

Comprehensive Guide to Trip Management

1. Executive Summary

This report introduces the **Trip Management** feature, a powerful tool designed to streamline how you plan, track, and oversee all journeys within your fleet. It provides clear visibility into every trip, whether it's scheduled in advance, dispatched immediately, or completed. By centralizing trip data, enabling real-time monitoring, and offering quick actions like editing, sharing, and repeating trips, this feature helps you boost operational efficiency, reduce costs, and ensure timely, accurate deliveries. For users, it means less administrative burden and greater control over your fleet's movements.

2. Introduction

Managing a fleet can be complex, often leading to challenges like inefficient route planning, difficulties in real-time tracking, and fragmented communication with drivers. The **Trip Management** module addresses these pain points by offering a unified system for all your vehicle journeys.

The purpose of this module is to give you complete control and visibility over every trip your fleet undertakes. From the moment a journey is conceived to its successful completion, Trip Management helps you:

- **Optimize routes and schedules**
- **Assign the right vehicles and drivers**
- **Monitor progress in real-time**
- **Maintain a detailed history for analysis**

In **Trip Management**, a "Trip" refers to any planned or unplanned journey. Each trip has defined start and end points, assigned drivers and vehicles, and can include multiple stops. This module helps you log, prioritize, and monitor every stage of a trip, ensuring smooth execution and real-time visibility of all fleet activities.

3. Main Content (User-Focused Sections)

What This Means for You

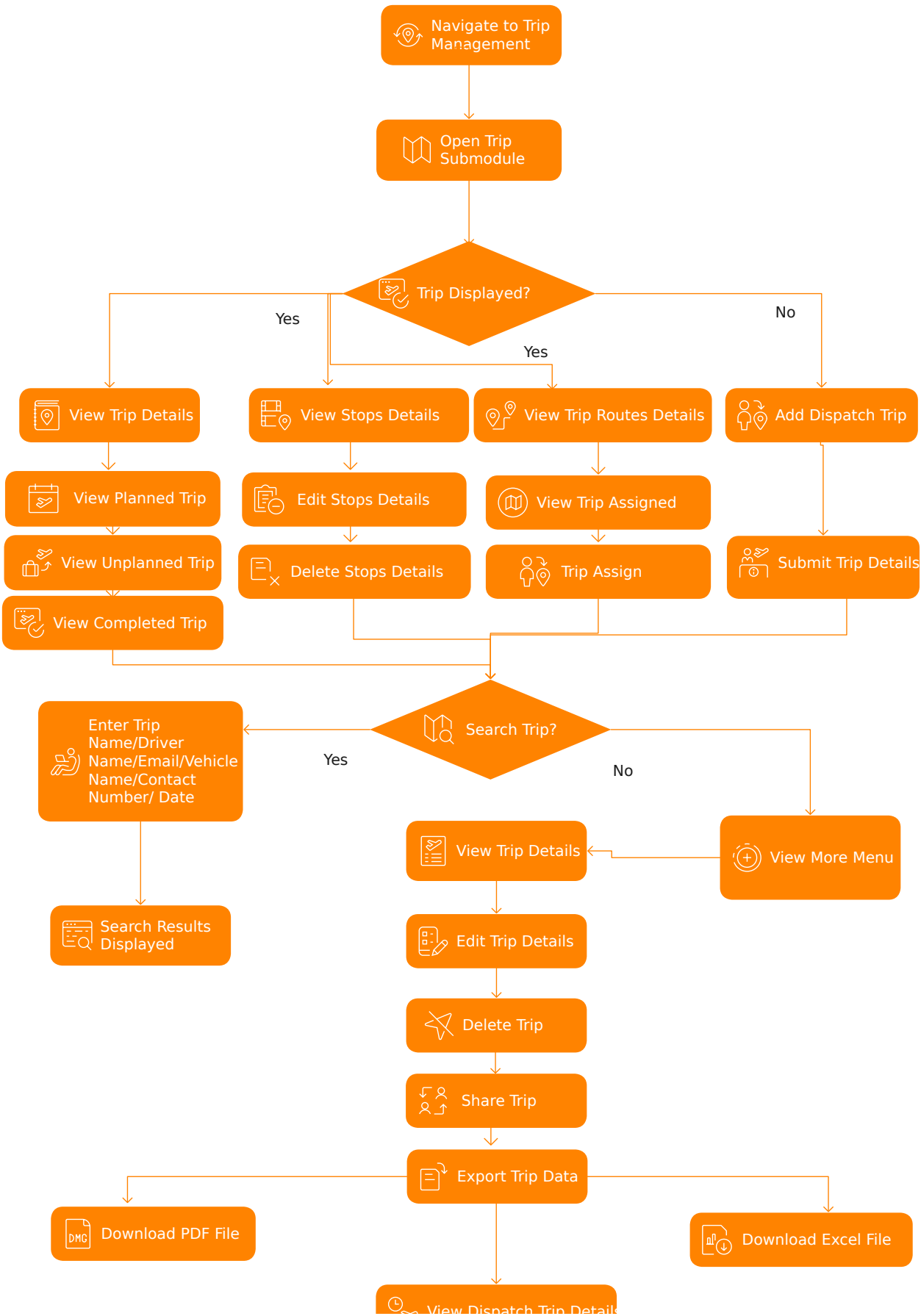
- **Less time spent on planning:** Easily create and manage trips, assign vehicles and drivers with a few clicks.
- **Peace of mind knowing your fleet's status:** Monitor trips in real-time, see planned, unplanned, and completed journeys at a glance.
- **Improved decision-making:** Access comprehensive trip details, order summaries, and stop lists to make informed operational choices.
- **Enhanced collaboration:** Share trip details effortlessly with team members or customers, ensuring everyone is on the same page.
- **Better record-keeping:** Automatically store detailed trip histories, making reporting and analysis simple.
- **Cost savings:** Optimize routes and stops to reduce fuel consumption and operational expenses.

