

Getting Started

A practical guide for Admin Users

SEPTEMBER 2019

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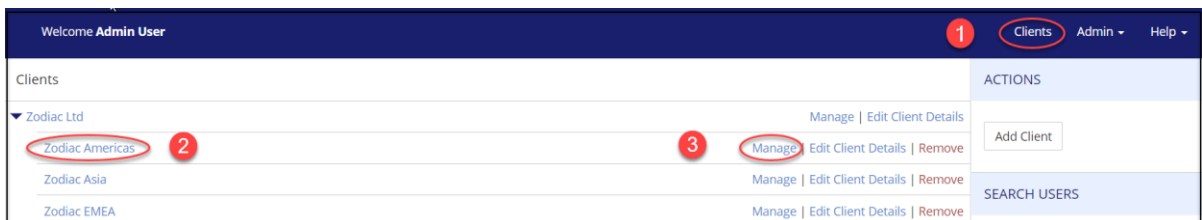
MANAGING PRE-TRIPS

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

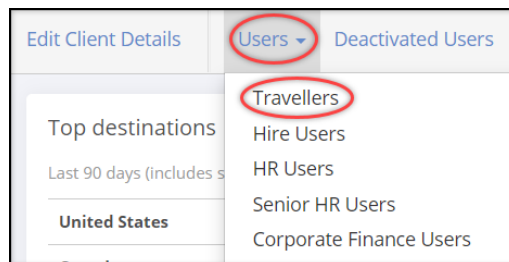
10.01 Adding Pre-View-Trips

To add a pre-view trip:

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



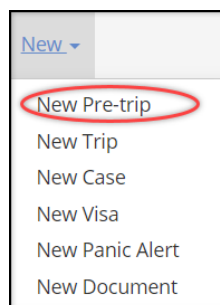
4. Select Users from the navigation bar and Travellers from the drop-down list.



5. Select the traveller
6. Select view

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

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



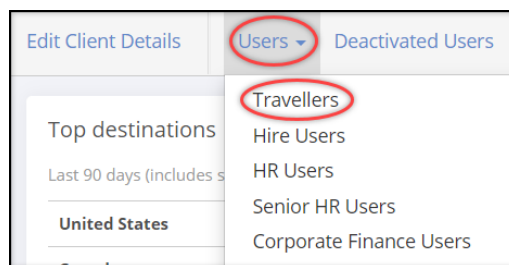
10.02 Editing Pre-View Trips

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. Select Edit to make any changes.

COUNTRY	STATE	FROM	TO	VISA	APPROVAL	ALERTS	
Mexico	Colima	22 Jul 2019	24 Jul 2019		Approved	⚠	View/Edit Remove
Argentina		04 Apr 2019	17 Apr 2019		Approved	⚠	View/Edit Remove

Save any changes by selecting Update pre-trip.

* Approval status
Denied

Denied reason
Permanent Establishment Risk

Notes
Call Tax Team on #9909

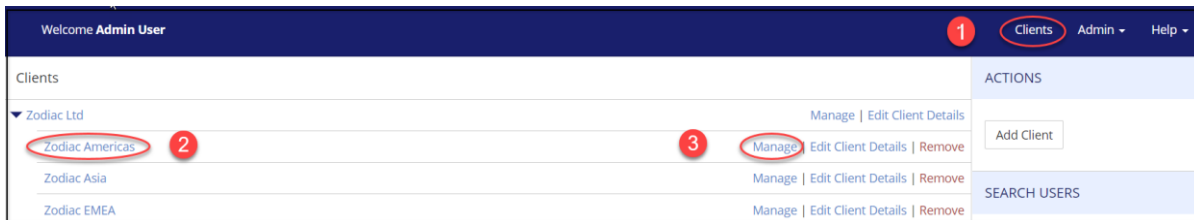
Update Pre trip Create Pre trip and add another leg

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

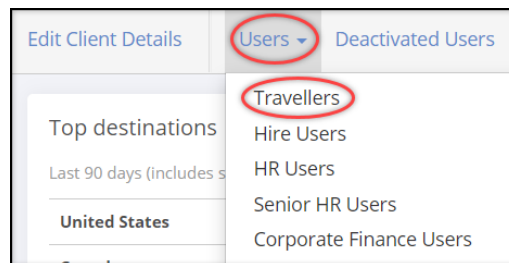
10.03 Delete Pre-View-Trips

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	View Edit Deactivate
Bob	Brown	Hong Kong	Hong Kong	View Edit Deactivate
Ling	Luong	Singapore	Singapore	View Edit Deactivate

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				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

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