



TRIPS MODULE GUIDEBOOK



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APPLICATION OF THE PRESENT GUIDE

Your account has been set-up according to your plan as well as accesses granted you by the administrator of the account (if applicable). The information contained in this guide is general in nature and certain sections may not apply to you.

1. Introduction

A detailed listing of all trips registered by your Odotrack device is in the Trips Module.



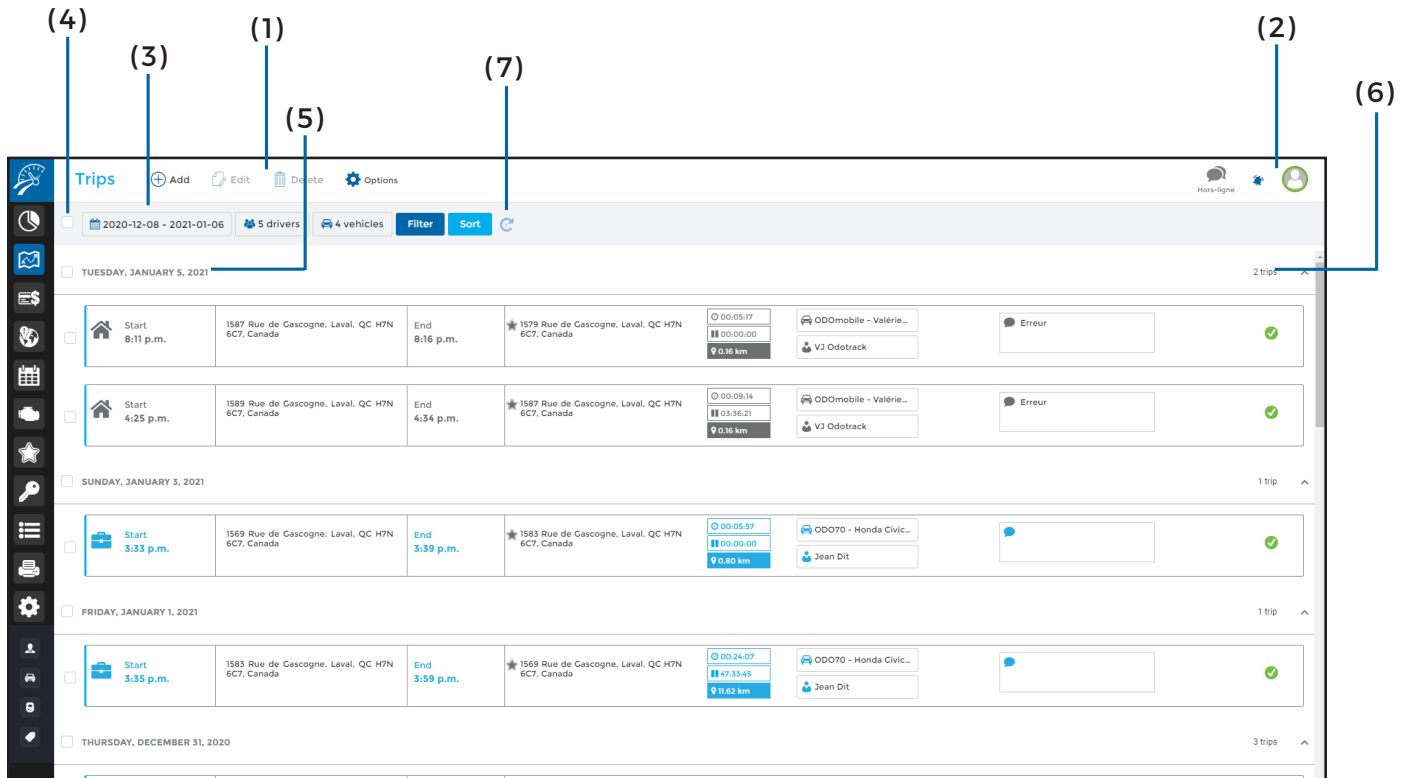
PRIVACY PROTECTION

By default, personal trips are not visible to the administrator or account manager, unless otherwise authorized by the user, as a means to protect his privacy.

To de-activate Privacy Mode, click on Contacts situated in the Configuration module, located to the left of your screen. In the Settings tab, in the section Rights and access, select "Allow Other Contact to See My Personal Trips".

