

Getting Started with TripMaster

This is a step-by-step guide to setting up your new database, and with each step is a link to a video explaining each topic. *Please perform these steps and videos in order*—they build upon each other. We recommend that you complete each step in your new database before moving on to the next video in order to best understand the software.

You may go back and review them in any order after completing the initial process. Before we get started, here are a few items you will need to know:

Route - A Route is the combination of a vehicle, driver, and riders.

Ride - Also called a *Reservation*. A ride is a single rider going from point A (getting on the vehicle) to point B (leaving the vehicle.) The terms "Route" and "Ride" are not interchangeable.

Time - All time entered in Trip Master is in *military time* (24-hour) format.

These videos are part of TripMaster's online training program. As a CTS customer, you will have access to the entire set of online tools, including in-depth training of all features and options. Happy training!

Step One: Logging into your database

Trip Master is a web-based program that you can access from any computer. To access your database, click the link below and log in with the information CTS has provided for this purpose. <https://app.tripmastersoftware.com/>

Once you log in, you will be taken to the *Daily Schedule* screen. Below is an image of a typical Daily Schedule. Yours will be blank at first, but we will fill parts of it in during this tutorial.

The screenshot shows the TripMaster web interface. At the top, there are navigation tabs: Common Tasks, Master Pages, Reports, Fixed Routes, Billing, Utilities, Vehicle Maintenance, Bus Management, User Profile, and Help. Below the tabs, there's a search bar and a date selector set to 04/26/2024. The main content area is divided into two sections. The top section is a table with columns: Status, Sync, Route #, Description, Available Times, Scheduled Times, Driver, Vehicle, and Mob. The bottom section is a table with columns: Status, Name, From, Pickup, Pickup Location, To, Dropoff Location, Dropoff, Priority, Mob, Acct, Will Call, and Direct Drive. The interface also includes a sidebar with icons for Daily Schedule, Route Validation, Subscription Routes, New Reservation, Notes, and Admin Notes.

Status	Sync	Route #	Description	Available Times	Scheduled Times	Driver	Vehicle	Mob	Warnings
Not Validated	2		Chris Denning	08:00-16:00	08:00-16:00	Denning, Chris - 13	BU52	WC	
Not Validated	3		John Doe	08:00-17:00	08:00-17:00	Doe, John - 1234	CAR1	WC	1 warning(s)
Not Validated	4		Tim Burton	08:00-17:00	08:00-17:00	Burton, Tim - 1243	WAN1	L	
Not Validated	5		Emily Bulard	08:00-17:00	08:00-17:00	Bulard, Emily - 5768	BU51	WC	
Not Validated	6		John Smith	08:00-17:00	08:00-17:00	Smith, John - 4785	CAR1	WC	1 warning(s)

Status	Name	From	Pickup	Pickup Location	To	Dropoff Location	Dropoff	Priority	Mob	Acct	Will Call	Direct Drive
<input type="checkbox"/>	No Status	Pre-Trip	08:00				08:15		00:00	00:00	N	
<input type="checkbox"/>	No Status	Post-Trip	16:45				17:00		00:00	00:00	N	

