DISPATCH GUIDE

Adding & Managing Riders

Riders can sign up on their own, but Dispatch can also create and manage rider accounts directly in the system. This guide shows how to add a new rider using each of the three account types, and how to deactivate, reset, or remove an existing rider account.

ROLE	WHERE	COVERS
Dispatch	Accounts (left menu)	Add · Deactivate · Reset · Remove

1. Open the New Account window

Step 1. Make sure your role is set to **Dispatch** using the **Role** drop-down at the top left of the screen.

Step 2. In the left-side menu, select **Accounts**.

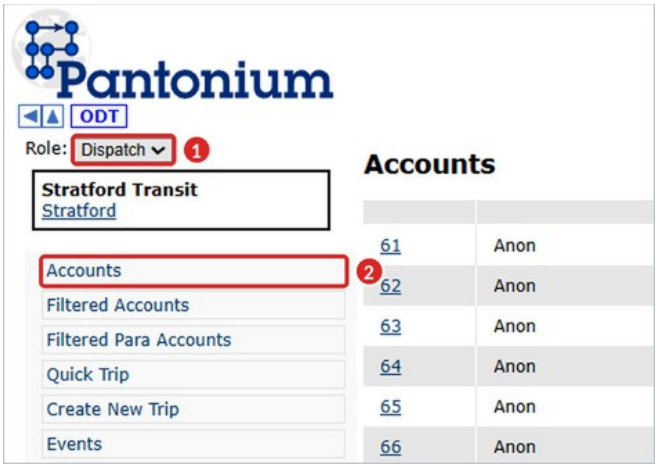


Figure 1: *Select the Dispatch role (1), then Accounts in the left menu (2)*

Step 3. The **Accounts** screen lists every rider account in the system. Click **Add Account** at the top of the list.

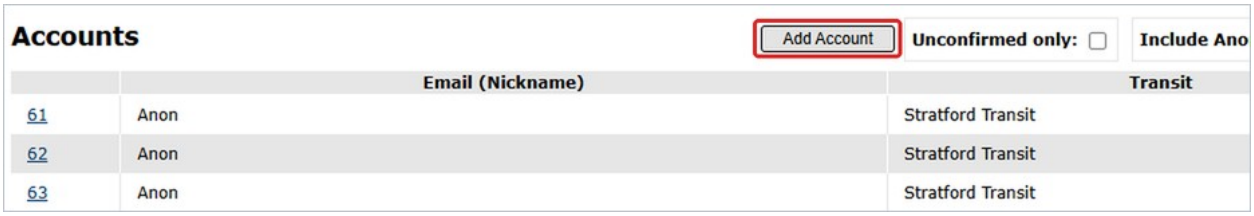


Figure 2: *The Add Account button on the Accounts screen*

The **New Account** window opens. Continue with the section below that matches the type of account you want to create.

2. Choose an account type

There are three ways to create a rider account:

Account type	Use it when...	How the rider signs in
Option 1 – Email account	The rider has an email address they can access.	Rider's email. The system emails them a link to set their own password.
Option 2 – Private account	The rider has no email, or prefers Dispatch to set up their login.	A username and password created by Dispatch and passed on to the rider.
Option 3 – Paratransit account	The rider is registered for paratransit service (only if your service offers it).	A username and password created by Dispatch. Every paratransit account is a private account.

3. Option 1 – Create an account with the rider's email

Use this option when the rider has an email address. The email is mandatory for this method; all other details are optional but recommended.

