

# Getting Started

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**A practical guide for Admin Users**

JULY 2019

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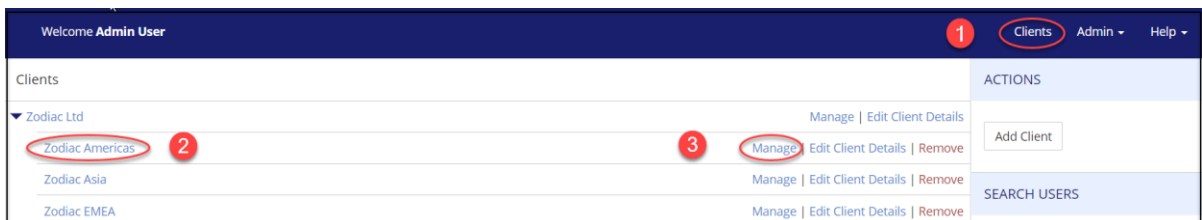
## MANAGING PRE-TRIPS

Note that a travellers profile must be complete, before pre-trips can be entered.

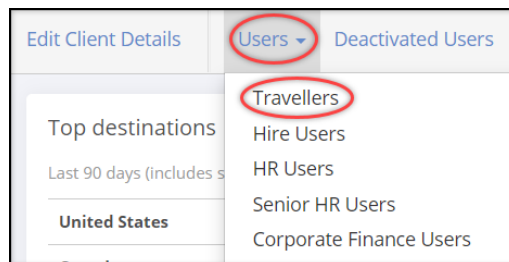
### 10.01 Adding Pre-View-Trips

To add a pre-view trip:

1. Select the Clients tab.
2. Select the parent company/subsidiary unit.
3. Select Manage



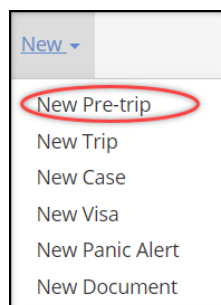
4. Select Users from the navigation bar and Travellers from the drop-down list.



5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Jorge	Brown	United Kingdom	United Kingdom	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Bob	Brown	Hong Kong	Hong Kong	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Ling	Luong	Singapore	Singapore	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

7. Select New and then New Pre-Trip from the drop-down list



- Enter Pre-Trip details. Select 'Create pre-trip' or 'Create per-trip and add another leg', to save details.

New Pre-trip

**\* Recipient** ↕

**\* Visiting country**

Select an Option ▼

**State**

**Project**

**\* Start date** **\* End date**

**Visa**

If you have a Valid Visa for this location it will show here - if not please leave it blank

**\* Purpose category**

You must select a Category

**\* Purpose**

Create Pre trip
Create Pre trip and add another leg

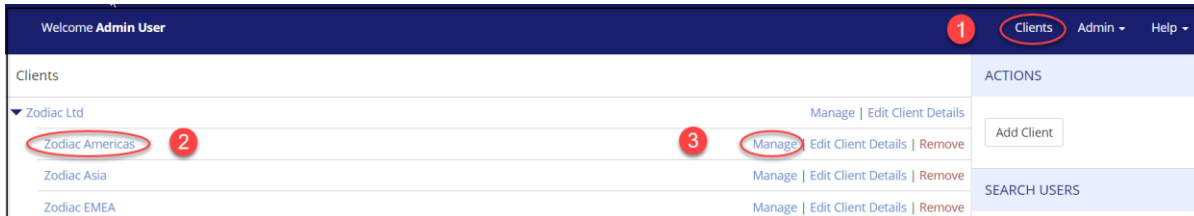
- The status of the pre-trip will immediately appear on the right of the screen, together with any alerts. The pre-trip details will be routed to the HR representatives, agreed during implementation. When they approve or deny the trip the status shown will automatically update.

