smartrak

Mobile Pool Booking
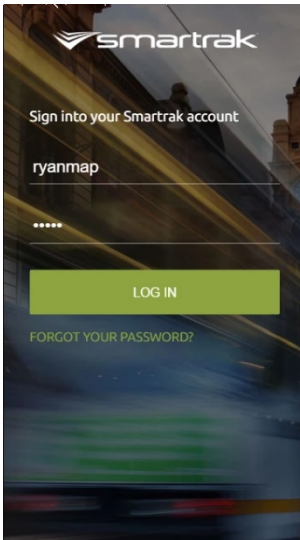
User Guide

Contents

Logging In

Any user who has Smartrak Pool Booking logon credentials can access the mobile site.

- Go to https://booking.smartrak.co.nz or https://booking.smartrak.com.au

- Enter your username and password

- If you have forgotten your password, click" FORGOT YOUR PASSWORD?" link and follow the instructions to reset your password

- Pool Booking administrators can use the Pool Booking mobile site but will not have any administration functions. They will be operating as a Driver or Passenger
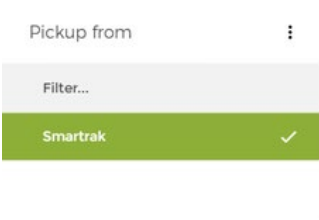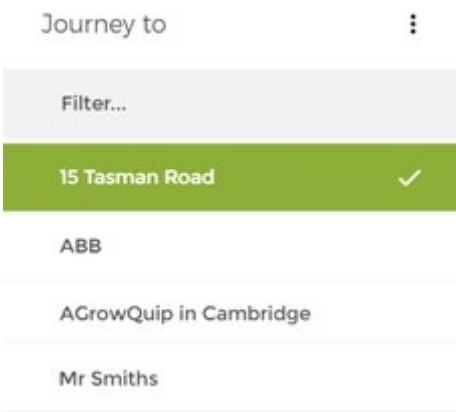
New Bookings

