

## « Travel » module

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The [Travel] module allows you to plan and save your trips, keep track of important routes, and, thanks to the link to the [Ecology] module, to find out your ecological footprint.

Invoices can either be entered directly in the [Travel] module or entered and paid from the [Payments] module. Once the payment has been validated in the [Payments] module, they will be automatically added to the relevant tab of the [Travel] module.

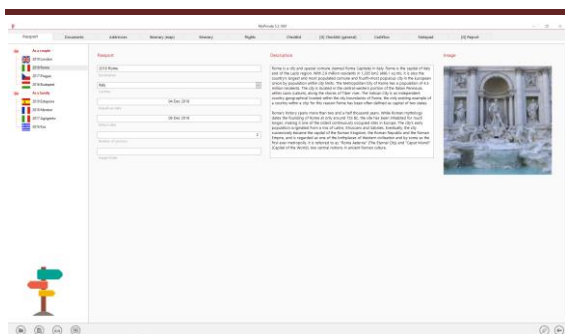
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## Summary of module tabs

|                      |  |
|----------------------|--|
| [Passport]           | Basic information about each trip                              |
| [Documents]          | Non-financial documents related to the respective passports    |
| [Addresses]          | List of addresses related to travel                            |
| [Directions - Map]   | Map of the region  |
| [Itinerary]          | Detailed itinerary   |
| [Flights]            | Flights, airports, costs, distance travelled and CO2 emissions |
| [Specific checklist] | List of luggage items for the selected trip                    |
| [General checklist]  | General list of luggage items to bring on each trip            |
| [Cashflow]           | Cash inputs and outputs  |
| [Notepad]            | This is the area for various notes about the current module    |
| [Reports]            | Selection of information to print                              |

### [Passport]



The [Travel] module passport provides a summary of each trip:

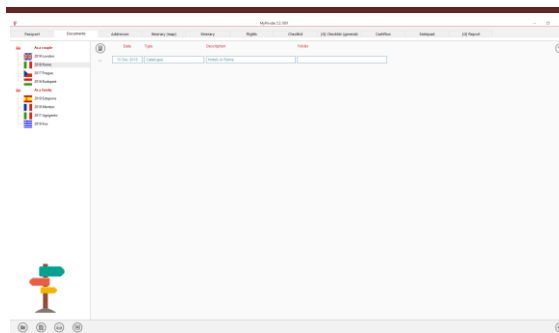
- Departure and return dates
- Destination
- Number of guests
- Trip Summary

#### Special field:


[Image Folder]: Allows you to choose a location on the computer where travel-related images are stored.

To choose or open a directory, click in the field with a right click of the mouse.

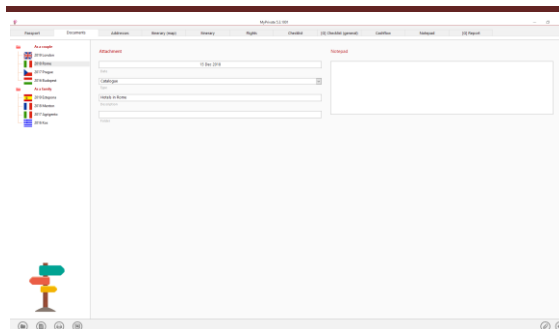
### [Documents] - Summary



This tab allows you to scan and preserve all types of documents by assigning them a date, a type and a title. A summary of documents related to the object is displayed and allows a quick view of the documents available.

To add a new document, click on the icon . The following screen opens:

### [Documents] - Details



Enter the date of the document, a type (select an existing type from the drop-down menu or enter a new one) and a description. These three items will appear in the [Documents] - Summary. The [Notepad] field is for additional information.

