



User Manual

v0.2.3

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About 4TMs App

4TMsApp is an application that is aimed at Tour Managers. Although initially developed for the use of TMs working for Great Rail Journeys, it is being adapted to be suitable for use on other tours.

4TMsApp is a web application written in JavaScript. It will run on any web browser so is suitable for use on mobile phones as well as desktop and laptop machines.

The application is written by Robert Herd an experienced Tour Manager with Great Rail Journeys.

The application is copyrighted by CiEL Services Limited.

Subscription

The application is available as a subscription service. Currently the fee to use it is £10 annually.

Current features

Currently you can import a tour from **4TMsConvert**, edit the client list and then export it in Word and Excel Format. It can also be used to create group emails.

The key feature that is included in this first release of the application is the ability to generate a **.vcf** file that automatically adds the clients to the user's telephone book on a MacOS.

Future enhancements

The feature that is currently under development is the generation of seating labels.

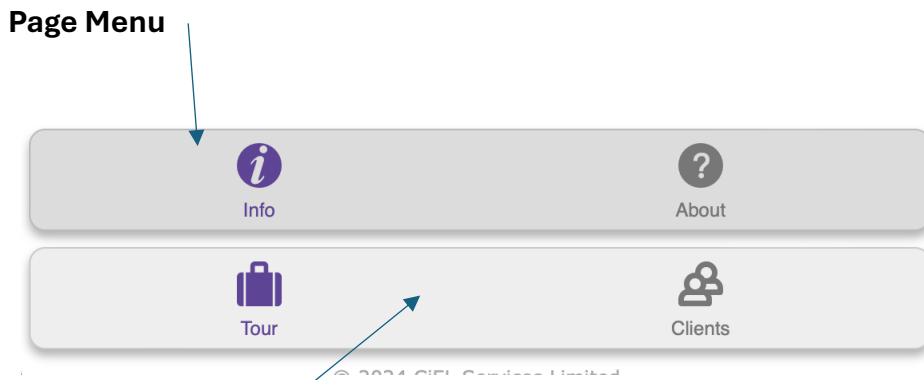
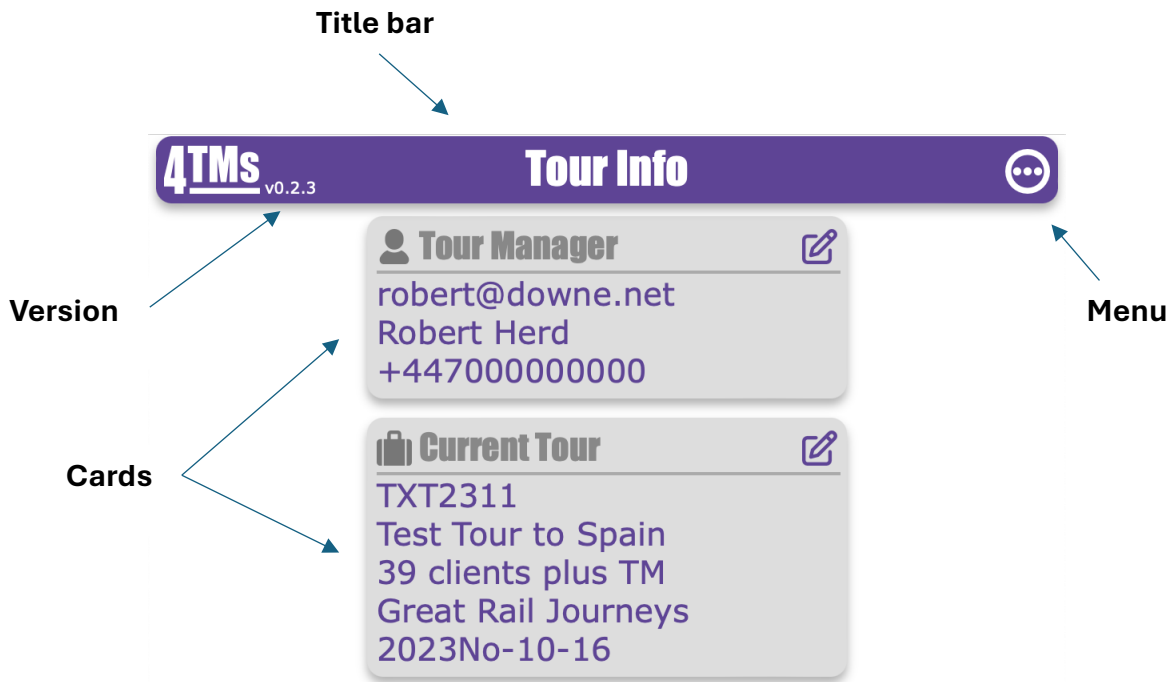
Support

