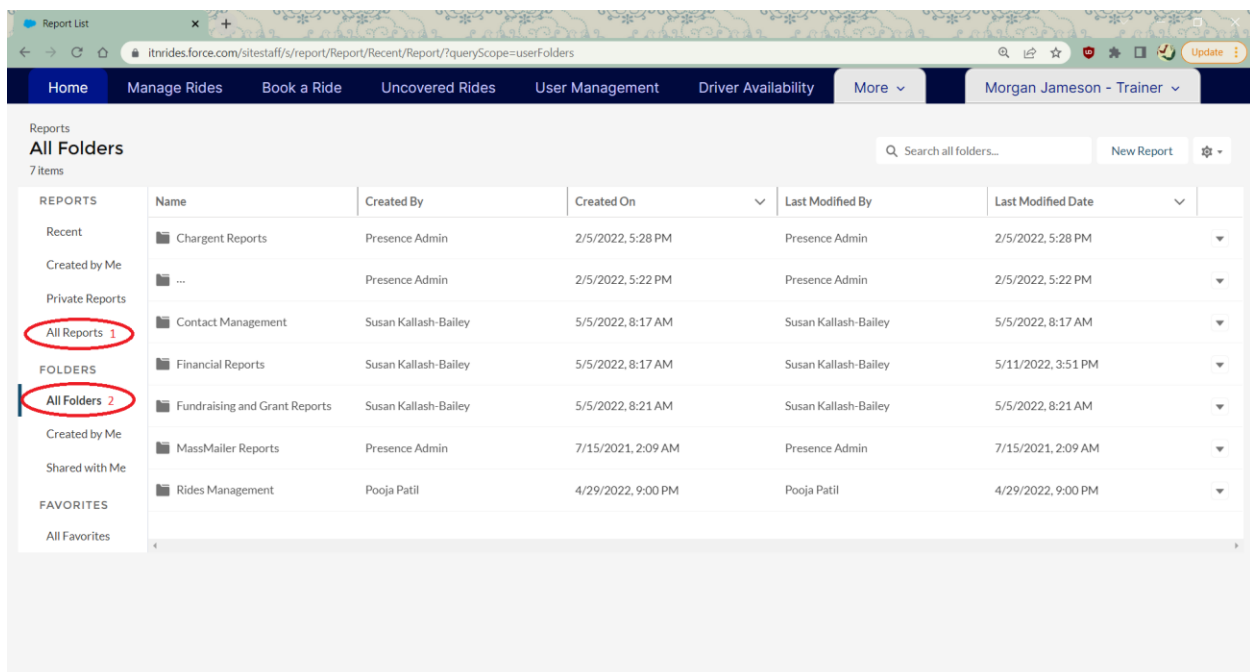
Quick Links to Reports:

Ride Management Reports	Contact Management Reports	Financial Reports
Daily Overview Daily Overview Rpt - Today Daily Overview Rpt - Tomorrow Rides NOT Routed for Tomorrow Batch Routing Job History Report Rides Overview by Timeframe Report Daily Rides for Drivers	All Drivers Report All Riders Report New Riders and Drivers Riders and Service Needs	AR - Riders below Minimum Account Receivable - All Riders Driver Occ & Unocc credits

To find other reports, click on the “More” tab and choose “Reports”.

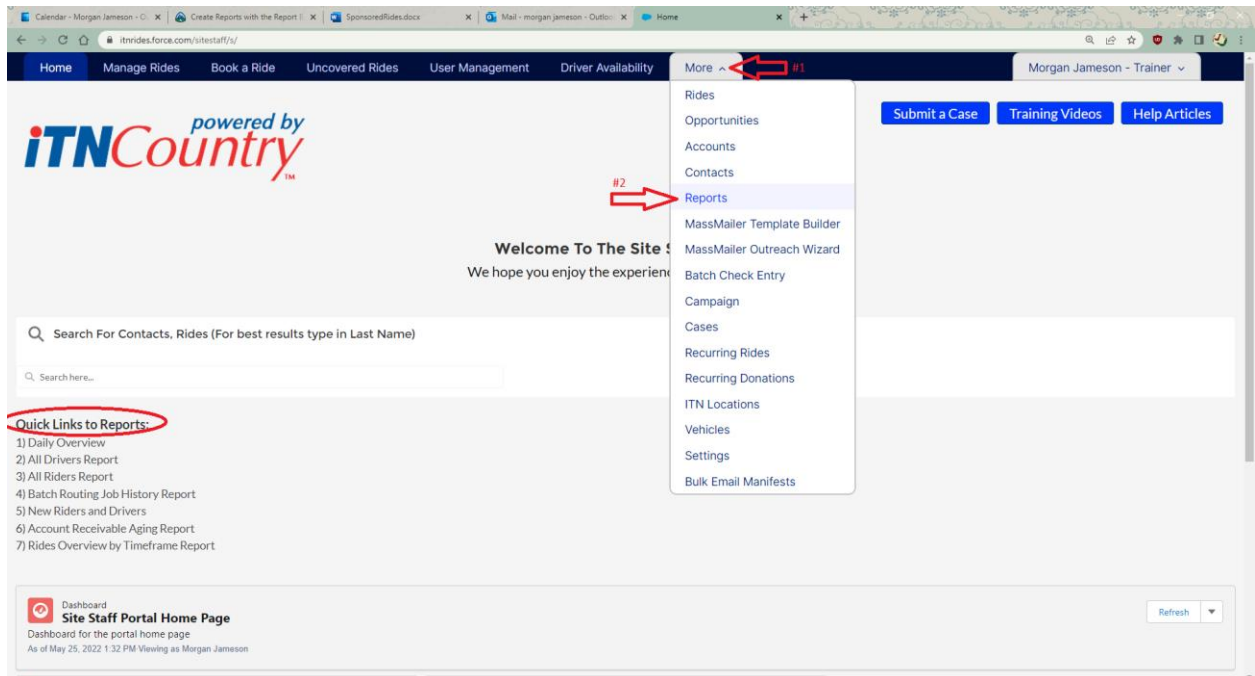


Along the left side of the screen is a navigation bar to help you sort through the available reports. You can click on “All Reports” (1) for the full, alphabetized listing of all reports. If you would prefer to see the reports by category, click on “All Folders” (2) to see the categories displayed to the right.