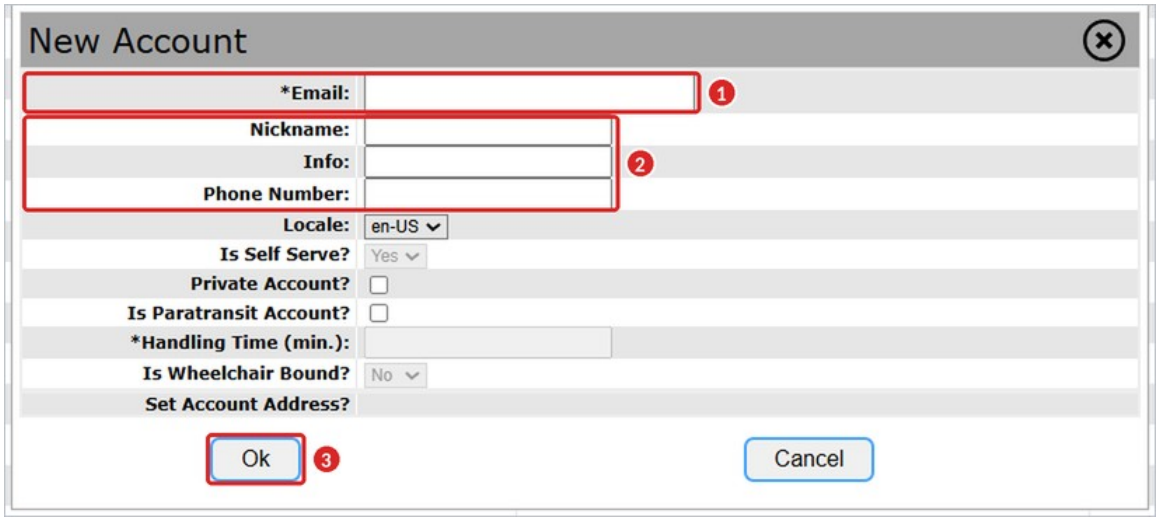


Figure 3: *New Account window – email account*

#	Field	What to do
1	**Email** *required*	Enter the rider's email address.
2	**Nickname, Info, Phone Number**	Add any other details you have, such as a nickname, phone number, or important information about the rider (e.g. *"Requires a specific seat in the vehicle"*).
3	**Ok**	Click Ok to create the account.

A confirmation message appears. The system automatically emails the rider with instructions to set their password.



Figure 4: *Confirmation that the account was created*

> **NOTE** The rider must open the email and set a password before they can sign in.

4. Option 2 – Create a private account (username & password)

Use this option when the rider does not have an email address. Instead of an email, Dispatch creates a username and password for the rider.

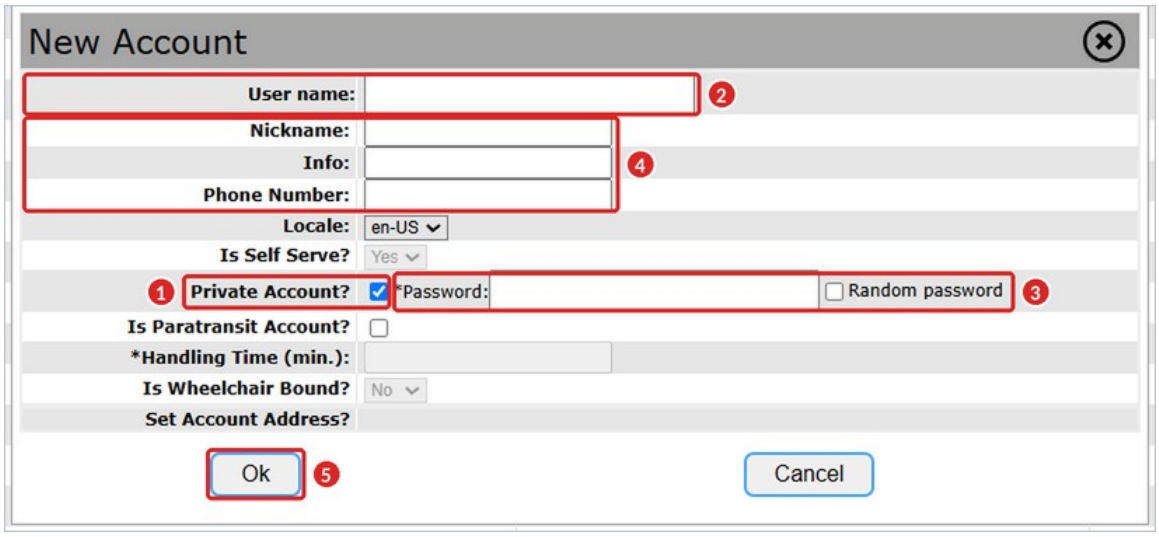


Figure 5: *New Account window – private account*

#	Field	What to do
1	**Private Account?**	Tick this box. The Email field changes to User name and a Password field appears.
2	**User name** *required*	Create a username for the rider.
3	**Password** *required*	Enter a password for the rider, or tick Random password to have the system create one.
4	**Nickname, Info, Phone Number**	Add any other details you have about the rider.
5	**Ok**	Click Ok to create the account.