To report bugs, request features, make correction or ask for additions to this manual or to ask for help then email support@4TMs.uk

Version

The current version of **4TMsApp** is **v0.2.3**

Screen



Workflow

The way in which I prefer to work is the following steps:

1. Create a **.4TMs** file by converting a GRJ Client Details list using the free **4TMsConvert** applet. (available at www.4TMs.uk);
2. Open the **.4TMs** file into the **4TMsApp**;
3. Generate an email to all the clients by utilising the **Create Email** option in **4TMsApp**. I then email I request that the clients update be with their preferred names, email addresses and mobile numbers for all;
4. As the clients respond I update the client details in **4TMsApp**;
5. Once I have all the client's details updated:
6. I use **4TMsApp** to **Export Mobile File**. If I then open this file on a Mac it adds all the client's details to Contacts, which in turn is automatically adds them to my iPhone.
7. Utilising the iPhone I can then add all the users to a tour WhatsApp group (WAG).
8. I then use **4TMsApp** to **Export Excel File** an up-to-date client list for further uses.

Chapters

In this Manual you will see references to **Chapters** these are the way in which **Pages** are grouped together and appear the **Chapters menu**. Clicking/tapping on a **Chapter menu** icon takes you to that Chapter, i.e. **Clients**.

Pages

Menu

When working in a page there will be options specific to that page in the **Menu** that is on the right of the title bar.

Creating a .4TMs File

Currently working with the **4TMsApp** requires a **.4TMs** file. In order to create one you will need to convert a **GRJ Client Details** pdf using **4TMsConvert**.

Go to the www.4TMs.uk website and click on the **Go to 4TMs Convert** button



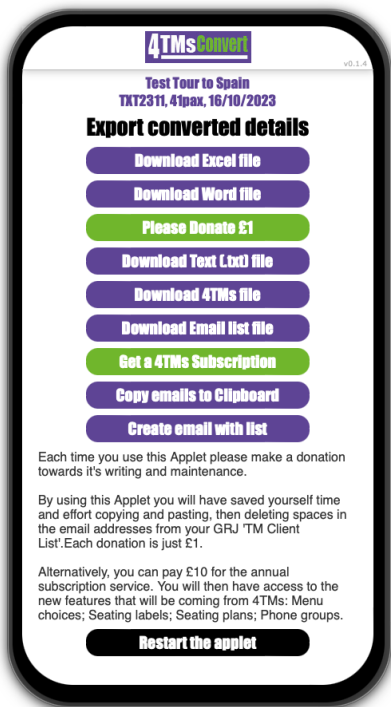
Ensure that you have downloaded your **TM Client Details** file from **TMportal**



Click on the **Choose File** button and locate and open your **TM Client Details** file



The file will be converted and the screen will change to the download options



Click on the **Download 4TMs file** button and the file will be downloaded to your **Downloads** folder.