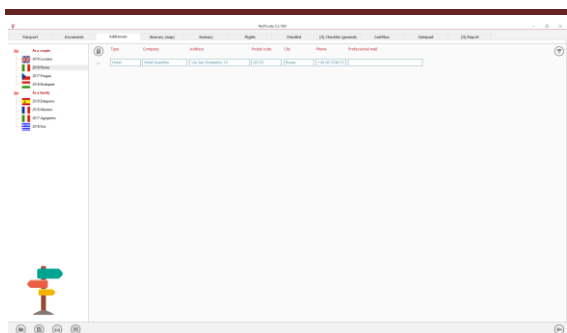
Once these fields are filled, click on the icon



to start scanning documents.

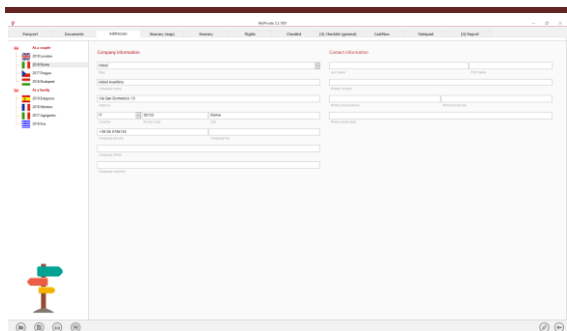
For scanning and document integration, refer to the "Document Management" user manual.

### [Addresses] - Summary



Displays a list of travel-related addresses.

### [Addresses] - Details

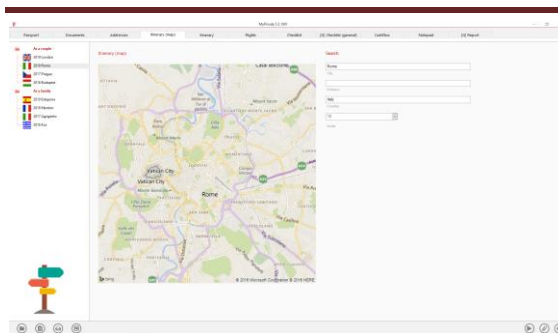


Detailed information on travel-related addresses, for example:

- Travel agency
- Local representative
- Hotels and restaurants
- Museums
- Any other point of interest

This tab will also allow you to scan and file business cards and brochures.

### [Itinerary (map)]



Allows you to download a regional map from Microsoft Bing.


To do a search, it is not necessary to fill in all fields. It will be useful to enter very precise information, for example when a city name is used in several countries.

Several informations can be entered, separated by a comma.

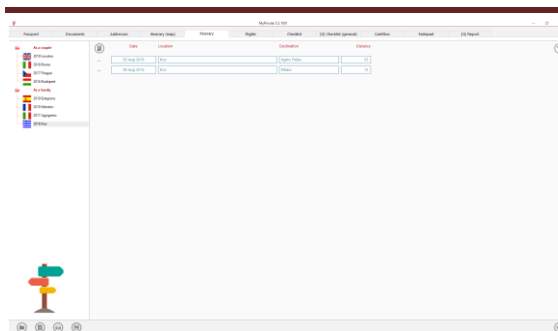
#### Special fields:

[Zoom]: Allows you to zoom in our out, in relation to the place entered.

1 = the farthest, 20 = closest.

Once the parameters have been entered, click on the icon . If the result is not satisfactory, repeat the operation and MyPrivate will display a new map.

### [Itinerary] - Summary



Displays the itinerary of the steps travelled during the trip.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Itinerary] - Detail

Detailed information on each step.

## [Flights] - Summary

List of flights made during the trip.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Flights] - Detail

Detailed information on each flight:

- Departure and return dates
- Departure and arrival airports
- Class
- Price
- Trip distance
- CO2 emissions

The cost of flights will automatically appear in the [Cashflow] tab of the [Financial statements] module.

### Special fields:


[Flying from] and [Going to]: Search for the airport according to the airport code (GVA for Geneva - CDG for Paris Charles de Gaulle, etc.)

The [One-way distance] and [Emissions for all travellers] fields are calculated and displayed automatically. Values cannot be changed.

