User Guide

Book smart, save money
Welcome to thetrainline business

Great news! Booking rail travel - and managing it right across your business - has just got a whole lot quicker, easier and cheaper too. We’ve written this new user guide to help you and your colleagues start making the most of your online booking portal straightaway.

Your portal has been purpose-built for the business market by thetrainline, the UK’s leading independent retailer of train tickets online. We sell tickets for all train companies on all national routes, with access to over 293 million fare and journey combinations. Since 1999 we’ve sold to 3.3m travellers, made more than 14m transactions and have over 8.4 million registered users.

We’re delighted now to be putting our online rail booking experience to work for you.

Book smart, save money – thetrainline Top Tips:

- Buy in advance
- Buy single tickets
- Travel off peak
- Specify return dates
- Book online
Tuned-in to the needs of your company

If you’re already familiar with thetrainline.com public website, you’ll recognise many of its easy-to-use features on the business portal to help you find and book tickets for yourself or colleagues at the best possible price.

Log-on as an administrator and you can also use its powerful additional business functionality to enable accurate monitoring and control of your company’s rail travel spend.

So whether you’re booking your own ticket, planning and booking a journey for others, or administering the account for your company, you’ll quickly discover that your business portal is packed with features that deliver real business benefits:

For individual users

- Easy user access by self-registration (if enabled by your company)
- Centralised ‘My account’ for profiles, bookings, refunds and more
- Reserve preferred seats plus book bus, tube, sleeper and other ‘Travel Options’
- Tickets delivered or collect at station
- Make a single transaction for single/multiple journeys using the ‘Shopping Basket’
- Search for the cheapest deal using ‘Best Fare Finder’
- Find out first with ‘Ticket Alert’

For bookers

- Book tickets on behalf of others
- Register new users and travellers
- Manage profiles and bookings for users and travellers

For account administrators

- Customise account set-up and user control to reflect your company travel policy
- Download management information 24/7
- Manage users and their access rights
- Set-up a credit facility and manage your account online (available only to SMEs)

Make this step-by-step guide your first stop for all your business portal queries. If you can’t find the answer, then visit the Help portal at http://railportal.custhelp.com
If you still need help, then please do contact your account administrator or travel provider.
Making the most of your rail portal

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Making the most of your rail portal

1. Getting started

1.1 Settings

1.2 Accessing the portal

1.3 Registering as a new user

1.4 Logging in as an existing user

1.5 Understanding the 'logged in' home screen

1.6.1 Logging out

1.1 Settings

This section covers the way your computer, browser and network should be set up to access your online rail booking portal.

If you’re a user and don’t have access to make ‘behind the scenes’ settings changes, then you can skip all this and move straight on to 1.2 ‘Accessing the portal’.

If you’re an account administrator, this is what you need to know:

1.1.1 Enable JavaScript

To ensure that your portal works at optimum speed and efficiency, we recommend that JavaScript is enabled on all browsers used. Most likely this will already be the case, but you can check using the instructions below. (If a browser isn't listed, then simply consult its ‘Help’ resources.)

<table>
<thead>
<tr>
<th>Internet Explorer 6/7/8/9</th>
<th>Firefox 2/3</th>
<th>Safari 2/3</th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Click the Tools menu</td>
<td>‣ Click the Tools menu</td>
<td>‣ Click the Safari menu</td>
</tr>
<tr>
<td>‣ Select Internet Options</td>
<td>‣ Select Options</td>
<td>‣ Select Preferences</td>
</tr>
<tr>
<td>‣ Click the Security tab</td>
<td>‣ Click the Contents tab</td>
<td>‣ Click the Security tab</td>
</tr>
<tr>
<td>‣ Click the Custom Level button</td>
<td>‣ Select the 'Enable JavaScript' checkbox</td>
<td>‣ Select the 'Enable JavaScript' checkbox</td>
</tr>
<tr>
<td>‣ Scroll down until you see the ‘Scripting’ section. Select the 'Enable' radio button for ‘Active Scripting’</td>
<td>‣ Click OK button</td>
<td></td>
</tr>
<tr>
<td>‣ Click OK button</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‣ Click ‘Yes’ in the confirmation window</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.1.2 Allow access to the portal and other content

Your organisation may have network restrictions in place so that users are only able to access specific websites via your company internet.

If so, you'll need to ensure that the proxy/firewall allows access to the following URLs:

- http://www.thetrainline.com
- https://www.thetrainline.com
- http://www.business.thetrainline.com
- https://www.business.thetrainline.com
- http://metrics.thetrainline.com
- https://smetrics.thetrainline.com
- http://ajax.googleapis.com
- https://ajax.googleapis.com
- http://content.announcements.uk.com
- https://a248.e.akamai.net
- https://www.buybutton.net
- https://aa.online-metrix.net
- https://h.online-metrix.net
- https://xmlfeed.laterooms.com (only if site includes booking of hotels)

"Ad blocking” software:

We are aware that some “ad blocking” software can inadvertently block dynamic messages that we show on our site, such as messages about disruption and engineering work. If you suspect that you are not seeing such messages, please check your “ad blocking” software settings.
1.2 Accessing the portal

Make sure you are connected to the internet. Then choose either of these routes:

Enter [www.business.thetrainline.com](http://www.business.thetrainline.com) into your browser

or

Click on [thetrainline business icon](http://thetrainline.com) or [rail link](http://www.rail.com) installed on your desktop, company intranet or travel portal.

This will take you to the business portal login home screen where you can register as a new user or log in as an existing user if you’ve done that already:

![Portal Login Screen](image)

**Note:** Your company may have a ‘single sign-on’ link to the portal which will automatically sign you in without your having to access the home screen to login. See section 12 for more about single sign-on.
1.3 Registering as a new user

Sign-up to your company’s account by clicking **Sign up to your company’s account** to display the sign up fields.

Enter your **email address and business ID** - then click **Sign up**.

You'll now be taken to the **new user registration screen** where you'll need to complete all requested fields (see below).

**Note:** Your company may have restricted the ability for new users to self-register on the portal, in which case you will have to contact your account administrator so that they can register you (see section 12.1).
New user registration screen:

### New user details

**Your details**

- **Title**: 
- **First Name**: 
- **Surname**: 
- **Email Address**: SSTdemo@thetrainline.com 
- **Password**: 
- **Confirm Password**: 
- **Phone Number** (Optional): 
- **Alternative Phone Number** (Optional): 

**Additional questions required by your business**

- **Department**: (Optional)

**Your contact address**

- **Company Name**: TRAINLINE BUSINESS DEMO1
- **Address**: TRAINLINE.COM LIMITED, THE MATRIX, 9 ALDGATE HIGH STREET, LONDON EC3N1AH United Kingdom
- **Phone Number**: 0203 128 2000

**View our privacy policy and terms and conditions:**

- Please tick this box to confirm that you accept our terms and conditions

---

Although viewing the privacy policy is optional, you **must tick to confirm acceptance** of our **terms and conditions** before clicking the **Register** button.
Making the most of your rail portal

The system will then return you to the **logged in home screen** with a message confirming that your registration was successful (see below), as well as sending you a confirmation email.

**Logged in home screen confirming successful registration:**

All set! You’re now ready to start saving time and money on online rail bookings for real.

1.4 **Logging in as an existing user**

Simply enter your **email/password details** on the portal login home screen and click **Login**.

Password escaped you? Just click **Forgot password?** to request a new one by email.
1.5 Understanding the ‘logged in’ home screen

Once you’re logged in, the home screen offers easy access to all key portal functions:

- **Search for train times and tickets.**
- **Company logo and message.** This example reminds users of the company’s travel policy.
- **Handy links** to Account tools (for administrators), Home, Help, My account, Shopping basket and Logout.
- **Your portal’s welcome message** will be specific to your company.
- **See what journeys** you have in your shopping basket.
- **Access powerful tools** for finding best fares and setting up ‘cheap ticket’ email alerts.
Making the most of your rail portal

The **Contact us & Help** link is in the header of all portal screens:

![Contact us & Help](image)

The **Terms and conditions** link is in the footer of all portal screens:

![Terms & Conditions](image)

### TERMS AND CONDITIONS

**Agreement between the customer and thetrainline**

This website and accompanying booking service (together, the "Booking Service") are offered as a service to you, the customer, by us, Trainline.com Limited.

**Supply of train tickets**

These terms and conditions set out the terms of our contract with you in relation to our supply of any ticket that you purchase using the Booking Service. If you do not agree with these terms, you must not use the Booking Service.