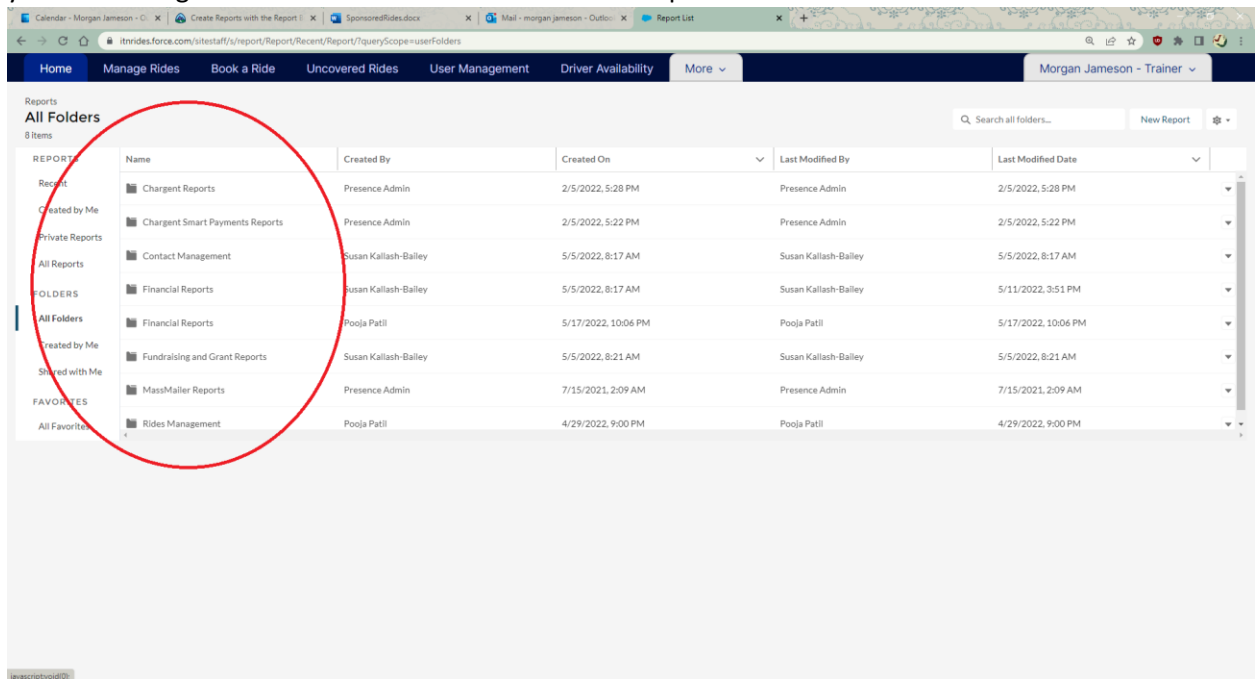


Viewing a Report

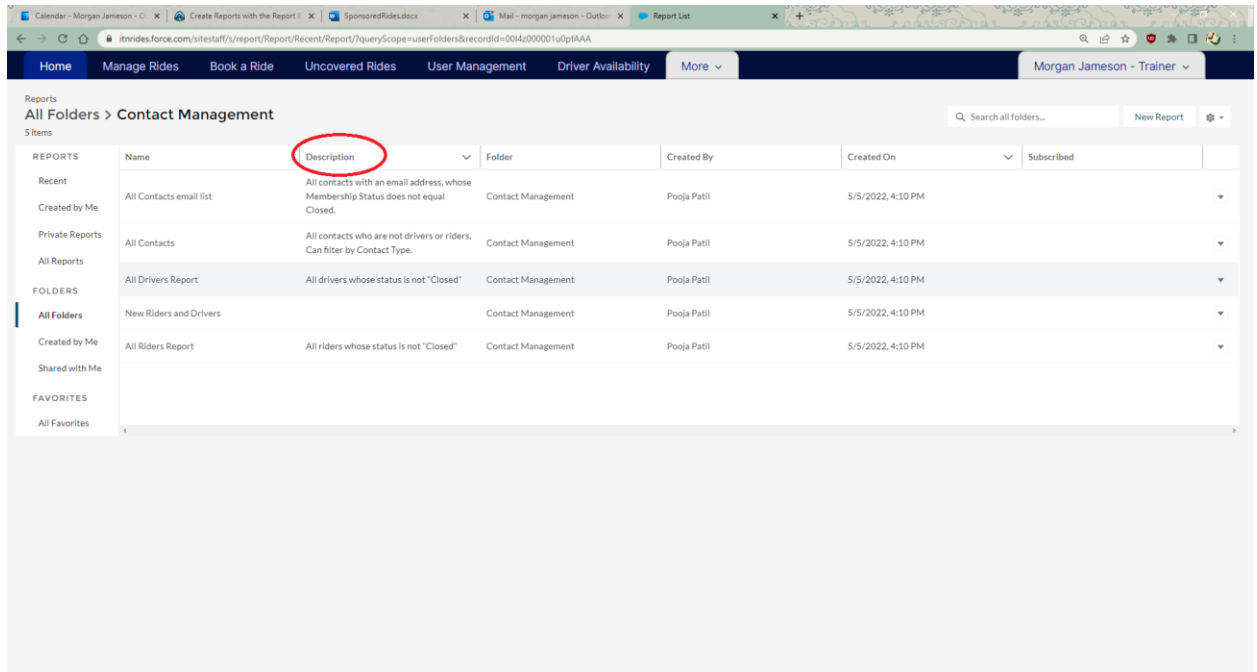
1. Select a report from the list on the home page, or click on the “More” tab and then select “Reports”.



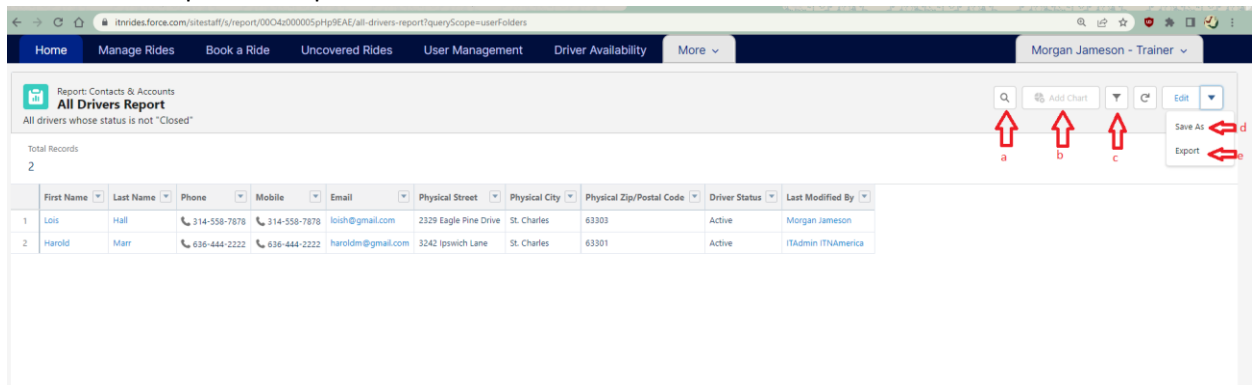
2. Reports are categorized into folders based on their contents. Choose the category of report you are looking for and click on that folder to see the reports.



3. Choose the report you want to view, and click on the report name. All reports should list a description to make it simple to determine what information each report contains.



4. The report table will open, showing you all the information the report contains. You can choose to-
 - a. search the table information
 - b. add a chart (if the information is chartable)
 - c. apply filters to the report
 - d. save the Report to copy it and change/alter the fields
 - e. export the report in Excel format



Customizing a Report

1. Open the report you want to customize.
2. Click the arrow at the top right hand side of the screen and choose "Save As".

Report: Contacts & Accounts
All Contacts email list
All contacts with an email address, whose Membership Status does not equal Closed.