Information on CO2 emissions will be included in the [Ecology] module.

## [Checklist] - Specific - Summary

Objects to take along during the specific journey and actions to be taken before departure (vaccines, babysitting, watering, ...).

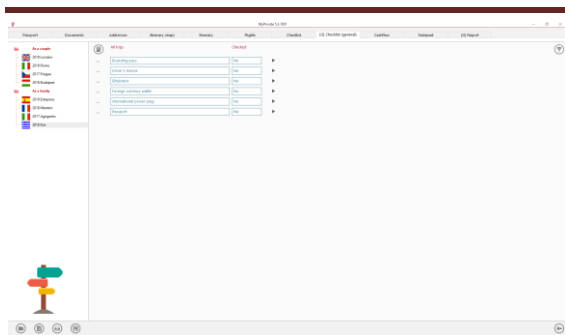
Click on the icon  to change status (checked, yes/no).

To view and/or edit the details of a record, click on the [...] field on its left.


## [Checklist] - Specific - Detail

Details of items to bring and actions to take.

## [Checklist] - General - Summary



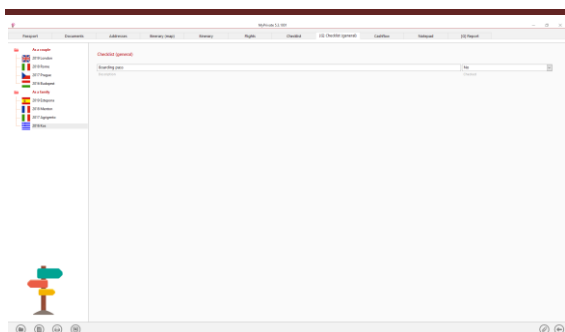
List of items to take with you during each trip and the actions to be taken before departure (vaccines, babysitting, watering plants, ...).

Click on the icon  to change status (checked, yes/no).

This tab is [Global]. It is visible and identical for each trip.

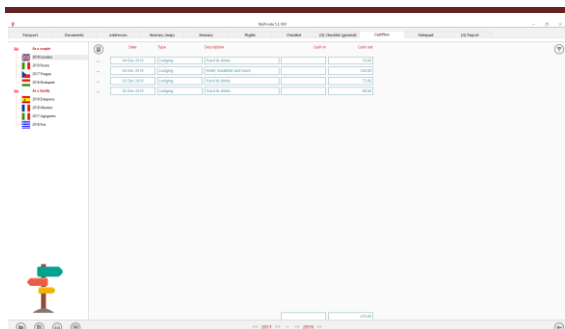
To view and/or edit the details of a record, click on the [...] field on its left.

## [Checklist] - General - Detail



Details of items to bring and actions to take.

## [Cash Flow] - Summary



The [Cashflow] tab is used to record trip-related cash in and expenditures.

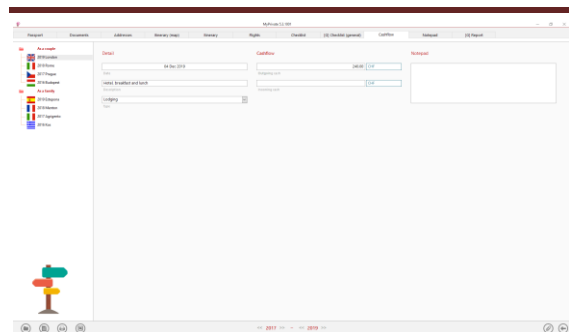
These amounts will automatically appear in the [Cashflow] tab of the [Financial statements] module.

To view and/or edit the details of a record, click on the [...] field on its left.

