THE ORGANIZED TRAVELLER

Whats New?

November 2017

- This doc
- Itinerary Sharing....you can download your itinerary (with certain details) to a csv file. You can then email that file to someone else who can then load it into their app.
  - NOTE: you can't amend a plan that's Shared with you....theres only 1 planner!

December 2017

- Trip Outlines – the first step towards planning your trip. Enter basic information then create the detailed plans automatically from the outline. Can also validate your plans against the outline just to be sure you haven't screwed anything up!

General Hints

<u>Documents</u>

- I use Dropbox to hold all of my paperwork, then just copy & paste the link into the app. If the document is made available offline, then you'll still be able to access it on your travels.

<u>Cost/Payment Amounts</u>

- All cost and payment amounts are in your own currency. The app matches cost and payment amounts to determine whether you have fully paid for things...so cross-currency isn't really practical due to fluctuations in exchange rate.

Settings

Payment Methods

Just enter a simple description, not the card details, as it's just to help you track your payments late.

This could be helpful if you need to make a claim on Travel Insurance...or if your free Credit Card Travel Insurance only kicks in if you pay for a specified part of the trip using that card.

I just use simple values of My Card, Wifes Card, PayPal etc.

Field	Description
Description	Description of payment method (no details!!!)

Checklist Items

A list of reminders that can be applied to every trip. I've included some of my favourites.

Field	Description
Item	Description of checklist item

ToDo List Configuration

Work in Progress

Create a Trip

Field	Description
Trip Name	Description of trip
Start Date	Beginning of trip
End Date	End of trip
Status	Select from dropdown list

Add Trip Outline

Trip Outline allows you to:

Enter a basic outline....then generate detailed plans from it.

Create more outlines if you change your mind, then validate against the entered plans.

Field	Description
Description	Description of outline
Status	Select from dropdown
People	Used to calculate an estimated cost of the trip.

When the Trip Outline is saved, there will be a row created for each day (from Trip start to end)

Field	Description
Travel From	Only fill for the days you'll be travelling
Travel To	
Travel Via	You can enter multiple places, separated by a comma. These will appear as Transport legs when you generate the plans.
Overnight	Whera are you staying for the night
Notes	
Transport Cost	Per person
Overnight	Hotel cost

Add Transport

Field	Description
Type	Select from dropdown list
Company	Name of company providing transport
Description	Description to appear on list of transports (e.g. Flight MEL-KUL-MEL)
Notes	Whatever you like
Include in Trip	Press button to include/exclude item from trip
Booked	Press button to indicated Booked/Not Booked
Booking ID	Enter if transport has been booked
Date to Book	Future date for reminder
Booking Not Required	Check if transport does not require a booking.
Tickets	Number of tickets
Cost	Cost per ticket
CheckIn	Time prior to departure that you can check in (applies to flights...get in early to get the best seat!)
www	URL for company or booking site
Doc Link	Copy and paste link to booking confirmation (e.g. dropbox link)
Date Printed	If you really want to carry the paperwork.

Notes:

- The DELETE button will be hidden if you have Legs or Payments attached to this transport

Will appear on TODO list if...

- Booking reminder – if marked as INCLUDE and NOT BOOKED (unless Booking Not Required is checked). Date to book will show on TODO list.
- Paperwork reminder – if marked as INCLUDE and BOOKED but date printed has not been entered.

Add Transport Leg

Transport must have at least 1 leg...but can have more. Each leg will appear on your itinerary individually.

Field	Description
From	Where travelling from
To	Where travelling to
Flight / Transport ID	Flight ID or equivalent
Departure	Date & Time
Arrival	Date & Time
Duration	Time
Notes	
Baggage	Weight allowed per person. Many budget airlines now require you to purchase this.
Seats	Seat numbers. Many budget airlines now require you to purchase this too.
Extras	Could be meals, in-flight entertainment etc.
Checked In?	Yes or No

Will appear on TODO list if...

- Baggage/Seats reminder – if nothing is entered in those fields. So for example, you could enter "Carry On" or "at CheckIn" to get rid of the todo list entries.
- Check In reminder - if you enter a check-in period on the transport screen.

Add Accommodation

Accommodation can have as many shortlist entries as you like.

Field	Description
City	
From Date/Time	Time is important as it will determine the order in the Itinerary
To Date/Time	Time is important as it will determine the order in the Itinerary
Selected	Choose an entry from the dropdown Shortlist
Include in Trip	Press button to include/exclude item from trip
Final?	Press button to mark as Final or Review
Booked	Press button to indicated Booked/Not Booked
Booking ID	Enter if accommodation has been booked
Pay On Arrival	Tick checkbox if payment is made at the hotel on arrival
Pay on Date	Future date for reminder
Notes	Whatever you like
www	URL for company or booking site
Doc Link	Copy and paste link to booking confirmation (e.g. dropbox link)
Date Printed	If you really want to carry the paperwork.