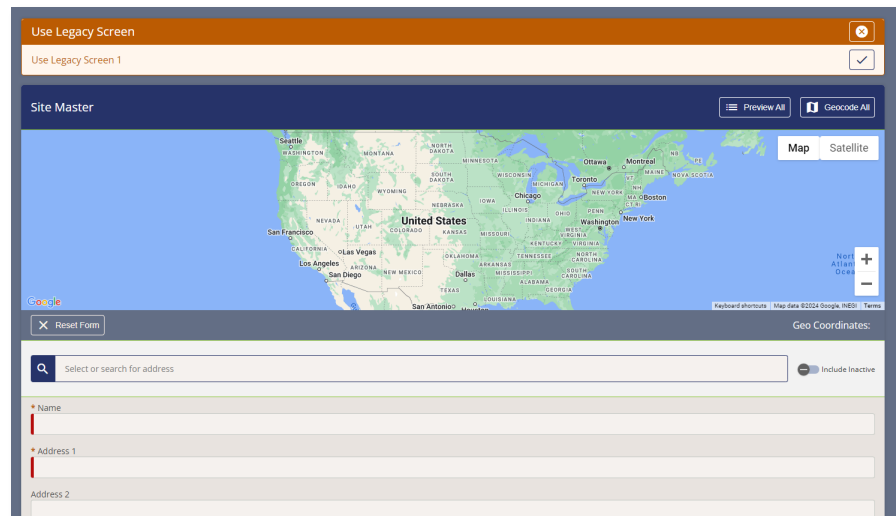
Status	Name	From	Pickup	Pickup Location	To	Dropoff Location	Dropoff	Priority	Mob	Acct	Will Call	Direct Drive
<input type="checkbox"/>	Not Validated	Tohaikovsky, Pyotr	00:00	Raleigh, NC 27610	Meymandi Concert Hall 2 E South St	Raleigh, NC 27601	09:00	09:00 Drop	CA, S	MIK	N	4.73
<input type="checkbox"/>	Not Validated	Vaughan, Steve R.	08:15	Raleigh, NC 27615	Dr. David B. Greenlee 1018 Oberlin Rd	Raleigh, NC 27605	08:45	08:45 Drop	BL, A	CRD	N	8.11
<input type="checkbox"/>	Not Validated	Adams, John	08:30	Raleigh, NC 27603	Wake County Justice Center-300 S Salisbury St	Raleigh, NC 27601	09:00	09:00 Drop	S	CRD	N	3.22
<input type="checkbox"/>	Not Validated	Jefferson, Thomas	08:45	Raleigh, NC 27601	Senior Center-The Atlantic Lounge	Raleigh, NC 27604	09:00	09:00 Drop	BL, A	CRD	N	0.88
<input type="checkbox"/>	Not Validated	Brady, Tom	09:00	Raleigh, NC 27607	PHC Arena-1400 Edwards Mill Rd	Raleigh, NC 27607	09:30	09:30 Drop	WC	PP	N	4.11
<input type="checkbox"/>	Not Validated	Jones, Adam	09:45	Raleigh, NC 27608	Kinsy Krome-549 N Person St	Raleigh, NC 27604	10:15	10:15 Drop	WC	MIK	N	2.09
<input type="checkbox"/>	Not Validated	Shuback, Dave	11:00	Cary, NC 27513	C. Grace-407 Glenwood Ave	Raleigh, NC 27603	11:30	11:30 Drop	BL, A	CRD	N	9.59

Step Two: Master pages

Your database will be built from information in the Master Pages. Below is a list of the core Master Pages necessary to build your database. *In all Master Pages, if the red error message "this field is required" appears when you click "save" on a page, you will need to fill in that field.*

1. **Vehicle Master** - [Vehicle Master \(Video\)](#)
The Vehicle Master contains a record for each vehicle in your fleet. After entering the required information, you can always return to the Master Page to edit this record.
2. **Driver Master** - [Driver Master - \(Video\)](#)
The Driver Master contains a record for each individual driver. As with the Vehicle Master, you can always return to edit records later.
3. **Account Master** - [Account Master - \(Video\)](#)
Accounts, also known as funding sources, are required when making reservations. You can enter as many accounts as necessary, and you can also edit them later.
4. **Site Master** - [How to Edit Sites - \(Video\)](#)