Total Records: 11

	First Name	Last Name	Contact Type	Email	Physical Street	Physical City	Physical Zip/Postal Code	Last Modified By
1	Morgan	Jameson - Trainer	Staff (ITT/TPP/ITNC)	morgan.jameson@tnamerica.org.invalid	17 Point West Blvd	St. Charles	63301	Pooja Patil
2	James	Edwards	Rider	jedwards@gmail.com	3053 Lyme Street	St. Charles	63301	Morgan Jameson
3	Mary	Bailey	Rider	cake@icellbakery.com	12 Tupelo Circle	St. Charles	63301	Morgan Jameson
4	Lois	Hall	Volunteer Driver	loish@gmail.com	2329 Eagle Pine Drive	St. Charles	63303	Morgan Jameson
5	Harold	Marr	Volunteer Driver	haroldm@gmail.com	3242 Ipswich Lane	St. Charles	63301	ITAdmin (TNkAmerica)
6	Quentin	Hossain	Paid Driver; Staff (ITT/TPP/ITNC)	azeelonas7@mon.com	-	-	-	Presence Admin
7	Nancy	Deshais	Board Member; Donor	deshais243@gmail.com	-	-	-	Presence Admin
8	Freddy	Fundraiser	Donor; Media	freddyfundraiser@gmail.com	-	-	-	Presence Admin
9	Charles	Hossain	Donor	charleshossain@gmail.com	-	-	-	Presence Admin
10	Cindy	TestRider	Rider	testrider@gmail.comnopo	2360 Chemin Ave	Saint Charles	63301	Presence Admin
11	Bob	Smith	Emergency Contact	testec@gmail.com	-	-	-	ITAdmin (TNkAmerica)

- Name your report something that is descriptive of what the report contains or its use. Do not leave the name as "Copy of..." or you will not be able to find your saved custom reports.

Save Report As

* Report Name
Contacts with Start Date

Report Unique Name
Contacts_with_Start_Date_Osh

Report Description
All contacts with an email address, whose Membership Status does not equal Closed. Added member/contact entry date to this report.

Folder
Contact Management

Cancel Save

- Add a report description so you know what this report will be used for.

list

Save Report As

* Report Name

Contacts with Start Date

Report Unique Name ⓘ

Contacts_with_Start_Date_Osh

Report Description

All contacts with an email address, whose Membership Status does not equal Closed. Added member/contact entry date to this report.

Folder

Contact Management

Select Folder

Cancel Save

5. Choose a folder to save the report in and click “Save”.

list

Save Report As

* Report Name

Contacts with Start Date

Report Unique Name ⓘ

Contacts_with_Start_Date_Osh

Report Description

All contacts with an email address, whose Membership Status does not equal Closed. Added member/contact entry date to this report.

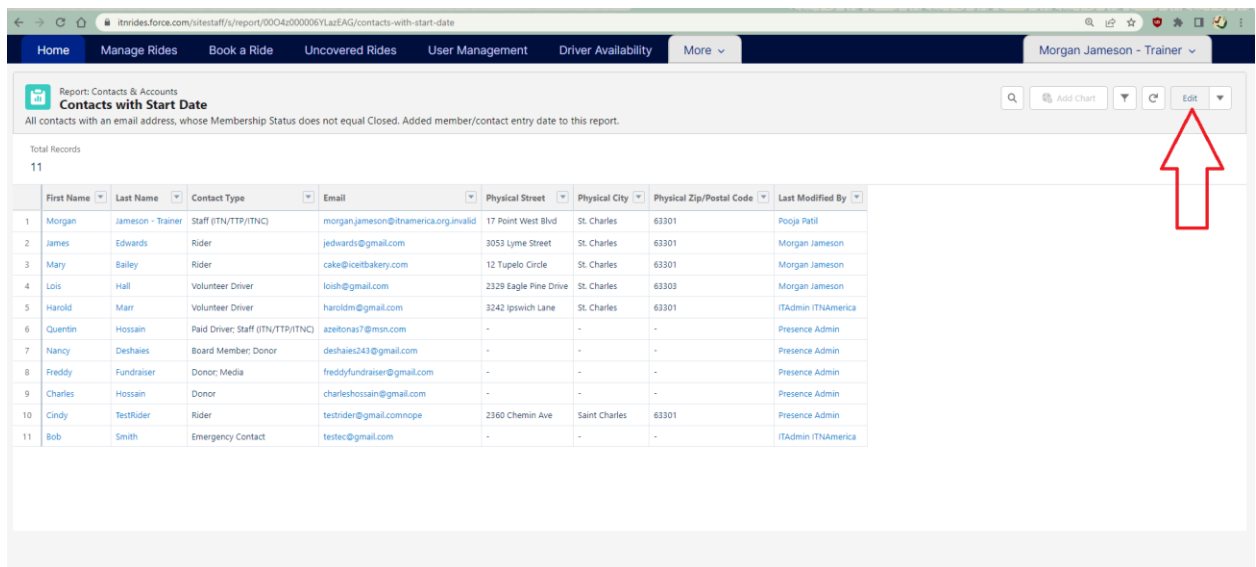
Folder

Contact Management

Select Folder

Cancel Save

6. The new report will open up, select “Edit: to add or delete columns in the report.

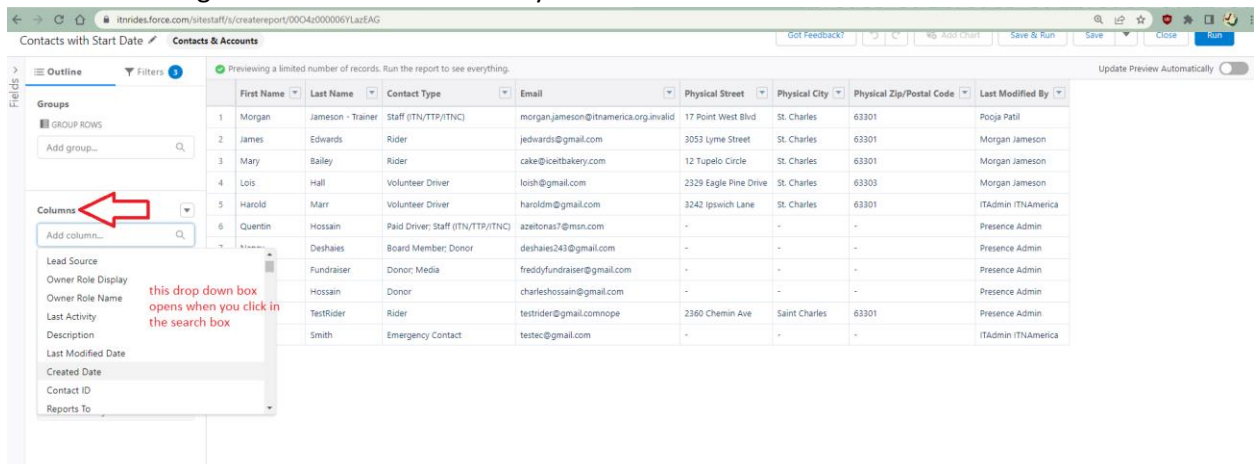


Report: Contacts & Accounts
Contacts with Start Date
 All contacts with an email address, whose Membership Status does not equal Closed. Added member/contact entry date to this report.