2. Overview

Below is a preview of all elements within the Trips module:



(1) Main Menu – left section: Allows you to quickly do the following tasks: Add, Modify, Delete and Options;

(2) Main Menu – right section: Allows you to see all notifications, send comments to technical support as well as account logout;

(3) Selection Menu: Allows you to select which trip you would like to view as well as in what order:

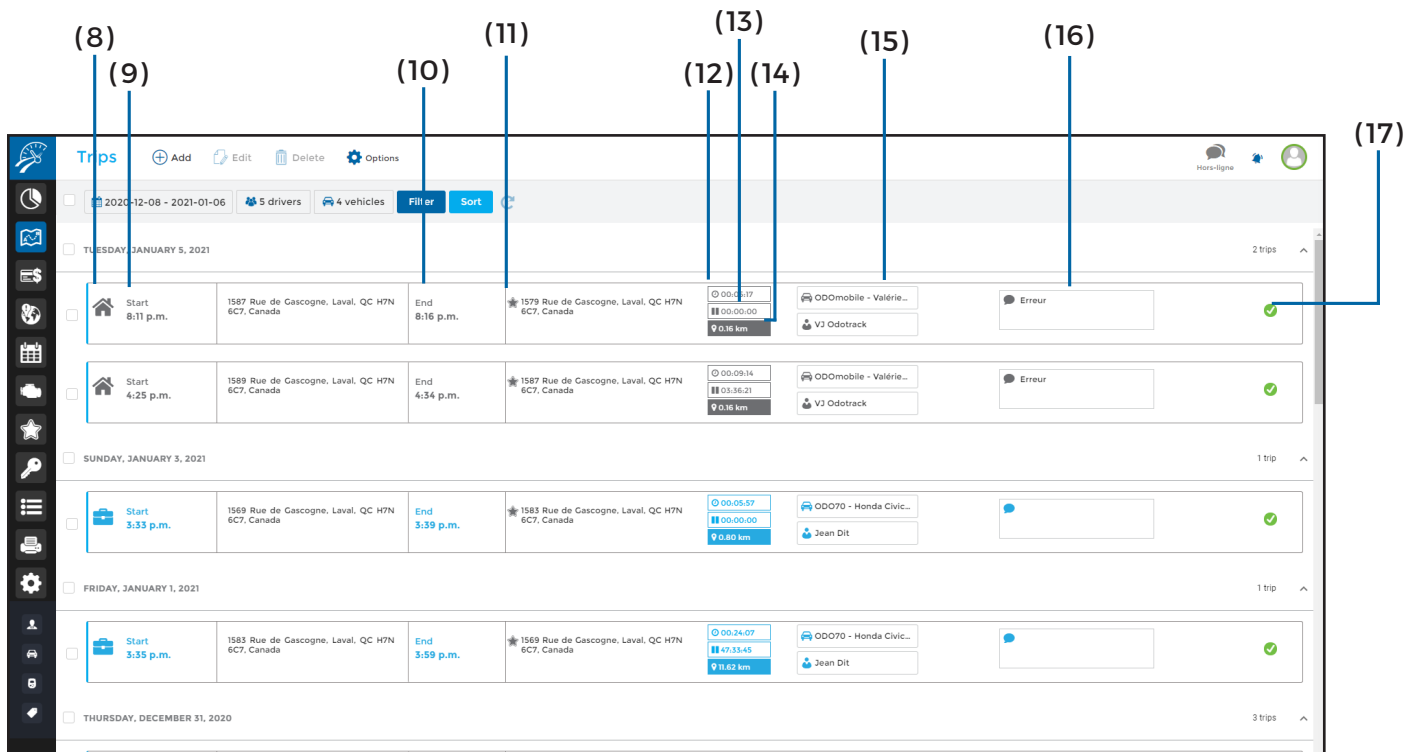
- Display according to drivers, vehicles, type, status or trip validity;
- Sort your trips by date, driver, vehicle, in ascending or descending order;

(4) Selection Boxes: Allows trip selection. To select ALL trips, click on the box to the left of the Selection Menu. To select all Same Day trips, click on box to the left of the desired date;

(5) Date: By default, if sorted by date, all trips will be shown by date. If sorted by driver or vehicle, these shall then be displayed;

(6) Number of trips: Indicates the number of trips within the sort selected. Menu can be opened or closed using the arrow sign;

(7) Refresh button: Allows you to refresh the view of the current page



(8) Type of trip: Displays the type of trip. Business Mode is represented by the briefcase icon and Personal by the house icon;

(9) Departure: Shows time and address of departure (Start);

(10) Destination: Shows time and address of arrival (End);

(11) Favorites: The star icon, in front of the arrival address, allows you to locate the favorite linked to this address:

- ★ Non-existent favorite;
- ★ Favorite created in account;
- ★ Favorite in which the comment or route was modified;
- ★ Favorite created by another user;

(12) Duration: Indicates the length of the trip;

(13) Stop: Indicates the time-stop;

(14) Distance: Indicates trip distance;

(15) Vehicle & Driver: Indicates the names of both car and driver associated to this trip;

(16) Comments: Indicates the reason of the trip as defined by the driver or in accordance to the pre-set favorite (if applicable);