> **TIP** Once the account is created, share the **username** and **password** with the rider so they can sign in and book trips.

5. Option 3 – Create a paratransit account

This option is only available if your transit service offers paratransit. Paratransit accounts have several extra mandatory fields, marked with an asterisk (*) in the window.

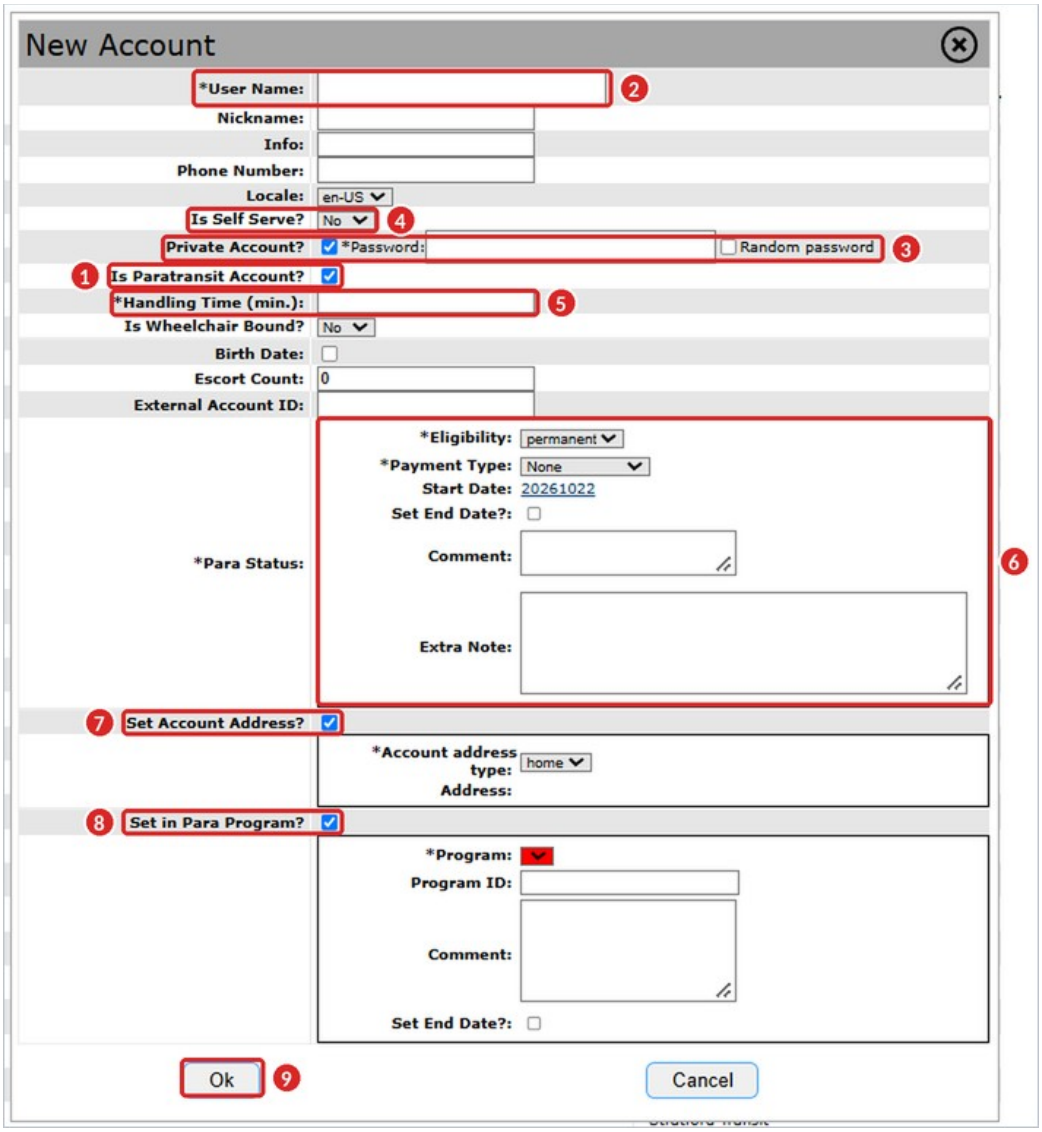


Figure 6: *New Account window – paratransit account*

#	Field	What to do
1	**Is Paratransit Account?**	Tick this box first. The paratransit fields appear, and Private Account? is ticked and locked automatically – every paratransit rider needs a private account.
2	**User Name** *required*	Create a username for the rider.

#	Field	What to do
3	**Password** *required*	Enter a password for the rider, or tick Random password to have the system create one.
4	**Is Self Serve?**	Choose whether the rider can book trips on their own – see the Important note below.
5	**Handling Time (min.)** *required*	Enter the time, in minutes, the rider needs to get on and off the vehicle.
•	**Is Wheelchair Bound?**	Optional. Set to Yes if the rider travels in a wheelchair.
•	**Birth Date**	Optional. Tick to record the rider's date of birth.
•	**Escort Count**	Optional. Number of escorts or attendants who usually travel with the rider.
•	**External Account ID**	Optional. The rider's ID in another system (e.g. your agency's client number).
6	**Para Status** *required*	Set the rider's paratransit status: **Eligibility** and **Payment Type** – required **Start Date** and, if needed, an end date (tick **Set End Date?**) **Comment** / **Extra Note** – any additional notes for this rider
7	**Set Account Address?**	Optional. Tick to add the rider's address (choose the address type, e.g. home).