Editing the Tour Manager details

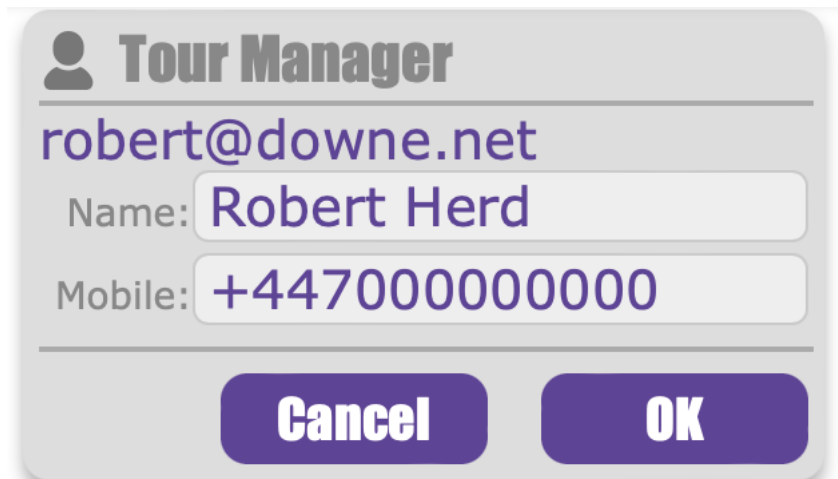
On the Tour Info page is the 'Tour Manager Card':



Clicking on the 'Edit' button ...



... puts the card into Edit mode:

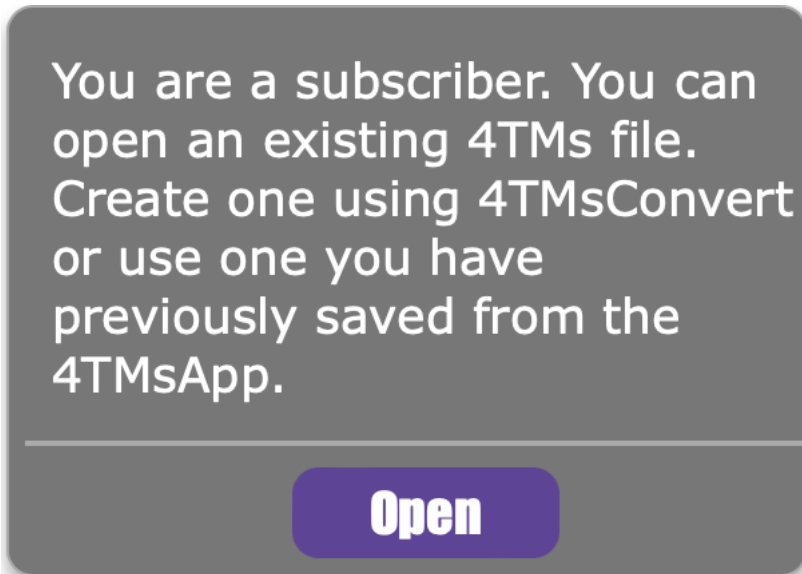


You can edit the Name and Mobile number, the Email is not editable.

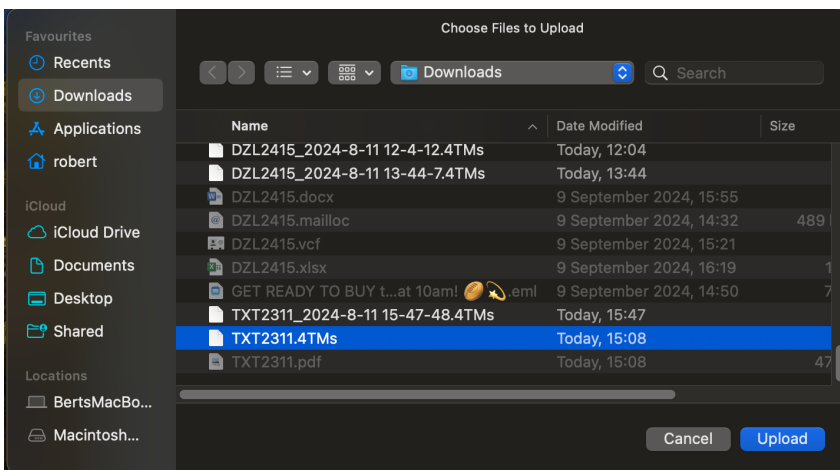
Click **Okay** to your save your changes.

Opening a tour

If you do not have a tour open then you need to open one using clicking/tapping on the **Open** button on the **Tour Info** page.



A standard **Choose files dialog** will appear ...



... where you can select a **.4TMs** file from **4TMsConvert**, or one you have saved from **4TMsApp**.

