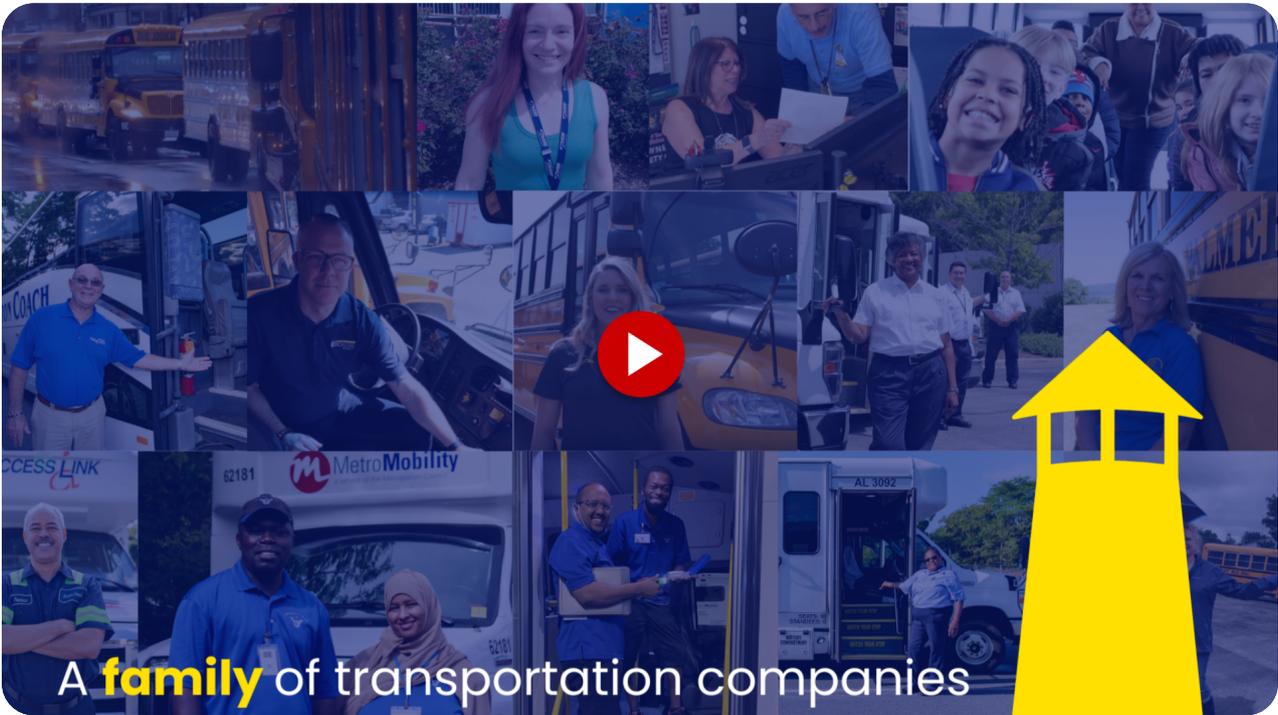




# Email Incident Reports from Beacon Connect



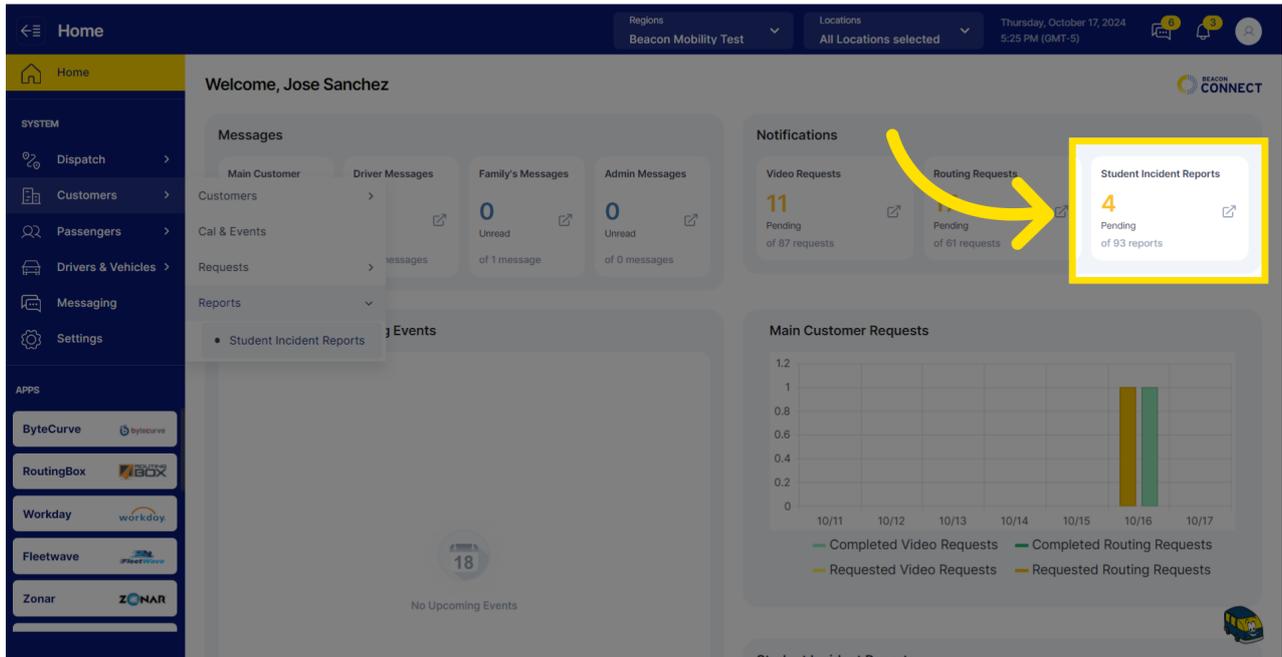
A **family** of transportation companies

Did you know you can easily email a student incident report, submitted by a driver, directly to a customer from Beacon Connect? In the next steps, we'll show you just how simple it is to share an incident report with anyone — even if the customer isn't using Beacon Connect

Go to [admin.beaconconnect.app](https://admin.beaconconnect.app)

## 01 Click "Student Incident Reports" tile on the dashboard

To get started, click on the "Student Incident Reports" tile located on the dashboard. This will take you directly to the incident reports page.



## 02 Select an incident report

Next, select any incident report, regardless of its status. Then, use the horizontal scroll bar to move all the way to the right.

The screenshot displays a web application interface for managing incident reports. The main content area is titled "Student Incident Reports" and contains a table with the following columns: ID, Status, Region, Location, Main Customer, Sub Customer Name, and a numeric value. The