Total Records: 11

	First Name	Last Name	Contact Type	Email	Physical Street	Physical City	Physical Zip/Postal Code	Last Modified By
1	Morgan	Jameson - Trainer	Staff (ITN/TFP/ITNC)	morgan.jameson@itnamerica.org.invalid	17 Point West Blvd	St. Charles	63301	Pooja Patel
2	James	Edwards	Rider	jedwards@gmail.com	3053 Lyme Street	St. Charles	63301	Morgan Jameson
3	Mary	Bailey	Rider	cake@icetbakery.com	12 Tupelo Circle	St. Charles	63301	Morgan Jameson
4	Lois	Hall	Volunteer Driver	loish@gmail.com	2329 Eagle Pine Drive	St. Charles	63303	Morgan Jameson
5	Harold	Marr	Volunteer Driver	haroldm@gmail.com	3242 Ipswich Lane	St. Charles	63301	ITAdmin (ITNamerica)
6	Quentin	Hossain	Paid Driver: Staff (ITN/TFP/ITNC)	azeitonas7@msn.com	-	-	-	Presence Admin
7	Nancy	Deshais	Board Member: Donor	deshais243@gmail.com	-	-	-	Presence Admin
8	Freddy	Fundraiser	Donor: Media	freddyfundraiser@gmail.com	-	-	-	Presence Admin
9	Charles	Hossain	Donor	charleshossain@gmail.com	-	-	-	Presence Admin
10	Cindy	TestRider	Rider	testrider@gmail.comnopo	2360 Chemin Ave	Saint Charles	63301	Presence Admin
11	Bob	Smith	Emergency Contact	testec@gmail.com	-	-	-	ITAdmin (ITNamerica)

- Use the search box under Columns to add the information you would like to display. You can also scroll through the list to find the field if you can't remember the name to search for it.



Previewing a limited number of records. Run the report to see everything.

Fields > Outline > Filters 1

Groups

GROUP ROWS

Add group...

Columns

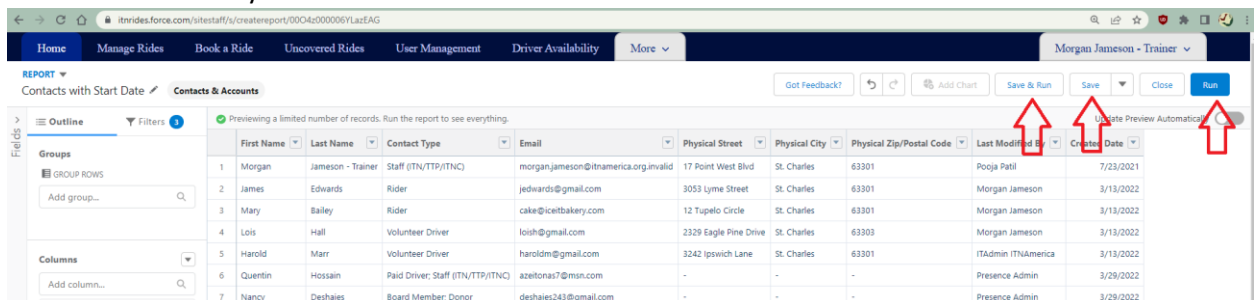
Add column...

Lead Source
 Owner Role Display
 Owner Role Name
 Last Activity
 Description
 Last Modified Date
 Created Date
 Contact ID
 Reports To

this drop down box opens when you click in the search box

	First Name	Last Name	Contact Type	Email	Physical Street	Physical City	Physical Zip/Postal Code	Last Modified By
1	Morgan	Jameson - Trainer	Staff (ITN/TFP/ITNC)	morgan.jameson@itnamerica.org.invalid	17 Point West Blvd	St. Charles	63301	Pooja Patel
2	James	Edwards	Rider	jedwards@gmail.com	3053 Lyme Street	St. Charles	63301	Morgan Jameson
3	Mary	Bailey	Rider	cake@icetbakery.com	12 Tupelo Circle	St. Charles	63301	Morgan Jameson
4	Lois	Hall	Volunteer Driver	loish@gmail.com	2329 Eagle Pine Drive	St. Charles	63303	Morgan Jameson
5	Harold	Marr	Volunteer Driver	haroldm@gmail.com	3242 Ipswich Lane	St. Charles	63301	ITAdmin (ITNamerica)
6	Quentin	Hossain	Paid Driver: Staff (ITN/TFP/ITNC)	azeitonas7@msn.com	-	-	-	Presence Admin
7	Nancy	Deshais	Board Member: Donor	deshais243@gmail.com	-	-	-	Presence Admin
8	Freddy	Fundraiser	Donor: Media	freddyfundraiser@gmail.com	-	-	-	Presence Admin
9	Charles	Hossain	Donor	charleshossain@gmail.com	-	-	-	Presence Admin
10	Cindy	TestRider	Rider	testrider@gmail.comnopo	2360 Chemin Ave	Saint Charles	63301	Presence Admin
11	Bob	Smith	Emergency Contact	testec@gmail.com	-	-	-	ITAdmin (ITNamerica)

- Click "Save" to save the report edits.
- Click "Run" to display the results of your edits. You can also click "Save and Run" to do steps 8 and 9 simultaneously.



REPORT > Contacts with Start Date > Contacts & Accounts

Got Feedback? Add Chart Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything.

Fields > Outline > Filters 1

Groups

GROUP ROWS

Add group...

Columns

Add column...

	First Name	Last Name	Contact Type	Email	Physical Street	Physical City	Physical Zip/Postal Code	Last Modified By	Create Date
1	Morgan	Jameson - Trainer	Staff (ITN/TFP/ITNC)	morgan.jameson@itnamerica.org.invalid	17 Point West Blvd	St. Charles	63301	Pooja Patel	7/23/2021
2	James	Edwards	Rider	jedwards@gmail.com	3053 Lyme Street	St. Charles	63301	Morgan Jameson	3/13/2022
3	Mary	Bailey	Rider	cake@icetbakery.com	12 Tupelo Circle	St. Charles	63301	Morgan Jameson	3/13/2022
4	Lois	Hall	Volunteer Driver	loish@gmail.com	2329 Eagle Pine Drive	St. Charles	63303	Morgan Jameson	3/13/2022
5	Harold	Marr	Volunteer Driver	haroldm@gmail.com	3242 Ipswich Lane	St. Charles	63301	ITAdmin (ITNamerica)	3/13/2022
6	Quentin	Hossain	Paid Driver: Staff (ITN/TFP/ITNC)	azeitonas7@msn.com	-	-	-	Presence Admin	3/29/2022
7	Nancy	Deshais	Board Member: Donor	deshais243@gmail.com	-	-	-	Presence Admin	3/29/2022

Exporting/Downloading Reports

Reports can be exported in Excel format. To export a report-

1. Open the report that you want to download/export.
2. Click on the arrow at the top right of the window and select "Export".

Report: Contacts & Accounts
All Contacts email list
All contacts with an email address, whose Membership Status does not equal Closed.

