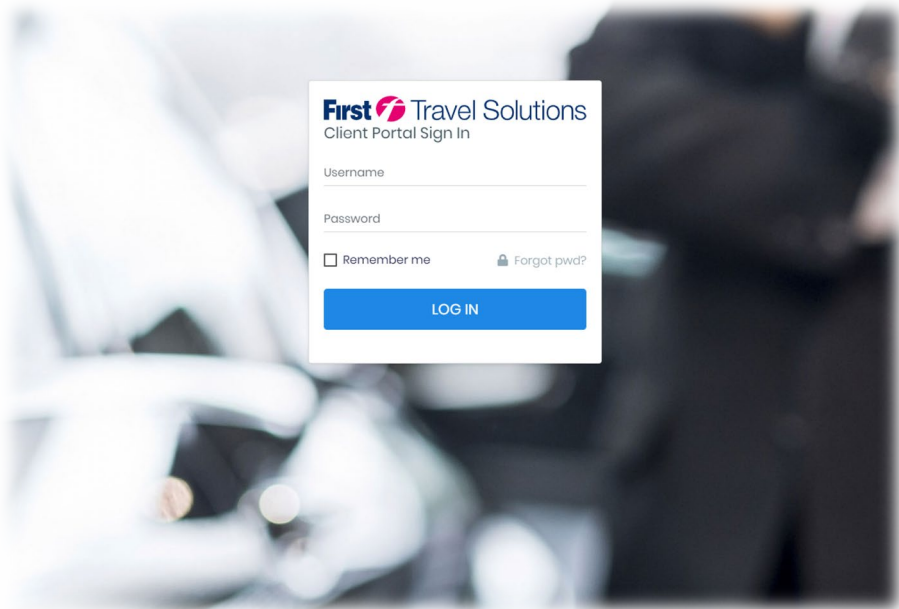


Getting Started

A quick guide to booking business travel online

Version 2.0



Welcome

The client portal is the online booking tool containing everything you need to book your UK bus, coach and taxi services simply and quickly.

Benefits

The client portal provides easy access to a number of features:

- Create new online booking requirements
- Booking order status tracker
- Real-time service information
- Management Information

Browser compatibility

This user guide has been written to assist in the use of the client portal. Screen-shots are for illustration purposes and based on a Google Chrome browser.

Other supporting browsers may alter the appearance of their layout.

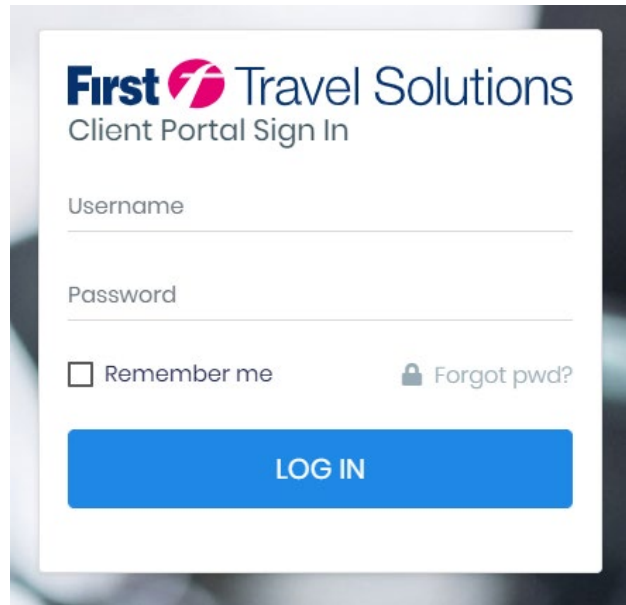
Please note: Some browser may not be supported.

For the optimum experience, please use the latest version of either Google Chrome or Microsoft Edge.

Getting started

To get started, navigate to the client portal using the URL provided below.

<https://client.firsttravelsolutions.com/>



The image shows the login page for the First Travel Solutions Client Portal. It features the company logo at the top, followed by the text 'Client Portal Sign In'. Below this are two input fields for 'Username' and 'Password'. There are also checkboxes for 'Remember me' and a link for 'Forgot pwd?'. A prominent blue 'LOG IN' button is at the bottom.

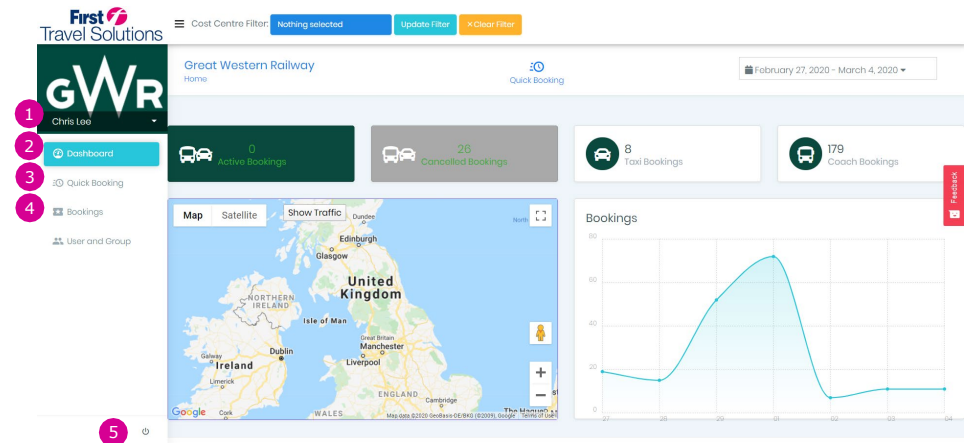
Please enter the login credentials provided to you via email from your company administrator.