(17) Statut: Indicates the status of the trip

- Trip in progress, not ended;
- Warning – missing points;
- Error or rejected;
- Validated;
- Odometer updated;

3. Display trips

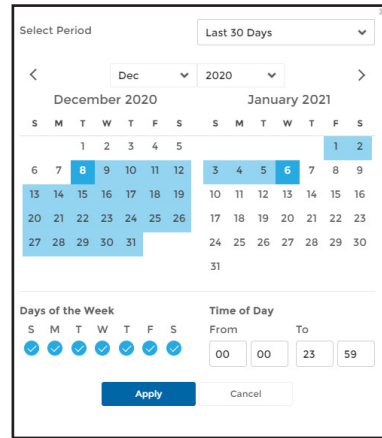
By default, trips shown are those travelled within the last 30 days. Use the calendar, filters or sort button to display trips of your choice.

a. By date

Using the calendar, click on the dates you wish to display or use the pre-populated periods (yesterday, today, current week, current month, last 7 days, last 30 days or custom).

You can also specify time-frames or days of the week desired.

Click **Apply** to confirm your choice.



b. By driver

To display trips of one or more drivers, click on the driver selection.

Make your selection in the window to the right and click **Apply**.

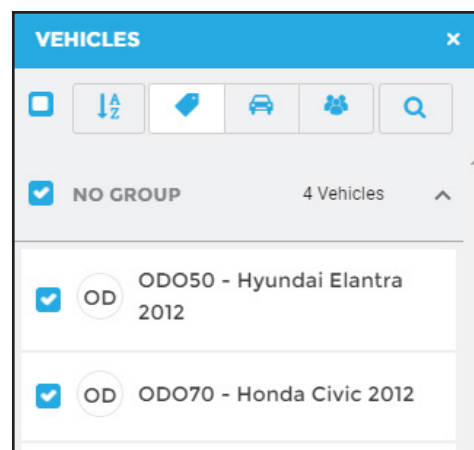
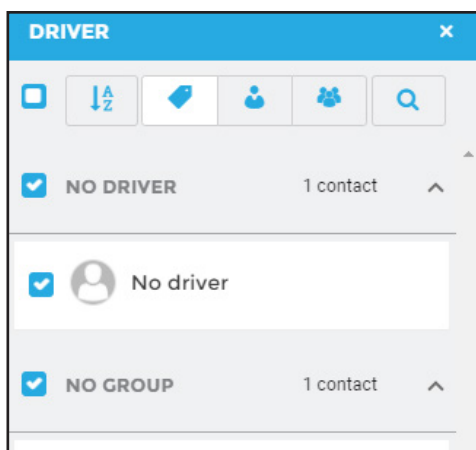
Once selected, only trips linked to said drivers will be displayed.

c. By vehicle

Use the vehicle selector to the vehicle(s) you wish to display.

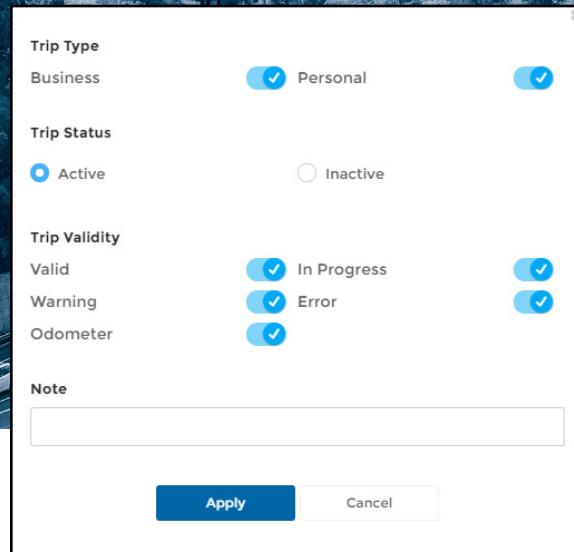
Once selected in the window to the right, click **Apply**.

Once selected, only trips linked to said vehicle will be displayed.



d. Filter

You can display trips according to trip type, status, validity or according to comments entered by filtering.