Creating a booking through the mobile site has some limitations:
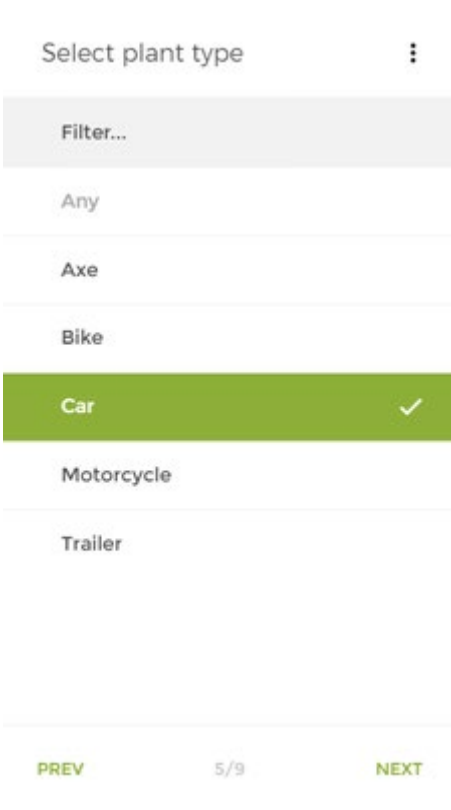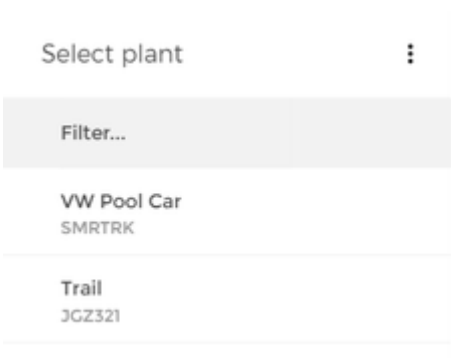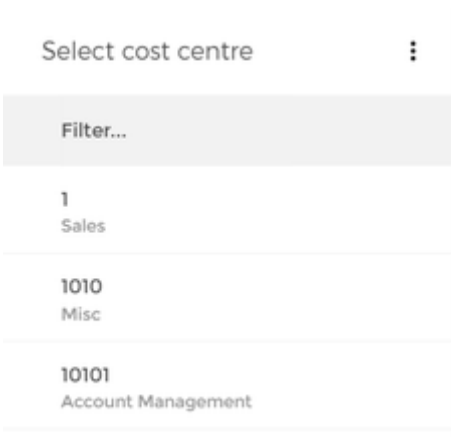
- You cannot book on behalf of someone
- You cannot book on behalf of someone
- You cannot allocate passengers
- You cannot perform recurring bookings
- You cannot specify a 4wd or tow bar requirement
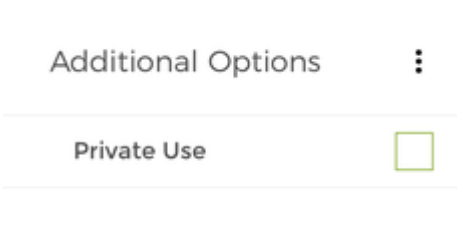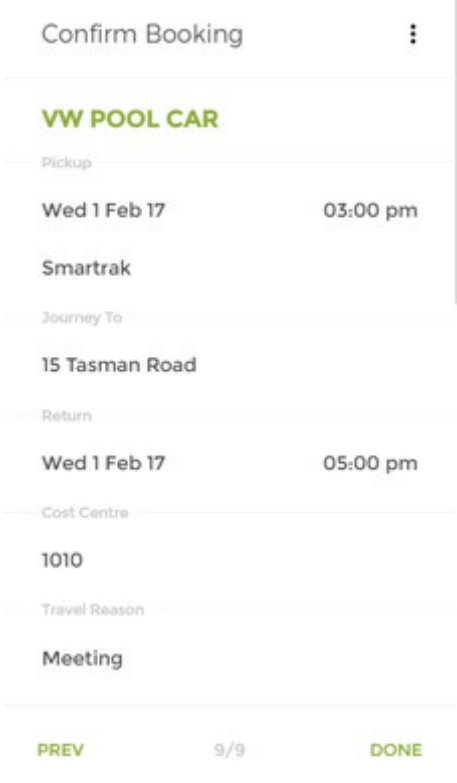
Create a New Booking
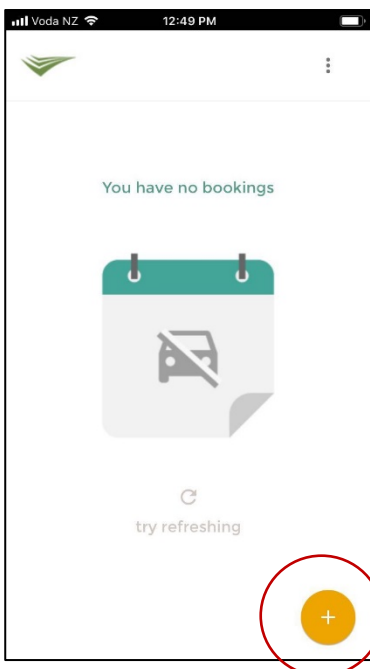
- Click the ⊕ button to start a new booking

- Follow the booking wizard to create a booking. Depending on your company setup, you may not be required to perform some of the steps below.

- You can cancel the booking creation process at any time from the menu ⋮

- At any point you can navigate back to a previous step with PREV and move to the next step with the NEXT text (when the text is green). Some steps will require you to specify a selection before you can move to the next step.

- Any step that has Filter... will allow you to filter the list down by what you type in the filter box.