**Your train journey**

The train operating companies with whom you book tickets through this Booking Service are responsible to you in respect of the provision of the train journey you have booked. All bookings made through the Booking Service are subject to the National Rail Conditions of Carriage (explained below) and any specific restrictions imposed by the relevant train operating companies which may vary by ticket type.

### 1.6 Logging out

![Logging out](image)

Clicking **Logout** on the header takes you out of the portal.
2. Searching for train times

2.1 Entering journey details (including stations, dates, times and passenger numbers)

2.2 Applying railcard discounts to your booking

2.3 Advanced search (including stations to go via or avoid)

2.4 Understanding the train times and tickets screen

2.5 Using ‘Best Fare Finder’

2.6 Using ‘Ticket Alert’

2.1 Entering journey details

Once logged in, enter your journey details as follows:

The **Saved** dropdown is for any favourite journeys you’ve previously saved into **My account** (see section 9 for more).

Entering the first few letters of your **preferred station names** in the ‘From’ and ‘To’ fields prompts a pop-up list with clickable options. You can also use station codes – or the map-style **Station finder** (see over for more).

A date ‘pop-up’ plus ‘Today/Tomorrow’ and ‘Same day/Next day’ buttons help you specify dates and times out and return. You can also check boxes for ‘one way’ or ‘open return’ fares at this stage. Further drop-downs enable you to specify preferred times.

All you need to do now (apart from specifying any railcard/s you might be using – see next section) is to use the drop-downs to indicate the number of adults and children under 15 travelling.

Click **Get times & tickets** to see the trains available that match your preferred dates/times.
Click **Station finder** link to search for stations on a map by keying in a **location**:

![Station finder](image)

Then click a **station icon** to plan your journey **from here** or **to here**:

![Plan journey](image)

These update the **From** and **To** fields on the **Get train times & tickets screen** (see 2.1).

### 2.2 Applying railcard discounts to your booking

The portal can take into account a range of railcard discounts at individual traveller level, even if there are several passengers on the same booking.

- Simply check the **Railcards** box and use the drop-downs to bring up the railcard options available and enter the number of passengers to which a specific card(s) applies:

![Railcards](image)

Click **Add railcard** to apply an additional railcard of a different type to either one or more passengers on the booking.

Click **Get times & tickets** to see the trains available that match your preferred dates and times.

See **Appendix A: Common National railcards** for details on the most common railcards.
2.3 Advanced search (including stations to go via or avoid)

Click More options to further refine your search:

Advanced search

Welcome, Please use the form below to plan your journey

Where do you want to go?

Leaving from: London
Going to: Manchester

When would you like to travel?

Outward

Date (dd/mm/yyyy): [Current Date]
Time: [Current Time]

Journey type: Return

Return

Date (dd/mm/yyyy): [Current Date]
Time: [Current Time]

Number of passengers

Adults: 1
Children (5-15 years): 0

Extra journey requirements (optional)

Journey options: All Services
Go to or avoid: Please Select

Railcards and other discounts (optional)

Railcard: None
How many? 0

Promotional codes (optional)

Check fares and availability

Data already entered on the main search screen is retained.

Use the optional Extra journey requirements fields to specify direct/indirect services, stations to go via or avoid.

Railcard discounts (see 2.2 for more) and promotional codes can also be entered at this stage.

Finally, click Check fares and availability to see the trains available that match your preferred dates and times.
Making the most of your rail portal
2.4 Understanding the train times and tickets screen

Once you’ve entered your preferences, click **Get times & tickets** to go to a screen displaying trains matching your preferred dates and times:

To adjust dates and times further, click **Change journey** to show a new Search pop-up.

Or, click **Earlier** or **Later** to see more trains.

Once you’re happy with your options, click **Show prices** to view the tickets available.

See **Train times & tickets example screen** next.
Making the most of your rail portal

This screen displays the **cheapest Standard** and **First Class single fares** for **outward** and **return journeys** (if requested) of which the cheapest are highlighted. **Cheapest returns** then follow below.

Clicking to select specific trains shows a **costed Journey summary** including the **savings** you’re making.

Additional links show even more options with **View all single tickets**

**Click here** to view slower trains for cheaper tickets (see 2.4.7).

Once you’re happy with your selection, choose **Next** to progress to **Travel options** (see section 3).

Alternatively, use **Quick Buy** to proceed directly to the shopping basket page and we’ll automatically use your saved seating preferences and the default delivery method for your company.

See next page for details on other features available on the **Train times & tickets screen**.
Train times and tickets screen features:

2.4.1 Discounted promotional tickets

Where available, discounted tickets are highlighted on the Train times & tickets screen. Here is an example of a negotiated exclusive Net fare – ‘route deal’:

```
| Scottish Executive Package          | £150.20 |
| Includes complimentary upgrade to First Class seating, and one free voucher |
```

2.4.2 To view ‘Ticket restrictions’ pop-up - click the ticket type:

```
<table>
<thead>
<tr>
<th>Ticket restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ANYTIME RETURN</strong></td>
</tr>
<tr>
<td>BREAK OF JOURNEY</td>
</tr>
<tr>
<td>You may start, break and resume, or end your journey at any intermediate station along the route of travel.</td>
</tr>
</tbody>
</table>
| OTHER CONDITIONS:
| The outward portion of an Anytime Return ticket is only valid for travel when accompanied by an unused return portion. |
| TICKET TYPE:        |
| ANYTIME             |
| DESCRIPTION:       |
| Flexible ticket with no time restrictions on when you can travel. |
| VALIDITY:          |
| Your outward journey must be on the date specified or up to 5 days later. You must return within one calendar month of outward travel date specified. |
```

2.4.3 Tickets not permitted by your company Travel policy are ‘disabled’ and cannot be booked:
2.4.4 To view ‘Journey summary’ pop-up - click on the ‘Changes’ shown:

2.4.5 Add Journey to your calendar

On Journey summary pop-up click Add to calendar, then choose your preferred calendar option and follow Save instructions:

On Journey summary pop-up click Calling Points to view the calling points and stopping times for the leg of your journey.
2.4.6 To view ‘price summary’ bubble - hover over the ticket price:

2.4.7 Cheapest ticket travel policy warning (only if policy in force)

Should you choose a ticket that contravenes a cheapest ticket travel policy, you’ll see an overlay like this asking you to justify a more expensive ticket:

Note: If you continue and decline savings, your purchase and reason for not selecting the cheapest ticket will be viewed by your account administrator in management information reports.
2.4.8 To check slower routes for cheaper tickets click here:

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>Route/Company</th>
<th>Price</th>
<th>Check for trains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Super Off Peak Return</td>
<td>Chesterfield</td>
<td>£95.20</td>
<td>Check for trains</td>
</tr>
<tr>
<td>Off Peak Return</td>
<td>Any Permitted</td>
<td>£86.20</td>
<td>Check for trains</td>
</tr>
<tr>
<td>Anytime Return</td>
<td>Chesterfield</td>
<td>£225.00</td>
<td>Check for trains</td>
</tr>
<tr>
<td>Anytime Return</td>
<td>Any Permitted</td>
<td>£280.00</td>
<td>Check for trains</td>
</tr>
<tr>
<td>First Anytime Return</td>
<td>Chesterfield</td>
<td>£262.00</td>
<td>Check for trains</td>
</tr>
<tr>
<td>First Anytime Return</td>
<td>Any Permitted</td>
<td>£399.00</td>
<td>Check for trains</td>
</tr>
<tr>
<td>Virgin Business Return</td>
<td>Virgin Only</td>
<td>£420.00</td>
<td>Check for trains</td>
</tr>
</tbody>
</table>

Then explore your options by clicking **Check for trains** which takes you to **Train time and tickets**.

**Journey Selection**

The ticket types valid for your journey are listed below. Find the availability of your preferred train by clicking the relevant **Check for trains** button.

**Return from London Euston to Manchester Piccadilly**

- **Out Thursday 16 Jan 2014**
  - Route: London Euston EUS to Manchester Piccadilly MAN
  - Depart: 05:40
  - Arrive: 11:49
  - Duration: 2h 9m
  - Changes: 0
  - Cheapest: £79.70

**Return Friday 17 Jan 2014**

- Route: Manchester Piccadilly MAN to London Euston EUS
  - Depart: 09:35
  - Arrive: 12:43
  - Duration: 3h 9m
  - Changes: 0
  - Cheapest: £79.70
3. Travel options (e.g. seat preferences, onward bus travel, Travelcards)

Once you have made your choice(s) on the **Train times and tickets screen** (see 2.4.1), click **Next** to specify seat preferences and additional travel products via **Travel options**.