Total Records: 11

	First Name	Last Name	Contact Type	Email	Physical Street	Physical City	Physical Zip/Postal Code	Last Modified By
1	Morgan	Jameson - Trainer	Staff (ITN/TPP/ITNC)	morgan.jameson@itnamerica.org.invalid	17 Point West Blvd	St. Charles	63301	Pooja Patel
2	James	Edwards	Rider	jedwards@gmail.com	3053 Lyme Street	St. Charles	63301	Morgan Jameson
3	Mary	Bailey	Rider	cake@icelbakery.com	12 Tupelo Circle	St. Charles	63301	Morgan Jameson
4	Lois	Hall	Volunteer Driver	loish@gmail.com	2329 Eagle Pine Drive	St. Charles	63303	Morgan Jameson
5	Harold	Marr	Volunteer Driver	haroldm@gmail.com	3242 Ipswich Lane	St. Charles	63301	ITAdmin (ITN/America)
6	Quentin	Hossain	Paid Driver; Staff (ITN/TPP/ITNC)	azetomas7@msn.com	-	-	-	Presence Admin
7	Nancy	Deshaies	Board Member; Donor	deshaies243@gmail.com	-	-	-	Presence Admin
8	Freddy	Fundraiser	Donor; Media	freddyfundraiser@gmail.com	-	-	-	Presence Admin
9	Charles	Hossain	Donor	charleshossain@gmail.com	-	-	-	Presence Admin
10	Cindy	TestRider	Rider	testrider@gmail.comnopo	2360 Chemin Ave	Saint Charles	63301	Presence Admin
11	Bob	Smith	Emergency Contact	testec@gmail.com	-	-	-	ITAdmin (ITN/America)

3. Choose if you want a formatted report or the report details only. Choose report details only if you are planning to sort the information more when you open it in Excel.

Export

Export View

Formatted Report

Export the report, including the report header, groupings, and filter settings.

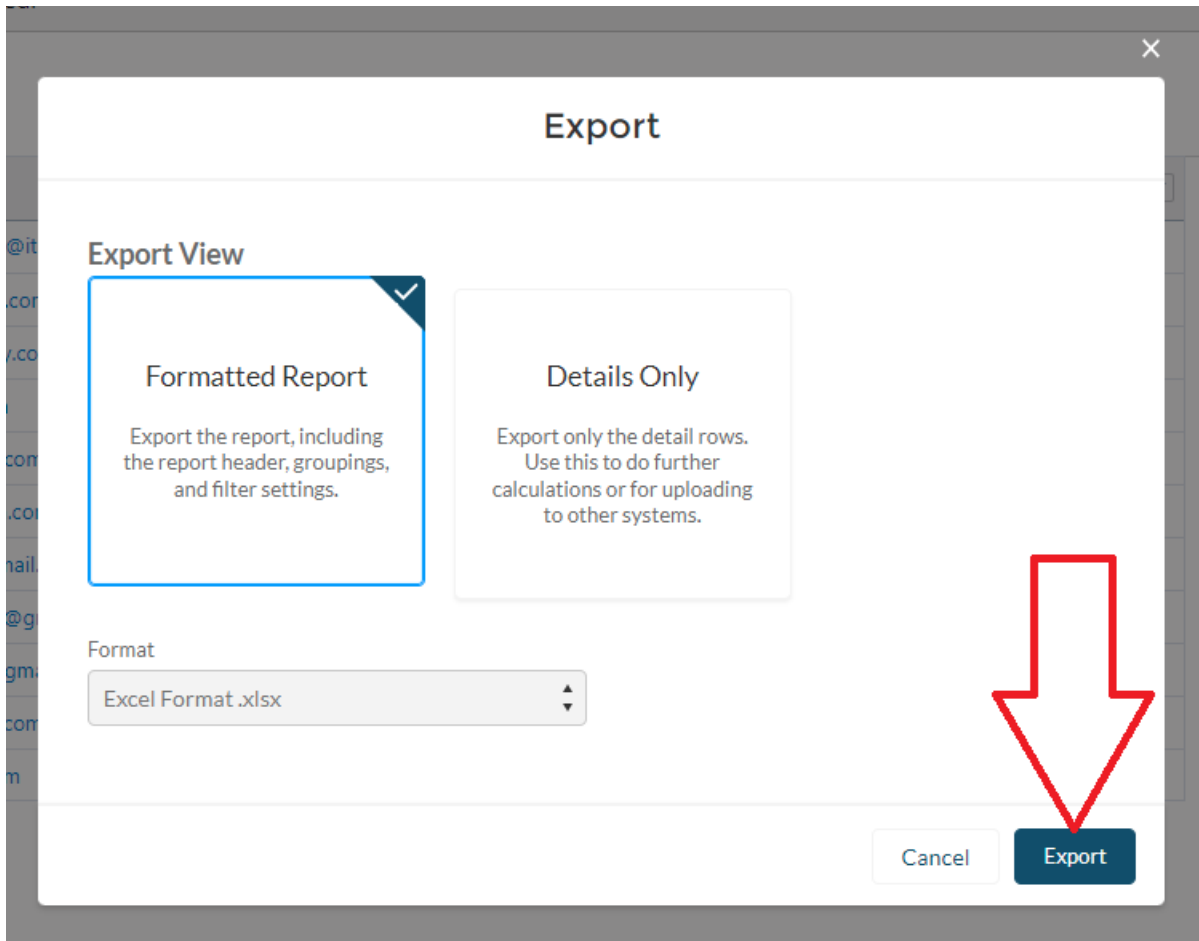
Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format.xlsx

Cancel Export

4. Click Export, and a download will launch. You can find the report in your downloads folder.



Additional Training on Reports and Creating a Custom Report

Creating (and customizing) reports requires a deeper knowledge of Salesforce, and the way it works on the back end. This knowledge is not necessary to use the software, and if you would like a report that doesn't appear to be built already, please contact ITNAmerica. We may be able to build the report for you if it is something that would benefit other communities as well.

If you would like to be able to build custom reports, we suggest exploring the Trailhead training system for Salesforce, which is free and available to the public. This training can help you learn more about the inner workings and organization of the Salesforce software and gain the competencies needed to build reports.

The link below takes you to a specific training on using reports, one of many different trainings available on Salesforce's education platform.

https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_reports_dashboards/lex_implementation_reports_dashboards_using_report_builder

Community Outreach Tools

Tracking Fundraising

Grants

Instructions coming soon!

Private Giving

Campaigns

What are Campaigns Used for?

Campaigns can be used to track outreach efforts and fundraising. Using the campaign functions, you can bulk email groups of people, set up tasks and follow-ups, and document completed tasks or communications.

Setting Up a New Campaign

Entering Contacts to Track

Campaigns use Contacts to track outreach, so the first step in setting up a campaign is to make sure you have entered all the Contacts you want to include into your ITNRides database. If the contact you want to include in the campaign is not a rider, driver, or emergency contact they may not be in your ITNRides database yet. Use your online form to enter contacts, just like you use online applications to enter riders and drivers. The online form lets you choose from the following to categorize your contacts:

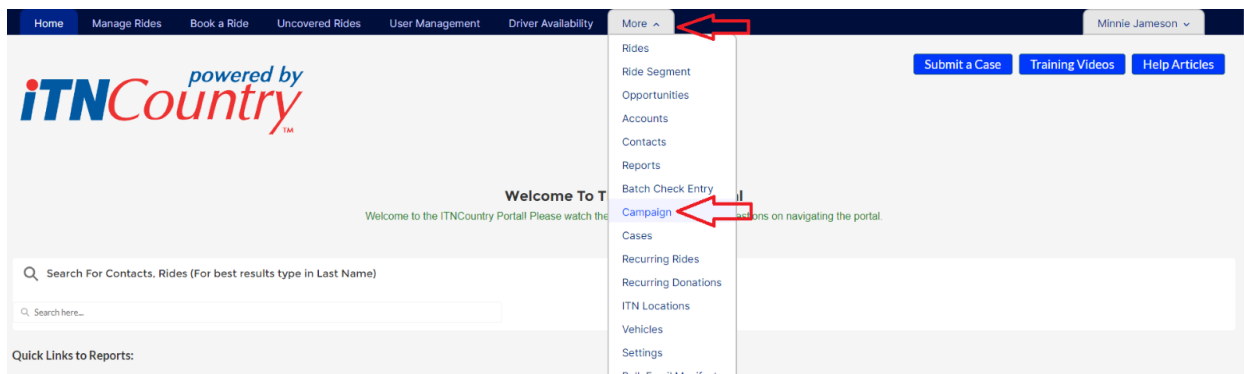
- Board Member
- Committee Leader
- Committee Member
- Community Contact
- Council of Advisors
- Donor
- Employee
- Executive Director
- Foundation Program Officer
- Foundation Staff
- Foundation Trustee
- ITNAmerica Staff
- Media
- Political
- Relative
- Research Contact
- Volunteer
- Volunteer (ITN/TTP/ITNC)
- Newsletter Request