The screenshot shows a 'Filter' dialog box with the following settings:

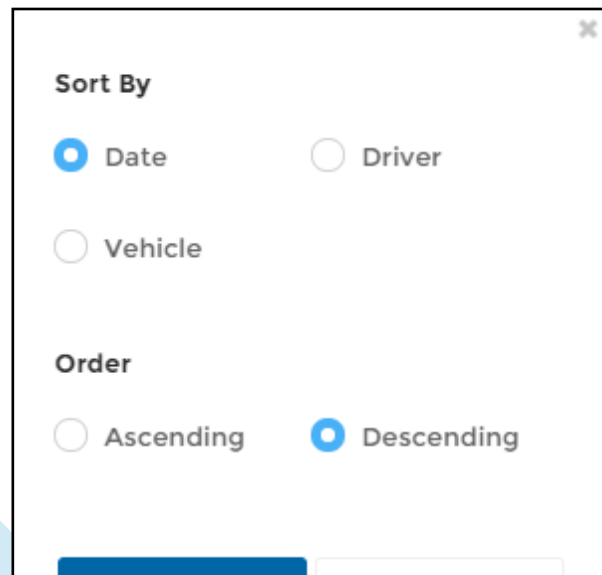
- Trip Type:** Business (checked), Personal (checked)
- Trip Status:** Active (selected), Inactive (unselected)
- Trip Validity:** Valid (checked), In Progress (checked), Warning (checked), Error (checked), Odometer (checked)
- Note:** An empty text input field.

Buttons: Apply, Cancel

e. Sort

By default, all trips displayed are displayed by date in descending order (most recent to oldest).

You can sort your trips by date, driver or vehicle in both ascending and descending order.



The screenshot shows a 'Sort' dialog box with the following settings:

- Sort By:** Date (selected), Driver (unselected), Vehicle (unselected)
- Order:** Ascending (unselected), Descending (selected)

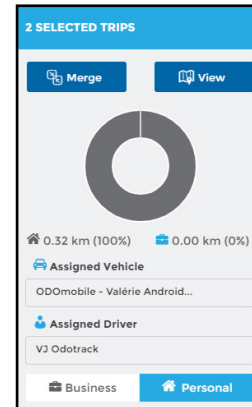
Buttons: Apply, Cancel

A

4. Display details of a trip

Click on the trip(s) desired in your trip list or use the selection box provided to display the details of one or more trips.

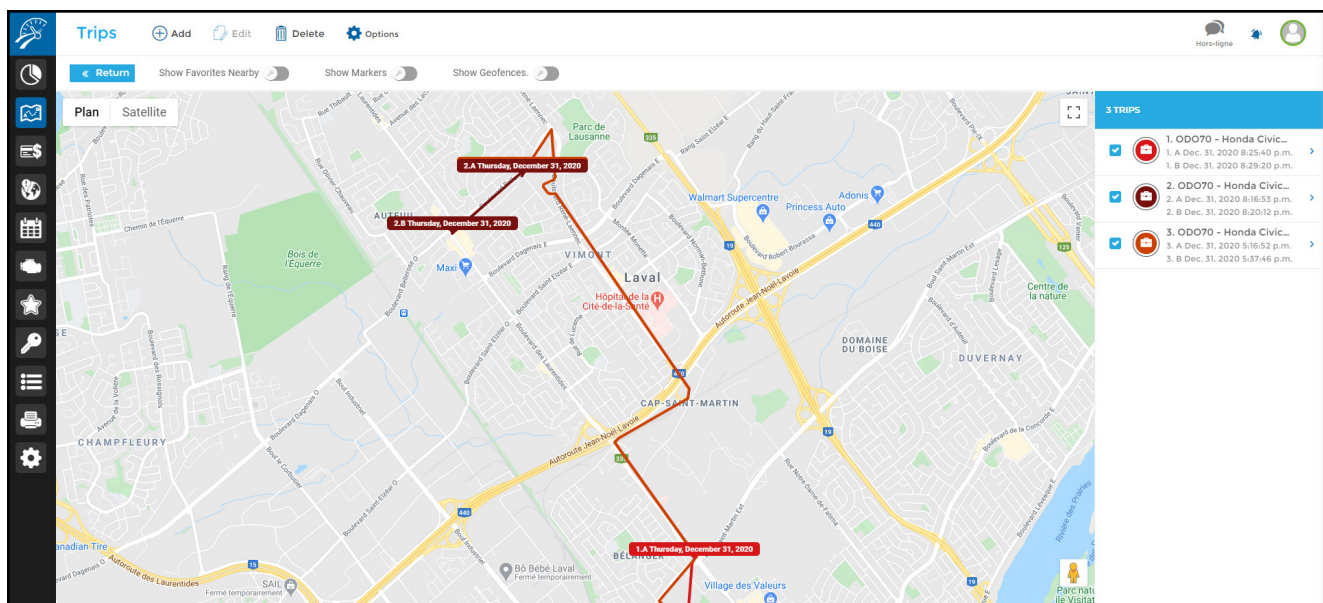
A pop-up window will open to the right of your screen indicating detail of the trip(s) selected.



To have the route of the trip(s) on a map, click **View** on the top right.

Using the selection box provided on the right, chose which trip(s) you wish to view on the map.

Nearby favorites, markers and a satellite view can be displayed by using the option provided in the menu at the top of the map.