The username will be the email address provided by your company administrator.

If you have forgotten your password, please use the forgotten password link to receive a new password via email.

Menu and features

The client portal includes many helpful features that have been designed to simplify your booking, making it quick and easy.



The menu

1. User Profile
2. Dashboard
3. Quick Booking
4. Bookings
5. Logout

User profile

Contains all information about your own personal details from name, email to updating your password.

Dashboard

This is the main landing page when successfully logging into the client portal, designed to provide you with the tools which will enable you to gain insights into all the live bookings.

Quick booking

This feature will only appear if you are setup as a verified booker by your company administrator.

The Quick Booking feature is a 5-step process which enables your organisation to make online bookings which are integrated with our operating system, providing a more streamlined booking process which is quick and easy.

Bookings

Bookings is separated into 5 sub menus, these have been listed below:

1. Real Time Info
2. Station View
3. Live
4. Cancelled
5. All

Please read the section on bookings for more information about each specific booking view.

Logout

Logs you out of the client portal.

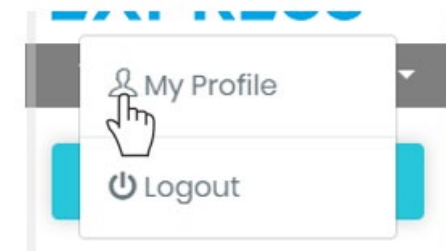
Updating your password

We recommend upon first login that you update your password by updating your profile.

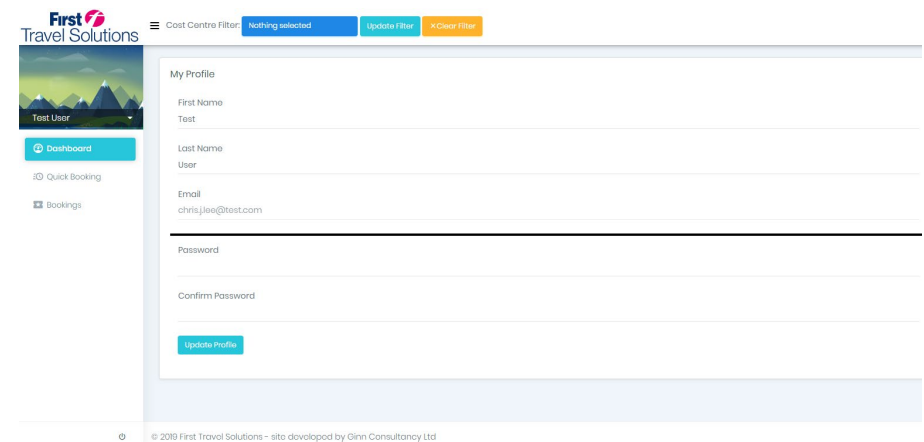
To do this, please select the down arrow adjacent to your user name.



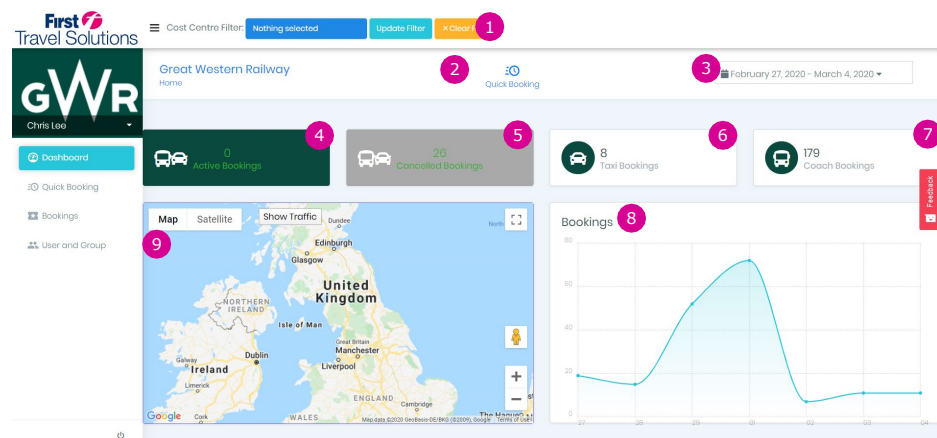
Select My Profile to navigate to the profile page.



Here you can update your password and update your profile.



The dashboard



1. Cost Center Filter
2. Quick Booking Widget
3. Date Filter
4. Live Bookings
5. Cancelled Bookings
6. Taxi Bookings
7. Coach Bookings
8. Booking Timeline
9. Map View

Cost center filter

This is a global filter for the entire site which allows you to view specific cost center bookings, making the portal tailored to your viewing needs.

Quick booking widget

This is a quick access widget to access the Quick Booking page.

Date filter

This is another global filter for the entire site which allows you to view specific dates using either the predefined date selections or custom dates.

Live bookings

This is a tile which outlines the number of live bookings in operation, with a quick access navigation search filter to view the live bookings within the bookings page.

Cancelled bookings

This is a tile which outlines the number of cancelled bookings within the date range filtered, with a quick access navigation search filter to view the cancelled bookings within the bookings page.

Taxi bookings

This is a tile which outlines the number of taxi bookings within the date range filtered.

Coach bookings

This is a tile which outlines the number of coach bookings within the date range filtered.

Booking timeline

This is a line graph visual which provides analytical insights into the number of bookings confirmed within the date range filtered.

Map View

This is an interactive map which provides insights into the live bookings. Here you can gain real time information on the service, the percentage of the scheduled service completed and the latest reported status by our operational control team.