These options are the same for all sites, so they may not all apply to your situation. Once you enter a contact, you can include that contact in multiple campaigns. You only need to enter them once. The

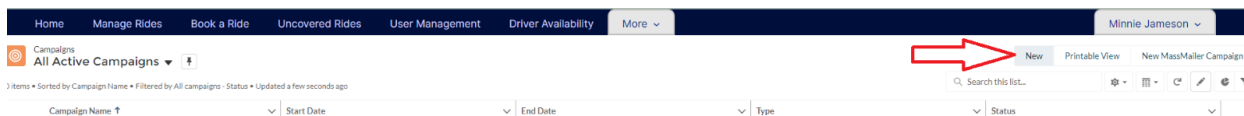
contact entry form is 5 pages, but the required information is all on page 1. Be sure to add the contact's email to be able to use the bulk email functions in Campaigns.

Add a New Campaign

1. From the Home Page of the staff Portal, click on the More tab and choose Campaign from the drop-down menu.



2. A list of all your campaigns will open. To start a new campaign, click "New" in the upper right hand of the screen.



3. A pop-up form will open to set-up your Campaign. Fill out the applicable fields: Status, Campaign Name, Start and End Date, Type, Site, and Description. You can also use the costs fields if you want to track that.

New Campaign: Email

Campaign Information

Campaign Owner

Minnie Jameson

Status

Planned

Campaign Name

Board Recruitment

Start Date

3/1/2023

Type

Email

End Date

3/31/2023

Site

Community Playground

Active

☐

Other Information

Num Sent in Campaign

0

Expected Response (%)

0.00%

Additional Information

Expected Revenue in Campaign

Budgeted Cost in Campaign

Actual Cost in Campaign

Description Information

Description

Emailing stakeholder organizations to recruit new potential Board Members.

Cancel

Save & New

Save

- Click Save, and the new Campaign Record will open. Click on the “Related” tab to add contacts and tasks to the Campaign.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Campaign Board Recruitment Send List Email Edit Clone

Type	Status	Start Date	End Date
Email	Planned	3/1/2023	3/31/2023

DETAILS RELATED

Campaign Owner: Minnie Jameson

Campaign Name: Board Recruitment

Type: Email

Site: Community Playground

Status: Planned

Start Date: 3/1/2023

End Date: 3/31/2023

Active: ☐

Other Information

Num Sent in Campaign: 0

Expected Response (%): 0.00%

Leads in Campaign: 0

Converted Leads in Campaign: 0

Contacts in Campaign: 0

Responses in Campaign: 0

Opportunities in Campaign: 0

Value Opportunities in Campaign: \$0

Won Opportunities in Campaign: 0

Value Won Opportunities in Campaign: \$0

Additional Information

Expected Revenue in Campaign:

Budgeted Cost in Campaign:

5. Add your Campaign members by clicking on the Add Contacts button in the Campaign Members section of the Related Lists.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More Minnie Jameson

Campaign Board Recruitment Send List Email Edit Clone

Type	Status	Start Date	End Date
Email	Planned	3/1/2023	3/31/2023

DETAILS RELATED

Campaign Members Add Leads Add Contacts

Open Activities (0) New Task

Opportunities (0) New

Activity History (0)

Attachments (0) Upload Files

Upload Files Or drop files

6. A pop-up window will open with your contacts listed. You can scroll down the list and click on the + sign to the left of the name to add the contact or use the search box at the top to type in names to find contacts.

Board Recruitment

Add Contacts to Campaign

Search Contacts...

0 items selected

	Name	Account Name	Phone	Email	Contact Type
<input type="checkbox"/>	Example Rider	Example Rider - PTA	207-123-4567	examplerider199@gmail.com	Rider
<input type="checkbox"/>	James Edwards	James Edwards - PTA	636-240-5656	jedwards45@gmail.com	Rider
<input type="checkbox"/>	Example Driver	Example Driver - PTA	(207) 456-9871	exampledriver123@gmail.com	Volunteer Driver
<input type="checkbox"/>	Example Contact	Example Contact - PTA	1111111111		Emergency Contact
<input type="checkbox"/>	Family2 Example	Family2 Example - PTA			Rider
<input type="checkbox"/>	Family1 Example	Family2 Example - PTA			Rider
<input type="checkbox"/>	Allison Cuda	Allison Cuda - PTA			Volunteer Driver
<input type="checkbox"/>	Charles Haze	Charles Haze - PTA	207-409-6136	charleshaze@gmail.com	Volunteer Driver
<input type="checkbox"/>	Thomas Tolliver	Thomas Tolliver - PTA	(859) 859-8598	jomntoe@att.net	Volunteer Driver
<input type="checkbox"/>	Butter Bean	Butter Bean - PTA			Rider
<input type="checkbox"/>	Roofus Cat	Roofus Cat - PTA			Emergency Contact

Cancel Next

7. Select all the Contacts to add to the Campaign and then click Next.

Board Recruitment

Add Contacts to Campaign

Search Contacts...

Example Rider × Charles Haze × Roofus Cat × Anne Hagan × Hank Armstrong × Charles Smith × James Doe × Gary Goller ×

0 items selected

<input type="checkbox"/>	Family1 Example	Family2 Example - PTA			Rider
<input type="checkbox"/>	Allison Cuda	Allison Cuda - PTA			Volunteer Driver
<input checked="" type="checkbox"/>	Charles Haze	Charles Haze - PTA	207-409-6136	charleshaze@gmail.com	Volunteer Driver
<input type="checkbox"/>	Thomas Tolliver	Thomas Tolliver - PTA	(859) 859-8598	jomntoe@att.net	Volunteer Driver
<input type="checkbox"/>	Butter Bean	Butter Bean - PTA			Rider
<input checked="" type="checkbox"/>	Roofus Cat	Roofus Cat - PTA			Emergency Contact

Cancel Next

8. Another pop-up box will open, which asks you to set the Member Status. For now, keep it as Sent, even though you haven't sent the email yet. Click Submit.

Add to Campaign

8 Contacts Selected

* Campaign

Board Recruitment
×

* Member Status

Sent
▼

Update existing campaign members?

☒ Keep member status
☐ Overwrite member status

Cancel
Submit

9. The Related page will now show the number of contacts you entered. To send an email to all the contacts, click on the down arrow in the Campaign Members section, and choose Send List Email.