To return to your trip listing simply click on **Return**.

5. Modify a trip

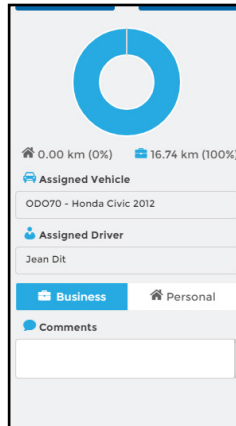
To modify a trip simply click on the desired trip or use the selection box attached to it. Two options are available: either use the pop-up window to the right or use the Modify option in the Main Menu.

a. Modify using the pop-up window

Using the window, you can modify the vehicle, driver, trip type as well as the comments section. All other modification **MUST** be done in the main menu.

To confirm changes click **Save**.

Note: This window allows you to modify several trips at once.




b. Modify using the main menu

Changes can be made through the Main Menu. Select the trip and click **Edit**. Once changes entered simply click **Save**.

QUICK MODIFICATION OF TRIP TYPE

CHANGE THE TYPE OF TRIP (BUSINESS OR PERSONAL) QUICKLY BY SIMPLY CLICKING ON THE BRIEFCASE OR HOME ICON IN THE TRIP LISTING

<input type="checkbox"/>	 Start 6:05 p.m.	1980 Rue Michelin, Laval, QC H7L 5C2, Canada
<input type="checkbox"/>	 Start 6:08 p.m.	1970 Rue Michelin, Laval, QC H7L 5C2, Canada

6. Add a trip

The trip listing reflects all trips registered.

To add a trip, click **Add** from the Main Menu.

Capture information needed and click **Save**.

To create a round-trip, click on **Add Return Trip**.

NOTE: It is not possible to view a trip added manually on the map

ADD TRIP

Trip Type *
Business

From * To *
2021-01-06 04:25 PM 2021-01-06 04:26 PM

Address of Departure *
Enter Address 0 0

Address of Destination *
Enter Address 0 0

Duration Distance *
00:01:00 0 km

Vehicle * Driver *
Select vehicle Select driver

Suggested Place (0) Comment
Comment

Add Return Trip

Save Cancel

7. Delete a trip

All you need is a few simple clicks to delete a trip.

To delete a trip(s), select the trip, using the selection box, and click on **Delete** in the main menu.

Click **Delete** to confirm your choice.

Once the trip is deleted it will no longer appear in your trip listing.

To restore a trip, click on **Filter** in the selection menu, chose the trip status **Inactive** and click on **Apply**.

All deleted trips will appear. Chose which trip you wish to restore, click **Options** in the main menu and then click **Restore**.

Refresh the page to return to the trip listing.

DELETE TRIP(S)

Are you sure you want to delete all selected trips?

Delete Cancel

8. Split a trip

Splitting is used to fraction a trip in two.

To split a trip, you can use either the window to the right for an established distance or the route map to fraction from precise points.

a. Split according to an established distance

Using the window to the right, select the desired trip and click on **Split** in the upper left-hand corner.

A pop-up window will appear showing the distance where you wish to split this trip. Click **Save** and confirm your choice by clicking **Yes**.

SPLIT TRIP

Enter the Distance Where you want to Split the Trip
Total Trip Distance 0.16 KM

Distance Unit

Save **Cancel**

SPLIT

Are you sure you want to split this trip here?