Please refer to the vehicle tracking section of this guide for more information on how to use this feature.

Map View



1. Map layer
2. Traffic overlay
3. Enlarge map
4. Street view
5. Map zoom (In/Out)
6. Vehicle tracking

For the purpose of this guide items 1 to 5 haven't been outlined and described as these are standard features available within Google Maps.

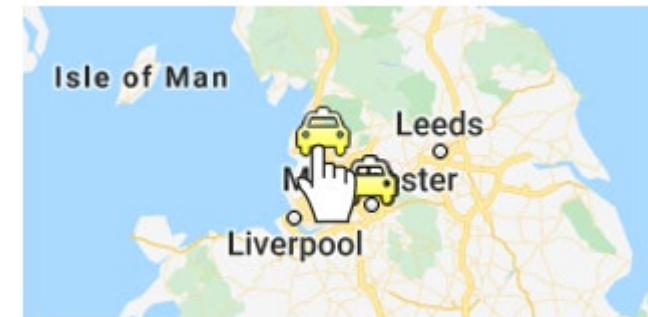
Vehicle tracking

This is a vehicle tracking identifier for a specific booking actively in operation.

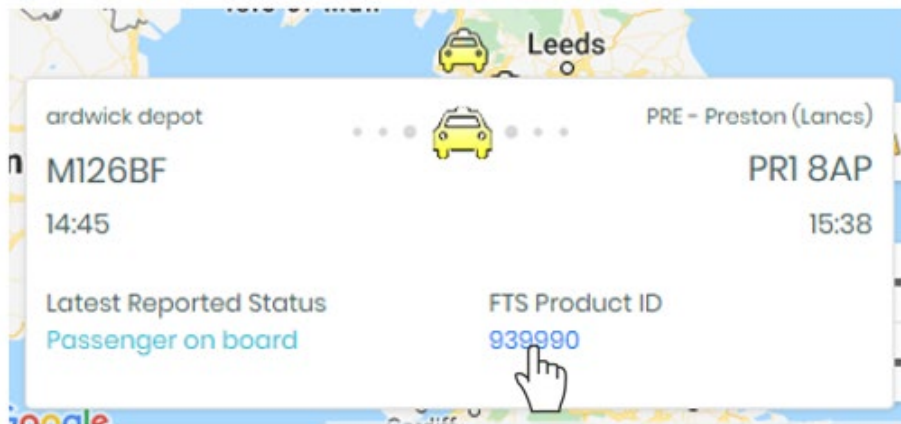
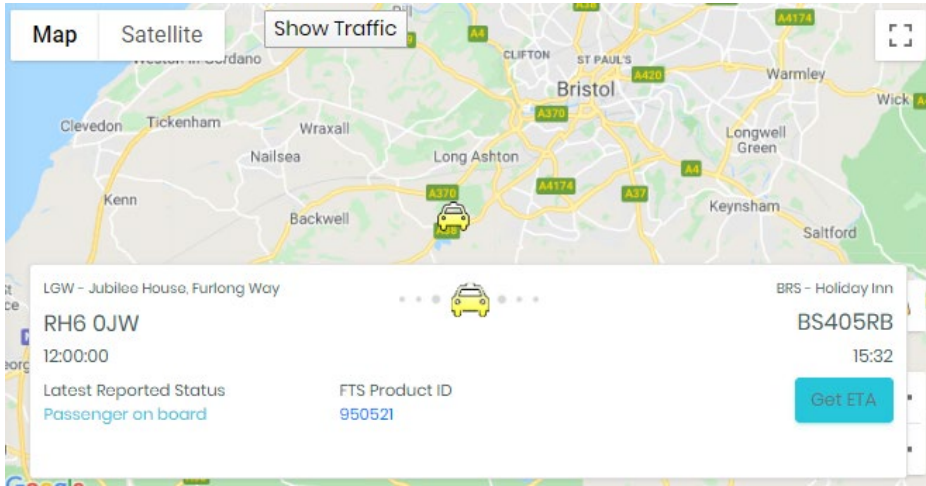
Please note: vehicles are visible on the map only when GPS data is obtained

Selecting the vehicle on the map will open the real time service information window.

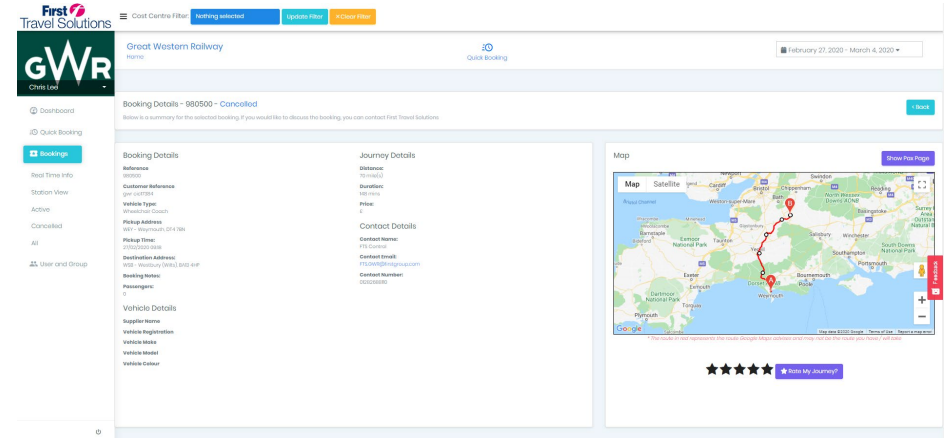
Selecting away from the vehicle on the map will close the real time service information window.