8	**Set in Para Program?**	Optional. Tick to place the rider in a paratransit program – select the Program and enter the rider's Program ID.
9	**Ok**	Click Ok to create the account.

IMPORTANT **Is Self Serve?** Dispatch decides whether the rider can use the account themselves.

- Set to **No** if the rider needs Dispatch to book trips for them.
- Set to **Yes** if the rider can book trips on their own.

6. Manage an existing rider account

Dispatch can deactivate an account, send a new password-reset email, change a rider's password, or remove an account completely.

Step 1. In the left-side menu, select **Accounts**.

Step 2. In the **Search** box at the top right of the screen, start typing the rider's email or username. Select the matching account from the list that appears.

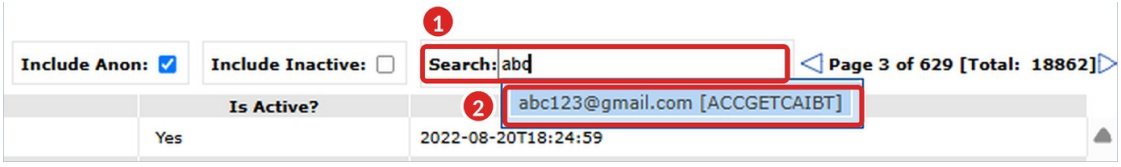


Figure 7: *Search for the rider (1) and select their account (2)*

Step 3. The rider's **Account** page opens. Click the ▼ arrow next to the email (or username) to show the account options.



Figure 8: *Open the drop-down arrow (1) to see the account options (2)*

Step 4. Select the option you need:

Option	What it does
Deactivate	Turns the account off. The rider can no longer sign in to the Rider app.
Trigger reset password	Sends the sign-up / password email to the rider again, with a link to set their password. Useful when a rider did not receive, or cannot find, the original email.
Modify password	Lets Dispatch set a new password for the rider. Share the new password with the rider – they can change it later in the Rider app.
Remove account	Deletes the rider's account from the system.

> **NOTE** Trigger reset password needs a rider email address. For private and paratransit accounts (username only), use **Modify password** instead.

> **IMPORTANT** If the rider may need their account again, use **Deactivate** rather than **Remove account**.