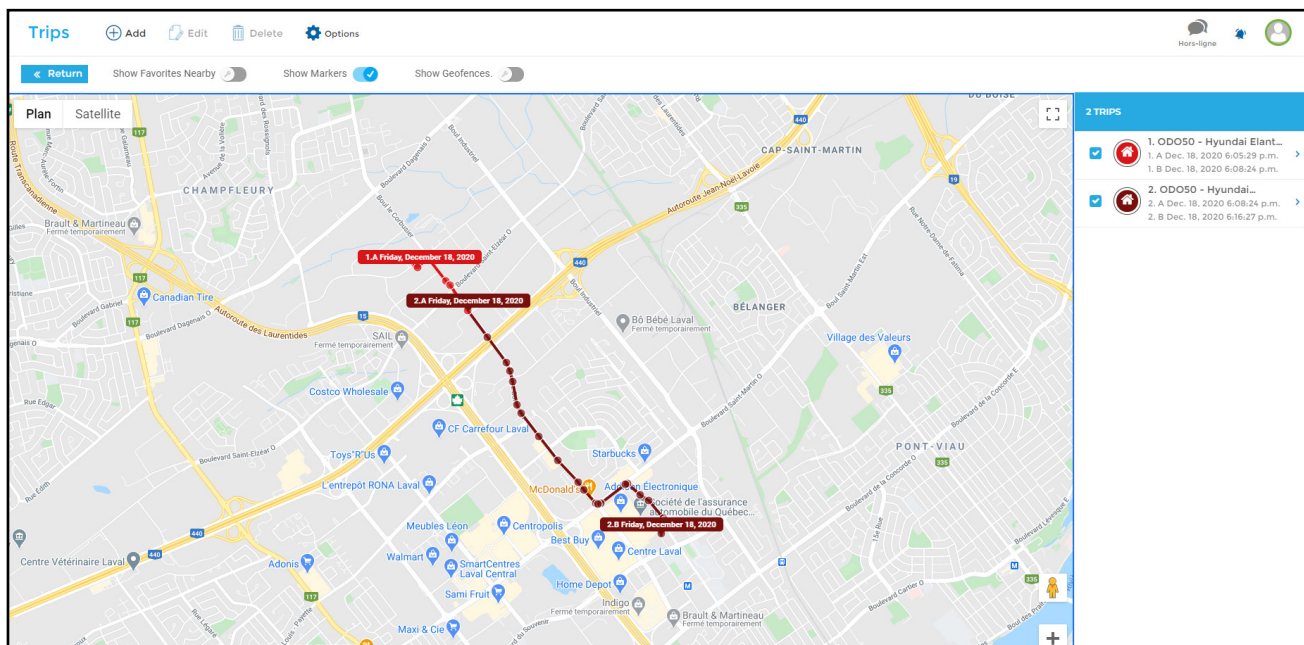
Yes **Cancel**

b. Split from route map

You can use the route map to split your trip. Simply select the trip you wish to split from the list. Click **View** in the window on the right. In the menu at the top of the map click **Show Markers**.


Using these markers click on the spot where you wish to split. Use the scissor icon that appears in the window and confirm according to your choice.

A summary of both trips will appear on the right once the split is saved. To display details, simply use the arrows to this effect.



c. Display a split trip

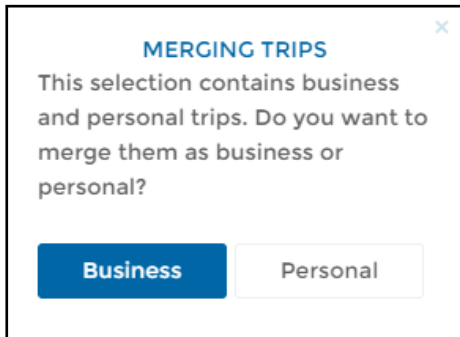
You can easily view all split trips from your trip listing since the comment **Fragmenté / Split** appears in comments.

 Start 8:03 a.m.	1583 Rue de Gascogne, Laval, QC H7N 6C7, Canada	End 8:04 a.m.	★ 1970 Rue Michelin, Laval, QC H7L 5C2, Canada	 00:00:46  00:00:00  3.00 km	 ODO70 - Honda Civic...  Jean Dit	 Fragmenté / Split
 Start 8:04 a.m.	1970 Rue Michelin, Laval, QC H7L 5C2, Canada	End 8:05 a.m.	★ 1970 Rue Michelin, Laval, QC H7L 5C2, Canada	 00:01:18  10:02:49  5.08 km	 ODO70 - Honda Civic...  Jean Dit	 Fragmenté / Split



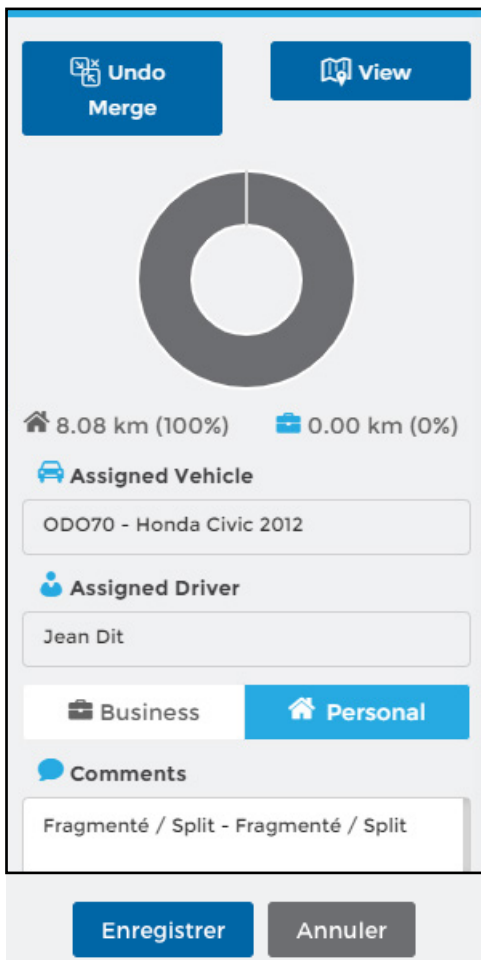
9. Merge trips

Merging allows you to merge two or more trips together. Only consecutive trips with the same driver and vehicle can be merged.