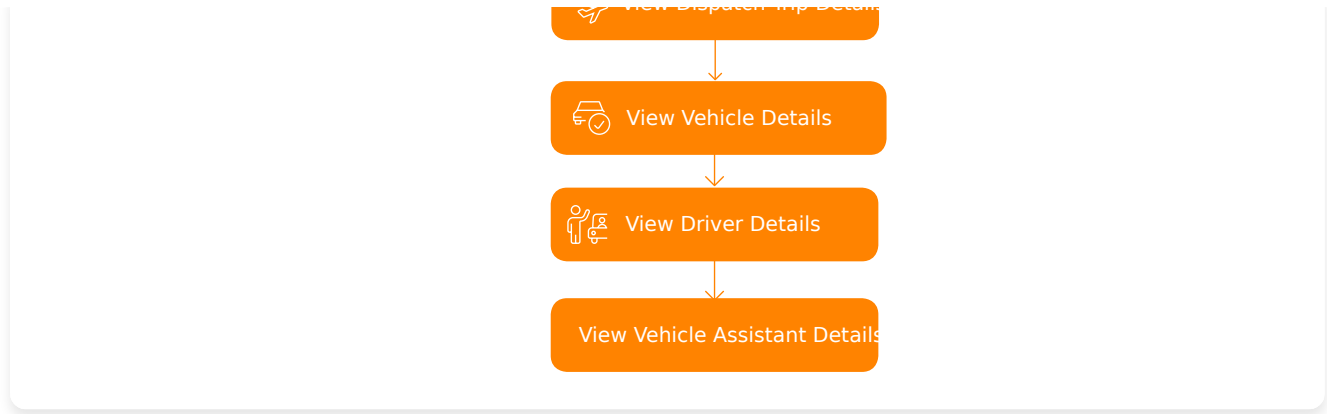
How It Works

The Trip Management module simplifies the entire trip lifecycle. You start by either creating a brand-new trip or assigning a vehicle to an existing route. Once a trip is initiated, you can track its progress, manage individual stops, and make necessary adjustments on the fly. After a trip is completed, its details are archived for future reference and reporting. The system also categorizes trips into "Planned," "Unplanned," and "Completed" for easy organization and management.