APPROVAL	
TYPE	STATUS
Budget	Pending
HR	Pending
Security	Approved (auto)
ALERTS	
<p><b>Chile Alert</b>  <i>0 day threshold</i>            Your Passport will expire within 180 days - please renew as soon as possible</p>	

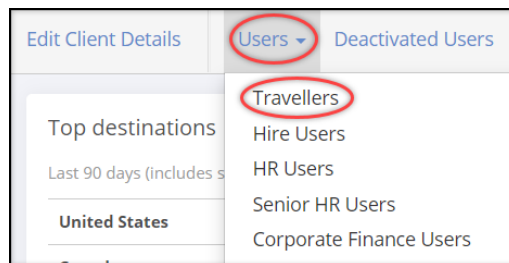
## 10.02 Editing Pre-View Trips

To view and edit a pre-view trip:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



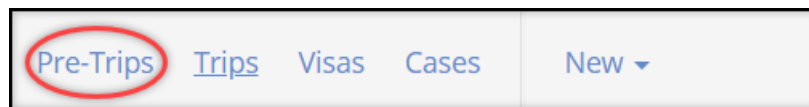
4. Select Users from the navigation bar and Travellers from the drop-down list



5. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Jorge	Brown	United Kingdom	United Kingdom		View   Edit   Deactivate
Bob	Brown	Hong Kong	Hong Kong		View   Edit   Deactivate
Ling	Luong	Singapore	Singapore		View   Edit   Deactivate

6. Select Pre-Trips



A list of pre-trips will appear:

COUNTRY	STATE	FROM	TO	VISA TYPE	VISA START DATE	VISA END DATE	ALERTS
Algeria		13 Mar 2019	13 Apr 2019				⚠ View/Edit Remove
Argentina		12 Mar 2019	13 Mar 2019				⚠ View/Edit Remove
Bahrain		07 Mar 2019	08 Mar 2019				⚠ View/Edit Remove
Kazakhstan		07 Mar 2019	07 Mar 2019				⚠ View/Edit Remove

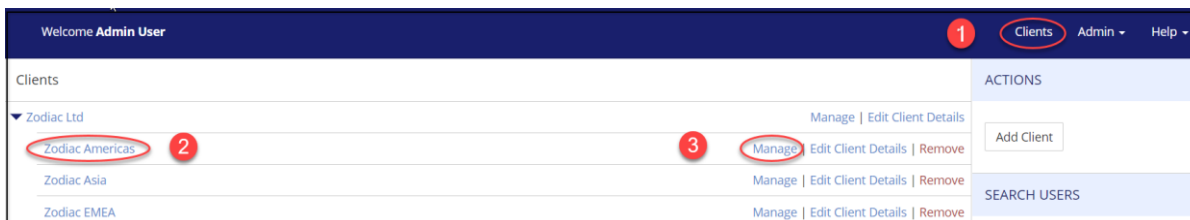
* Approval status
Denied
Denied reason
Permanent Establishment Risk
Notes
Call Tax Team on #9909
<a href="#">Update Pre trip</a> <a href="#">Create Pre trip and add another leg</a>

**Note that if a pre-trip has been approved, changing the details will trigger to approval process to recommence.**

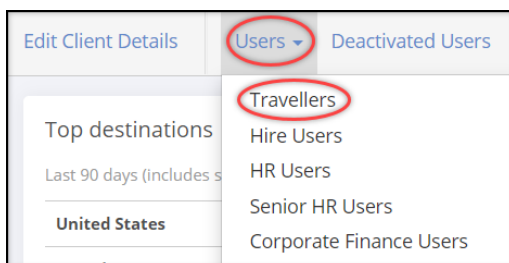
### 10.03 Delete Pre-View-Trips

To delete a pre-view trip:

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



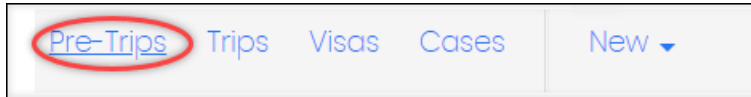
4. Select Users from the navigation bar and then Travellers from the drop-down list.