row with ID 21290 and status "Approved" is highlighted with a yellow border. The interface also includes a search bar, export options (Excel and PDF), and a pagination control at the bottom showing "1 - 50 of 93 Records".

ID	Status	Region	Location	Main Customer	Sub Customer Name	Rc
20137	Waiting Review	Beacon Mobility Test	Beacon Location A	District One	N/A	83
20136	Waiting Review	Beacon Mobility Test	Beacon Location A	N/A	N/A	83
20096	Waiting Review	Beacon Mobility Test	Beacon Location A	Beacon Tech School	Beacon High School	12
20087	Waiting Review	Beacon Mobility Test	Beacon Location A	N/A	N/A	Te
21625	Approved	Beacon Mobility Test	Beacon Location A	Beacon Tech School	Beacon High School	Rc
21308	Approved	Beacon Mobility Test	Beacon Location A	Beacon Tech School	Beacon High School	22
21290	Approved	Beacon Mobility Test	Beacon Location A	Beacon Tech School	Beacon High School	24
21234	Approved	Beacon Mobility Test	Beacon Location A	Batool Daily	Daily sub customer	10
21215	Approved	Beacon Mobility Test	Beacon Location A	Beacon Tech School	Beacon High School	10
21169	Approved	Beacon Mobility Test	Beacon Location A	Beacon Tech School	Beacon High School	12