**Note:** Amounts in foreign currencies can be entered in the [Invoices] module.

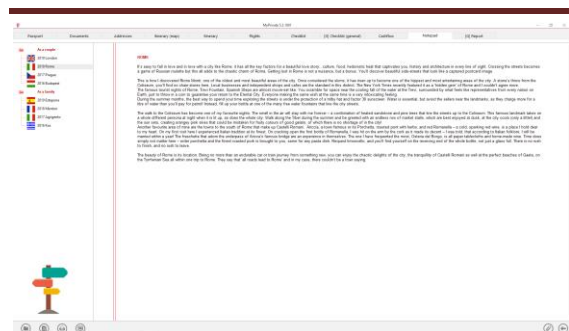
From this module they will be changed in the local currency to the last rate downloaded by MyPrivate and linked to the chosen trip.

## [Cashflow] - Details



Displays the cashflow details.

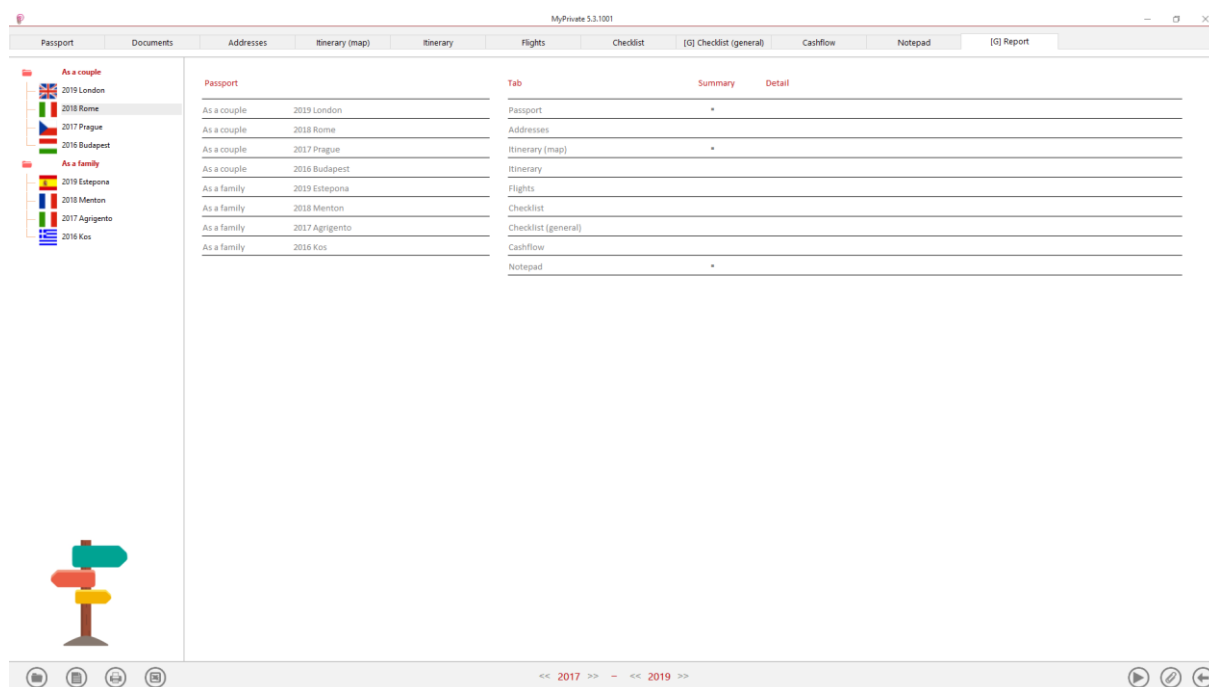
## [Notepad]



This tab allows you to enter various notes related to the selected trip.

## [Reports]

This tab allows you to choose which passports and tabs to print



Select/deselect the data to be printed by clicking on the corresponding row(s) and column(s).


The choices are

- Passports
- Tabs - Summary and details

The selected passports and tabs are marked with the character [✓].

For some tabs it is possible to print the summary and/or the details.

When a print option is not available, it is indicated by the character [•].

Once the information to be printed has been chosen, click on the button  then choose the [Generate Report] option.

MyPrivate prepares a PDF file that will be ready for printing.