Options shown are those available for your **specific journey** - for example here:

- **What would you like to do...?**
  - Reserve seats on your journey.
  - Request seating preferences – no guarantees, but we’ll do our very best!
  - Review journey summary and view more details (see 3.1 next).
  - Add PLUSBUS tickets for onward bus journey.

- **Save Favourite journey** (see 3.1).

Click **Continue** to progress to ticket **Delivery options** (see 4).
3.1 Travel option screen pop-ups:

3.1.1 Click **More details** (see Travel options screen on previous page) to view a summary of your booking and ticket restrictions - including any options:

**Journey summary**

- **Journey price**: £79.70
- **Out**: 09:35 (Tue 28 Jan), Manchester Piccadilly to London Euston, 0 change(s)
- **Return**: 09:40 (Fri 31 Jan), London Euston to Manchester Piccadilly, 0 change(s)

**Total price**: £79.70

**Journey**: MANCHESTER PICCADILLY to LONDON EUSTON

<table>
<thead>
<tr>
<th>Depart</th>
<th>Arrive</th>
<th>Travel by</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:55 Manchester Piccadilly</td>
<td>11:04 London Euston</td>
<td>Virgin Trains</td>
</tr>
</tbody>
</table>

**Ticket details**

- **Advance Single**
- £22.00
- 1 Adult(s) Full Fare @£22.00
- This ticket is only valid when traveling exclusively on Virgin Trains.
- Non-refundable ticket, only valid for the date, time and train specified.

3.1.2 Not sure which Travelcard to select? Click **Which ticket do I need?**

**Travelcards**

Available Travel

ZONE R12
ZONE R123

3.1.3 Click **Save as favourite journey** to give your journey and preferences combo a name and save it for quick and easy access again at a later date:
4. **Ticket delivery options**

4.1 Selecting a delivery option

4.2 Self-service ticket machine

4.3 Office self-service ticket machine

4.4 First class post and Next day delivery

4.5 Office delivery

4.6 Print your own ticket

**4.1 Selecting a delivery option**

Once you’re happy with your **Travel options choices** (see 3), click **Continue** to select your **Ticket delivery option**.

Select **delivery options** from those available for your departure date(s).

In this example booking, options available include:

- Self-service ticket machine (selected)
- First class postal delivery
- Next day delivery

When done, click **Continue** to add booking to **Shopping Basket** (see section 5).

**Note:** **Delivery options available depend on the delivery types enabled for your company’s account.**
4.2 Self-service ticket machine (if available)

This option enables you to collect your tickets from the station. Tickets are ready for collection 30 minutes after booking.

Select **Self-service ticket machine**, then **specify the station** for collection - and view machine location.

Your account email address will be used automatically for **booking confirmation** – or edit to an alternative.

**Note:** To collect your tickets from the machine, insert a debit or credit card and enter your unique collection reference which is available in your booking confirmation. Your card is used for identification and is not charged.
4.3 **Office self-service ticket machine (if available)**

This option enables you to collect your tickets from your office self-service ticket machine. Tickets are ready for collection 30 minutes after booking.

Select **Self-service ticket machine** and **specify the office machine** for collection.

Use your default email address for **booking confirmation** – or edit to an alternative.

**Note:** To collect your tickets from the machine, enter your unique collection reference which is available in your booking confirmation.

You can add additional recipients for the email confirmation at a later stage.
4.4 First class post and Next day delivery (if available)

Have your tickets sent by **First class post** or **Next day delivery**. Select the option you require and specify the address for delivery.

**Select a Delivery Option**

- **First class post** (£1.00)
  - We will dispatch your tickets within 24 hours and you will receive your tickets within 5 days.
- **Next day delivery** (£7.50)
  - Guaranteed ticket delivery by 1 pm the next working day for bookings made before 3 pm.
  - All tickets insured for up to £500. You will need to sign for your tickets on delivery.

**First class post**

- **Name**: Test User
- **Delivery address**: Primary address
- **Country**: United Kingdom
- **Postcode search**: EC3N1AH

**Address 1**: TRAINLINE.COM LIMITED,
**Address 2**: THE MATRIX,
**Address 3**: 9 ALDGATE HIGH STREET,
**Address 4**: LONDON

**Manage Addresses**

Add or edit saved address here.  

All done - click **Continue**.
4.5 Office delivery (if available)

Select **Office delivery**, then specify the printer and address for delivery.

**Add or edit saved address here.**

All done - click **Continue**.
4.6 Print your own ticket by emailed pdf

If you’re travelling on one of many selected routes and purchase an Advance Single fare, you can now print your own ticket on any home or office printer. See our Which routes can I print my own ticket? from our help section for more details.

Select Print your own ticket, verify the email address and choose a form of ID to carry while travelling and then click the Continue button:

When travelling with a Print your own ticket the traveller must carry a nominated form of ID to present along with the ticket. If the passengers are travelling separately you will need to enter the ID details for each passenger.

We will then email immediate confirmation of your purchase, followed by a second email 30 minutes after booking which contains a link to download and print your e-ticket in printable pdf format.

Note: You can add additional recipients for the booking confirmation email at a later stage in the booking.
5. Shopping basket

The **Shopping basket** is where you can collect together all your journeys prior to paying for them, and will be held for up to 8 hours.

This is where you can check all aspects of your journey - including **dates, times, price etc** - before you pay.

Click ticket type to remind yourself of ticket restrictions.

Remove a booking if you no longer wish to go ahead and book it.

Once you've accepted Terms and Conditions, click **Proceed to payment**.

Add another journey? Do it here.
6. Company-specific questions

The portal enables your company to gather useful information about your purchase before you proceed to payment.

The following example is typical of the kind of questions you might be asked. Some areas could include drop-downs; other fields might involve entering answers that may be validated before allowing you to proceed:

![Image showing the portal interface with fields for cost code, reason for travel, work order number, and account selection.]  

The **Your account** field (if shown) is where you choose how to pay for your journey – for example charging it to a specified company account or paying by debit or credit card. The payment options available to you will have been set up by your company.

All done? Then click **Continue** to proceed to payment.
7. Paying for your tickets

7.1 Paying on account

7.2 Paying by payment card

7.3 Paying on account or by payment card (if both options are available)

7.1 Paying on account

If your account has a credit facility so tickets can be purchased on account, you’ll see the following message above the booking summary:

**Payment details**

**Pay on account**

Your booking will be charged to your company account.

**Email confirmation**

Your booking details will be sent to the following email address:

Email: TEST@TEDEMO1.COM

**Add recipient**

**Booking summary**

Journey price: London Euston to Manchester Piccadilly
Advance Single (Outward) & Advance Single (Return), 1 Adult

Self-service ticket machine

Total booking cost

£58.50

To complete booking, click **Buy tickets**. The next screen you’ll see is confirmation (see section 8).
7.2 Paying by payment card

If your account is set up to pay by card, you'll progress to a card payment/booking summary screen that looks like this:

Complete all requested fields in what is a 'standard' layout for a secure e-commerce transaction.

Choose a Saved card to pay with (if set up).

Or, want to Save card details for future bookings? Click here.

Check your billing address.

Email confirmation. Need to email multiple people? Click Add recipient.

Finally, click Buy tickets (checking out what you're saving!) when you're ready.
7.3 Paying on account or by payment card (if both options are available)

If both On account and Payment card options have been set up for your account, you’ll be able to choose how to pay on the payment screen:

Payment details

Select payment method

- On account
- Payment card

Select **On account** and then click **Buy tickets** to charge the booking to your account.

Select **Payment card** to open the card payment screen. Then, follow the steps shown in 7.1 on the previous page to pay by card.
8. **Confirmation of purchase**

Once you click **Buy tickets**, the system will send you an **email confirmation**. You’ll also see a **confirmation screen** which includes any instructions for collecting your ticket(s) and summarises your booking – like this one:

![Confirmation Screen](image)

### Booking Confirmation

- **Journey:** London Euston to Manchester Piccadilly
- **Getting your tickets:** Self-service ticket machine
- **Ref 68F992L7**
  - You will need your reference number and any credit/debit card.
  - Tickets will be ready for collection in 30 minutes time.
  - Collect your ticket(s) from the ticket machine at London Euston.