Here's a simplified overview of the workflow:

Trip Management Submodule Flowchart





Getting Started

Follow these steps to effectively manage trips:

1. Access the Trip Management Module:

- Navigate to the "Trip Management" module from your main dashboard.
- Click on the **"Trip"** submodule. This will take you to the main Trip overview page, displaying planned, unplanned, and completed trips.

2. Create a New Trip:

- On the Trip overview page, click the **" + New Trip "** button.
- You will be redirected to the "Add Dispatch Trips" page.
- **Fill out all required fields** such as Trip Name, Start Location, End Location, Trip Dates, Times, Vehicle ID, and Driver details.
- Click **"Submit"** to successfully create the new trip.

3. View Trip Details:

- From the "Planned," "Unplanned," or "Completed" tabs, locate the trip you wish to view.
- Click on the **three dots (...)** next to the trip.
- Select **"View"**.
- You will be directed to the "View Dispatch Trips" page, showing details like Map Overview, Order Summary, Stop List, Vehicle, Driver, and Vehicle Assistant information.

4. Edit an Existing Trip:

- Locate the trip you want to modify from the respective trip tab.
- Click on the **three dots (...)** next to the trip.
- Select **"Edit"**.
- You will be taken to the "Edit Trip" page where you can **modify trip details** such as Start Location, End Location, Trip Name, Dates, Times, and assign/change vehicle or driver details.
- Make your changes and **save** them.

5. Manage Trip Stops:

- Go to the **"Stop" tab** within the Trip submodule.
- To view details of a specific stop, click the **three dots (...)** next to it and select **"View"**.
- To update a stop, click the **three dots (...)** and select **"Edit"**. Here you can modify details like "Add To Point Of Interest" or adjust the stop's location on the map.

- To remove a stop, click the **three dots (...)** and select **"Delete"**, then confirm by clicking **"Delete"** in the popup.

6. Assign a Vehicle to a Trip Route:

- Go to the **"Trip Routes"** tab.
- Locate the route you want to assign and click the **"Assign"** button.
- In the "Assign Route" popup, **choose the date and vehicle**.
- Finalize the assignment.

7. Share a Trip:

- Locate the trip you want to share.
- Click on the **three dots (...)** next to the trip.
- Select **"Share"**.
- A popup will appear with a shareable link. **Copy this link** and send it to others. They can view trip details without logging in.

8. Export Trip Details:

- From the "Trip" tab or "Stop" tab, look for the **export button (right arrow icon)**.
- Click it and select either **"PDF"** or **"Excel"** to download the trip details in your preferred format.

Key Features You'll Use

- **Trip Categorization:** Organize trips into "Planned" (scheduled for the future), "Unplanned" (immediate trips, also called "Instant Trips"), and "Completed" (journeys that have finished). "Dispatch" trips are specially linked with orders from the "Orders" module.
- **Comprehensive Trip Details:** Dive deep into each trip with a "View Dispatch Trips" page that includes a Map Overview, Order Summary, Stop List (showing Stop Name, Merchant Name, Order Number, Stop Code, Duration, and ETA), Vehicle, Driver, and Vehicle Assistant details.
- **Interactive Route & Stop Management:**
 - The "Trip Routes" tab provides a list of routes with key data like Trip ID, Start/End Location, Date & Time, and actions to assign vehicles.
 - The "Stop" tab allows you to view, edit, or delete individual trip stops, complete with Pick-Up Point Trip, Pick-Up Point Code, Pick-Up Point Priority, Distance From Customer (Km), Stop Latitude/Longitude, and map views.
 - You can mark stops as "Add To Point Of Interest" during editing.
- **Advanced Search & Filtering:** Quickly find specific trips or stops by using search boxes for Trip Name, Driver Name, Vehicle Name, Contact Number, Trip Date, Start Location, End Location, Distance From Customer (Km), Pick-Up Point Code, and Pick-Up Point Priority.
- **Data Export:** Easily download trip and stop details into PDF or Excel formats for reporting and analysis.
- **Seamless Trip Sharing:** Generate a shareable link for any trip, allowing external parties to view pick-up/drop locations and map overview without needing login credentials.
- **Repeat Completed Trips:** Save time by using the "Repeat" feature to duplicate details of past completed trips for new scheduling.
- **Intuitive Map Functionality:** View trip routes and stop locations on integrated maps, with options to zoom in (+), zoom out (-), and go fullscreen.

