

## YOUR GUIDE TO TRAVELMANAGER

TravelManager is a secure online portal designed to help you manage every aspect of your Equity school trip.

Bringing together trip details, itineraries, documents, key dates and passenger information, TravelManager helps you to stay organised, reduces time spent on administrative tasks, and ensures you're ready to travel with confidence.



## ACCESSING TRAVELMANAGER

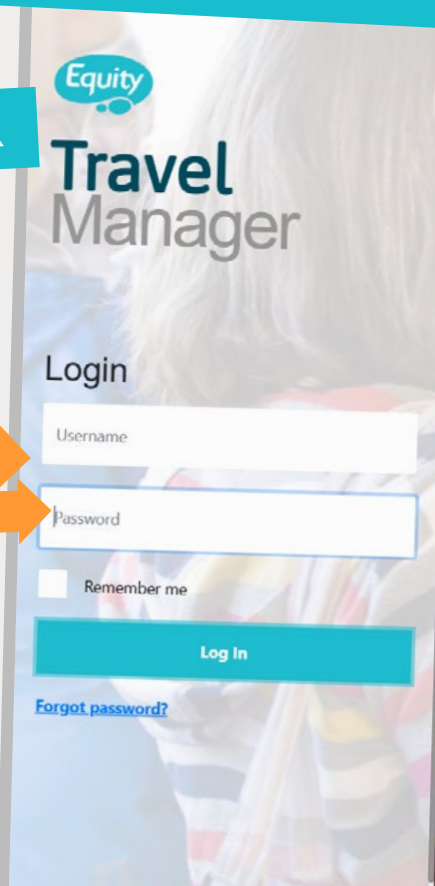
In your browser of choice, visit:  
[equitytravelmanager.co.uk/Login](https://equitytravelmanager.co.uk/Login)

Enter your username and password, which will have been sent to you by email.

USERNAME

PASSWORD

Please note that loading trip data can take a minute or two, so don't be tempted to refresh.



## ABOUT YOUR LOGIN DETAILS:

Your login is unique  
to your school

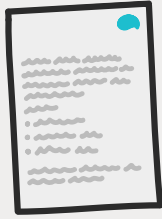
Please only share  
with relevant staff

Passwords cannot be  
changed or reset  
(we can remind you if needed)

If you experience any issues accessing the portal,  
please contact your Delivery Executive.

# THE DASHBOARD

The dashboard provides a clear overview of your trip, including:



**FULL PACKAGE  
DETAILS**



**TIMELINE OF KEY  
PRE-TRAVEL DATES**



**PAYMENT  
SCHEDULE**



**COUNTDOWN  
TO DEPARTURE**

You can also add your own important school dates to the timeline to help manage internal deadlines.

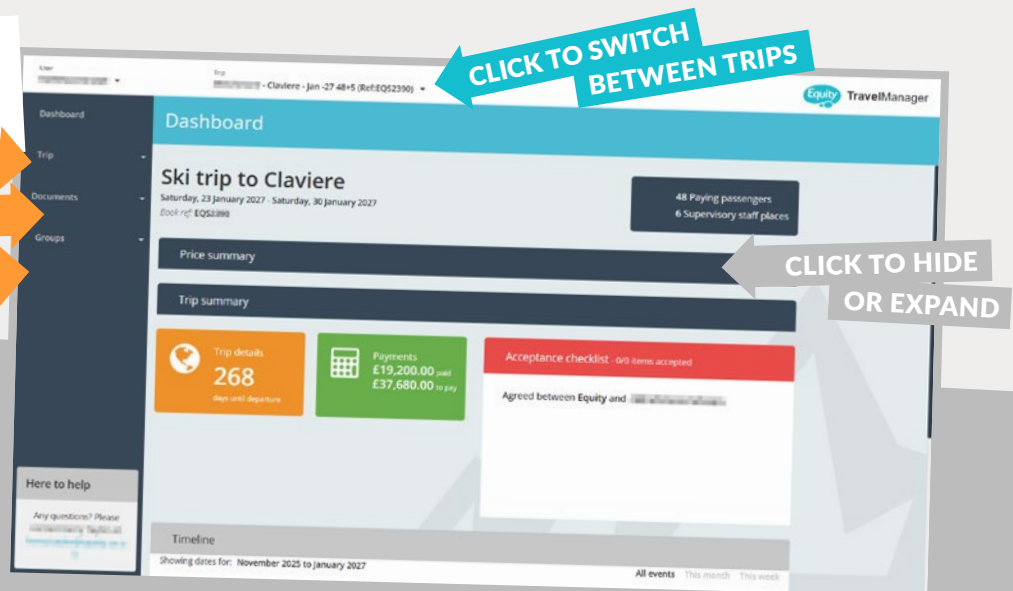
From the dashboard, there are three main areas to explore:



**TRIP**

**DOCUMENTS**

**GROUPS**



## TRIP

View your trip details in the itinerary tab.