#### Outward - Monday 8th November 2010
- **Depart:** 09:40 London Euston
- **Arrive:** 11:07 Manchester Piccadilly
- **Seat:** Coach B, Seat 07A (Window)
- **Travel By:** Virgin Trains

#### Return - Tuesday 9th November 2010
- **Depart:** 15:26 Manchester Piccadilly
- **Arrive:** 18:02 London Euston
- **Seat:** Coach B, Seat 05A ( aisle)
- **Travel By:** Virgin Trains

### Ticket details

- **Advance Single (Outward)**: £29.00
- **Advance Single (Return)**: £29.00
  - This ticket is only valid when travelling exclusively on Virgin Trains.
  - Non-refundable ticket, only valid for the date, time and trains specified.

### Total payment

- **You saved £18.10 with thetrainline.com compared to buying your ticket at the station on the day of departure**

- **Journey:** London Euston to Manchester Piccadilly (£58.50)
  - **Outward:** £29.00
  - **Return:** £29.00
  - **Self-service ticket machine:** £0.50
  - **Total booking cost:** £58.50

---

*Your delivery details* - you’ll need this reference number if collecting from the station.

*Click here* to receive your journey information by text message, or add it to your calendar.

*Check out how much you saved!*

*Need to add another journey?* Click here.
8.1 Text confirmation pop-up

If you’ve requested your journey details by text, you’ll see a pop-up that looks like this – including details of service charges by network:

![Text confirmation pop-up]

To have your journey sent to you, simply enter your mobile number below.

**Your Message**

business.thetrainline.com  
London E 305p 09.30 8 Nov to Mancht Plc (arr 11:07)  
CollectRef B8F 99827  
business.thetrainline.com

- **Mobile Number**: +447361025180
- **Verification Code**: [enter verification code]

Read and accept our terms and conditions and then click **Continue** to activate text confirmation.

Nearly done - you’ll receive a verification code by text message.

Enter the code here and click **Continue** and we’ll text you your Journey details.
9. Fare saving tools

9.1 Using Best Fare Finder

Click **Search now** on **Best Fare Finder** on the ‘logged in’ home screen to find the best deals around when price - rather than specific date or time - is your priority:

This brings up the **Best Fare Finder** search window:

Here you can specify **From** and **To** stations, as well as leaving/returning around dates or one-way travel.

Click **Available routes** to see an up-to-date list, then click the route you want:

Once you’re happy with your choices, click **Find cheap tickets** to take you to the **Select your travel dates and price** screen with cheapest fares highlighted (see next).
Making the most of your rail portal

Select your travel date screen:

- **View train times** either departing or arriving.
- **Change date range** earlier or later.
- **Click ticket name for ticket restrictions**.

**View best fares by month** in pop-up:

Select date(s) and price(s) then click **Next** on main screen or summary pop-up to buy tickets (see next).
If there are multiple train options for your specified date, time range and price, select your preferences from the pop-up that will first display like this:

Once you have selected your ticket, specify the passengers on your booking and applicable railcards using the dropdowns:

Then, click Next to go to the Train times & tickets screen to book your tickets:
9.2 Using Ticket Alert

Receive an email as soon as cheap tickets become available for your specified journey(s) through Ticket Alert by clicking **Sign up** on the ‘logged in’ home screen:

You can set up multiple alerts for different journeys.

Enter your **contact** and **journey details** before confirming you are happy for thetrainline to send you Ticket Alert emails. Then click **Done** for confirmation of your Ticket Alert request.
10. My account

10.1 How 'My account' makes life easier

'My account' makes it quicker and easier to use your portal – securely storing key information such as favourite journeys and payment details so that you’re not driven to distraction re-entering data each time you wish to make a booking!

Access My account via the header that appears on the Home and all other key portal screens. This will take you to Log in where you enter your password to view your My Account management options:

My account

Welcome back Demo

Personal details

Update your details
Manage your addresses
Manage your credit/debit card details
Manage your favourite journeys

My bookings

Order status and refund applications
10.2 Updating your details

Clicking ‘Update your details’ (See 10.1) takes you to a screen that looks like this – it’s where you can change/update personal information and review account information set up by your account administrator:

**Update your details**

**Your details**

- **Title:** Mr
- **First Name:** Test
- **Surname:** User
- **Email address:** test@business.com
- **Password:**
- **Confirm Password:**
- **Phone number:** Optional
- **Alternative phone number:** Optional

**Additional questions required by your business**

- **Employee number:** 12345

**Business details registered to the account**

- **Company name:** TRAINLINE BUSINESS DEMO
- **Address:**
  - TRAINLINE COM LIMITED,
  - THE MATRIX,
  - 9 ALDORGE HIGH STREET,
  - LONDON
- **Phone number:** 02031262001

**Your contact address**

- **Country:** United Kingdom
- **Postcode search:**
- **Address 1:** TRAINLINE LTD
- **Address 2:** ALDORGE HIGH STREET
- **Address 3:** LONDON
- **Address 4:**
- **Address 5:**

View our [privacy policy and terms and conditions](#).

- Please tick this box to confirm that you accept our terms and conditions

Accept [Terms and Conditions](#) then click **Update** to save changes made.
10.3 Managing your addresses

Clicking Manage your addresses (10.1) takes you to a screen that looks like this – it’s where you can edit, save and set a default delivery address, and assign it a ‘nickname’:

![Manage your addresses screen]

- **Edit address(es)** (See 9.3.1 below).
- **Want to add a new address?** Enter the details here.
- **Search address by postcode.**
- **Save new address.**

### 10.3.1 If you clicked Edit, make changes and then Save changes.

![Edit this address]

**Edit this address**

- **Address Details**
  - **Set as default delivery address (UK addresses only)**
  - **Nickname**
  - **Country** United Kingdom
  - **PostCode search**
  - **Address 1** TRAINLINE LTD
  - **Address 2** ALDgate high street
  - **Address 3** LONDON
  - **Address 4**
  - **Address 5**

- **Save changes**
10.4 Saving and managing payment card details

Clicking **Manage your credit/debit cards** (9.1) takes you to a screen that looks like this – it’s where you can add, delete, edit, save payment cards, and specify a default:

**Manage your card details**

You can store details of your credit/debit cards. You are able to edit or replace these details at any time.

<table>
<thead>
<tr>
<th>Nick Name</th>
<th>Name on Card</th>
<th>Billing Address</th>
<th>Card Type</th>
<th>Card Number</th>
<th>Expiry Date</th>
<th>Default Card</th>
<th>Delete</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>test card</td>
<td>Demo User</td>
<td>TRAILLINE LTD</td>
<td>Visa</td>
<td>************4242</td>
<td>11/15</td>
<td>YES</td>
<td>Delete</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 ALLOCATE HIGH STREET LONDON EC1N 1AH United Kingdom</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add a new credit card**

**Card details**

- Card nickname
- Define default card
- Name on the card
- Card number
- Issue number
- Card type

**Card address**

Your bill will be sent to this address

- Use saved address
- Your billing address is

- TRAILLINE LTD 5 ALLOCATE HIGH STREET LONDON EC1N 1AH United Kingdom

**Save updated card details.**

Review details for existing card(s), delete or edit (see 9.4.1).

Add new card and set default.

Use Saved address.

Or add/edit billing address.

Save updated card details.
10.4.1 Edit your card details

Clicking *Edit* next to an existing card on the **Manage your card** screen (9.4) brings you here:

![Edit your card details form](image)

- **Edit card nickname**, **card number**, **card type** and **validity dates**.
- **Use Saved address**.
- **Or add/edit billing address**.
- **Save card details**.
10.5 Saving and managing favourite journey details

Clicking **Manage your favourite journeys** (9.1) takes you to this screen – it’s where you can manage and edit existing favourites, as well as add new ones:

**Manage your favourite journeys**

<table>
<thead>
<tr>
<th>Name</th>
<th>Station</th>
<th>Details</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manchester -</td>
<td>London-Manchester</td>
<td>Depart 1:30 Return 1:30</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gorst Forward facing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Quiet Table seat Power</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>socket Window</td>
<td></td>
</tr>
</tbody>
</table>

**Add a favourite journey**

**1 Where do you want to go?**

- Name
- Leaving from
- Going to

**2 When would you like to travel?**

- One way
- Return

**3 Number of passengers**

- Adults
- Children (5-15 years)

**Extra journey requirements**

- Journey options
- On or off rail
- Please select

**Railcard and other discounts (optional)**

- Railcard
- None
- How many?

