

# Using the Trip function

Last Modified on 06/11/2019 9:51 am CET

The trip panel is used to group hours and expenses on a single line. This function is extremely useful when defining customer visits etc. where you want to be able to add and remove all the costs of a trip easily.

## Pre-requisites

The trip function needs to be configured by the administrator before first usage. If you are not an administrator (you cannot access the basic data menu), please consult him/her first.

As an administrator there are two things you need to do to be able to allow people to use the trip function;

- **Setup expense routing**
- **Setup activities used in the trip function. Please note that the end user cannot manually set cost/price on activities used in the trips function, so you also need to make sure that the activities used has cost/price set (can be set on hour level).**

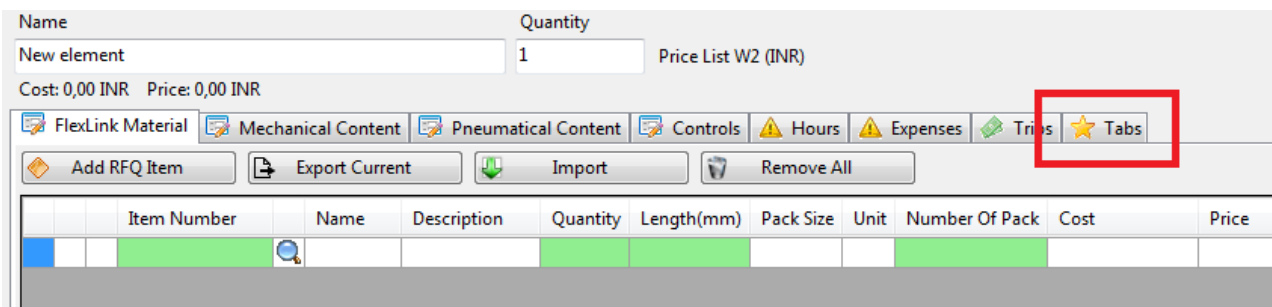
Please consult the user guide (basic data section) for more information on how to set this up.

## Creating a trip

The trip tab is not visible by default, so the first thing you need to do is to enable it.

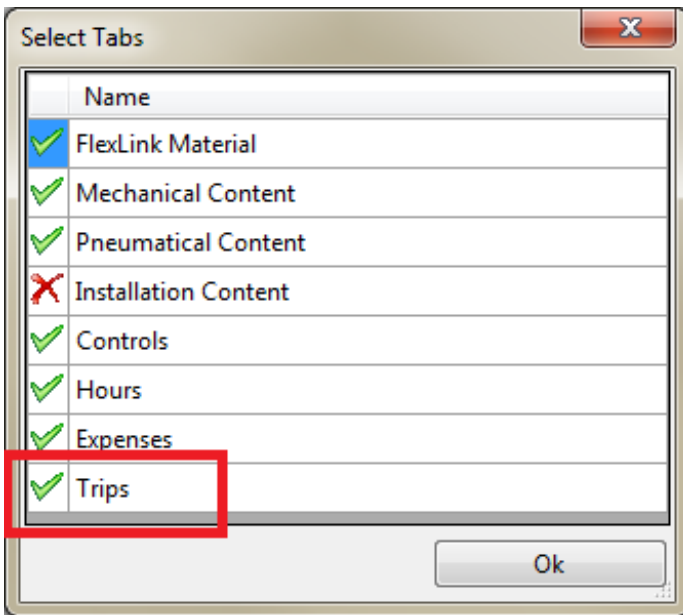
Add a new sub element to your quotation (right click on the element tree and select **Add new subelement**).