Home Manage Rides Book a Ride Uncovered Rides User Management Driver Availability More
Minnie Jameson

Campaign

Board Recruitment

Send List Email Edit Clone

Type	Status	Start Date	End Date
Email	Planned	3/1/2023	3/31/2023

DETAILS

RELATED

Campaign Members

Add Leads Add Contacts

▼
Send List Email

Number of Members

8

View All

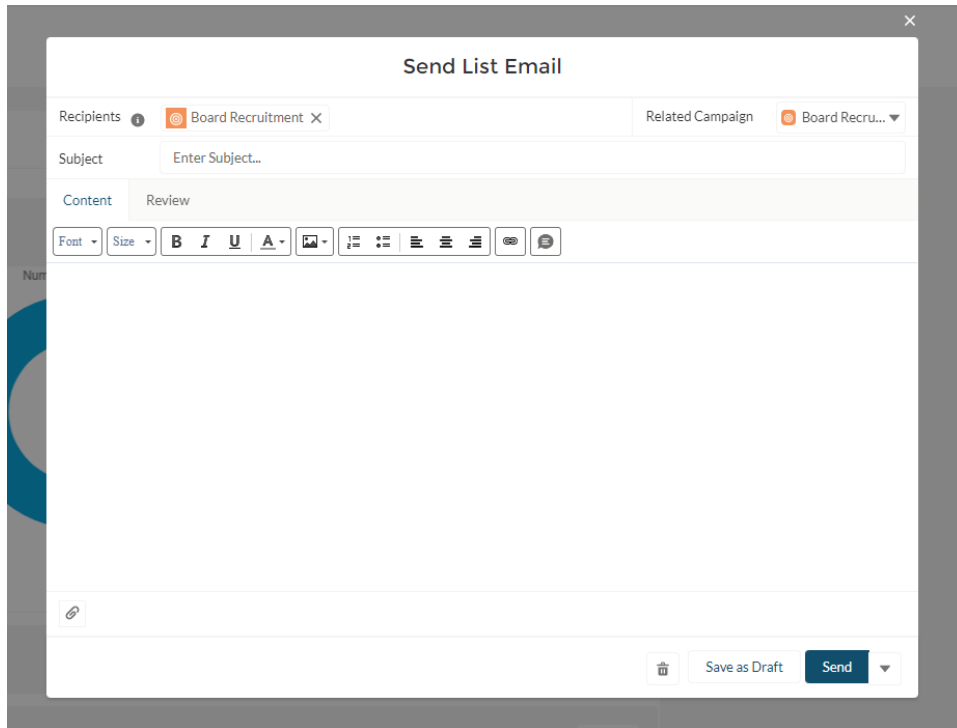
✓ Open Activities (0)

📌 Opportunities (0)

📅 Activity History (0)

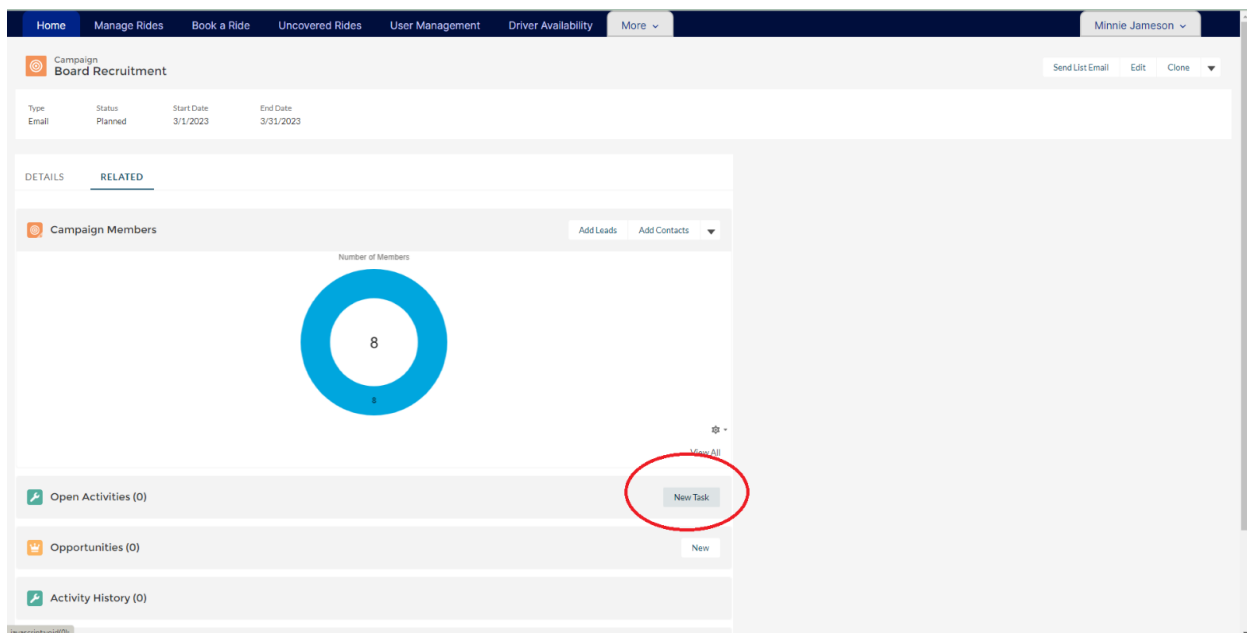
New Task
New

10. A pop-up box will open to compose and send an email to all contacts in the Campaign.



The image shows a 'Send List Email' dialog box. At the top, there's a title bar with a close button. Below it, the 'Recipients' field is set to 'Board Recruitment' with a dropdown arrow. The 'Related Campaign' field is also set to 'Board Recruitment' with a dropdown arrow. The 'Subject' field has a placeholder text 'Enter Subject...'. Below the subject field, there are two tabs: 'Content' and 'Review'. The 'Content' tab is active, showing a rich text editor with various formatting options like bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink. At the bottom right of the dialog, there are three buttons: a trash icon, 'Save as Draft', and 'Send'.

11. Next, you can set follow-up tasks and assign them to staff. In the Open Activities area of the Related page, click on New Task.



The image shows the 'Campaign Board Recruitment' page. The top navigation bar includes links like Home, Manage Rides, Book a Ride, Uncovered Rides, User Management, Driver Availability, and More. The user 'Minnie Jameson' is logged in. The page header shows 'Campaign Board Recruitment' with buttons for 'Send List Email', 'Edit', and 'Clone'. Below the header, there's a table with columns: Type, Status, Start Date, and End Date. The table shows one row: Email, Planned, 3/1/2023, 3/31/2023. Below the table, there's a 'RELATED' section. Under 'RELATED', there's a 'Campaign Members' section with a donut chart showing 'Number of Members' as 8. Below the chart, there's a 'New Task' button circled in red. Other buttons like 'Add Leads' and 'Add Contacts' are also visible. At the bottom, there are sections for 'Open Activities (0)', 'Opportunities (0)', and 'Activity History (0)'.

12. Fill in the information for the task in the pop-up window and click Save.

New Task

Task Information

* Assigned To: Minnie Jameson

* Status: Not Started

* Subject: Call

Name: Search Contacts...

Due Date: 3/15/2023

Related To: Board Recruitment

* Priority: Normal

Description Information

Comments: Call interested contacts to schedule an in-person meeting.

