

# Saving Customized Settings in Trip Boss™ with Copy Trip Online Tutorial

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Trip Boss™ was designed to be highly configurable. Many areas are configurable to your needs and uses, including pop-up list items, itinerary display preferences, and trip preferences such as distance units (miles, km) and currencies. You can even enter/edit items into your own language. But how do you keep these from trip to trip? This tutorial will cover steps on how to accomplish this task.

## Background:

Trip Boss was designed to be flexible, but also not to overwhelm the databases—allowing quick access to data. No one needs to spend time waiting for minutes, even seconds, for data retrieval. So, while Trip Boss is customizable, the customization typically resides in individual trips. Therefore, each consecutive trip will not be bogged down by past trip customizations. However, the need to not have to reenter data is recognized. We approached this need in a few different ways:

- 1) We added many default options, especially where the data doesn't typically change from user to user. Examples are currencies, expense types, payment types. For these a rather thorough pop-up list is available. However, since we cannot account for everything, these lists can be modified and added to.
- 2) Places were the toughest to add defaults for, since Trip Boss is intended to be used internationally and the possibilities could be endless, or at least more than you want to stuff into a functional database. So, for Trip Boss 2.0, we added over 300 places ranging from airlines, airports, hotel chains, and car rental agencies. *Many of these places include standard contact data such as 800 numbers or websites as well.*
- 3) Some people may travel to the same place repeatedly, but also may have a few standard destinations, especially on business. We wanted Trip Boss to be flexible enough to allow for customization for different destinations, especially some that may be very unrelated, such as those in different continents or local versus international. More on this aspect later.
- 4) A standard “global” customization can cause database issues when reviewing or editing past trips that do not include changes made after completion of the trip, so this had to be taken into consideration. We knew customers did not want to deal with broken trips, lost data, or a buggy application.

## So how CAN you save your customizations?

Simply put, use the “Copy Trip” function in the drop down menu, when starting a trip. Here's how:

### Step 1: Start with a New Trip

When you set up your first trip, use the “New Trip” button on the “Trips” (suitcase) Tab to create your new trip. You don't have to create a “default” trip, but those who wish to put in a conscious effort into the process, can set up a “default.” We recommend just building your customizations from trip to trip, so that you don't have to go back to your default trip and add new things that you come up with.

However, if you want to set up a default trip in your own language, to start from, a default or starter trip would be recommended.

As you add new Places (*most common*), new Currencies, new Place Types, new Budget Types, new Expense Types, new Payment Types, or new Pastime Types (all directly accessible in the drop down menu under “Tools”) these customizations will be saved in the current trip. These items can also be modified as you go—when you are setting up itineraries or selecting them in expenses, for example, by moving to the bottom to the applicable pop-up list and selecting “Edit Places...” or whichever applies.



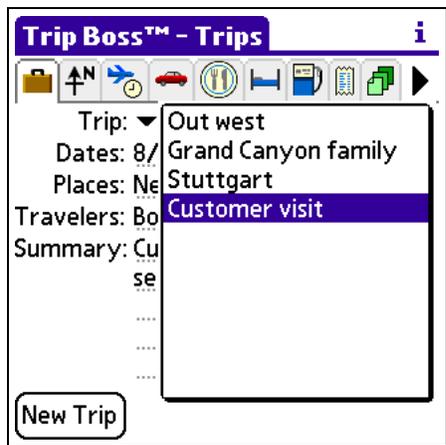
In addition, any Places (and data associated with them) you import from your contacts, plus Ratings you give to Places, will also be stored in the current trip with the ability to be transferred to a new trip using “Copy Trip.”

The “Trip Prefs...” and “Itin Prefs...” that you select in the drop down menu “Options” will also copy to a new trip using “Copy Trip.”

**Step 2: Use Copy Trip on your Next Similar Trip**

Ready for a new trip? This time, on the “Trips” Tab (suitcase), instead of selecting “New Trip”, you can use “Copy Trip” and all the customizations will be copied into the new trip. The only that does not copy over is any actual trip data, such as journal entries, expense data, itinerary schedule, etc.

- 1) Tap on suitcase (Trips) tab.
- 2) Using the selector down arrow after “Trip” select the trip you wish to copy.



- 3) From the drop down menu, select “Record” “Copy Trip”.
- 4) Enter a new name (Trip Boss will automatically start you out with “Copy of” name of last trip for the name, which you can change now or later.
- 5) Tap OK and a new trip database will be created with all your past customizations and preferences!



### **Step 3: Further customization.**

Now that you have copied your trip, you can continue to customize this trip as necessary. For the third trip, you can either copy this new trip, or go back to the first trip. Any trip can be copied.

*Please Note: Trip Boss™ 2.0 and above supports ver. 1.x databases. However, when “Copy Trip” is used, the 300+ new default places from which to choose will not be available for copied old 1.x trips.*

### **Tip for several common destinations:**

Let's say you travel to three main places a lot: New York, locally in your area, and to Europe. You can set up one trip that is customized for each. You can enter places applicable to each in a separate trip.

When you repeat travel to those areas, you can simply copy the applicable trip. Therefore, you do not clutter the database with unrelated data.

Creative Algorithms provides tutorials and manuals for Trip Boss and other applications on our website. New ones are added frequently and can be found at <http://www.creativealgorithms.com/tutorialsandmanuals.html>. Our detailed manuals can also be downloaded at this webpage. If you find an area on which you would like further explanation, please feel free to contact us via our website to suggest future tutorials. A convenient online form is available for contacting us.

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