Now click on the **Tags** tab

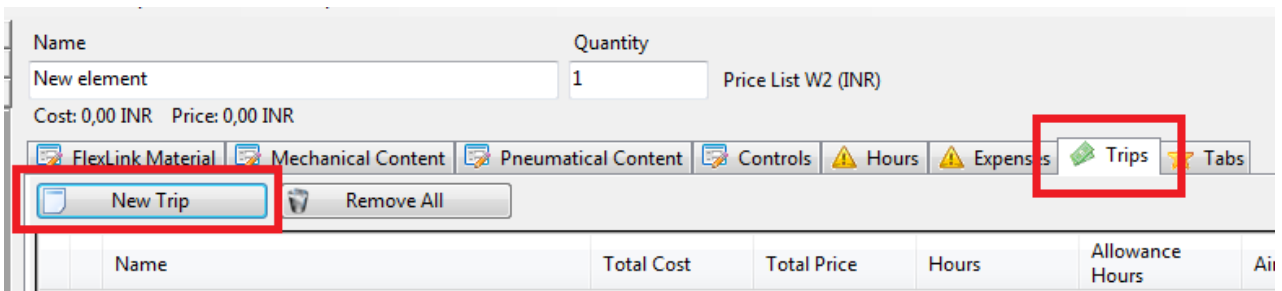


The screenshot shows a software interface for creating a new element. At the top, there are input fields for 'Name' (containing 'New element'), 'Quantity' (containing '1'), and 'Price List W2 (INR)'. Below these are 'Cost: 0,00 INR' and 'Price: 0,00 INR'. A horizontal menu contains several tabs: 'FlexLink Material', 'Mechanical Content', 'Pneumatical Content', 'Controls', 'Hours', 'Expenses', 'Trips', and 'Tags'. The 'Tags' tab is highlighted with a red rectangular box. Below the menu are four buttons: 'Add RFQ Item', 'Export Current', 'Import', and 'Remove All'. At the bottom, there is a table with the following columns: 'Item Number', 'Name', 'Description', 'Quantity', 'Length(mm)', 'Pack Size', 'Unit', 'Number Of Pack', 'Cost', and 'Price'. The first row of the table is highlighted in green.

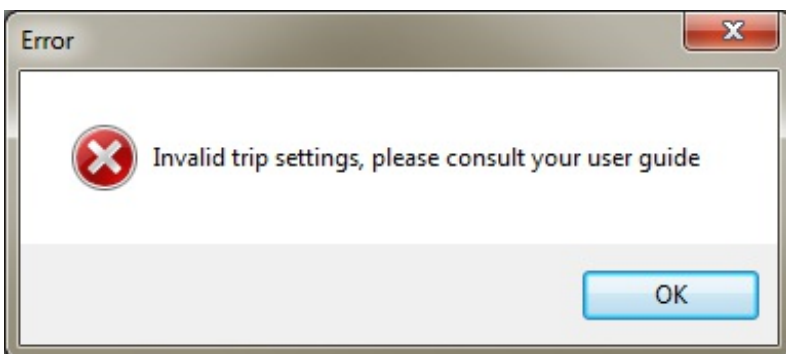
The tabs dialog will be shown, make sure **Trips** is selected then press **Ok**.



Now click on the **Trips** tab to view the trips section, then click on the **New Trip** button to create a new trip.



If you get an error message like the one below, consult your administrator/user guide on how to correctly configure the trips function (as stated in the pre-requisites).



If your system is properly configured though, you should see the trip dialog.

Add/Edit

Name  
Startup meeting

All hours

Activity	Cost	Price	Hours
Customer site visit	100	200	10,0
Travel Time	230	300	20,0

Hotel

1	200	300
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Air Fare

1	1000	1000
---	------	------

Car Rental

0	0	0
---	---	---

Km Qty

0	0	0
---	---	---

Allowance Hours

0	Country
	None

Description	Value
Total Cost	6 800,00
Total Price	9 300,00

Comments

Cancel Ok

Enter a name, the hour quantity and any expenses tied to the trip. Expense cost/price can be altered at the time of creation, hour cost/prices are fixed according to your database settings. If any of the activities (hour types) used in the trip function does not have cost and/or price, the administrator needs to properly configure the price in the basic data section.

Allowance also uses fixed pricing according to the basic data settings (database). If the application complains about not having cost/price for any of the allowances that you require, consult your user guide on how to set up allowance cost/price (administrators only).

When your done, click **Ok**.

The resulting trip will be visible as a single line in the trips tab.

Name	Total Cost	Total Price	Hours	Allowance Hours	Al
Startup meeting	6 800,00	9 300,00	30,00	0,00	

In the element summary the trip no longer exists as the trip is now evaluated as separate hours and expenses.

Description	Hours mixed	Cost Total	Sales Total	%	Currency
Quantity: 1					INR
<b>- Hours</b>					INR
- Mechanical engineering					INR
- Customer site visit	10,00	1 000,00	2 000,00		INR
- Travel time					INR
- Travel Time	20,00	4 600,00	6 000,00		INR
<b>Sub Total</b>	30,00	5 600,00	8 000,00		INR
<b>- Expenses</b>					INR
+ Expenses		1 200,00	1 300,00		INR
<b>Totals (Expenses)</b>		1 200,00	1 300,00		INR
Calculated Value (from Elements)	30,00	6 800,00	9 300,00		INR
Freight In					INR

That's it.

To delete the trip simply click the delete icon. Edit is done by clicking the edit icon (to the left of the trip name in the trip tab).