**Seating (optional)**

- Seating preferences may not be available with all train companies and are not guaranteed. We suggest you book as soon as possible.
- Direction
- No preference
- Position
- No preference
- Carriage preference
- No preference
- Hear luggage rack
- Hear toilet
- Table seat
- Power socket

**Save journey**

**Edit/delete existing favourite(s) - if already set up. (See 10.6.1)**

**Name and add new favourite journey - using initial letters or station code to display possible stations and drop-downs.**

**Specify optional seating preferences.**

**Then Save journey.**
10.6 Checking booking details and requesting a refund

Clicking Order status and refund applications (see 10.1) displays a screen like the one below:

Streamline the number of bookings shown by date or type of booking using the Show me drop-down. Click on the Journey to see detailed information on the booking of your choice – like this example:

If you have selected a Print your own ticket, you can download the PDF from here.
Once you’ve been guided through Refund FAQs and clicked Request refund, you’ll see a request refund screen like this:

### Request refund

The total price has been calculated as follows:

<table>
<thead>
<tr>
<th>Fare type</th>
<th>Number of tickets</th>
<th>Price per ticket</th>
<th>Sub total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Full Fare</td>
<td>1</td>
<td>£131.00</td>
<td>£131.00</td>
</tr>
</tbody>
</table>

Number of refunds requested:

0

Total cost of tickets: £131.00

### Refunds

Enter the number of travellers you would like a refund for in each category, choose the reason for the refund from the drop-down menu, then click the continue button.

We are unable to process partial refunds of bookings that have not yet been dispatched. If you require a partial refund you can wait for your tickets to be delivered and request a refund in the normal way or refund the total booking and book again.

- **Adult**: 1
- **Reason for refund**: Cancel travel

Then click Continue to view your Ticket breakdown.

After Continue, you’ll see a Ticket breakdown screen like this one:

### Ticket breakdown

You have requested a refund on the following tickets:

Please confirm that the information is correct then click Continue.

#### Requested refunds

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>No. of tickets</th>
<th>Ticket price</th>
<th>Total cost</th>
<th>Amount eligible</th>
<th>Admin fee</th>
<th>Refund amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Full Fare</td>
<td>1</td>
<td>£131.00</td>
<td>£131.00</td>
<td>£131.00</td>
<td>£131.00</td>
<td></td>
</tr>
</tbody>
</table>

Total price: £131.00

Total Admin fee: £0.00

Total refund amount: £131.00

Have you collected your tickets?

- [ ] Yes
- [ ] No

The refund request process is complete once you see this message:

**Your refund request is now being processed**

We aim to process all refund requests within 21 days of receipt and may take up to a further 5 days for this to be credited to your account.

You can view the status of your refund request at any time by going to My Account and clicking on Order Status.

Continue
10.7 Change Date/Time of Advance Fares

You can change the date or time of their Advance Tickets by logging into My Account.

Click "Change date/time" next to the journey you want to change, and follow the steps to select the new time and date.

**Note:** Changes can be made up to 2 hours before the original departure time. You can change to any ticket of equal or greater value.
If a change is permitted, you’ll be asked to confirm the tickets you want to change.

Where there are multiple tickets for multiple passengers, you’ll have the ability to select the individual tickets you’d like to change.

For bookings set for collection by Self-service ticket machine or Office self-service ticket machine, you’ll need to confirm if you have already collected the tickets.

<table>
<thead>
<tr>
<th>Select tickets to change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manchester Piccadilly to London Euston</strong></td>
</tr>
<tr>
<td><strong>Outward</strong> - Tuesday 7th February 2012</td>
</tr>
<tr>
<td>☑ Adult Advance Single @ £18.00</td>
</tr>
</tbody>
</table>

Have you collected your tickets?
Have you collected the tickets for the journey you are about to change?
☐ Yes  ☐ No

<table>
<thead>
<tr>
<th>Refund amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manchester Piccadilly to London Euston</td>
</tr>
<tr>
<td><strong>Outward</strong></td>
</tr>
<tr>
<td>1 Adult Advance Single @ £18.00</td>
</tr>
<tr>
<td>Change of Journey Fee for 1 passengers @ £10 per passenger</td>
</tr>
<tr>
<td>Total refund amount</td>
</tr>
<tr>
<td>£10.00</td>
</tr>
<tr>
<td>£8.00</td>
</tr>
</tbody>
</table>

**Note:** For Self-service ticket machine or Office self-service ticket machine, if not all tickets within the booking are being changed, then you will still be required to collect your booking as it will include all the original tickets for those passengers that still want to travel using the original tickets.

For example: If there are 4 passengers with 4 tickets within a booking, and only 2 tickets are changed, then the whole booking needs to be collected and you must return the 2 unused tickets that they wish to be refunded as part of the change.
Next you’ll be asked to specify your new travel requirements.

You can’t change the route, but you can select a new date, time, journey type, and number of passengers. You can even go via or avoid a specific station.
Now all that’s left to do is to select and purchase your new tickets.

The amount you will be refunded will be shown on the constant journey summary throughout the booking process.

**Note:** As part of the terms of changing your Advance fare tickets, you can only select tickets of equal or greater value to that of your originally purchased tickets.

Once you have completed your transaction you will receive confirmation of your new booking, and a refund will be requested on your original tickets.

Tickets that are in your possession will need to be returned for the refund to be processed and the money credited back to your account. These instructions appear on the both the Shopping Basket page and Payment page:

### New booking summary

<table>
<thead>
<tr>
<th>Journey price: Manchester Piccadilly to London Euston</th>
<th>£18.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advance Single, 1 Adult</td>
<td></td>
</tr>
</tbody>
</table>

### Refund information

Once payment for the current transaction has been completed a request to refund the original tickets will be made. Upon receipt of the original tickets you will be refunded. To reduce the risk of loss in post we advise tickets are returned using Recorded Delivery.

| Total amount to be refunded | £8.00  |
11. Account administrator tools and set-up

11.1 What account tools can do for you - and how to access them

11.2 Downloading management information

11.3 Setting up and maintaining management questions

11.4 Setting up optional user messages and email confirmation

11.5 Updating your business details

11.6 Setting your travel policy to control access to specific fares

11.7 Managing existing users and managers; inviting new users

11.1 What account tools can do for you – and how to access them

Account tools enable you as a business administrator to set-up and manage your company’s portal to reflect your specific business rail travel needs. Use them to:

- Build valuable data-gathering questions into the booking process
- Communicate with users through welcome/confirmation messages and emails
- Manage user access rights including inviting and deleting users
- Download detailed management information about staff rail travel

Access the Account tools menu via the header that appears on the ‘logged in’ Home and other key portal screens:
11.2 Booking manager

The Booking manager feature on the B2B Internet portals lets Admin and Booker level users search for and view bookings that have been made against their company account in the last 90 days.

There are two ways for Admins and Bookers to search for transacted bookings:

1. Primary search by booking reference (Transaction ID) or collection reference (CTR).
2. Secondary search by lead passenger name.

11.2.1 How does it work?

The Booking manager feature is available to Admins and Bookers via Account tools.

Select the search type and enter the required information; booking reference or collection reference, or lead passenger name (if available):

Note: The option to search by Lead passenger name may not be available if it has not been enabled for your business account.
11.2.2 Searching by Booking / Collection reference

Use the primary search option to recall bookings by the booking reference (Transaction ID) or collection reference (CTR).

Matching bookings are displayed in the search results as shown in this example:

**Booking manager**

<table>
<thead>
<tr>
<th>Search for bookings made over last 90 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Booking / collection ref</td>
</tr>
<tr>
<td>☐ Lead passenger</td>
</tr>
</tbody>
</table>

**Search results**

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Total Cost</th>
<th>Journey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ref 537308057</td>
<td>£18.20</td>
<td>London Euston to Manchester Piccadilly 28 March 2012</td>
</tr>
<tr>
<td>28 March 2012 at 08:11</td>
<td></td>
<td>31 March 2012</td>
</tr>
</tbody>
</table>

11.2.3 Searching by Lead passenger name

Use the secondary search option (if enabled) to recall bookings by lead passenger name.

**Booking manager**

<table>
<thead>
<tr>
<th>Search for bookings made over last 90 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Booking / collection ref</td>
</tr>
<tr>
<td>☐ Lead passenger</td>
</tr>
</tbody>
</table>

Now select the appropriate lead traveller from the matching registered profiles:
Making the most of your rail portal

The bookings belonging to this lead traveller are displayed in the search results:

**Booking manager**

Search for bookings made over last 90 days

- Booking / collection ref
- Lead passenger

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Total Cost</th>
<th>Journey</th>
<th>Change date/time</th>
<th>Refund</th>
<th>Buy again</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ref 537389057</td>
<td>£79.20</td>
<td>London Euston to Manchester Piccadilly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26 March 2012 at 08:11</td>
<td></td>
<td>31 March 2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Bookings belonging to the passenger are displayed here.

