

LARGE COMPANY ONLINE ORDER FORM GUIDE

At the beginning of the month, you will receive a spreadsheet that summarizes your company's order from last month. You will use this form to edit a current member's order, add a new member, or reactivate a member that is already in the order system.

BASIC INFORMATION

- The spreadsheet is based on your previous month's Benefit Report.
- If no changes are made to a rider's order, their transit benefit selection for the previous month will be renewed as it is listed on the spreadsheet.
- Trips will renew unless we are told otherwise.
- You can copy+paste from Excel into the online spreadsheet as long as product types and Breeze #'s are valid. However it's important that you do not copy+paste within the Google sheet as that can mess up some of the validations.
- Only the last four digits or characters of an existing member's ID number and Breezecard number will show in the auto populated spreadsheet. Only the first letter of their first name will show.

ACTION: NO CHANGE

- Leave the rider as-is and ensure the Action under column E reads "No Change"

ACTION: EDIT MEMBER

- To Deactivate/Do not renew a rider or a product, Select "None" under Benefit 1, 2, 3, and 4, or leave the Benefit selection blank.
- To change a benefit selection for a member, use the drop down menu under each benefit to select up to 4 products to load to the rider's card.

ACTION: ADD NEW MEMBER

Limited information is provided for existing members in the auto populated spreadsheet. When entering new member information, please provide the full first name, last name, member ID, and Breezecard number.

1. Scroll down until you reach the first open row of the spreadsheet.
2. Insert the new rider's full first and last names.
3. Assign the rider a member ID number.
4. Assign the rider a 20 digit Breezecard number from a blank inventory card. Do not include any spaces or other characters.
5. Change the action to "Add New Member"
6. Select your desired transit benefits.

ACTION: REACTIVATE PREVIOUS MEMBER

Limited information is provided for existing members in the auto populated spreadsheet. When entering information to reactivate a previous member, please provide the full first name, last name, member ID, and Breezecard number.

1. Scroll down until you reach the first open row of the spreadsheet.
2. Insert the previous member's name.
3. Insert the previous member's member ID number.
4. Insert the previous member's Breezecard number or assign them a new card number.
5. Change the action to "Reactivate Previous Member"
6. Select your desired transit benefits.