5. Select the traveller
6. Select view

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Jorge	Brown	United Kingdom	United Kingdom	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Bob	Brown	Hong Kong	Hong Kong	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Ling	Luong	Singapore	Singapore	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

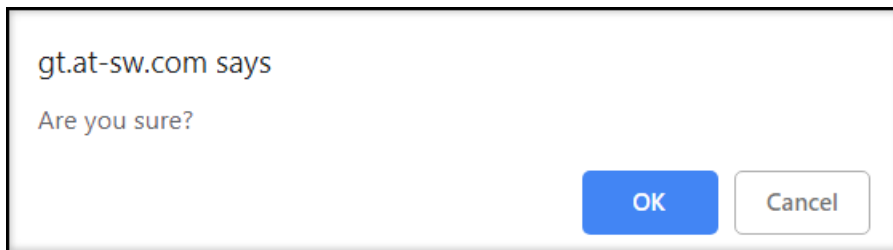
## 7. Select Pre-Trips



## 8. Select Remove against the pre-trip

COUNTRY	STATE	FROM	TO	VISA TYPE	VISA START DATE	VISA END DATE	ALERTS
Algeria		13 Mar 2019	13 Apr 2019				<a href="#">View/Edit</a> <a href="#">Remove</a>
Argentina		12 Mar 2019	13 Mar 2019				<a href="#">View/Edit</a> <a href="#">Remove</a>
Bahrain		07 Mar 2019	08 Mar 2019				<a href="#">View/Edit</a> <a href="#">Remove</a>
Kazakhstan		07 Mar 2019	07 Mar 2019				<a href="#">View/Edit</a> <a href="#">Remove</a>

## 9. You will be asked to confirm the action



### 10.04 View Pre-View-Trips

The home page includes a summary of the most recently created pre-trips. Select latest pre-trips to view information.

Clients / 1. Example Company

Edit Client Details | Users ▾ | Deactivated Users | Download consent | Add User ▾

#### Top destinations

Last 90 days (includes subsidiaries)

United States	8 days
Belgium	4 days
United Kingdom	2 days
France	2 days
Germany	2 days

#### Destinations with most alerts

Last 90 days (includes subsidiaries)

United States	70 alerts
Canada	25 alerts
Belgium	23 alerts
France	22 alerts
Ireland	18 alerts

#### Highest volume travellers

Last 365 days (includes subsidiaries)

JEANETTE RYAN	30 trips
Liam Brennan	16 trips
Alex Duller	5 trips
Jeanette UK	5 trips
Mary Murphy	5 trips

#### Permanent Establishment Risk

Last 365 days

United States	15 trips
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#### Most common alerts

Last 90 days (includes subsidiaries)

You are spending time in an EU/EEA country. Please advise HR/service provider so they can review ...

This jurisdiction participates in the Convention on Mutual Administrative Assistance in Tax Matte...

This country is a member of the Base Erosion and Profit Shifting (BEPS) Inclusive Framework. Plea...

Your Passport will expire within 180 days - please renew as soon as possible

No Double Tax Treaty Protection

#### Highest risk trips

Last 90 days (includes subsidiaries)

Christine McRory	Canada
JEANETTE RYAN	Slovenia
Jeanette UK	Netherlands
JEANETTE RYAN	United States
Una Threek	France

**LATEST PRE-TRIPS**

▶ LATEST CASES

▼ LATEST PRE-TRIPS

1 2 3 4 5 6 Next > Last »

USER	COUNTRY	STATE	FROM	TO	VISA	APPROVAL	ALERTS
JEANETTE RYAN	Australia	New South Wales	01 Jul 2019	16 Jul 2019	ELECTRONIC TRAVEL AUTHORITY (601) VISA	Pending	⚠ View/Edit   Remove
Mary Murphy	United States	Wisconsin	30 Jul 2019	01 Aug 2019		Approved	⚠ View/Edit   Remove