Save & New Cancel Save

13. Assigning a task to a staff member won't automatically generate an email or reminder to them, they will have to look at the Campaign to see it, so don't forget to let them know about the task as well.
14. When a task is completed, change the status to completed, and it will move to the Activity History section.

Salesforce resources for Campaigns

https://trailhead.salesforce.com/en/content/learn/modules/campaign_basics/campaigns_basics_unit_1

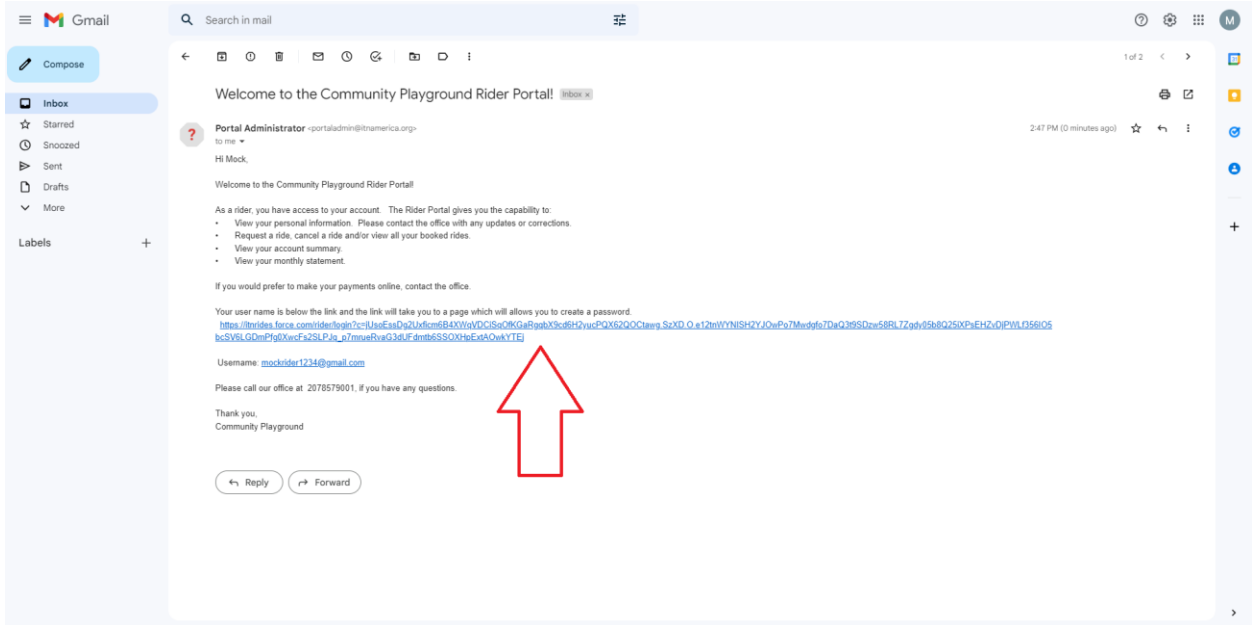
https://help.salesforce.com/s/articleView?id=sf.campaigns_def.htm&type=5

https://help.salesforce.com/s/articleView?id=sf.campaigns_landing_page.htm&type=5

Instructions for User Portals

How to Set Up Rider/Driver Portal Accounts

1. Make sure you enter an email address that you have access to when you complete your application.
2. After your application is accepted by the site, you'll receive an email from "Portal Administrator" with the subject line "Welcome to the (site name) Rider Portal!" or "Welcome to the (site name) Driver Portal!"
3. This email will tell you what you can access in the Driver or Rider Portal, and there is a long link that looks like gibberish that you click to set your password.

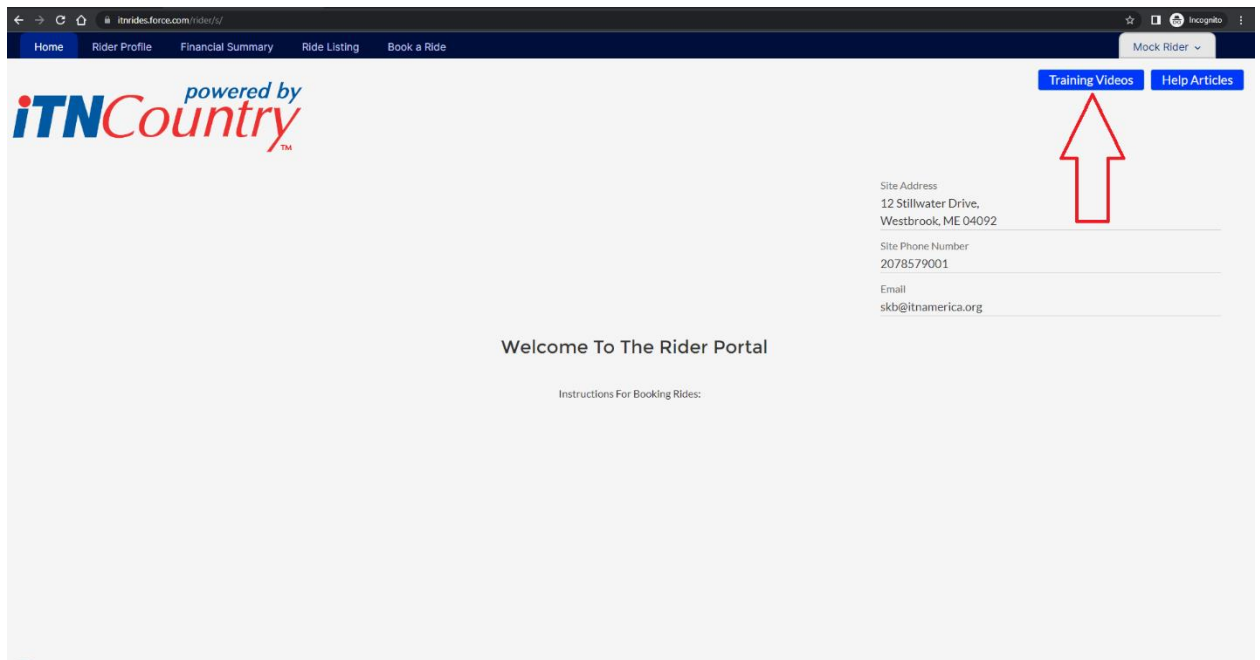


4. Click the link. This will take you to a Salesforce page to set up a password. Your password will need to- have at least 8 characters, use 1 letter and 1 number, have 1 special character (something like a question mark or exclamation point). Enter the password twice, making sure they match.

The screenshot shows the Salesforce 'Change Your Password' page. The page has a header with the Salesforce logo and the title 'Change Your Password'. Below the title, there is a form with the following elements:

- A message: 'Enter a new password for mockrider1234@gmail.com. Make sure to include at least:'
- Four requirements with green checkmarks:
 - 8 characters
 - 1 letter
 - 1 number
 - 1 special character
- A 'New Password' field with a 'Good' status indicator.
- A 'Confirm New Password' field with a 'Match' status indicator.
- A blue 'Change Password' button.
- A footer message: 'Password was last changed on 8/18/2022 2:47 PM.'

5. Click Change Password at the bottom, and the Driver or Rider Portal will open. If you need assistance with anything in the Portal, click on the Training Videos button near the top to watch short videos on how to navigate the Portal.



More written instructions for Rider and Driver Portals coming soon. There are video instructions available on the Portal for users to access now.