Editing tour details

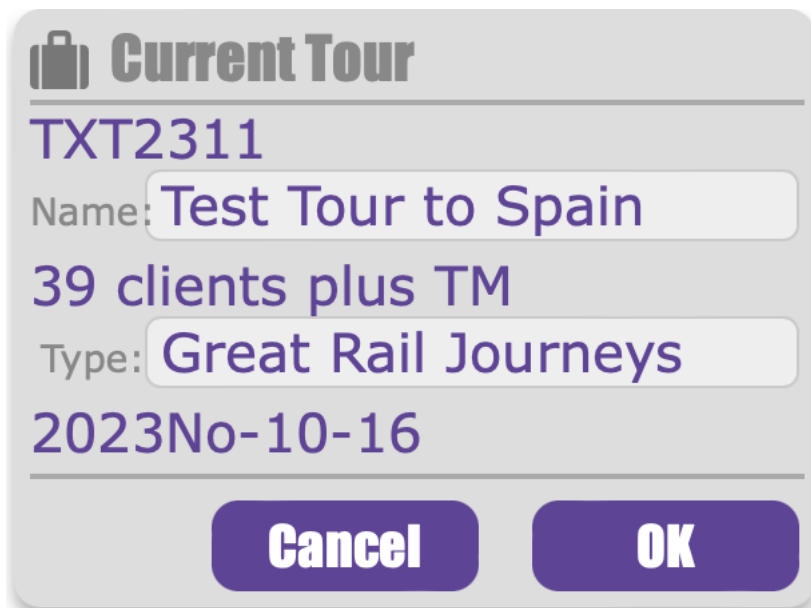
Once you have opened a .4TMs file then the details will appear in the **Current Tour** card on the **Tour Info** page.



Clicking on the 'Edit' button ...



... puts the card into Edit mode:

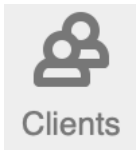


You can edit the Name and Type, the Code, Client count and Date are not editable.

Click **Okay** to your save your changes.

Client details

Clicking on the **Clients Chapter Icon ...**



...takes you to the **Clients** page:



Merging Client Groups

In order to work more efficiently when allocating seats etc you can merge two groups that are travelling together.

Select the first group by clicking on their **Group Card Icon**:

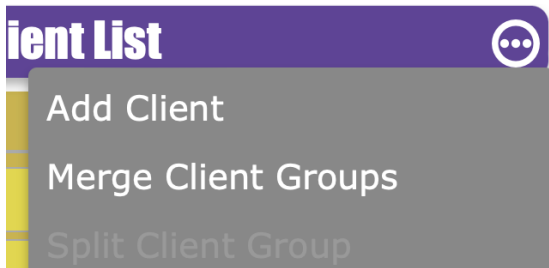


The card will change colour to show it has been selected:



Clicking on the **Group Card** Icon a second time will de-selected it.

Once you have selected cards you can choose **Merge Client Groups** from the **Menu**:

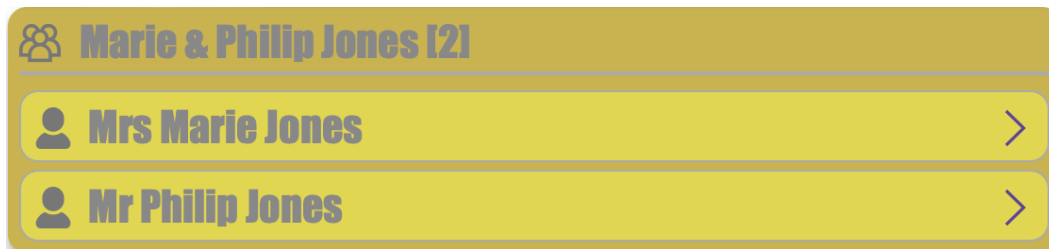


Splitting a Group

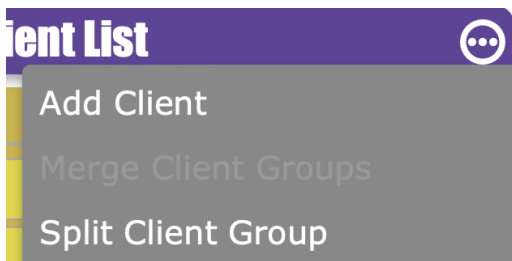
If you want to split a Group then you need to select the group by clicking on the **Group Card Icon**:



The card will change colour to show it has been selected:



Once you have selected the card you can choose **Split Client Groups** from the **Menu**:



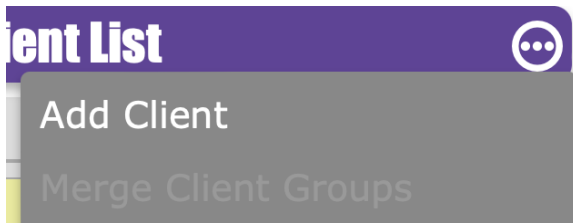
Changing the Group order

If you want to change the order of the groups you can click on the **Move** button to move the Group up the order:



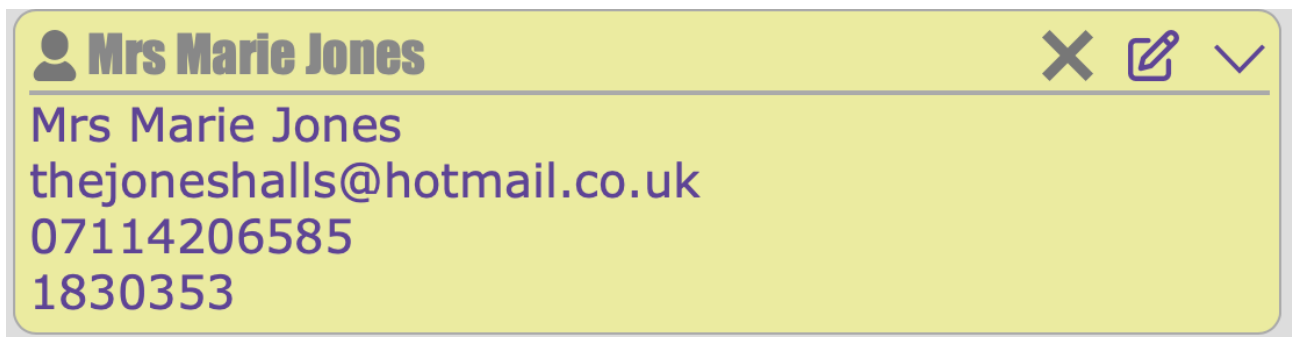
Adding a Client

If you want to add a new Client then you can choose **Add Client** from the **Menu**:



Viewing Client Details

If you want to see more details about a Client, then click on the **More** button:

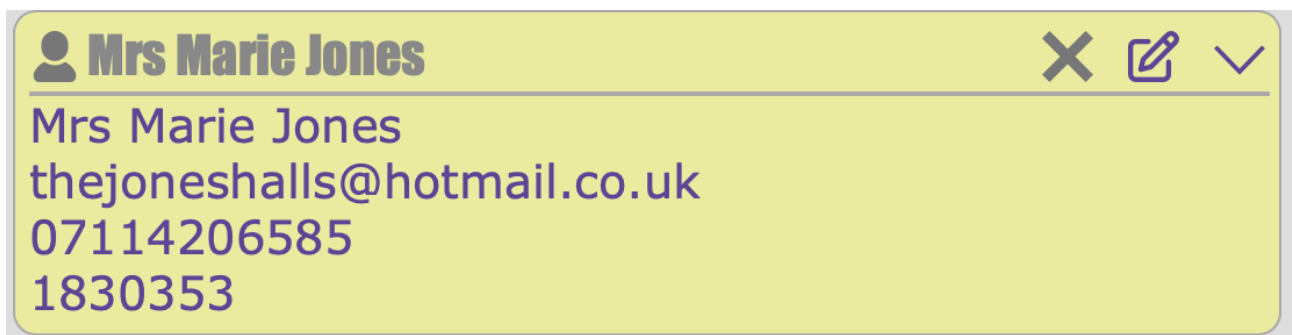


If you want to see less details about a Client, then click/tap on the **Less** button:



Editing a Client

Click/tap on the **More** button:



Clicking/tapping on the **Edit** button ...



