

# Transport module

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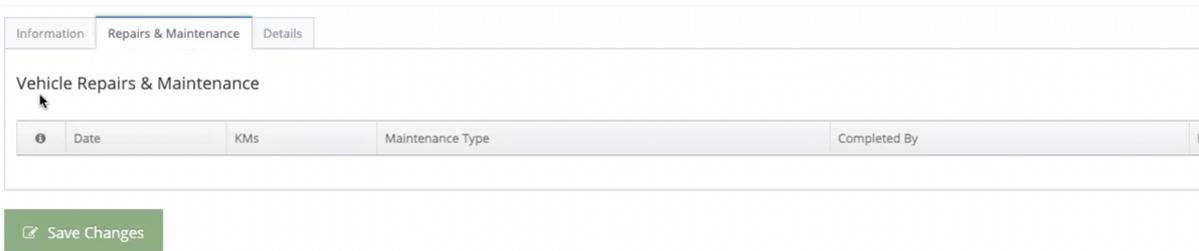
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## **Repairs & Maintenance**

To record a vehicle repair on the transport module, go to the Vehicles list and select a vehicle. Then, click on the second tab called “Repair and Maintenance”.

View Vehicle



Information	Repairs & Maintenance	Details		
Vehicle Repairs & Maintenance				
🔍	Date	KMs	Maintenance Type	Completed By

Save Changes

Click on the green button on the right-hand side that says “New Repair”. That will open a pop-up window where you can fill out the following details: “repair date”, “vehicle KMs”, “maintenance type”, “completed by” and “notes”, and create a “repair/maintenance entry”.

**Add Vehicle Repair/Maintenance**

Date:

Vehicle KMs:

Maintenance Type:

Completed By:

Notes:

**Create Repair/Maintenance Entry**

Once the repair is created, it will appear on the repairs list. To see details and add files to the repair (such as a receipt or a report), click on the “I” button on the left side and select “add files”. Browse the document you wish to upload on your device.

X

### View Vehicle Repair/Maintenance Entry

Date: <input type="text" value="24/05/2021"/>	Vehicle KMs: <input style="float: right; text-align: right; width: 90%;" type="text" value="10200.00"/>
Maintenance Type: <input style="width: 90%;" type="text" value="Windscreen"/>	Completed By: <input style="width: 90%;" type="text" value="Mats Windscreen Services"/>

Notes:

Replaced windscreen

#### Files

Add File

File	Date Added

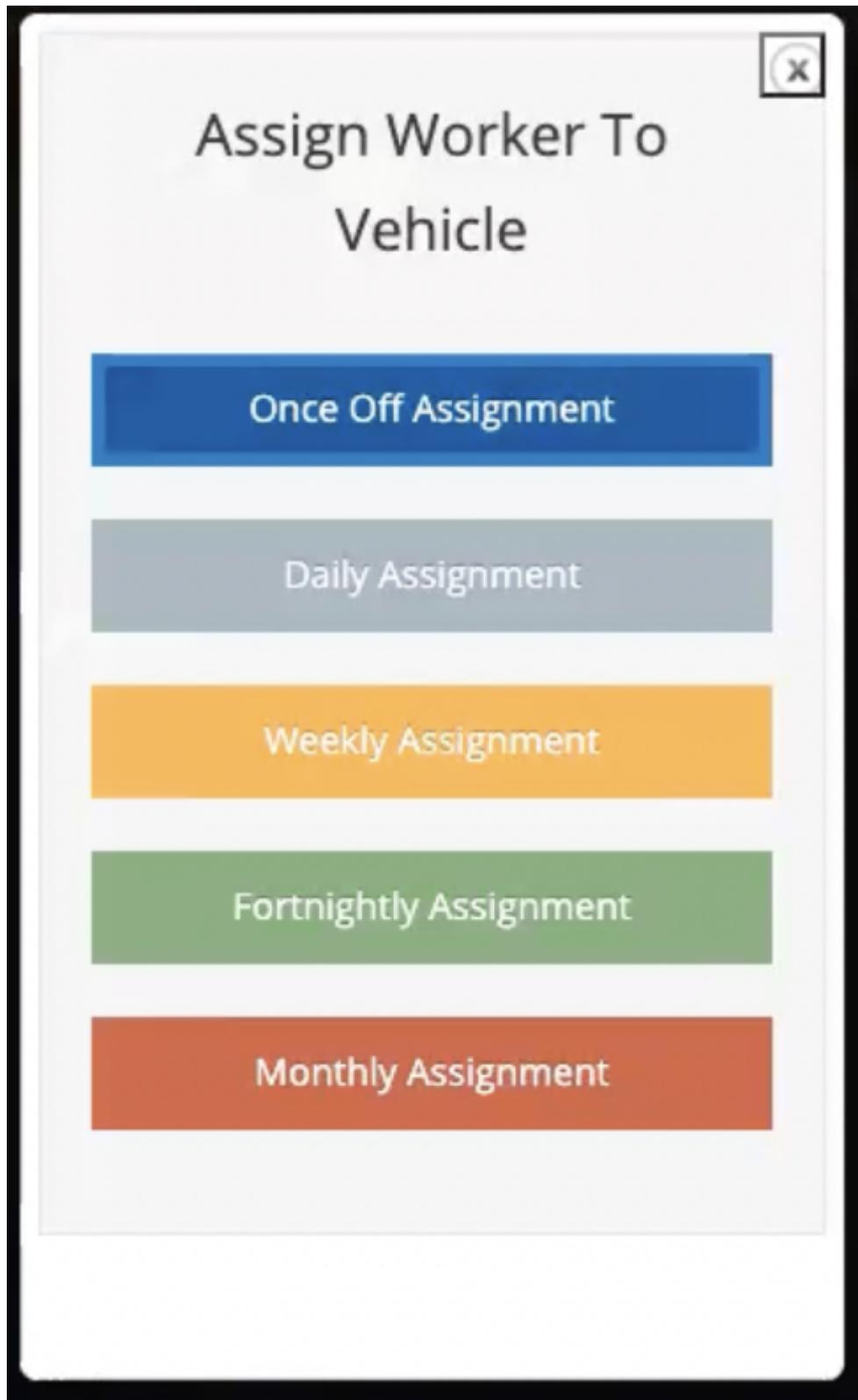
Edit Repair/Maintenance Entry

## Vehicle Roster

To manage the vehicle roster, go to "Transport" > "Vehicle roster". All your shared vehicles should appear on the calendar.

24/05/2021	
May 24, 2021 - May 24, 2021	
	Monday May 24, 2021 Mats Car
10AM	
11AM	
12PM	
1PM	
2PM	
3PM	

To assign a vehicle to a worker, just click on the “assign worker” button on the right-hand side and select how often that will occur - “once-off”, “daily”, “weekly”, “fortnightly” and “monthly”.



You can then complete the worker's name, what vehicle they will be using, date and start and end time they need the car for.



## Assign Worker to Vehicle

Worker:

David Jones (Staff) ▼

Vehicle:

Mats Car ▼

Date:

24/05/2021

Start Time:

09:00

End Time:

14:00

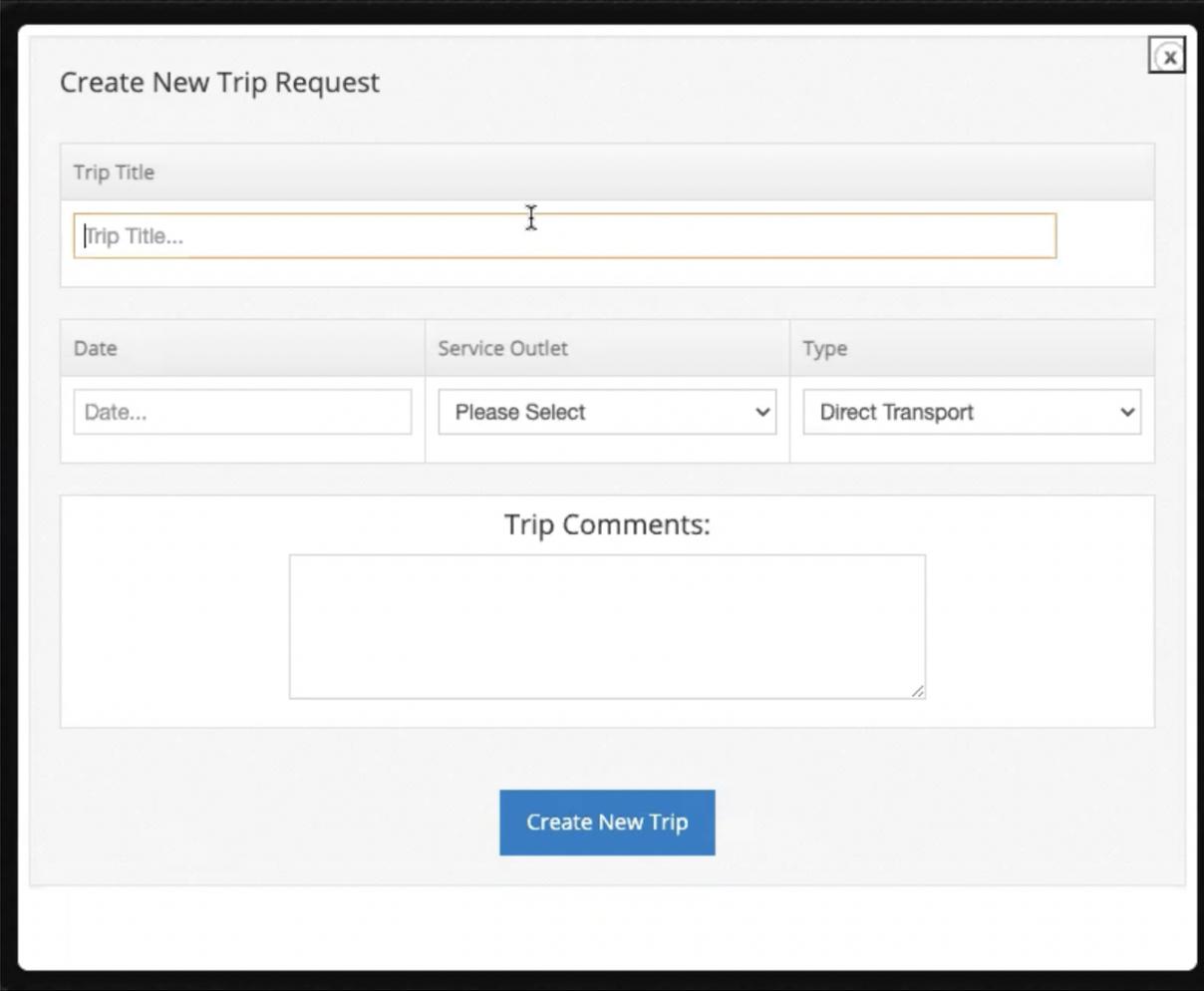
Assign Worker 

Once you've done that, the worker will be added to the calendar.

## **Weekly trip roster**

Go to "Transport" > "Trip Roster". To create a new trip, click on the button on the top right.

A pop-up window will appear with the option to add a "trip title", "date", "service outlet", "type" and "trip comments". Once you filled that out, click on "Create New Trip" to save it.



The screenshot shows a pop-up window titled "Create New Trip Request" with a close button in the top right corner. The form contains the following fields:

- Trip Title:** A text input field with a placeholder "Trip Title..." and a cursor.
- Date:** A text input field with a placeholder "Date..."
- Service Outlet:** A dropdown menu with the text "Please Select" and a downward arrow.
- Type:** A dropdown menu with the text "Direct Transport" and a downward arrow.
- Trip Comments:** A large text area with a placeholder "Trip Comments:" and a small icon in the bottom right corner.

At the bottom center of the form is a blue button labeled "Create New Trip".

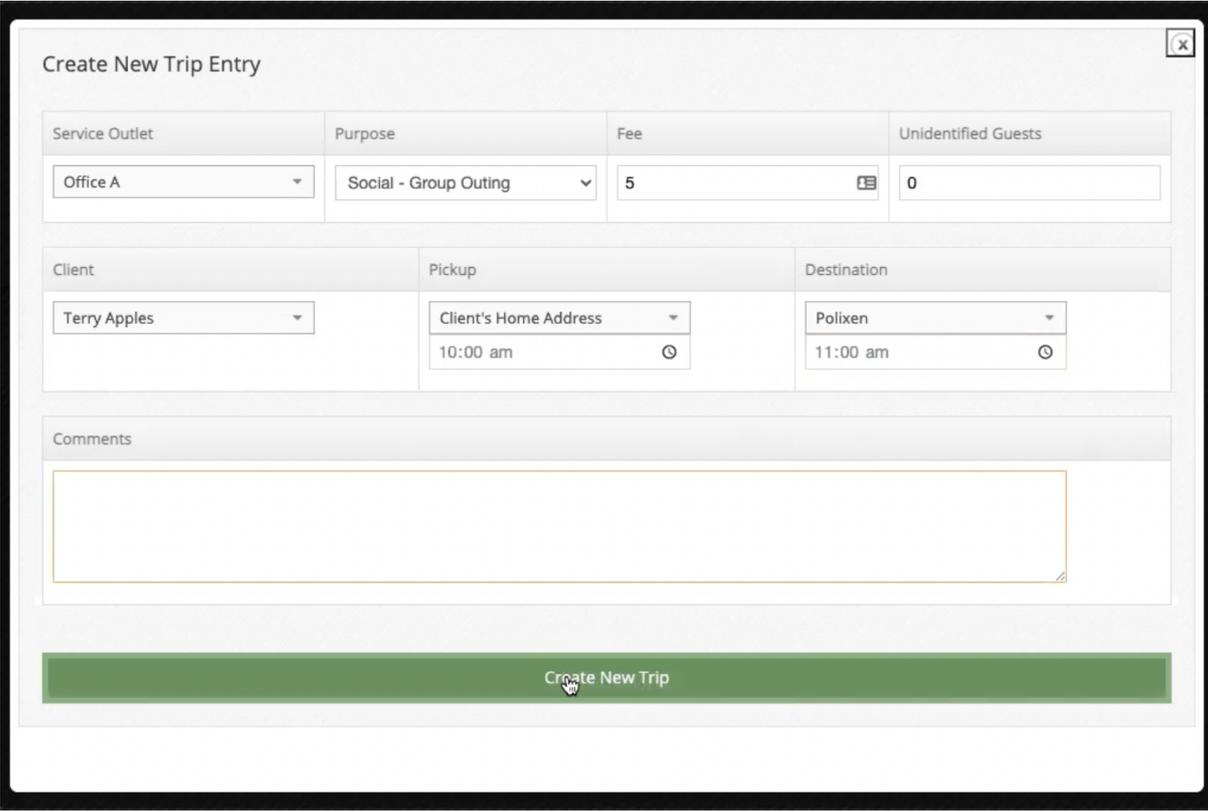
## **Assign clients to trips**

Click on the orange "i" button on the left side to view a trip.

## Weekly Trip Roster » Week 22

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Monday 24th of May 2021						
	 	Title	Type	Purposes	Clients	
		Shopping Trip	Direct Transport			

Select the “+” button under “trip entries” and add the trip information – “service outlet”, “purpose”, “fee”, “unidentified guests”, “client pick up location and time” and “destination address and time”. Then click on “Create Trip”.



Create New Trip Entry

Service Outlet	Purpose	Fee	Unidentified Guests
Office A	Social - Group Outing	5	0

Client	Pickup	Destination
Terry Apples	Client's Home Address 10:00 am	Polixen 11:00 am

Comments

Create New Trip

If you want to assign more clients to the same trip, simply copy the existing trip and change the client name and pickup details. Click on “update entry” to save.

To add a return trip, follow the same process but change the pickup and destination details.

### View Trip Entry ✕

Service Outlet	Purpose	Fee	Unidentified Guests
Office A	Social - Group Outing	5.00	0

Client	Pickup	Destination
Terry Apples	Client's Home Address 10:00 am	Polixen 11:00 am

Comments

Update Trip Entry

Remove Trip Entry

You can view all trip entries on “Trip view”

#### View Trip

**Trip Details**

Title	Service
Shopping Trip	Office A

**Trip Entries**

Service	Purpose	Client Name	Pickup	Destination	Fee
Office A	Social - Group Outing	Terry Apples	10:00 AM - Client Home	11:00 AM - Polixen	\$5.00
Office A	Social - Group Outing	Jennifer Goldings	10:15 AM - Client Home	11:00 AM - Polixen	\$5.00
Office A	Social - Group Outing	Terry Apples	13:00 PM - Polixen	14:00 PM - Client Home	\$0.00

## Assign workers to trips

Click on the green button on the right-hand side, under “trip workers”. That will open a pop-up window with the trip information.