### Schedule

View your day-by-day itinerary.

### Exclusions

See what is not included in your trip.

## DOCUMENTS

All trip documentation is stored online for easy access.

### Useful Info

Baggage advice, risk assessment guidance, accommodation rules and more.

### Trip Documents

Documents specific to your booking, including operational paperwork and vouchers.

This online travel pack helps reduce waste associated with printing, paper and postage.

## GROUPS

Manage all passenger information, including:

**Names & passport details**

**Dietary & medical information**

**Skier details (or other activity related details)**

**Emergency contacts**

**Generate Parent Form link**

# ENTERING AND UPDATING PASSENGER INFORMATION

In the groups tab, there are a few ways to enter and update your passenger details:



**SEND A PARENT FORM**



**EDIT INDIVIDUALLY**



**BULK UPDATE VIA SPREADSHEET**

Manage passenger details in the way that suits you best!

## USING THE PARENT FORM

### STEP ONE: Share the link with parents

#### Generate the 'Parent Info Form Link'.

The button for this is on the 'Passenger Details' page of TravelManager.

#### Send this link to parents via email.

(Parents do not need a login)

### STEP TWO: Parents complete the form

#### Parents enter details for their own child only.

Parents are reminded to ensure details match their child's passport.

- Forms are hosted securely by Equity
- All data is encrypted and handled in line with UK GDPR

### STEP THREE: Review submissions

#### When you next log in, you'll see a notification showing how many new submissions have been received.

Click 'Review Here' to view them.

#### Approve before adding.

- Review each submission before it's added to your passenger list
- Select which passenger record the information should be added to
- No data is added automatically without your approval

Once added, details can still be edited in the Groups tab.

## EDITING INDIVIDUALLY

To edit individual passengers, click the green pencil icon next to a passenger's ID number.



## BULK UPDATE

Updating via spreadsheet is an ideal way of managing your passenger information if you have a larger group, helping keep information consistent and accurate.

For further details on updating via spreadsheet, please check out the troubleshooting tips on the next page.

Export the passenger list as an .xls spreadsheet

Complete or amend details offline

Save the file as a .csv

Re-import the CSV to update all details at once

If you need help at any stage, your Delivery Executive can assist.

## EMERGENCY CONTACTS

Please ensure that you have added emergency contact details for your group and confirmed your UK mobile number.



For communication while you are on the trip, we must have a UK-based emergency contact name and phone number.

## FREQUENTLY ASKED QUESTIONS

### Do I need to re-enter passenger details if I've already sent them to Equity?

No. Any information already provided will be uploaded for you. Please review it and let your Delivery Executive know if changes are required.

### Is there a deadline for passenger information?

Yes. All passenger details must be confirmed 16 weeks before departure. If changes are needed after this point, please contact your Delivery Executive.

### Who is my Delivery Executive?

If you're unsure, email [reservations@equity.co.uk](mailto:reservations@equity.co.uk) and we'll put you in touch.

### What if I'm locked out or my login doesn't work?

Please contact your Delivery Executive or email [reservations@equity.co.uk](mailto:reservations@equity.co.uk).

### Do I use the same login for all trips?

Yes. One login gives access to all your bookings. Once logged in, simply select the trip you wish to manage.

# HAVING ISSUES INPUTTING DATA?

## A Quick Problem-Solving Guide

Updating via spreadsheet is a great way to manage your data, but errors can occur.

Here's a few key points to consider when exporting and importing data.



### KEEP COLUMN HEADINGS UNCHANGED

**Please ensure all column headings remain exactly the same as in the exported file.**

Changing, removing or reordering headings may prevent the file from uploading correctly.

### ENABLE MACROS (where applicable)

**The exported sheet contains macros that provide drop-down options using the correct format for our booking system (and airlines, where applicable).**

Some security settings automatically disable macros.  
If macros are disabled:

- Open the data tab in the file.
- Copy the accepted formats shown there and paste them into the import sheet before uploading to TravelManager.

### CHANGE PLACEHOLDER DATA

**An empty report from TravelManager will include default placeholder names.**

These are used to show the number of passenger spaces allocated in the booking system. For example, "Child (not sharing)" is a default name used for passengers under 18. These placeholders should be replaced with the correct passenger details before final submission.

### FIRST & LAST NAMES

**Please don't use any special characters when entering names.**

For example, 'Smith-Jones' should be entered as 'Smith Jones'.



[www.equity.co.uk](http://www.equity.co.uk)



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