### 03 Attention.

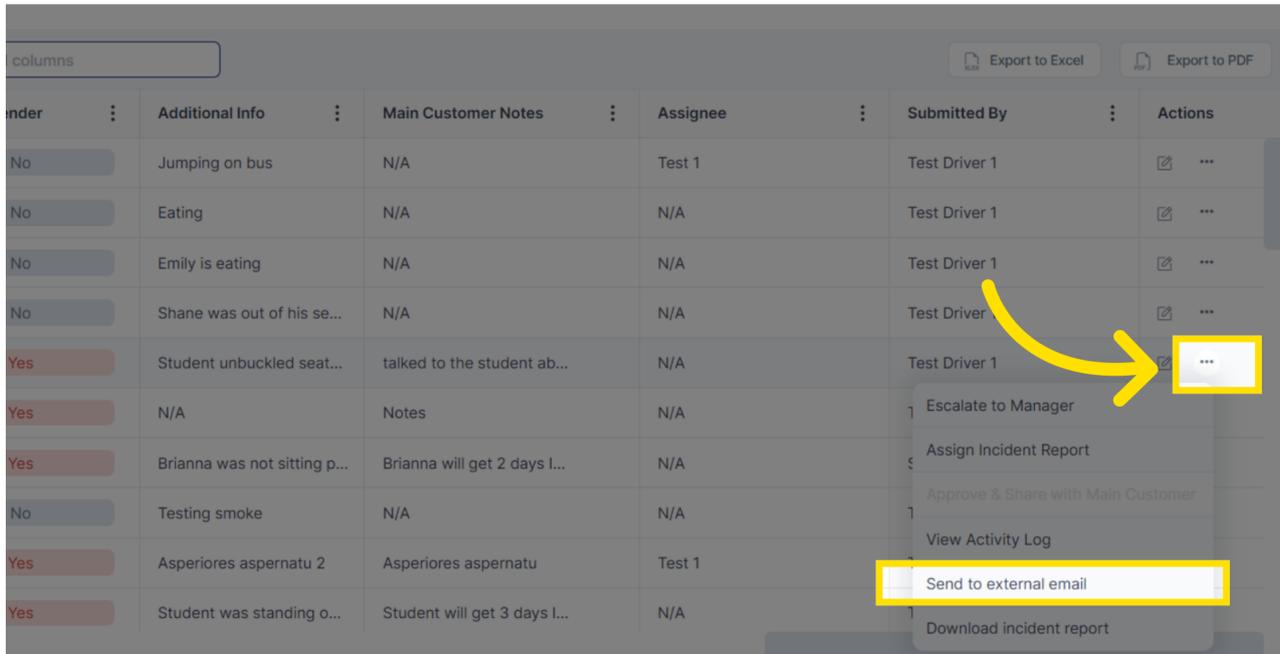
Please note that incident reports missing school or student data cannot be shared. This may occur if the driver didn't know the student's or school's name at the time of submission, or if the student's information hasn't been added to Beacon Connect yet. To proceed, you will need to find and add the missing information before the report can be sent

The screenshot shows a table of incident reports. Two columns, 'Sub Customer Name' and 'Student Name', are highlighted with yellow boxes. In the first two rows, both columns contain 'N/A' and a warning icon (a yellow circle with an exclamation mark). A yellow arrow points from the 'Student Name' warning icon in the second row to the 'Sub Customer Name' warning icon in the same row. The table also includes columns for 'Route Number' and 'Date'.

Sub Customer Name	Route Number	Student Name	Date
N/A	8302	N/A	08/14/2024
N/A	8302	N/A	08/14/2024
Beacon High School	123456	Test Student 4	08/01/2024
N/A	Test 730	N/A	07/30/2024
Beacon High School	Route 1016	Brianna Alcantara	10/15/2024
Beacon High School	22222	Test Student 4	10/06/2024
Beacon High School	24	Brianna Alcantara	10/04/2024

## 04 Click more options

After scrolling to the right, click the 'More Options' icon, represented by three dots under the 'Actions' column. Then, select 'Send to External Email'.



nder	Additional Info	Main Customer Notes	Assignee	Submitted By	Actions
No	Jumping on bus	N/A	Test 1	Test Driver 1	✉ ...
No	Eating	N/A	N/A	Test Driver 1	✉ ...
No	Emily is eating	N/A	N/A	Test Driver 1	✉ ...
No	Shane was out of his se...	N/A	N/A	Test Driver	✉ ...
Yes	Student unbuckled seat...	talked to the student ab...	N/A	Test Driver 1	✉ ...
Yes	N/A	Notes	N/A		Escalate to Manager
Yes	Brianna was not sitting p...	Brianna will get 2 days I...	N/A		Assign Incident Report
No	Testing smoke	N/A	N/A		Approve & Share with Main Customer
Yes	Asperiores aspernatu 2	Asperiores aspernatu	Test 1		View Activity Log
Yes	Student was standing o...	Student will get 3 days I...	N/A		Send to external email
					Download incident report