11.2.4 What users can do next

There are several actions available to Admins and Bookers for bookings they have recalled:

**View booking details**

Admins and Bookers can view the full booking details which includes:

- Journey information
- Delivery method
- Products and prices
- Ticket price and restrictions
- Price breakdown

The booking details are displayed in an overlay:
Making the most of your rail portal

Refund tickets

Admins and Bookers are able to request refunds on ticket, as well as view details of processed refunds.

You’ll be taken to the refund screen where you can select tickets to refund (as shown in this example), or if a refund has already been processed you’ll see a refund confirmation instead:
Select the tickets to refund

<table>
<thead>
<tr>
<th>London Euston to Manchester Piccadilly</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outward</strong> - Saturday 31st March 2012</td>
</tr>
<tr>
<td>☑ Adult Off-Peak Single @ £73.20</td>
</tr>
</tbody>
</table>

**Have you collected your tickets?**

- Have you already collected your tickets from a ticket machine at the station?
  - Yes
  - No

**Refund amount**

<table>
<thead>
<tr>
<th>Journey: London Euston to Manchester Piccadilly</th>
<th>£73.20</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Adult Off Peak Single @ £73.20</td>
<td></td>
</tr>
<tr>
<td>Refund fee</td>
<td>-£10.00</td>
</tr>
<tr>
<td>Refund amount</td>
<td>£63.20</td>
</tr>
<tr>
<td>Total refund amount</td>
<td>£63.20</td>
</tr>
</tbody>
</table>

Apply for a refund

**Buy again**

If this feature has been enabled for the client, it lets Bookers initiate a new booking with the same journey details.

**Note:** Admins don’t have access to the ‘Buy again’ feature unless they are also set up as a Booker.

**Search results**

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Total Cost</th>
<th>Journey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ref: 5783880867</td>
<td>£73.20</td>
<td>London Euston to Manchester Piccadilly</td>
</tr>
<tr>
<td>26 March 2012 at 08:11</td>
<td></td>
<td>31 March 2012</td>
</tr>
</tbody>
</table>

Change dateline | Refund | Buy again

Click Buy again link.
Making the most of your rail portal

The journey planning module is displayed, letting you make any adjustments before going to the fares matrix to select fares:

![Image of journey planning module]

- **Edit journey and passenger details where necessary.**

- **Click Get time & tickets to proceed.**

**Change date/time**

If this feature has been enabled for the client, it lets Bookers change the travel date/time for Advance Tickets – also known as a ‘Change of journey’.

**Note:** *Admins don’t have access to the ‘Change date/time’ feature unless they are also set up as Bookers.*

<table>
<thead>
<tr>
<th>Search results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transaction</strong></td>
</tr>
<tr>
<td>Ref: 537638057</td>
</tr>
<tr>
<td>26 March 2012 at 08:11</td>
</tr>
</tbody>
</table>

- **Click Change date/time link.**

If the booking contains an Advance ticket(s) and the date of travel hasn’t passed, you’ll be taken to the ‘Change of Journey’ booking flow:
Enabling the feature

Please contact your Trainline Business Manager so they can raise a Change Request with Trainline System Support to enable the Booking manager feature.

Both the primary search and secondary search functions can be configured at a Managed Group or Corporate Reference level.

**Note:** The secondary search can only be enabled in conjunction with the primary search.
11.2 Downloading management information

Click Download management information on the Manage your account menu (see 11.1) and you’ll see a screen like this:

**Download management information**

**Choose your date range**

You can check details for current and past bookings made over the last 6 months. For accounts that make more than 1000 bookings a month we recommend downloading a minimum of one month of data at a time.

Start date: September 1st, 2010

End date: October 31st, 2010

Then click Download to generate an Excel spreadsheet file like this example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Transaction Number</td>
<td>Delivery Charge</td>
<td>Booking Date</td>
<td>Booking Type</td>
<td>Customer Name</td>
<td>Departure Station</td>
<td>Arrival Station</td>
</tr>
<tr>
<td>2</td>
<td>7296542048</td>
<td>100</td>
<td>2010-01-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>BALING BROADWAY</td>
<td>LONDON PADDOCKTON</td>
</tr>
<tr>
<td>3</td>
<td>7296542048</td>
<td>100</td>
<td>2010-02-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>LONDON PADDOCKTON</td>
<td>BALING BROADWAY</td>
</tr>
<tr>
<td>4</td>
<td>7296542048</td>
<td>100</td>
<td>2010-03-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>BALING BROADWAY</td>
<td>LONDON PADDOCKTON</td>
</tr>
<tr>
<td>5</td>
<td>7296542048</td>
<td>100</td>
<td>2010-04-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>LONDON PADDOCKTON</td>
<td>BALING BROADWAY</td>
</tr>
<tr>
<td>6</td>
<td>7296542048</td>
<td>100</td>
<td>2010-05-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>BALING BROADWAY</td>
<td>LONDON PADDOCKTON</td>
</tr>
<tr>
<td>7</td>
<td>7296542048</td>
<td>100</td>
<td>2010-06-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>LONDON PADDOCKTON</td>
<td>BALING BROADWAY</td>
</tr>
<tr>
<td>8</td>
<td>7296542048</td>
<td>100</td>
<td>2010-07-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>BALING BROADWAY</td>
<td>LONDON PADDOCKTON</td>
</tr>
<tr>
<td>9</td>
<td>7296542048</td>
<td>100</td>
<td>2010-08-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>LONDON PADDOCKTON</td>
<td>BALING BROADWAY</td>
</tr>
<tr>
<td>10</td>
<td>7296542048</td>
<td>100</td>
<td>2010-09-01 09:00:00</td>
<td>Online</td>
<td>NR Demarco Diena</td>
<td>BALING BROADWAY</td>
<td>LONDON PADDOCKTON</td>
</tr>
</tbody>
</table>

This file contains travel, transaction, and account information relating to every booking made within the dates you’ve specified.
11.3 Setting up and maintaining management questions

You can set up management questions to gather additional information like the user's employee number, cost centre, or reason for travel.

Click Management questions on the Manage your account menu (see 11.1) and you'll see a screen like this:

Setting up Management questions to generate valuable management information is optional.

Specify what question is asked in the free-text box here.

Making the question mandatory means an answer is required to complete the booking.

Specify when question is to be asked here – i.e. when an employee makes a booking or registers.

Specify your answer field here, choosing from i) free entry text box (as above), ii) drop down list with answers (see 11.3.1), or iii) text box with answer validation (see 11.3.2).
10.3.1 Specify the answer field as a dropdown list with answers

First choose ‘dropdown list with answers’, then either enter and add possible answers manually as shown below, or upload a CSV answer file as shown in 11.3.3.

Enter answer and click Add.

Click Update to save question and answers.

11.3.2 Specify the answer field as a textbox with answer validation

First choose ‘textbox with answer validation’, then either enter and add possible answers manually as shown below, or upload a CSV answer file as shown in 11.3.3.

Enter answer and click Add.

Click Update to save question and answers.
11.3.3 Upload answers from Excel CSV file

Choose to **upload answers via CSV file** here, then **browse for file** here:

- Enter answers manually
- Upload a file containing the answers

Choose the Microsoft Office Excel CSV file containing the answer values to be uploaded.

[File upload instructions]

Files are uploaded overnight after midnight. The last file uploaded that day will overwrite all previously saved values.

To upload a file containing answer values please ensure:
- You use the Microsoft Office Excel CSV template that can be downloaded below.
- All values must be listed in column A only, e.g. value1 in cell A1, value2 in cell A2, value3 in cell A3 etc.
- Each value is no more than 30 characters long
- The maximum number of values allowed is 9,999,999
- You save and upload the file as a Microsoft Office Excel Comma Separated Value File (CSV), e.g. Values.csv

[Download answer values template]

[Check upload instructions]

Ready to upload chosen file? Then click **Update**.

**Note:** To ensure a hassle-free upload process, please check above the instructions, downloading and using the **answer values Excel template** (SampleValues.csv) should you wish.

The answer value uploads only take effect when the system updates after midnight.
11.3.4 View, edit and remove management questions you’ve added

Once you’ve set up at least one management question, you’ll see a screen like this:

Management questions

Edit or remove question here. You’ll then see the Edit screen below:

Add another question here.