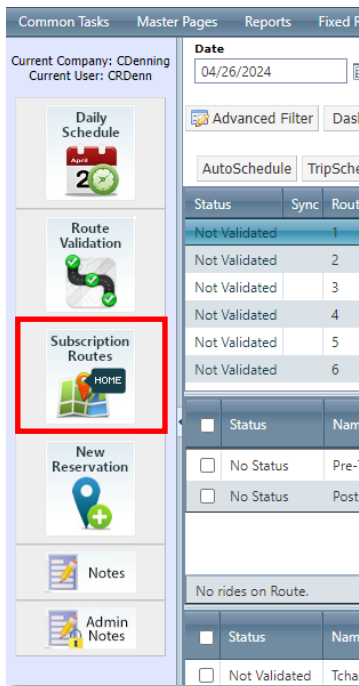
Site Creation will primarily occur when a staff member creates a reservation for a Rider. Adding the pickup and drop off locations in the reservation will automatically add them to your Site Master upon saving. The same is true for any reservation that is manually imported or reservations that come through an electronic integration. After this, Site Master is the tool you will use to additionally add, categorize, and manage addresses.



5. **Rider Master** - [How to Create a New Rider - \(Video\)](#)
The Rider Master is where you can add new Riders to your database. It also includes a record for each individual rider. From the Rider Master, you can also add one-time or recurring reservations and view past and future reservations. Riders can also be edited at any time to add or update information. A Rider Profile is also created whenever reservations are manually imported or come through the electronic integration.

Step Three: Subscription Routes

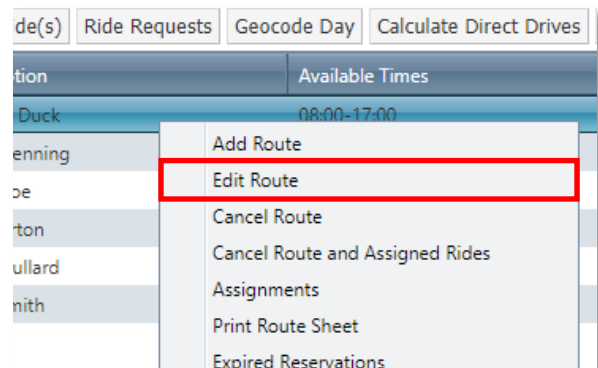
To create Routes onto which you will seat riders, you will use the Subscription Routes tool. Click the Subscription Routes button (highlighted below in red) to get started.



[How to Create New Subscription Routes](#)

You will create a separate Route for each time you change drivers or vehicles. If you don't know the exact driver or vehicle for each route, you can leave those fields blank and adjust them the day of the trip in the Daily Schedule. You can do this by right-clicking on a route on the daily schedule screen and editing the route. See the image below:

Route Description is used to identify a route quickly when dispatching. This can be the driver's name and phone number, a type of route ("Weekday Senior Center," for example) or a vehicle number.



Step Four: Reservations

Now that we have the Master Pages and our Routes set up, it's time to create and schedule some reservations for riders.

Understanding Priorities

In Trip Master there are 3 Priority Types for reservations:

Drop Off Priority - Typically, an initial trip or "A-leg," where a passenger is picked up at home or a primary residence and "dropped off" at a location or for an appointment. When the most important aspect of the "leg" of the trip is dropping a passenger off at or before a certain time, typically directly linked to an appointment time. This priority ensures that the Trip Scheduler will never create a schedule in which the passenger gets dropped off after the "drop off time".

Pickup Priority - Typically, a "B-leg," "Return Trip," etc. These additional legs traditionally involve returning the Rider back to their primary residence or in the case of a multi legged trip, taking them to multiple stops and then eventually back home.

Will-Call - No scheduled pickup time; the rider will call when ready.

Demand Reservations or Subscription Reservations

A *Demand Reservation* is a single occurrence ride, which is to say not recurring on a set schedule; for example, a person needs a ride to the pharmacy and back home.

A *Subscription Reservation* is a recurring ride or rides that occur on a set schedule. An example of this would be reservations for dialysis, a patient rides every Monday, Wednesday, and Friday, every week, from the same location, to the same location, at the same times each day.

Now that your database has been set up it is ready to start creating or receiving reservations for Riders. Once you have a days' worth of reservations in your Holding Pen on the Daily Schedule you can begin to learn how to use the Trip Scheduler or manually schedule rides on the Daily Schedule. This will be outlined in the trainings and manuals covering the Daily Schedule and Scheduling.