... puts the card into Edit mode:

Mrs Marie Jones [Close] [Checkmark]

Salutation: Mrs

Forename: Marie

Surname: Jones

Email: thejoneshalls@hotmail.co.uk

Mobile: 07114206585

Booking: 1830353

Tours:

Insurance:

Luggage:

With:

FADs:

Mobility:

[Cancel] [OK]

Click **Okay** to your save your changes.

Deleting a Client

Click/tap on the **More** button:



Mrs Marie Jones [Close] [Edit] [Checkmark]

Mrs Marie Jones
 thejoneshalls@hotmail.co.uk
 07114206585
 1830353

Clicking/tapping on the **Delete** button ...



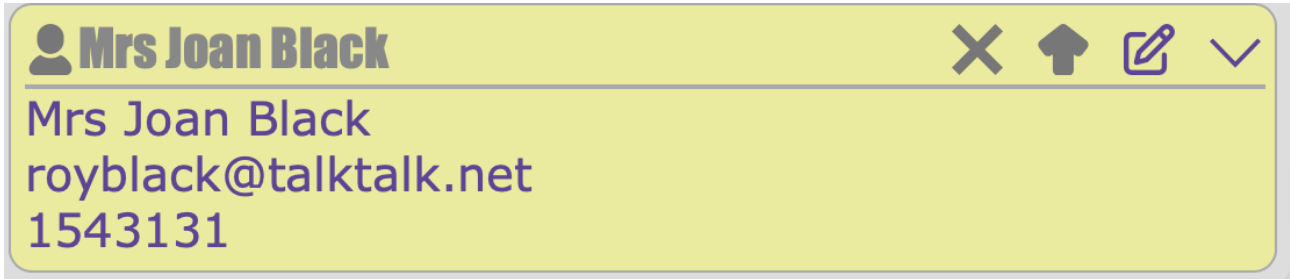
... deletes the client

Changing the Client order in a Group

If you want to change the order of the Clients in a Group you can click on the **Move** button to move the Group up the order:



If the Client is not the first in the Group ...

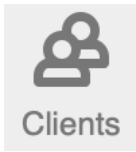


Click/tap on the **Move** button to move the Client up the order:



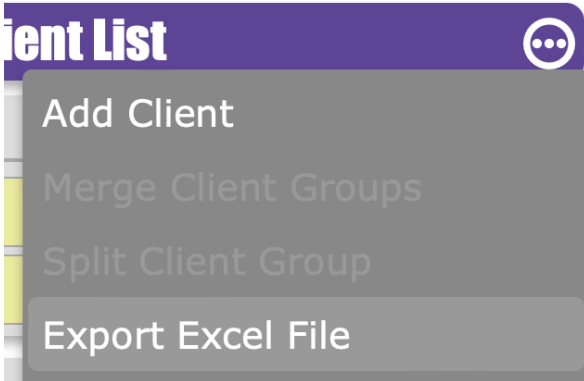
Exporting an Excel file

Clicking on the **Clients Chapter Icon** ...



...takes you to the **Clients** page.

Choose **Export Excel File** from the **Menu**

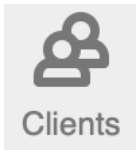


The **Excel** file will be downloaded to you downloaded to your **Downloads** folder, from where you can open it:

	A	B	C	D	E	
1	Code:	TXT2311				
2	Name:	Test Tour to Spain				
3	TM:	Robert Herd				
4	Date:	2023No-10-16				
5	Emails:	thejoneshalls@hotmail.co.uk,johngreen467@talktalk.net				
6	No	Booking	Email	Name	Mobile	Tou
7	1	1830353	thejoneshall:	Marie Jones	0711420658!	
8	2	1830353	thejoneshall:	Philip Jones		
9	3	1676172	johngreen46	John Green	0118023894!	4
10	4	1543131	royblack@ta	Roy Black	0117279198!	2
11	5	1543131	royblack@ta	Joan Black		
12	6	1339811	suejelly7@y	Susan Yellow	0710827929!	
13	7	1338358	mary@fame	Mary Orange	0714592907!	
14	8	1338358	mary@fame	Stephen Ora		
15	9	1337116	celian7895@	Ian Paris	0110535391!	1
16	10	1337116	celian7895@	Celia Paris		
17	11	1336162	chrissweden	Chris Swede	0719073991!	
18	12	1336162	chrissweden	Susan Swede		