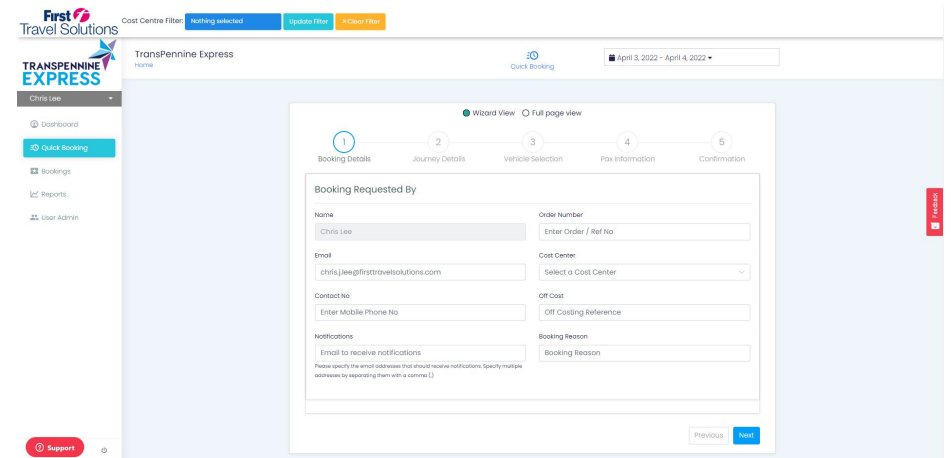
The service information outlines the scheduled booking details, the latest reported status from our control team, a quick navigation link to the booking details page by selecting the FTS Product ID and the ability to obtain an estimated time of arrival by selecting the **Get ETA**.



Selecting the FTS Product ID will navigate you to the booking details page which provides more details of the booking.



Quick bookings



The quick booking page is a 5-step wizard designed to streamline the booking process and offer an improved customer experience.

Step 1 – Booking details

The booking details screen will pre-populate the details of the user logged into the client portal.

To progress to step 2, please complete all the relevant details and select next to progress to the next stage (Journey details).

Please contact your company administrator to understand which fields are mandatory for your organisation.

Step 2 – Journey details

The screenshot shows a progress bar at the top with five steps: 1. Booking Details (highlighted), 2. Journey Details, 3. Vehicle Selection, 4. Pax Information, and 5. Confirmation. Below the progress bar is the 'Journey Info' form. It includes a 'Journey Type' dropdown menu set to 'One Way', an 'ASAP' checkbox, a 'Pickup Location' field, a 'Dropoff Location' field, a '+ VIA' button, a 'Pickup Date / Time' field with date and time pickers, a 'Passengers' dropdown set to '00', a 'Wait & Return' checkbox, and buttons for 'Special Requirements' and 'Booking Note'. 'Previous' and 'Next' buttons are at the bottom right.

The default journey type is one way, selecting this drop-down selector will provide you with 3 options:

The dropdown menu for 'Journey Type' is open, showing four options: 'One Way', 'Return', 'One Way' (highlighted in blue), and 'Hourly'.

One Way – Single Outbound Journey

Return – Outbound and Return Journey

Hourly – To be selected for standby type vehicles when only the point of origin is known.

Pickup Location

The screenshot shows a search bar with 'Manchester Piccadilly Train Station' entered. Below the search bar are three search results, each with a location pin icon: 'Manchester Piccadilly Train Station Manchester, UK', 'Manchester Piccadilly Train Station Car Park Unnamed Road, Manchester, UK', and 'Europcar Manchester Piccadilly Train Station Boad Street, Manchester, UK'. A 'powered by Google' logo is at the bottom right.

Pickup and Dropoff locations are linked to a Google address lookup to assist with identifying the location address. Start typing and the most relevant addresses will be presented to you for selection.

You can search on a street name or a post code.

Please note this is a UK wide google address lookup feature, so please take care and be sure the correct address is selected.

The screenshot shows two 'Via Location' input fields. Each field has a text input area, a placeholder 'Enter the journey via location', and a blue 'x' button to delete the entry.

Multiple vias can be added or deleted following the same location address steps as previously described.

ASAP

Pickup Date / Time

The 'Pickup Date / Time' field shows the date '22/11/2019' and two time pickers set to '17' and '29'.

Enter the journey pickup date

Date and Time pickers are available to assist the date selection with validation to prevent any selections in the past.

ASAP checkbox will automatically set your date and time with a predefined SLA period for immediate booking requests. (20-minute default)

Selecting the special requirements button will open a window that enables you to outline specific requirements for Wheelchair, Toilet and Bicycle accessible transport requirements.

 Special Requirements

Special Requirements ✕

Wheelchair Accessible

Toilet Accessible

Bicycle

Close Save

Selecting the booking note button will open a window that enables you to outline any further special instructions for your booking.

 Booking Note

Booking Note ✕



















Close Save

Step 3 – Vehicle selection

1 2 3 4 5

Booking Details Journey Details **Vehicle Selection** Pax Information Confirmation

Vehicle Selection Total No Vehicles Selected:

Standard Car 	Luggage  2	Passengers  4	Qty <input type="text" value="1"/>
Executive Car 	Luggage  2	Passengers  4	Qty <input type="text" value="0"/>
MPV 	Luggage  4	Passengers  6	Qty <input type="text" value="0"/>
Minibus 	Luggage  2	Passengers  10	Qty <input type="text" value="0"/>
Mini Coach 	Luggage  30	Passengers  30	Qty <input type="text" value="0"/>
Coach 	Luggage  40	Passengers  40	Qty <input type="text" value="0"/>

Previous Next

The vehicle selections step provides guidance on luggage and passenger capacity. Please use the plus and minus button to make the correct vehicle quantity selections based on your total passenger requirements.


