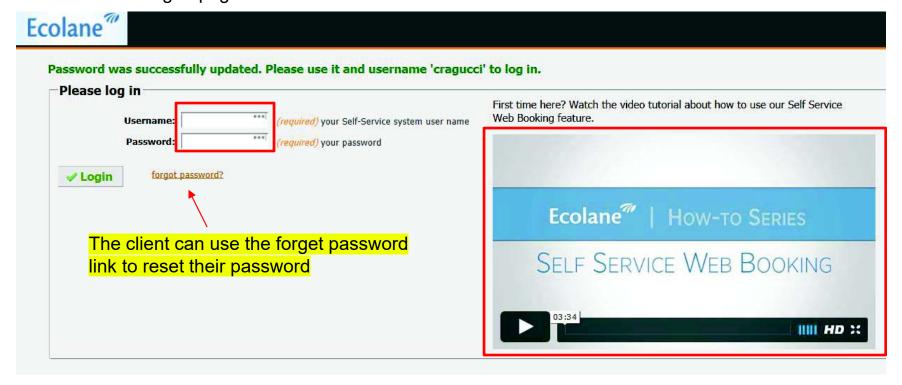# Using The Self Service Portal

Ecolane

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.
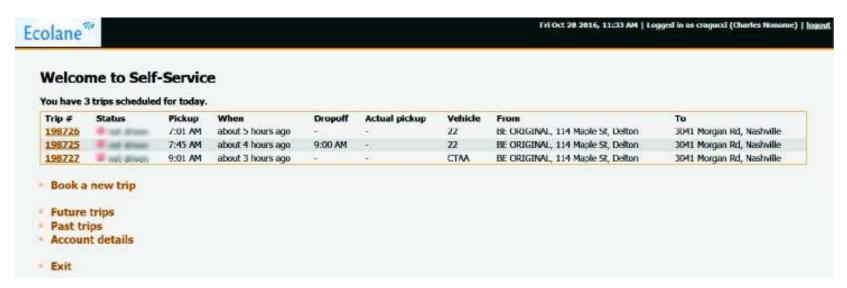

Tip: The client should review the short how to video located on the log-in page

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. Clock logout or Exit to logout of the portal

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 <u>section 1 & 2</u>. 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 <u>drop off </u>must be selected. Click the **[Book trip]** button to book the trip.
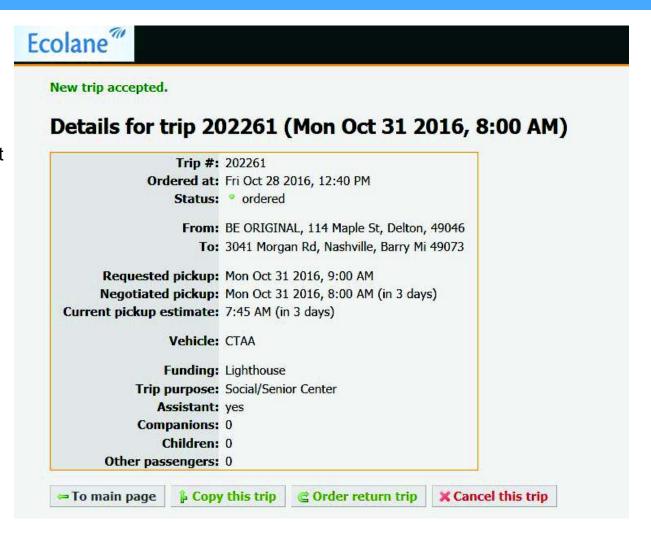
Ecolane

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.
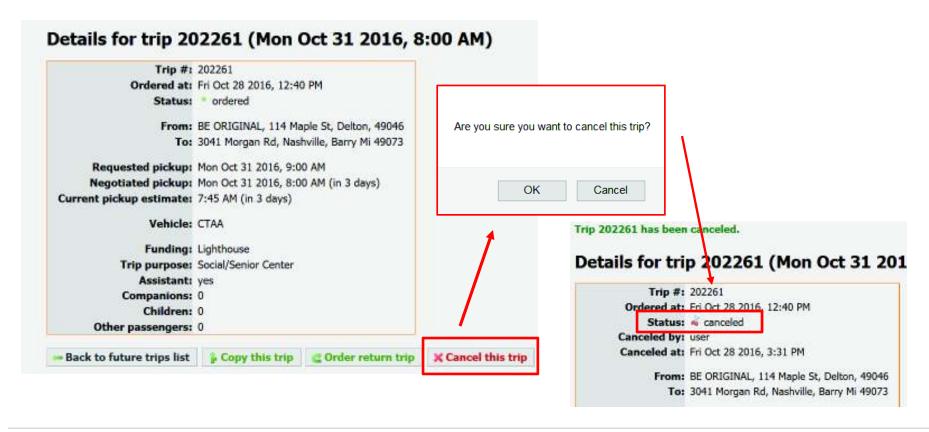[Order return trip]: Creates the PU trip from the previous order.
[Cancel this order]: Cancels the displayed trip.

Ecolane

New trip accepted.

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

← To main page   ⊩ Copy this trip   ⇄ Order return trip   ✗ Cancel this trip

Ecolane

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.

Ecolane

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.

Email

CONFIDENTIAL – DO NOT DISCLOSE