Common Scenarios

- **Planning a Delivery Route for the Week:**

- *Your Need:* You need to set up routes for several deliveries next Monday.
- *How Trip Management Helps:* Go to "**+ New Trip**", select the "Scheduled" category, enter the Start/End Locations, add all your stops in the correct order, assign a vehicle and driver, and set the Trip Start Date to next Monday. You can enable specific days using the "Days" option if it's a recurring route.
- **Checking the Progress of an Urgent Delivery:**
 - *Your Need:* A customer called asking about an urgent package dispatched an hour ago.
 - *How Trip Management Helps:* Go to the "**Unplanned**" tab, find the trip, click the **three dots (...)**, and select "**View**". You'll see the real-time map overview, the current stop, and estimated time of arrival (ETA).
- **Adjusting a Driver's Schedule Mid-Day:**
 - *Your Need:* A driver called in sick, and you need to reassign their ongoing trip to another driver.
 - *How Trip Management Helps:* Locate the active trip in the "Planned" or "Unplanned" tab, click the **three dots (...)**, and select "**Edit**". You can quickly change the assigned Driver Name and Vehicle ID, and save the updated trip.
- **Providing a Customer with Real-time Tracking:**
 - *Your Need:* A high-value customer wants to track their order without needing to constantly call you.
 - *How Trip Management Helps:* Find the customer's trip, click the **three dots (...)**, select "**Share**", and copy the unique link. Send this link to your customer, and they can view the live trip map and progress on any device without logging in.
- **Analyzing Fuel Consumption for Last Month's Trips:**
 - *Your Need:* You want to review all trips from the previous month to identify trends in distance and compare against fuel logs.
 - *How Trip Management Helps:* Go to the "**Completed**" tab, use the date filter to select the previous month, then click the **export button** and choose "**Excel**". This will download a detailed spreadsheet of all completed trips, ready for your analysis.
- **Finding a Specific Stop by its Code:**
 - *Your Need:* A supplier is asking about a specific pick-up point and you only have the pick-up code.
 - *How Trip Management Helps:* Go to the "**Stop**" tab, and use the search box to enter the **Pick-Up Point Code**. The system will filter the list to show only the relevant stop, where you can then view all its details.

What to Expect

- **After creating a new trip:** A new dispatch trip will be successfully created and listed in the appropriate "Planned," "Unplanned," or "Dispatch" tab.
- **After viewing trip details:** The system will display all comprehensive trip information, including a map, order summary, stop list, vehicle, and driver details.
- **After editing a trip:** Trip details, such as Start Location, End Location, or assigned driver, will be updated correctly and immediately reflected in the system. The vehicle details, including type and registration, will be accurately displayed during editing.
- **When using search/filters:** The trips or stops list will instantly filter to display only the relevant information matching your search criteria (e.g., Trip Name, Driver Name, Vehicle Name, Start Location, Distance From Customer). Search results for valid pick-up points will appear within 2 seconds.
- **After deleting a trip or stop:** The selected trip or stop will be permanently removed from the system after confirmation.
- **After exporting data:** A PDF or Excel file containing accurate trip or stop details will be successfully downloaded to your device. If no data is available for export, an error message like "No data to export" will be

displayed.

- **When sharing a trip:** A unique, shareable link will be generated, allowing recipients to view trip details and the map without needing to log in.
- **When repeating a trip:** A new trip will be created based on the details of the selected completed trip, ready for scheduling.
- **When interacting with the map:** Clicking "+" will zoom the map in for a more detailed view, while "-" will zoom out for a broader perspective. The map will enter fullscreen mode when the fullscreen button is clicked.
- **Calendar interactions:** When a date with trips is selected, correct trip details will be displayed. Past dates will be unselectable.

4. Visual Elements & Supporting Information

Below is a screenshot of the "Add Dispatch Trips" page, where you initiate new trips, followed by a table detailing the input fields you'll encounter.