Qty

-0+

Step 4 – Passenger information

1 Booking Details2 Journey Details3 Vehicle Selection4 Pax Information5 Confirmation

Passenger Information

Standard Car  Lead Pax Details

Name Mobile

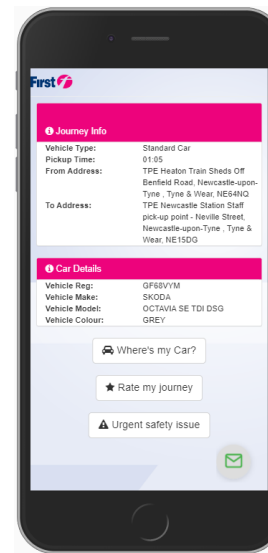
Previous Next

For each vehicle selection made within step 3, lead passenger details can be added for each vehicle requirement.

This step can be skipped if passenger details or mobile contact details are not known.

This is designed to support passenger assistance bookings, providing each leading passenger with a SMS notification 15 minutes prior to departure when a mobile number is entered.

An example SMS notification has been provided.



The is a taxi booked for you with First Travel Solutions. Click the link to view your booking online [URL](#)



Step 5 – Booking Confirmation

The final step which outlines all of your requirements to review and approve.

Submitting the booking will automatically create the booking within our operating system and send an email confirming your booking to the person making the order and any additional parties specified in the notifications field from step 1.

Booking Details

Booker Name: Test User
 Booker Email: chrisjoo@test.com
 Notifications Email: undefined
 Mobile No:
 Cost Center: DCXM - Taxi
 Order Ref:
 Booking Reason:

Journey Type: ONEWAY
 Pickup Date / Time: 30/11/2019 00:00
 Pickup Address: Manchester M60 7RA, UK
 Drop Off Address: Liverpool L1 1JD, UK

Booking Notes:

Vehicles:
 Standard Car x1

Previous Submit Booking

Booking Submitted Successfully!

Your booking has been successfully created. You will receive an email confirming your booking with details of how to view any status updates.

OK

Previous Submit Booking

Bookings

Real time service information

The real time service information screen is designed to replicate the way passengers view departure boards at railway stations, providing a view pane of the live vehicles, vehicles still to depart, late running vehicles and any cancelled bookings.

For the vehicles still to depart view pane, this will only show bookings that are due to start within the next 4 hours.

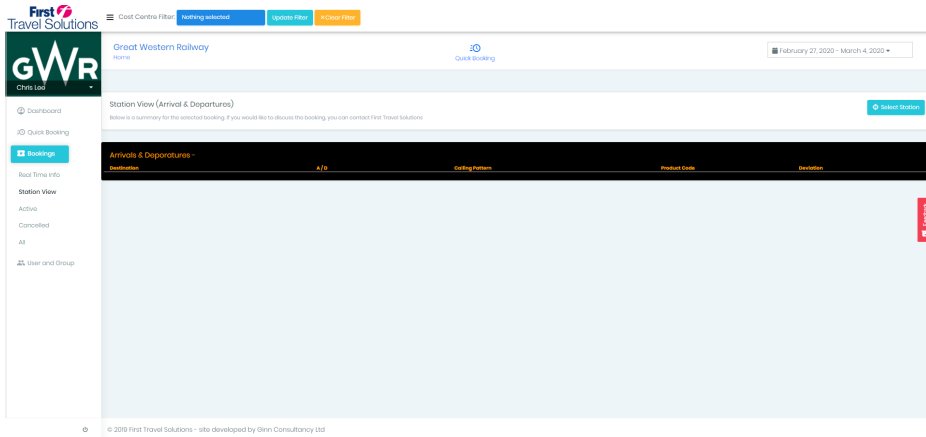
If the bookings listed within the view panes have multiple calling points, the calling pattern will alternate showing each calling point in the pattern of which the journey is scheduled.

Selecting the Product ID within each view pane will navigate you to the booking details page for each booking. For more information of the booking details page please refer to this section in the getting started guide.

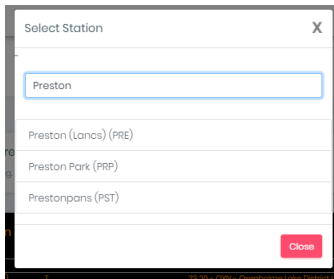
Station view

The station view service is a focused viewpoint of the bookings and services arriving, departing or driving through that specific location.

This page is currently a design concept requiring feedback from station representatives to enhance and improve this feature.



Please select a station to view the bookings and services for that particular location.