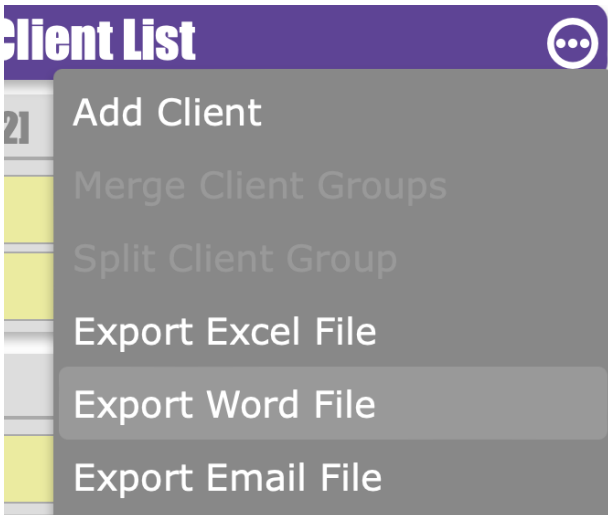
Exporting a Word file

Clicking on the **Clients Chapter Icon** ...



...takes you to the **Clients** page.

Choose **Export Word File** from the **Menu**



The **Word** file will be downloaded to you downloaded to your **Downloads** folder, from where you can open it:

Code: TXT2311
 Name: Test Tour to Spain
 TM: Robert Herd
 Date: 2023No-10-16
 Emails:
thejoneshalls@hotmail.co.uk, johngreen467@talktalk.net, royblack@talktalk.net, suejelly7@yahoo.com, mary@fameman.co.uk, celian7895@gmail.com, chrisweden@gmail.com, brian.madrid2@ntlworld.com, malcolmberling@mail.com, philips345@hotmail.co.uk, Hesdew@hotmail.co.uk, Davidmath@yahoo.co.uk, brian.freddy@ntlworld.com, hugh.bad@outlook.com, wendysailor@aol.com, bernddian@glenwoodtravel.co.za, mikewelling@hotmail.com, tom.wells987@gmail.com, Jillwhatsum@hotmail.com

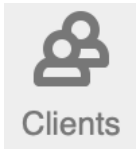
N	Bookin	Email	Name	Mobile	Tour	Insurance	Luggag	Wit	FAD	Mobilit
1	183035	thejoneshalls@hotmail.co.uk	Marie Jones	07114206585						
2	183035	thejoneshalls@hotmail.co.uk	Philip Jones							
3	167617	johngreen467@talktalk.net	John Green	01180238948	4					
4	154313	royblack@talktalk.net	Roy Black	01172791987	2					
5	154313	royblack@talktalk.net	Joan Black							
6	133981	suejelly7@yahoo.com	Susan Yellow	07108279295						
7	133835	marv@fameman.co.uk	Marv	0714592907						

Exporting an Email file

Copy to Clipboard

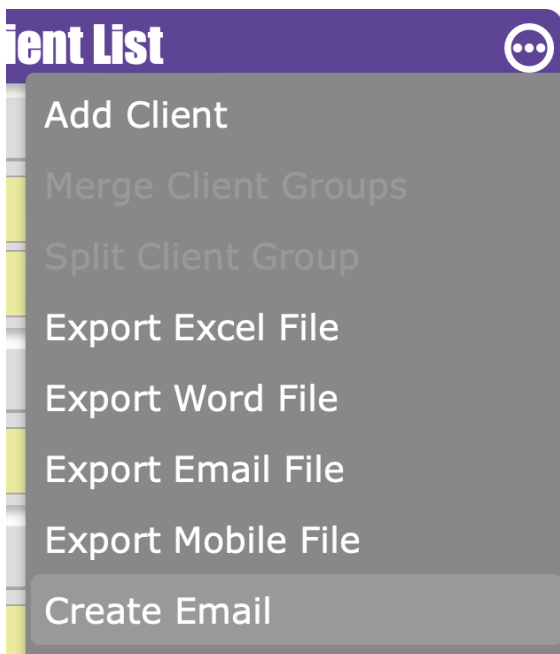
Creating an email

Clicking on the **Clients Chapter Icon** ...