Notes:

- The DELETE button will be hidden if you have Shortlist entries or Payments attached.

Will appear on TODO list if...

- Booking reminder – if marked as INCLUDE and NOT BOOKED. Date to book will show on TODO list.
- Review Reminder if Final button is not checked.
- Payment reminder – if Pay On Arrival indicator is not set.
- Payment reminder – if Pay On Date is set.

Add Accommodation Shortlist Entry

Your shortlist of hotels.

Field	Description
Type	Select from dropdown list
Name	Hotel name
Rank	Whatever you like. I use Trip Advisor rankings
Room	Room Type
Breakfast Included?	Yes/No
Laundry Facilities?	Select from dropdown list
Nightly Rate	Press button to indicated Booked/Not Booked

Add Attraction

List all of the things you want to do and see.

Handy for planning as you can enter details for many attractions etc...then, just include the ones you decide upon.

Some attractions you need to pre-book to avoid lengthy queues. Others you don't. You can mark those you don't need to book and set a reminder Book On Date for those you do,

Field	Description
City	
Rank	Whatever you like. I use Trip Advisor rankings
Name	Name of attraction
Type	Select from dropdown
Date/Time	
Include in Trip	Press button to include/exclude item from trip
Need to Book	Yes/No
Complete	Yes/No (Allows you to mark the attractions you've seen)
Book on Date	When to book
Booking ID	Enter if accommodation has been booked
Tickets	
Cost	
www	URL for company or booking site
Doc Link	Copy and paste link to booking confirmation (e.g. dropbox link)
Date Printed	If you really want to carry the paperwork.

Notes:

- The DELETE button will be hidden if you have Payments attached.

Will appear on TODO list if...

- Need to Book is YES and not yet booked. Will be dated as per "book on Date"

Will appear on Itinerary if...

- Date/Time is populated.

Add Expense

Record your miscellaneous expenses such as Visa, Airport Parking etc. Can also be used to budget for daily expenses.

Field	Description
Type	Select from dropdown list
Description	
Date From	Date range. Expenses may be per day
Date To	
Include in Trip	Press button to include/exclude item from trip
Complete?	Yes/No
Reminder Date	Date for reminder in ToDo list
Cost	
Per	One of Day/Ticket/Once
Tickets	Number
www	URL for company or booking site
Doc Link	Copy and paste link to booking confirmation (e.g. dropbox link)
Date Printed	If you really want to carry the paperwork.

Notes:

- The DELETE button will be hidden if you have Payments attached.

Will appear on TODO list if...

- Complete is NO. Will be dated as per "Reminder Date"

Add Note/Reminder

Enter reminders or notes for future reference.

Field	Description
Type	Select from dropdown list
Description	
Do Date	Date for reminder in ToDo list
Include in Trip	Press button to include/exclude item from trip
Complete?	Yes/No
Notes	Whatever you like
www	URL for company or booking site

Will appear on TODO list if...

- Complete is NO. Will be dated as per "Do Date"

Trip Checklist

Your list of checklist items entered in Settings may be applied to every trip.

Will appear on TODO list if...

- Complete is NO. Will be dated as per "Reminder Date"

Field	Description
Item	Description
Status	Select from dropdown
Reminder Date	Date for reminder in ToDo list
Notes	

Will appear on TODO list if...

- Status is OUTSTANDING . Will be dated as per "Reminder Date"

The RESET button will reset the checklist entries from Settings. Additional checklist items added to this trip will be untouched.

Add Payment

Payments may be added from the page for an individual Transport, Accommodation, Attraction or Expense.

Field	Description
Date	Date of Payment
Amount	
Payment Method	Select from dropdown
Notes	

View Itinerary

Lists all components of your trip where a date is involved:

- Transport – Legs will appear as individual rows
- Accommodation
- Attractions – where a date/time is specified

The status of that component will also be displayed to indicate whether you have booked and paid.

Clicking on a row will take you to that component.

View ToDo List

Lists reminders:

- Transport not booked.
- Transport booked but not paid.
- Transport Seats/Baggage not specified.
- Flights not checked in.
- Accommodation not booked.
- Accommodation not paid for.
- Accommodation marked for review (not final).
- Attractions marked for pre-booking but not booked.
- Expenses not complete.
- Outstanding checklist items.
- Manually entered Notes/Reminders.

View Cost Summary

Summary of costs by type, showing paid and outstanding amounts.

View Payment Summary

Summary of payments by payment method.

This is handy if you are using the travel insurance associated with a credit card as generally these policies are only active if you prepay a certain amount for your trip on that card.

 Also handy if you ever have to make a travel insurance claim, as you will need to how and where payments were paid.

View Sights

Attractions with a planned date will appear on your intinerary. Attractions without a planned date can be seen on the Sightseeing page.

Share Itinerary / Load Shared Itinerary

This function allows the user to export the trip itinerary into a file.

The file can then be emailed to another person, who can then load it into their app.

Note that this is a cut down version of your trip plan only and is not updateable.