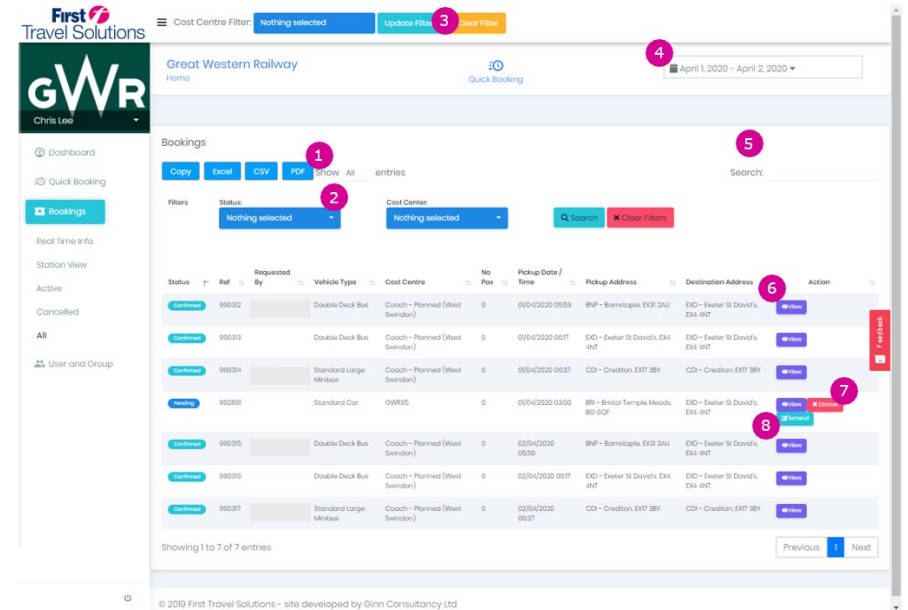


Bookings

This page enables you to search and view bookings in greater detail.

Here you can filter on a booking status, cost center and perform a search on the entire results to drill down into the bookings by using the search option.

Please note the results shown will be linked to the global date filter for the entire site, using either the predefined date selections or custom dates.



1. Export Options
2. Status Filter
3. Cost Center Filter
4. Date Filter
5. Search
6. View Booking (Booking Details Page)
7. Cancel Booking
8. Amend Booking

Booking Amendments

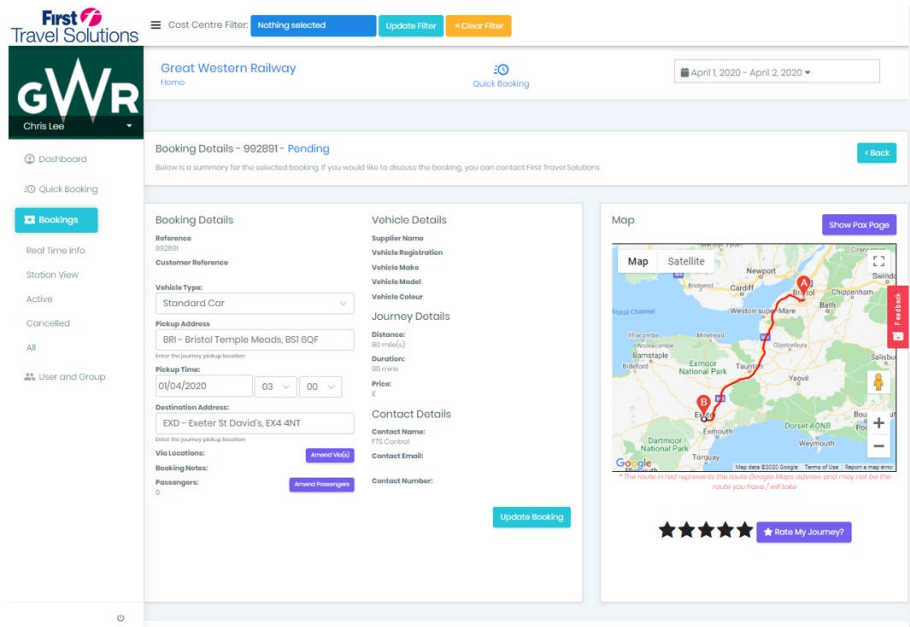
To amend a taxi booking please select the Amend action button within the booking results screen shown earlier.

Amendments are only available up until 4 hours prior to pick-up time. If you are within the 4-hour notice period, then the amendment button is unavailable.

To amend any taxi type bookings within this notice period, please contact our 24/7 control team with the relevant Product ID to help us.

Emergency 24-hour service

T: 0345 528 0270



Amendments are limited to the following fields:

- Vehicle Type
- Pickup Address
- Pickup Date & Time
- Destination Address
- Via Locations
- Passenger Details

Once the necessary fields have been amended please select the update booking button and this will update accordingly in our operating system for our control team to administer.

To amend any coach type bookings, please contact our 24/7 control team with the relevant Product ID to help us.

Emergency 24-hour service

T: 0345 528 0270

Booking Cancellations

To cancel a taxi booking please select the Cancel action button within the booking results screen shown earlier.

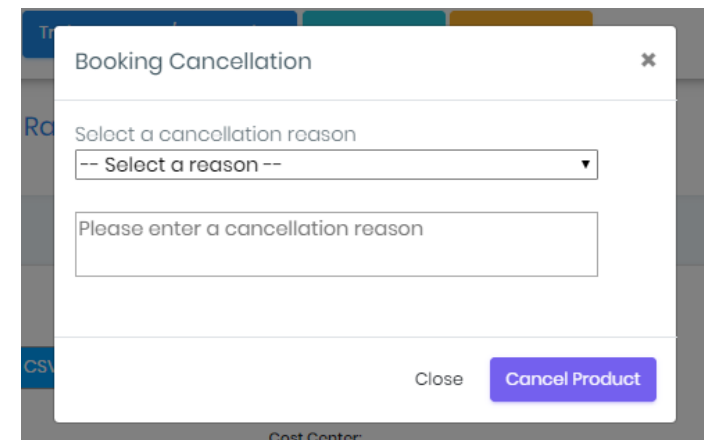
Cancellations are only available up until 10 minutes before the pick-up date and time. If you are within the 10-minute notice period, then the cancellation button is unavailable.