>

100 Vehicles Online

Add Dispatch Trip

Trip Name *

Enter Trip Name

Trip Start Location *

Enter Trip Start Location

Trip Start Time *

Trip Start Time

Driver Name

Select Driver Name

Trip Start Date *

09/29/2025

Trip Days

Select Days (Repeat, Custom)...

Monday

Select Start & End Time...

Wednesday

Select Start & End Time...

Friday

Trip Category *

Select Trip Type

Trip End Location *

Enter Trip End Location

Trip End Time *

Trip End Time

Vehicle

Select Vehicle...

Trip End Date *

09/29/2025

Tuesday

Select Start & End Time...

Thursday

Select Start & End Time...

Saturday

Field Validation Table

This table outlines the key input fields you will use when creating or editing trips and stops within the Trip Management module.

Field Name	Mandatory	Field Type	Data Type	Field Size (Max Length)	Is Editable	Description
Trip Name	Yes	Text Input	String	255	Yes	A unique and descriptive name for your trip.
Start Location	Yes	Text Input	String	255	Yes	The geographical starting point of the trip. This can be edited.
End Location	Yes	Text Input	String	255	Yes	The geographical final destination of the trip. This can be edited.
Trip Start Date	Yes	Date Picker	Date	N/A	Yes	The calendar date when the trip is scheduled to begin.
Trip End Date	Yes	Date Picker	Date	N/A	Yes	The calendar date when the trip is scheduled to conclude.
Start Time	Yes	Time Picker	Time	N/A	Yes	The specific time of day the trip is scheduled to begin.
End Time	Yes	Time Picker	Time	N/A	Yes	The specific time of day the trip is scheduled to end.
Vehicle ID	Yes	Dropdown/Text	String	50	Yes	The unique identifier of the vehicle assigned to this trip.
Vehicle Type	Yes	Dropdown	String	50	Yes	The category of the vehicle (e.g., Truck, Van, Car).
Driver Name	Yes	Dropdown/Text	String	100	Yes	The name of the driver responsible for this trip.
Vehicle Assistant Name	No	Dropdown/Text	String	100	Yes	The name of any assistant assigned to the vehicle for this trip.
Days	No	Checkbox Group	List	N/A	Yes	Allows you to select specific days (e.g., Mon, Tue) if the trip is a recurring schedule. Can be enabled/disabled.

Field Name	Mandatory	Field Type	Data Type	Field Size (Max Length)	Is Editable	Description
Stop Name	Yes	Text/Dropdown	String	255	Yes	The name of a designated stop point along the trip route.
Pick-Up Point Code	No	Text Input	String	50	Yes	A specific code associated with a pick-up location for a stop. Used for identification.
Distance From Customer (Km)	No	Number Input	Number	N/A	Yes	The recorded or estimated distance in kilometers from a customer's location to a stop. Useful for filtering.
Add To Point Of Interest	No	Checkbox	Boolean	N/A	Yes	A checkbox to mark a specific stop as an important point of interest, potentially for future reference or special handling.

5. Summary & Benefits

The Trip Management module is your central command for efficient fleet operations. By providing intuitive tools for planning, assigning, tracking, and analyzing trips, it transforms complex logistics into manageable workflows.

Key Benefits:

- **Optimal Resource Utilization:** Assign the right vehicle and driver to the right trip, ensuring your resources are used effectively.
- **Enhanced Visibility:** Gain complete insight into current, past, and future trips, including routes, stops, and real-time status updates.
- **Operational Control:** Easily create new trips, modify existing ones, or manage individual stops to adapt to changing needs.
- **Proactive Problem Solving:** Identify potential delays or issues early with real-time tracking and comprehensive trip details.
- **Improved Compliance & Record-Keeping:** Maintain detailed historical data for regulatory compliance, reporting, and performance analysis.
- **Better Customer Service:** Provide accurate ETAs and even share live trip updates with your customers, boosting their satisfaction.

In essence, Trip Management empowers you to run a leaner, more responsive, and ultimately more successful fleet operation, ensuring that every journey contributes positively to your business goals.