Select a Start Date	Select start date ⋮ **WED 1 FEB** ‹ FEBRUARY › SU MO TU WE TH FR SA 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 PREV 1/9 NEXT	Select the Start date of the booking Click NEXT
Specify the Booking Length	Booking length ⋮ 1 hour HOUR FEB 12 1 13 14 2 15 3 PREV 2/9 NEXT	Use the pencil icon to select the start and end time for the booking. The date can be changed by selecting the date on the right. Click NEXT
Select Pick Up Location	Pickup from ⋮ Filter... Smartrak ✓	Choose one of the pick-up locations where your company's plant can be booked from. Click NEXT
Select Destination Location	Journey to ⋮ Filter... 15 Tasman Road ✓ ABB AGrowQuip in Cambridge Mr Smiths	Choose a destination location you are travelling to from the list. Click NEXT

Select Plant Type (optional)	Select plant type ⋮ Filter... Any Axe Bike **Car** ✓ Motorcycle Trailer PREV 5/9 NEXT	Select the plant type. If you only have one plant type, you will not see this step. Click NEXT
Select Available Plant	Select plant ⋮ Filter... VW Pool Car SMRTRK Trail JGZ321	Select an available plant that matches your criteria Click NEXT
Select Cost Centre (optional)	Select cost centre ⋮ Filter... 1 Sales 1010 Misc 10101 Account Management	If required by your company, select the cost centre for your trip (only a single cost centre is allowed). Click NEXT

|		
Select Travel Reason	Select travel reason ⋮ Filter... Meeting ✓	Select the reason for travel If setup, this can include entering a custom 'Other' reason Click NEXT
Additional Options	Additional Options ⋮ Private Use ☐	If booking is for private use – click the box Click NEXT
Confirm Booking	Confirm Booking ⋮ **VW POOL CAR** Pickup Wed 1 Feb 17 03:00 pm Smartrak Journey To 15 Tasman Road Return Wed 1 Feb 17 05:00 pm Cost Centre 1010 Travel Reason Meeting PREV 9/9 DONE	The final screen provides a summary of the booking. To confirm select DONE

Existing Booking

When logged in, a user can view all their related future bookings in various states.

The booking could be a one off, part of a recurring booking, and the user could be either the driver or a passenger.

View Bookings List

- Go to https://booking.smartrak.co.nz or https://booking.smartrak.com.au
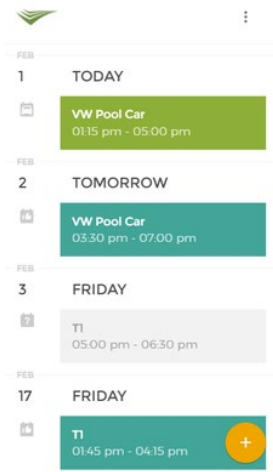
- Log on using your Smartrak credentials

- All your bookings that you are either a Driver or Passenger for will be listed

- Bookings are categorised by colour
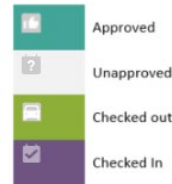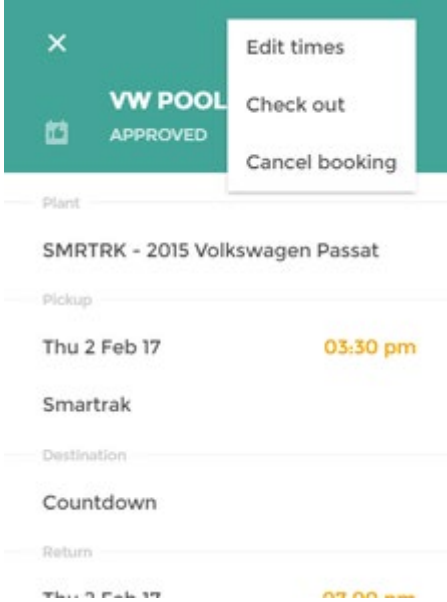

View Booking Details
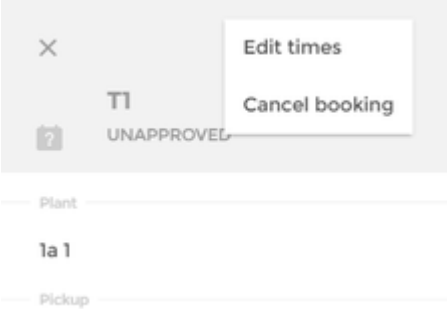
Obtain the booking details by clicking on the booking from the list. Information about the booking includes;

- the status of the booking
- the pickup date/time
- The destination
- The return date/time
- The reason for travel
- Any additional plant
- For any booking that has passengers, the user can select the phone icon to call the passenger, or the email icon to email them.