To cancel any taxi type bookings within this notice period, please contact our 24/7 control team with the relevant Product ID to help us.

Emergency 24-hour service

T: 0345 528 0270

Upon selecting the cancellation button, you will be prompted with a booking cancellation reason. Please select the most appropriate reason and any supporting notes.

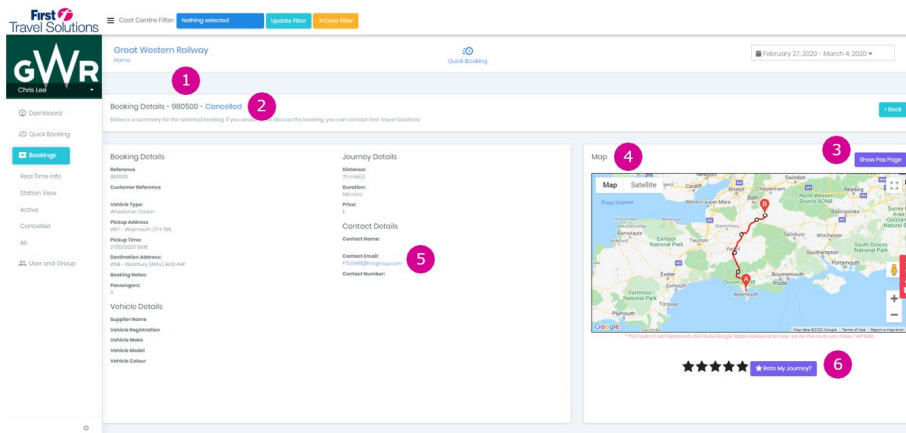


To cancel any coach type bookings, please contact our 24/7 control team with the relevant Product ID to help us.

Emergency 24-hour service

T: 0345 528 0270

Booking details page



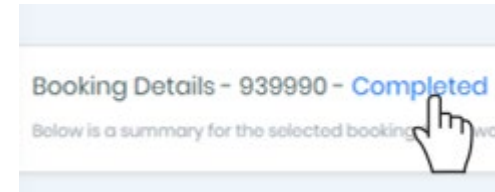
1. FTS Unique Product ID (Booking Reference)
2. Booking Status & Order Tracker
3. Passenger Portal View
4. Planned vs Actual Route Map (**GPS Tracking required**)
5. Contact Details (Amend Booking)
6. Customer Feedback Reviews

FTS unique product ID (booking reference)

This is the unique product reference which will help to identify the booking. Please use this number when contacting us to help us improve resolution time for any query you may have.

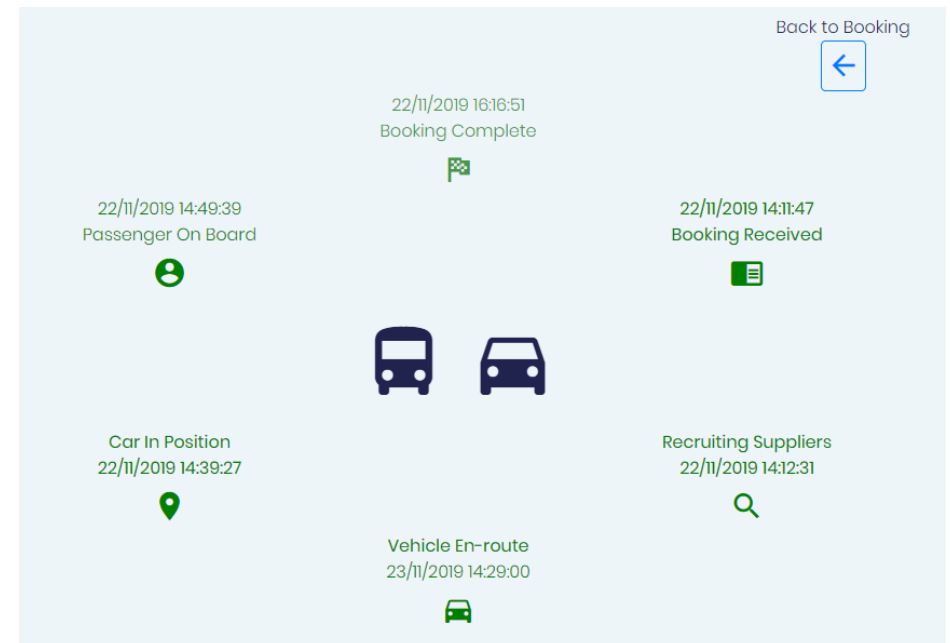
Booking status & order tracker

This is the status of the booking which includes an interactive link, when selected will open the order status page where an audit log of the order is presented.