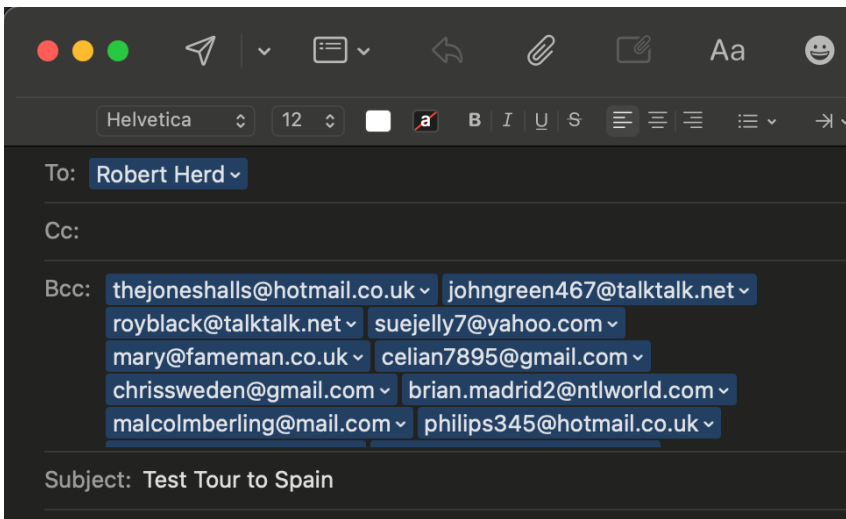


...takes you to the **Clients** page.

Choose **Create Email** from the **Menu**



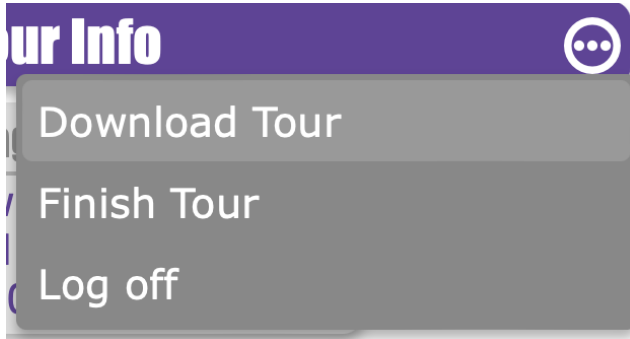
A pre-populated email will appear for you to edit:



Save Tour

If you wish to move your working from one device to another, for example from you Mac to an iPhone then you can download the **.4TMs** file and move it to the other device to then **Open**.

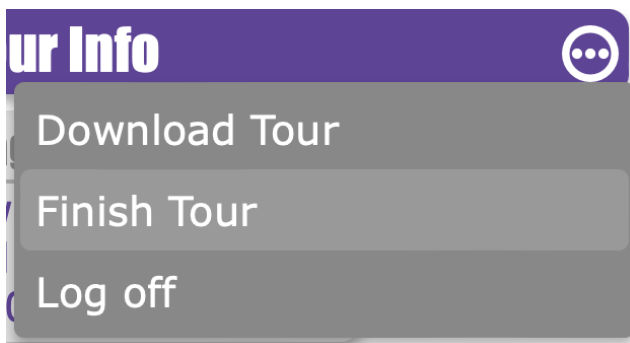
Go to the **Tour Info** page and choose **Download Tour** from the **Menu**:



A **.4TMs** file will be downloaded to your **Downloads** folder so that you can use it in the future if you require.

Finish tour

Once you have finished a tour and want to use **4TMsApp** for a new tour then you need to go to the **Tour Info** page and choose **Finish Tour** from the **Menu**:



A **.4TMs** file will be downloaded to your **Downloads** folder so that you can use it in the future if you require.

Log Off

When you have completely finished with the app then choose **Log off** from the **Menu**:

