

# Using The Self Service Portal



# Client Side: Using The Self-Service Portal

The client logs in to the Ecolane Self-Service portal using the following link.

<https://agency.ecolane.com/selfservice/login> **Note:** Please replace (agency).ecolane.com with the correct agency name. A username and password is required once the clients sets the password they will be redirected to this log-in page.

**Ecolane**

**Password was successfully updated. Please use it and username 'cragucci' to log in.**

**Please log in**

Username:  (required) your Self-Service system user name

Password:  (required) your password

[✔ Login](#) [forgot password?](#)

First time here? Watch the video tutorial about how to use our Self Service Web Booking feature.

**Ecolane | HOW-TO SERIES**

**SELF SERVICE WEB BOOKING**

03:34 HD

The client can use the forgot password link to reset their password

**Tip:** The client should review the short how to video located on the log-in page

# Client Side: Using The Self-Service Portal

After logging in, the main Ecolane Self-Service Portal is available.

1. Open, canceled and completed trips are displayed on the main page. Click on a trip # to display the details of a current trip.
2. Click the [Book a new] trip link to book a new trips.
3. Click on future trips to see future trips in the system.
4. Click on past trips to see past trips you have taken.
5. Click on account details to reveal your account details.
6. Click exit to exit and go back to the main log-in page.
7. Click logout or Exit to logout of the portal



The screenshot shows the Ecolane Self-Service Portal interface. At the top left is the Ecolane logo. At the top right, it displays the date and time 'Fri Oct 28 2016, 11:33 AM' and the user's login status 'Logged in as croquod (Charles Nasanic) | logout'. Below the header, a 'Welcome to Self-Service' message is followed by the text 'You have 3 trips scheduled for today.' A table lists these trips with columns for Trip #, Status, Pickup, When, Dropoff, Actual pickup, Vehicle, From, and To. Below the table are several menu items: 'Book a new trip', 'Future trips', 'Past trips', 'Account details', and 'Exit'.

Trip #	Status	Pickup	When	Dropoff	Actual pickup	Vehicle	From	To
198726	Cancelled	7:01 AM	about 5 hours ago	-	-	22	BE ORIGINAL, 114 Maple St, Delton	3041 Morgan Rd, Nashville
198725	Cancelled	7:45 AM	about 4 hours ago	9:00 AM	-	22	BE ORIGINAL, 114 Maple St, Delton	3041 Morgan Rd, Nashville
198727	Cancelled	9:01 AM	about 3 hours ago	-	-	CTAA	BE ORIGINAL, 114 Maple St, Delton	3041 Morgan Rd, Nashville

- Book a new trip
- Future trips
- Past trips
- Account details
- Exit

# Client Side: Booking A Trip

1. After clicking the [Book a new] trip link the trips details screen appears. The client can use the Home POI link to set the from and to address as shown in section 1 & 2. From and To address is required. Also freehand typing in the address information will work.
  2. PU & DO driver notes can also be added for any trip. [Not required]
  3. A Funding and trip purpose is required and must be selected. Section 3
  4. PU up and DO date is required
  5. Time of the trip is [required.]
  6. A selection of a PU or DO is [required.]
- Note:** If a client has to be somewhere at a specific time a drop off must be selected. Click the **[Book trip]** button to book the trip.

**Please enter trip details**

**From**

1 Street number: 509 Home  
Street or location: S Broadway st (required) street or location name Select Center  
City: Hastings  
Note: Pick me up at the side door Notes to driver for pickup

**To**

2 Street number: 131 Home  
Street or location: S Jefferson st (required) street or location name Select Center  
City: Hastings  
Note: Drop me off in the front Notes to driver for dropoff

3

Funding: Lighthouse (required)  
Sponsor: (no valid options exist)  
Trip purpose: Personal/Misc (required)  
Assistant:  personal assistant will also be traveling  
Companions: 0 number of companions  
Children: 0 number of children  
Other passengers: 0 number of other passengers

Pickup or dropoff date: 10/31/2016 (required)  
Time: 09 AM : 00 (required)  
 Pickup time  Dropoff time

# Client Side: Booking A Return Trip

1. When the first leg is booked the details for that trip appears.
2. Review is needed to ensure correctness.
3. If the trip is incorrect cancel it and copy to rebook but change the incorrect information.
4. To book the return trip click the [Order return trip] button this will book the return trip.
5. Confirm the trip on the next screen.

## Buttons:

[Copy this trip]: Copies the details of a trip. Can be used for the starting point of another trip.

[Order return trip]: Creates the PU trip from the previous order.

[Cancel this order]: Cancels the displayed trip.

The screenshot shows the Ecolane logo at the top left. Below it, a green message reads "New trip accepted." The main heading is "Details for trip 202261 (Mon Oct 31 2016, 8:00 AM)". A central box contains the following details:

- Trip #:** 202261
- Ordered at:** Fri Oct 28 2016, 12:40 PM
- Status:** ■ ordered
- From:** BE ORIGINAL, 114 Maple St, Delton, 49046
- To:** 3041 Morgan Rd, Nashville, Barry Mi 49073
- Requested pickup:** Mon Oct 31 2016, 9:00 AM
- Negotiated pickup:** Mon Oct 31 2016, 8:00 AM (in 3 days)
- Current pickup estimate:** 7:45 AM (in 3 days)
- Vehicle:** CTAA
- Funding:** Lighthouse
- Trip purpose:** Social/Senior Center
- Assistant:** yes
- Companions:** 0
- Children:** 0
- Other passengers:** 0

At the bottom of the box are four buttons: "← To main page", "↑ Copy this trip", "↻ Order return trip", and "✕ Cancel this trip".

# Canceling A Trip

To cancel an existing trip log into the Self-Service Portal. Click the [Future Trips Button] from the list of trips select the trips you wish to cancel by clicking the trip #. At the bottom of the trip details page click the [cancel this trips] button, click [OK]. The trip is canceled and displays a canceled status.

**Details for trip 202261 (Mon Oct 31 2016, 8:00 AM)**

Trip #: 202261  
Ordered at: Fri Oct 28 2016, 12:40 PM  
Status: ● ordered

From: BE ORIGINAL, 114 Maple St, Delton, 49046  
To: 3041 Morgan Rd, Nashville, Barry Mi 49073

Requested pickup: Mon Oct 31 2016, 9:00 AM  
Negotiated pickup: Mon Oct 31 2016, 8:00 AM (in 3 days)  
Current pickup estimate: 7:45 AM (in 3 days)

Vehicle: CTAA  
Funding: Lighthouse  
Trip purpose: Social/Senior Center  
Assistant: yes  
Companions: 0  
Children: 0  
Other passengers: 0

[Back to future trips list](#) [Copy this trip](#) [Order return trip](#) [✕ Cancel this trip](#)

Are you sure you want to cancel this trip?

OK Cancel

Trip 202261 has been canceled.

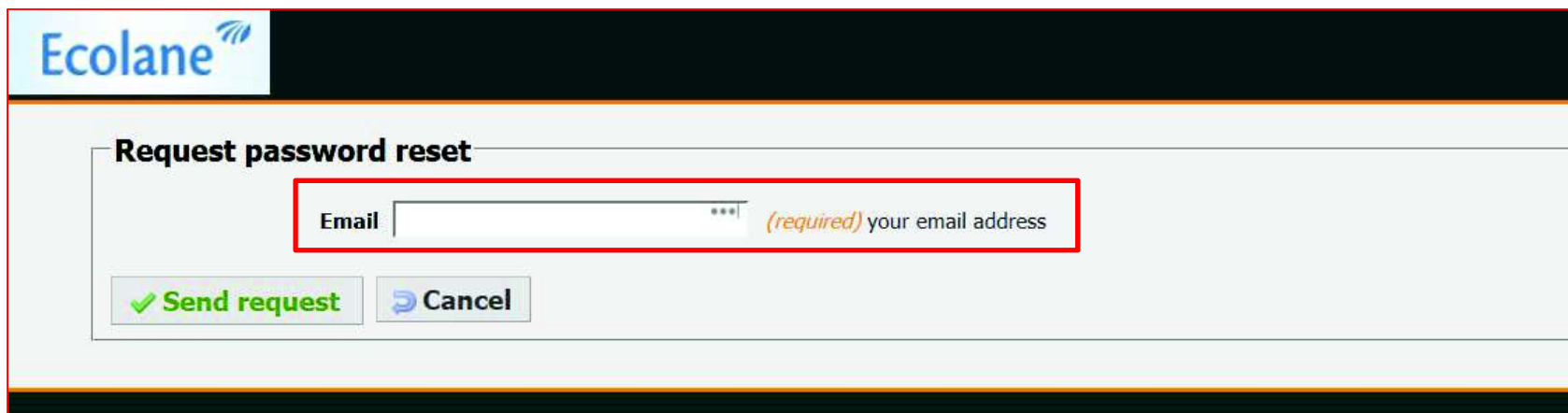
**Details for trip 202261 (Mon Oct 31 2016, 8:00 AM)**

Trip #: 202261  
Ordered at: Fri Oct 28 2016, 12:40 PM  
Status: ✕ canceled  
Canceled by: user  
Canceled at: Fri Oct 28 2016, 3:31 PM

From: BE ORIGINAL, 114 Maple St, Delton, 49046  
To: 3041 Morgan Rd, Nashville, Barry Mi 49073

# Reset Password

To reset your password click the [Forgot Password] link from the log-in page. You will receive an email with instructions, follow the link to enter a new password.



The screenshot shows the Ecolane logo in the top left corner. Below it is a form titled "Request password reset". The form contains a text input field for "Email" with a red border around it. To the right of the input field is the text "(required) your email address". Below the input field are two buttons: "Send request" with a green checkmark icon and "Cancel" with a blue circular arrow icon.