Generally, you would only need to fill in the worker’s name and click on “Update Worker”.

Then the worker can fill out the “start time” and “start kilometres”, the “first time” (when the first pickup occur) and “first kilometres”. They can also fill out “last time” and “last kilometre” as well as “end time” and “end kilometre”.

Once the trips are saved, they will be available on the Trip Roster. If you need a hard copy of a trip, you can print it by clicking on the printer icon on the left-hand side.

## Cancel a trip

If for any reason you need to cancel a trip for a client, simply click on the “cancel” button on the right-hand side. The cancelled trip will appear in red on the “Trip Entries”.

Trip Entries

Service	Purpose	Client Name	Pickup	Destination	Fee
Office A	Social - Group Outing	Terry Apples	10:00 AM - Client Home	11:00 AM - Polixen	\$5.00
Office A	Social - Group Outing	Jennifer Goldings	10:15 AM - Client Home	11:00 AM - Polixen	\$5.00
Office A	Social - Group Outing	Terry Apples	13:00 PM - Polixen	14:00 PM - Client Home	\$0.00
Office A	Social - Group Outing	Jennifer Goldings	13:00 PM - Polixen	14:15 PM - Client Home	\$0.00

You can write the reason for the cancellation in the comments box.

The screenshot shows a 'View Trip Entry' form with the following details:

Service Outlet	Purpose	Fee	Unidentified Guests
Office A	Social - Group Outing	5.00	0

Client	Pickup	Destination
Jennifer Goldings	Client's Home Address 10:15 am	Polixen 11:00 am

Comments: Cancelled because her daughter is taking her to the destination

Buttons: Update Trip Entry, Remove Trip Entry

## View Client & Staff Trip Histories

You can easily view the **Trip Histories** of your clients and workers in Polixen. The Service History is a date-ordered list of jobs and trips assigned, with information about cancellations, times, and services provided. You can filter these histories by selecting a **start date** and an **end date** to get the data you require.

To get to the **Client's Service History**, navigate to the client's **Client Page**. If you need instructions on that, please consult our documentation on [Clients](#). Then select the **Service History** tab. Both trips and services assigned to the client will be shown.

Services Provided

Start: 10/08/2022 END: 07/09/2022 Service Status: Show All Update

Print

Service Name	Date	Service Type	Worker Assigned												
test	Friday 2nd of September 2022	<table border="1"> <thead> <tr> <th>Service Name</th> <th>Scheduled Start</th> <th>Scheduled End</th> </tr> </thead> <tbody> <tr> <td>01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night</td> <td>08:00 AM</td> <td>10:00 AM</td> </tr> </tbody> </table>	Service Name	Scheduled Start	Scheduled End	01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night	08:00 AM	10:00 AM	<table border="1"> <thead> <tr> <th>Worker</th> <th>Start Time</th> <th>Finish Time</th> </tr> </thead> <tbody> <tr> <td>Adam White</td> <td>12:00 AM</td> <td>12:00 AM</td> </tr> </tbody> </table>	Worker	Start Time	Finish Time	Adam White	12:00 AM	12:00 AM
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test	Friday 26th of August 2022	<table border="1"> <thead> <tr> <th>Service Name</th> <th>Scheduled Start</th> <th>Scheduled End</th> </tr> </thead> <tbody> <tr> <td>01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night</td> <td>08:00 AM</td> <td>10:00 AM</td> </tr> </tbody> </table>	Service Name	Scheduled Start	Scheduled End	01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night	08:00 AM	10:00 AM	<table border="1"> <thead> <tr> <th>Worker</th> <th>Start Time</th> <th>Finish Time</th> </tr> </thead> <tbody> <tr> <td>David Jones</td> <td></td> <td></td> </tr> </tbody> </table>	Worker	Start Time	Finish Time	David Jones		
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Worker	Start Time	Finish Time													
David Jones															

You can view the **Staff Job History** in the same manner, by navigating to the required **Staff Page** (Instructions in the Staff section) and selecting the **Job History** tab.