In the trip listing, select the trips you wish to merge and click **Merge** on the top of the right panel.

If the trips selected are not of the same type (business or personal), a pop-up window will appear asking confirmation of the merged trips.



Delete a merge

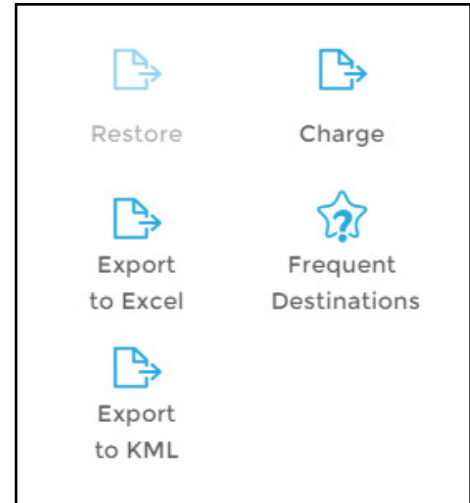
Select the trip you would like to un-merge and click on **Undo Merge** on the top left of the right panel. Deletion is instantaneous and the initial trips shall reappear in the trip listing.



10. Options

Below are the other options available in the Options section of the main menu:

- a) Restore
- b) Export to Excel
- c) Export to KML
- d) Charge
- e) Frequent destinations



a. Restore

This option allows you to restore deleted trips.

To display deleted trips, using the **Filter** button on the top of the page, chose the **Inactive** Status and then click on **Apply**.

Select the trip(s) you wished restored from the listing by using the selection box then click on **Restore** in the **Option** menu

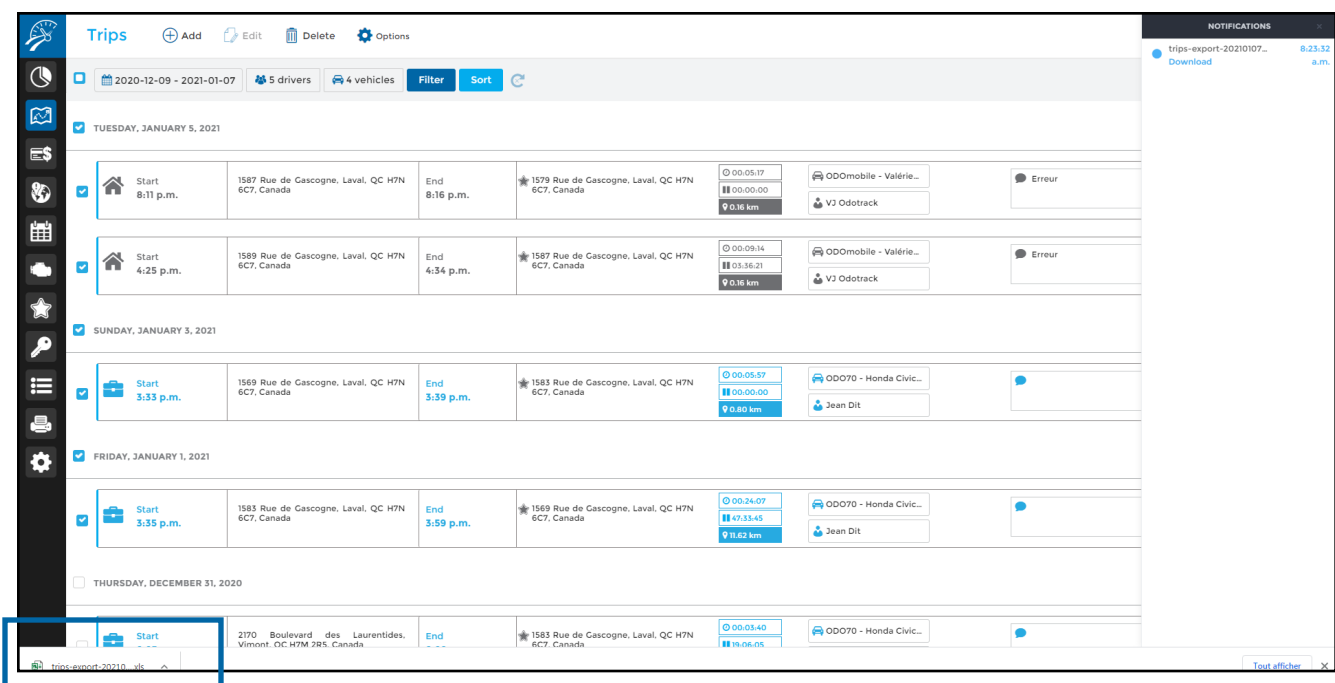
b. Export to Excel

This feature allows you to export your trips in an Excel format.

Select the trip(s) to export from your listing then click on the option **Export to Excel**.

To consult reports exported, click on the notification icon to the top of the screen and then click directly on the desired file.

Open the uploaded PDF file that appears on the toolbar to the bottom left of your screen by clicking directly on the file.



The file will open in another window. You can then print or upload your file directly to your computer.

If you wish to produce a mileage logbook you must use the Reports Module to do so.

c. Export to KML

This option allows you to export your trips in a KML file format (Google Earth Map).

Select the desired trip to export from your listing, click **Export to KML**.

To view exported reports, click on the notification icon on the top right of the screen and then click on the desired file.

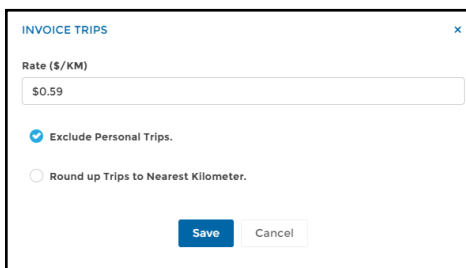
Open the uploaded PDF file that appears on the toolbar to the bottom left of your screen by clicking directly on the file.

The file will open in another window. You can then print or upload your file directly to your computer.

d. Charge

This option allows you to bill your customer according to a pre-selected rate per km.

Select the trips you wish to bill for from the listing, click on **Charge**. Enter the desired rate. Select options desired such as **Exclude Personal Trips** or **Round up Trips to Nearest Kilometer** then click **Save**.



To view the created document, click on the notification icon to the top right of the screen, then click on **View** or **Download**.

If you have chosen to download the document, you can open the PDF file by clicking on the file which appears in the toolbar on the bottom left of your screen.

The uploaded file will open in another window allowing you to either print or save the file to your computer

Note: Should you wish to create a report of Allowance you must use the Reports Module to do so.

IMPORTANT NOTICE: Notifications are saved for a limited time period only. It is strongly suggested that you either print or save your documents to your computer.

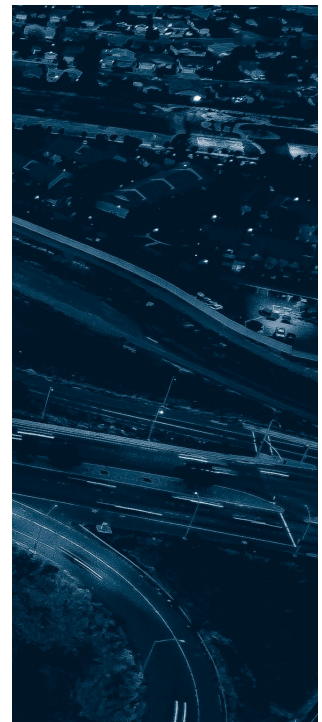
e. Frequent destinations


This option allows you to view your frequent destinations along with the number of visits per destination.

Select your desired dates then click on **Frequent destinations** in the **Options** menu.

Click on the map icon to view location. Click on the star icon to create a favorite for this destination.

FREQUENT DESTINATIONS	
1583 Rue de Gascogne, Laval, QC H7N 6C7, Canada	23 visits
1970 Rue Michelin, Laval, QC H7L 5C2, Canada	12 visits
1980 Rue de Gascogne, Laval, QC H7N 6C7, Canada	10 visits
1980 Rue Michelin, Laval, QC H7L 5C2, Canada	10 visits
1987 Rue de Gascogne, Laval, QC H7N 6C7, Canada	6 visits
1991 Rue de Gascogne, Laval, QC H7N 6C7, Canada	3 visits
1150 Boulevard de l'Avenir, Laval, QC H7N 6L2, Canada	3 visits
3035 Boulevard le Carrefour, Laval, QC H7T 1C8, Canada	3 visits
1035 Boulevard des Laurentides, Laval, QC H7G 3G8, Canada	3 visits
1310 Boul le Carrefour, Laval, QC H7N 0A9, Canada	3 visits
1760 QC-335, Laval, QC H7M 2Y4, Canada	2 visits
5260 Boulevard Robert-Bourassa, Laval, QC H7E 0A6, Canada	2 visits
5027 Boulevard des Laurentides, Laval, QC H7K 2J7, Canada	2 visits
De La Concorde / 12e Avenue (41328), Laval, QC H7N 5T1, Canada	2 visits
1995 Rue de Gascogne, Laval, QC H7N 6C7, Canada	2 visits
221 Boulevard Cartier O, Laval, QC H7N 2M9, Canada	2 visits





For any questions or additional information, we invite you to contact your ODOTRACK representative directly or to contact our customer service.

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