Edit your management questions

Edit question and click Update when you’re done...

...otherwise click here if you want to Delete.
11.5 Setting up optional user message and email confirmation

Click User message and email confirmation on the Manage your account menu (see 11.1) and you'll see a screen like this:

User message and email confirmation

User message on home page (optional)

This text will show on the home page when a user logs in. Suggested usage: Company travel policy.

Text to add:

Registration and booking confirmation by email (optional)

A confirmation email is sent to a user when they register and complete a booking. Copies of the confirmation emails can be sent to one nominated email address for your records.

Send copies to:

Update

Set up an optional home screen user message (for example your company travel policy) here. You can use HTML if you wish.

Set up optional additional email confirmation address here.

Click Update when done.

11.5 Updating your business details

Click Update your business details on the Manage your account menu (see 11.1) and you'll see a screen like this:

Update business details

Edit key business details here (most fields are mandatory).

Click Update when done.
11.6 Setting your travel policy to control access to specific fares

Click Travel policy on the Manage your account menu (see 11.1) and you’ll see the screen below where you can manage user access to Any class, Standard class or Cheapest available fares, as well as allow exceptions.

11.6.1 Allow Any class of tickets

Select the Any class button should you not wish to impose any fare restrictions:

```
Travel policy

Which tickets are your users allowed to book?

- Any class
- Standard class
- Cheapest available ticket must be chosen
```

Then confirm your choice by clicking the Update button.
11.6.2 Allow Standard class tickets only plus optional First Class exceptions

To specify Standard class tickets only, first select the **Standard class** button:

<table>
<thead>
<tr>
<th>Travel policy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Which tickets are your users allowed to book?</strong></td>
</tr>
<tr>
<td>[ ] Any class</td>
</tr>
<tr>
<td>[x] Standard class</td>
</tr>
<tr>
<td>[ ] Cheapest available ticket must be chosen</td>
</tr>
</tbody>
</table>

Users can only book standard class ticket. If you would like to allow first class under circumstances, please select from the below exceptions.

### Allow the following exceptions (optional)

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] First class advance single tickets (often cheaper than standard class return tickets)</td>
</tr>
<tr>
<td>[x] First class upgrades</td>
</tr>
<tr>
<td>[ ] First class if total journey travelling time is over 01:00</td>
</tr>
<tr>
<td>[ ] First class on weekdays (Monday to Friday) for journeys before 07:00 and journeys after 18:00</td>
</tr>
<tr>
<td>[ ] First class if travel is on weekends (Saturday and Sunday)</td>
</tr>
</tbody>
</table>

Then, if you wish, select any **optional First Class exceptions** from the list that displays. Happy with your policy? Then click **Update** to confirm.
11.6.3 Allow Cheapest available tickets only

First select the **Cheapest available** button.

**Travel policy**

- Which tickets are your users allowed to book?
  - Any class
  - Standard class
  - Cheapest available ticket must be chosen

Users must choose the cheapest available ticket for their journey or they will be asked to provide a reason for booking out of policy, which will be reported in the online management information.

**Reasons available to users for not choosing the cheapest ticket**

These reasons will appear in a dropdown list for users to choose.

- Need a more flexible ticket
- Executive / VIP traveller
- Accompanying a client or colleague
- Refund restrictions on cheapest ticket
- Break of journey not allowed
- Age restriction on cheapest ticket
- Package product purchased
- Sleeper product purchased
- First class not allowed

You can remove and add new reasons but we recommend using this default list. Up to ten reasons can be set up.

You can then specify reasons users must choose should they **not** opt for the cheapest ticket. Although a **default list** of reasons covers most likely scenarios, you can also **edit** the default list, **remove** reasons and **add** new reasons should you wish.

When you are happy with your travel policy, click **Update** to confirm.

**Note:** Should a user attempt to purchase a ticket that is not the cheapest, they will see a message from which they can either continue and decline savings by selecting a reason from the list of reasons you have set up (which will be reported in the online management information), or go back and choose the cheapest ticket (see 2.4.2).
11.7 Managing users

This area of the Account tools menu enables managers and bookers to view and amend users, manage people’s administration rights, register new users or travellers, and invite new users.

Note: The Administration rights link will not be displayed to bookers as they don’t have this authority. A booker will also not see the Register new user or traveller link if single sign-on is enabled for your account.

11.7.1 Click View/Amend users or travellers on the Manage users menu (see above) and you’ll see a screen like the one below:

All registered users are displayed, or search for users by last name. Select user(s) to remove, then click Update when done.

To view or edit a user’s details click Edit User (if link is displayed):
11.7.2 Click **Administration rights** via the **Manage users** menu (see above) and you’ll be taken to this screen. Here you can make users **managers** or **bookers** for other travellers, or remove these rights too.

**Administration rights**

Users who have administrative responsibilities in your organisation can be given Broker and Manager rights. Select the rights to be given to your administration users. Changes will take effect when the users next log in.

- **Broker** - Is a travel arranger who books travel for other people, and can also view and amend a user’s details.
- **Manager** - Will have access to all features within accounts to manage account and RTO users.

<table>
<thead>
<tr>
<th>Name</th>
<th>Broker</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Test</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>User Test</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>User Test</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>User Test</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

All registered users are displayed, or search for users by last name.

Select **administration rights** to be given or removed from the user(s), then click **Update** when done.

11.7.3 Click **Register a new user or traveller** on the **Manage users** menu (see 11.6) and you’ll see the screen below:

Enter the user’s profile and account information.

Accept terms and conditions and **Register**.
11.7.4 Click **Invite new users by email** on the **Manage users** menu (see 11.6) to generate an email via your email client which contains instructions and hyperlinks to start the user registration process:

Enter email addresses to which message is to be sent.

Edit message, if necessary, before sending.
12. Travel booker tools and booking for other people

12.1 What is a booker and what can they do?

Registered users who arrange travel for other people can be made a Booker in the portal (see how in 11.6). This allows them both to make bookings for themselves and on behalf of others.

Bookers can also Manage users in Account tools - so they can register new users, view and amend existing users, and invite new users by email.

12.2 Booking travel for other people

12.2.1 As a booker you can search for train times and tickets (section 2). On the Travel options screen you will need to confirm Who is travelling?

<table>
<thead>
<tr>
<th>Travel options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who is travelling?</strong></td>
</tr>
<tr>
<td>This booking is for: Someone else ☑ Myself</td>
</tr>
<tr>
<td>Name of Lead Traveller</td>
</tr>
<tr>
<td>Name of Traveller 1</td>
</tr>
<tr>
<td>Name of Traveller 2</td>
</tr>
</tbody>
</table>

Booking for someone else?

Enter traveller’s last name and Search to open search pop-up and select traveller from list.

Traveller not found?

Refine criteria and search again.

If none still found, register a new traveller (if link shown).
Traveller(s) selected?

**Travel options**

**Who is travelling?**

- This booking is for ☐ Someone else ☑ Myself

<table>
<thead>
<tr>
<th>Name of lead traveller</th>
<th>Change</th>
<th>View/Edit lead traveller's details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test User</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of traveller 2</th>
<th>Change</th>
<th>View/Edit traveller 2 details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo User</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click **Change** to choose a different traveller if you need to. Click **View/edit link** (if shown) to check or update traveller’s details. Now Continue to **Delivery Options**.

12.2.2 **Ticket delivery options** – follow the steps in section 6 to specify the delivery options.

The **lead traveller’s address details are shown** when postal delivery is selected - so tickets can be delivered to their address.

**First class post**

- **Name**: Test User
- **Delivery address**: Primary address
- **Country**: United Kingdom
- **Postcode search**: EC3N1AH

<table>
<thead>
<tr>
<th>Address 1</th>
<th>TRAINLINE.COM LIMITED,</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 2</td>
<td>THE MATRIX,</td>
</tr>
<tr>
<td>Address 3</td>
<td>9 ALDGATE HIGH STREET,</td>
</tr>
<tr>
<td>Address 4</td>
<td>LONDON</td>
</tr>
<tr>
<td>Address 5</td>
<td></td>
</tr>
</tbody>
</table>
12.2.3 Shopping basket – After leaving Delivery options, you are taken to the Shopping basket where you can review the journey details.

**Shopping basket**

Items will remain in your basket for up to two hours.