Changing Booking Status

From the Bookings Details view a booking can be edited, cancelled, checked out or checked in depending on its current status. Details of what happens when you
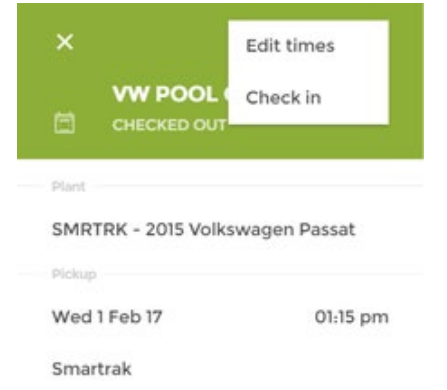
Approved		• Edit Times – see *"Edit a Booking"* • Check Out - the booking will update to being checked out, you will get the following message • Cancel Booking - the booking will be cancelled with the following message.
Unapproved		• Edit Times – see *"Edit a Booking"* • Cancel Booking - the booking will be cancelled with the following message.
Checked Out		• Edit Times – see *"Edit a Booking"* • Check In - When the booking is checked out, you can check it in, you will get the following message.
Checked In	 *No changes can be made to booking status*	• No changes can be made to booking status

Edit a Booking

Currently users are limited to only be able to edit the start and end time of bookings.

Pickup	
Fri 3 Feb 17	01:45 pm
Smartrak	
Destination	
Cambridge	
Return	
Fri 3 Feb 17	04:15 pm
Smartrak	

If you are the driver or a passenger who is also a booking administrator, you will see the Edit times menu option. Additionally, you will see the booking time(s) in **orange** if it is editable. This could be the Pickup time and/or the return time.

Note: You can only change pickup times when the booking is not checked out. You cannot change pick up or return times when a booking is checked in.

- Select the orange time next to the booking or select Edit Times from the menu

- You will see this icon whist the available times to move the booking to are checked

- A booking time can only be adjusted to when all the following conditions are met:

    - The plant it available (based on other bookings or restricted driving times)

    - The driver is available

    - Passengers are available

    - Additional plant is available

- Any period that is unavailable (due to the failure of one of more of the conditions above) will be shown as a greyed-out block in the time edit screen.

- The time editing screen will either show the start of the booking, the end of the booking, or if the booking is small enough the entire booking

- **A** Current booking time (updates if the time is adjusted)

- **B** The current booking date range (maybe a single day)

- **C** The booking block

- **D** Pickup start time

- **E** Return time

- **F** Non-available slots

- **G** Edit time toggle

- **H** Confirm changed time

- **I** Cancel editing time

- Select the pencil icon at the start of the booking to change the start time and at the end of the booking to change the end date of the booking

- The screen will adjust showing available slots (in bordered 15-minute slots) where the booking time can be moved to. The booking can be adjusted to one of the slots shown, or in to the current booking slot (in green) to pick up later or return earlier. This is indicated by the red arrow in the screen shot below.

- Simply tap the new time to change the booking time. Non available lots that are shaded in grey will have question mark which when pressed, will inform you of the reason the slot is unavailable.

- For a booking that covers multiple dates, the new date can be scrolled to, or the day (B in the above image) can be selected to auto-scroll to that day.

- To save the change in time(s) select the top right confirmation tick.

- A check will be made to ensure the change is still valid (in case any other impacting changes were made in the background).

- Once confirmed, a booking confirmed dialogue will show before returning to the booking detail screen.