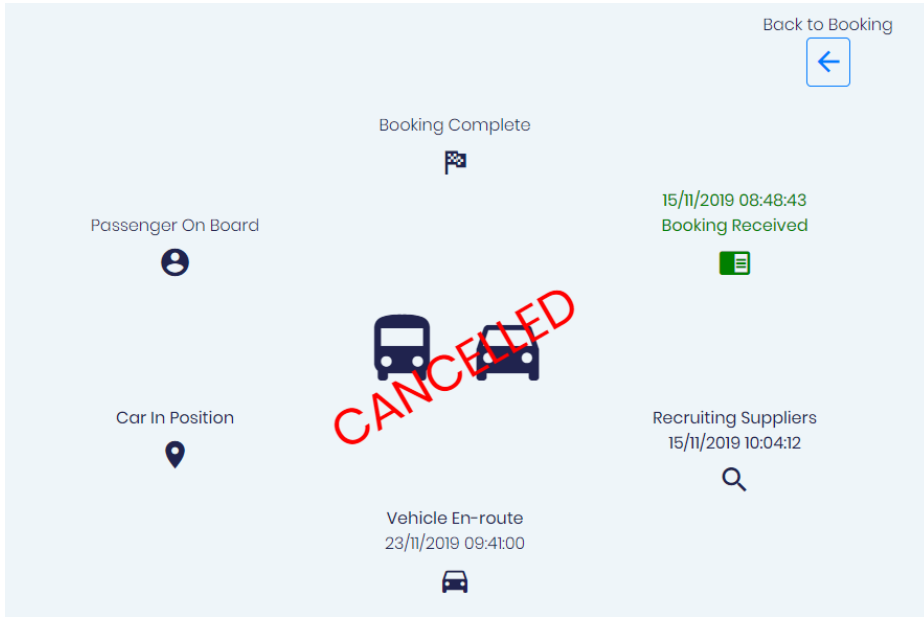


The order status tracker provides you with an overview of the booking timeline, indicating each significant stage of the booking with date and timestamps for each action throughout the booking lifecycle.

When a status is pulsing, this indicates the current stage of the booking.

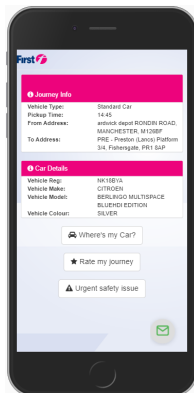


A cancelled status example has been provided for reference.



Passenger portal view

Selecting this button will open up a new tab within your browser, enabling you to view the passenger portal for this unique booking.



Please provide lead passenger mobile phone numbers for all bookings that require SMS notifications.

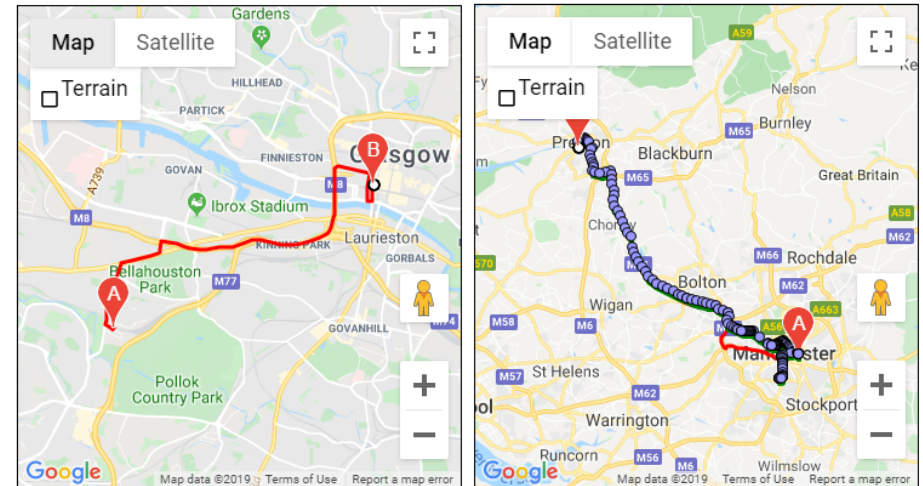
Instructions on how to use the Passenger Portal are available, please contact us if you require more information.

Planned vs actual route map

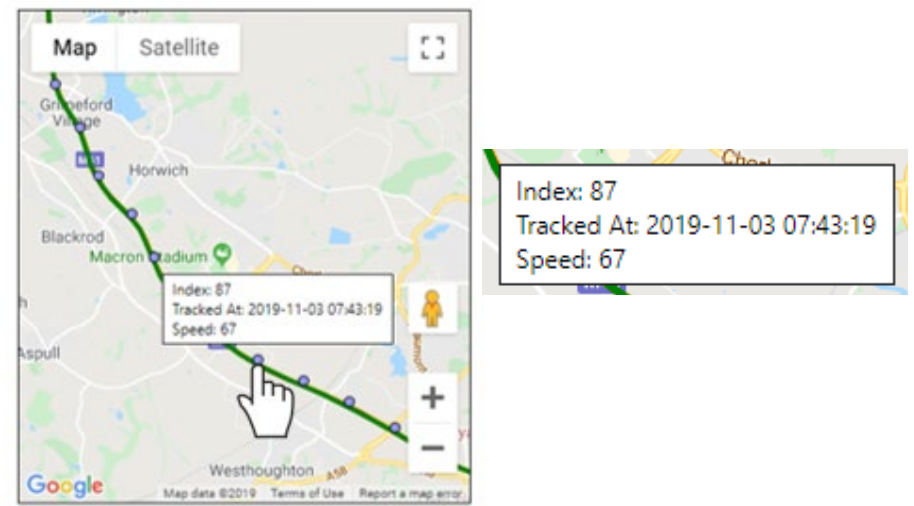
The map outlines the planned route for the booking.

The route in red represents the route Google Maps advises and may not be the actual route taken by the driver.

The route in green represents the route the driver has taken. This will only be visible when a booking has GPS data obtained.



Hovering over a GPS waypoint will provide the GPS index which includes the date and timestamp and the speed of travel recorded (if available).



Get in touch

Whilst there are online help tools throughout the client portal, we understand that it's often easier to speak to us.

You can contact our support team using the email address below:

E: clients@ftssupport.zendesk.com

Important contact information

Emergency 24-hour service

If you have more complex booking requirements and/or you wish to speak to one of our business representatives, you can contact the specialised teams as follows:

E: fts.control@firsttravelsolutions.com

T: 0345 528 0270