<table>
<thead>
<tr>
<th>Journey: London Euston to Manchester Piccadilly</th>
<th>£58.00</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outward - Monday 9th November 2010</strong></td>
<td></td>
</tr>
<tr>
<td>Depart</td>
<td>Arrive</td>
</tr>
<tr>
<td>09:00 London Euston</td>
<td>11:07 Manchester Piccadilly</td>
</tr>
<tr>
<td><strong>Return - Tuesday 9th November 2010</strong></td>
<td></td>
</tr>
<tr>
<td>Depart</td>
<td>Arrive</td>
</tr>
<tr>
<td>15:55 Manchester Piccadilly</td>
<td>18:02 London Euston</td>
</tr>
</tbody>
</table>

**Lead traveller for this journey**

DEMO USER (DEMO@THETRAINLINE.COM)

**Getting your tickets**

Self-service ticket machine
- Collect your ticket(s) from the ticket machine at London Euston.

The lead traveller for the journey is shown here.

**Note:** As a booker, you can only complete a booking that contains journey(s) naming the same lead traveller. If you have multiple journeys naming different lead travellers in your shopping basket, these extra journeys must be removed from your shopping basket (see section 5) and booked separately.

If you have any journeys held in your shopping basket, you will also be reminded of the 'same lead traveller' condition on the home page - as in this example:

**Journeys in your shopping basket**

You have 1 journey(s) held in your shopping basket

Go to shopping basket

Your basket must be empty if you want to book a new journey for a different traveller.
12.2.4 Paying for your traveller’s booking – just follow the same steps as section 7. As the booker, you will receive email confirmation once the booking has been completed.

**Note:** A copy of the confirmation email will not be sent to the lead traveller automatically. If required, you will need to specify their email address here.

Click **Add recipient** and enter lead traveller's email address on the Payment screen if you also want them to receive confirmation by email.

12.2.5 Booking confirmation - Once you click **Buy tickets**, payment will be made and you’ll see a confirmation screen like this:

![Booking Confirmation](image)

**Shows the lead traveller for the journey.**

12.2.6 Checking booking details and requesting a refund – Follow the steps in 10.1 and 10.6 to go to Your booking and journey information in My account.

Here you can view and refund the bookings you have made for yourself and other travellers.

![Your booking and journey information](image)

**The lead traveller is shown for each booking.**

Click here to Request refund.
13. Additional security options

13.1 Disable user’s ability to register themselves on the portal

Although users are able to sign up to their account themselves on the login home screen, the account administrator can disable this on request to the thetrainline.

Users will then have to be registered by a manager or booker instead.

13.2 Allow only those users using specific email address domains to register

The portal can be set up so that a user is only able to register if the domain of their email address matches the list of email domains authorised by your company.

For example, if your company’s email address domain is @greatbusiness.co.uk a user is only able to register if their email address contains this domain.

This must be set up by thetrainline. A list of acceptable email domains needs to be provided by the account administrator.

13.3 Control user login using single sign-on

13.4 Allow your portal to be accessible only to specific IP addresses
13.3 Control user login using single sign-on

Your company can set up a single sign-on access request which allows users to access the portal and login automatically from another online application, like the company intranet, without their having to enter their login details manually.

The single sign-on request needs to be set up by your company. Speak to your account manager for more information.

13.4 Allow your portal to be accessible only to specific IP addresses

The portal can be set up so that it only allows certain IP addresses (networks) to access and login to the portal successfully.

This allows your company to ensure that users accessing the portal are only accessing it from an authorised network, such as your office.

If a user tries to access the portal from a network that does not match the list of permitted IP addresses, then the user would be presented with a failed login screen.

Speak to your account manager for more information about this.
14. Adapted availability matrix for visually impaired using screen readers

Visually impaired customers using an enabled screen reader have access to a specially adapted availability matrix that is recognised and easily read by the screen reader to enable clear price comparisons by voice only.

Here’s an example of the screen reader-specific matrix layout:

<table>
<thead>
<tr>
<th>Train times &amp; tickets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Out 29 Jul 2010 Ladybank (LDR) to Manchester Piccadilly (MAA)</strong></td>
<td><strong>Return 12 Aug 2010 Manchester Piccadilly (MAA) to Ladybank (LDR)</strong></td>
</tr>
<tr>
<td><strong>1200 from Ladybank</strong></td>
<td><strong>1016 from Manchester Piccadilly</strong></td>
</tr>
<tr>
<td><strong>£37.00 CHEAPEST OFF-PeAK SINGLE</strong></td>
<td><strong>£26.00 CHEAPEST ADVANCE SINGLE</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>1016 from Manchester Piccadilly</td>
</tr>
<tr>
<td>£67.00 RETURN SINGLE</td>
<td>1331 from Manchester Piccadilly</td>
</tr>
<tr>
<td>1301 from Ladybank</td>
<td>1331 from Manchester Piccadilly</td>
</tr>
<tr>
<td><strong>£142.00 FIRST ANYTIME SINGLE</strong></td>
<td><strong>£280.00 CHEAPEST ADVANCE SINGLE</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>1016 from Manchester Piccadilly</td>
</tr>
<tr>
<td>£67.00 RETURN SINGLE</td>
<td>1331 from Manchester Piccadilly</td>
</tr>
<tr>
<td><strong>£74.00 OFF PEAK RETURN</strong></td>
<td><strong>£134.00 ANYTIME RETURN</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
<tr>
<td>£177.00 FIRST OFF PEAK RETURN</td>
<td>£177.00 FIRST ANYTIME RETURN</td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
<tr>
<td>£294.00 FIRST ANYTIME RETURN</td>
<td>£294.00 FIRST ANYTIME RETURN</td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
<tr>
<td><strong>1301 from Ladybank</strong></td>
<td><strong>1046 from Manchester Piccadilly</strong></td>
</tr>
<tr>
<td><strong>£34.50 CHEAPEST ADVANCE SINGLE</strong></td>
<td><strong>£280.00 CHEAPEST ADVANCE SINGLE</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>1016 from Manchester Piccadilly</td>
</tr>
<tr>
<td>£67.00 RETURN SINGLE</td>
<td>1331 from Manchester Piccadilly</td>
</tr>
<tr>
<td><strong>£50.00 FIRST ANYTIME SINGLE</strong></td>
<td><strong>£280.00 CHEAPEST ADVANCE SINGLE</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>1016 from Manchester Piccadilly</td>
</tr>
<tr>
<td><strong>£67.00 RETURN SINGLE</strong></td>
<td><strong>£134.00 ANYTIME RETURN</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
<tr>
<td><strong>£74.00 OFF PEAK RETURN</strong></td>
<td><strong>£134.00 ANYTIME RETURN</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
<tr>
<td><strong>£177.00 FIRST OFF PEAK RETURN</strong></td>
<td><strong>£177.00 FIRST ANYTIME RETURN</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
<tr>
<td><strong>£294.00 FIRST ANYTIME RETURN</strong></td>
<td><strong>£294.00 FIRST ANYTIME RETURN</strong></td>
</tr>
<tr>
<td>Any change, 91 adv. (price varies)</td>
<td>Any change, 91 adv. (price varies)</td>
</tr>
</tbody>
</table>
15. Troubleshooting

If you need any help while using the portal, or if you have any questions about rail tickets, just click the Help link in the header of the portal screens - this will take you to the Help portal:

- Search by topic
- Enter your question or keyword
- Browse frequently asked questions and answers

If you still need help, or you wish to report a fault with the portal, then contact your account administrator or travel provider.
Appendix A: Common National Railcards

16-25 Railcard (Young Persons Railcard)
For just £30 you'll save 1/3 on fares for a year.
You can now save on ALL Standard Class (and many First Class) Advance fares!
You can find more details about how to apply for a Railcard by visiting http://www.16-25railcard.co.uk/

If you decide to purchase a Railcard please revisit our site to book your train journey and take advantage of these savings.

Please note that the link above is to an external site. We are not responsible for the content of this site.

Disabled Persons Railcard
If you have a disability that makes travelling by train difficult you may qualify for the Disabled Persons Railcard.
The Railcard allows you - and an adult companion with you - to get a 1/3 off most standard and first class fares.
You can find more details about how to apply for a Railcard by visiting www.disabledpersons-railcard.co.uk

If you decide to purchase a Railcard please revisit our site to book your journey and take advantage of the savings.

Please note that the link above is to an external site. We are not responsible for the content of this site.
Network Railcard

It costs just £30 and you can save 1/3 on rail fares in South East England. Save 60% on children’s fares too.

You can find more details about how to apply for a Railcard by visiting www.railcard.co.uk/network.

Please note that the link above is to an external site. We are not responsible for the content of this site.