## 05 Click "Send to external email"

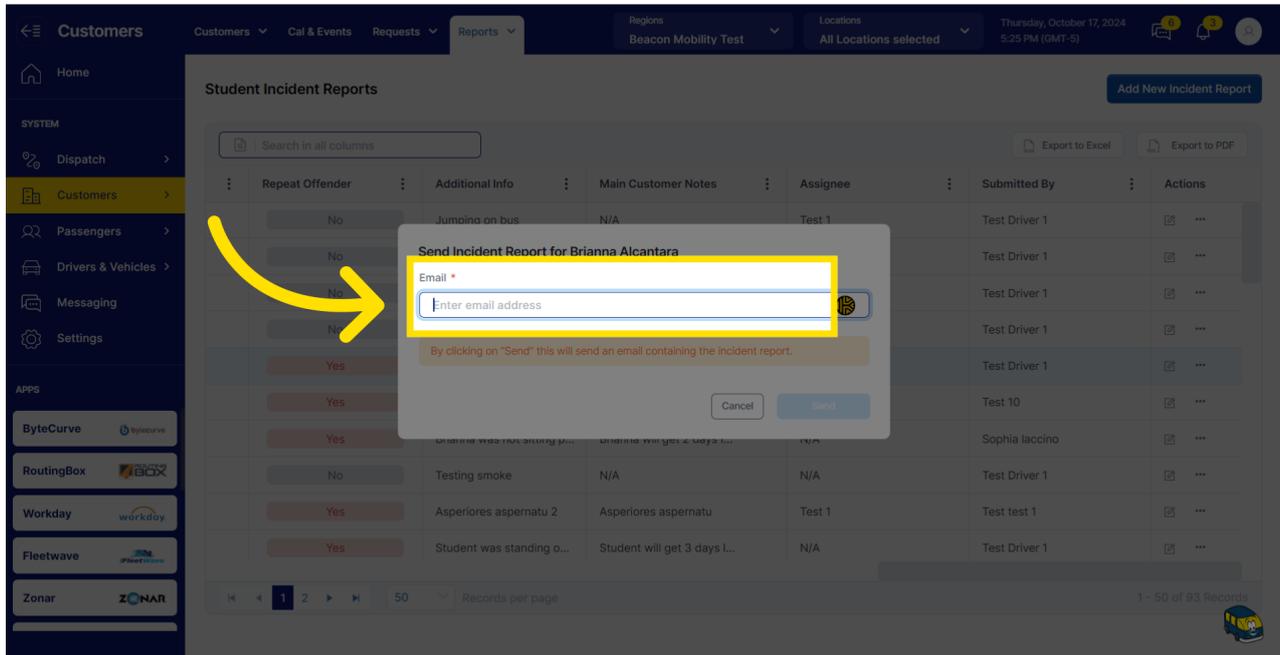
"After clicking 'Send to External Email,' a pop-up box displaying the student's name will appear."

The screenshot displays a software interface for managing customer incident reports. The main window is titled "Student Incident Reports" and contains a table with columns: Repeat Offender, Additional Info, Main Customer Notes, Assignee, Submitted By, and Actions. A pop-up dialog box is overlaid on the table, titled "Send Incident Report for Brianna Alcantara". The dialog has an "Email" field with the placeholder text "Enter email address" and a "Send" button. A yellow arrow points from the "Send" button in the dialog to the "Send to external email" option in the "Actions" column of the table. The "Send to external email" option is highlighted with a yellow box.

Repeat Offender	Additional Info	Main Customer Notes	Assignee	Submitted By	Actions
No	Jumping on bus	N/A	Test 1	Test Driver 1	Escalate to Manager Assign Incident Report Approve & Share with Main Customer View Activity Log Send to external email Download incident report
No				Test Driver 1	
No				Test Driver 1	
No				Test Driver 1	
Yes				Test Driver 1	
Yes				Test Driver 1	
Yes				Test Driver 1	
No	Testing smoke	N/A	N/A		
Yes	Asperiores aspernatu 2	Asperiores aspernatu	Test 1		
Yes	Student was standing o...	Student will get 3 days l...	N/A		

## 06 Enter an email address

Enter the recipient's email address in the provided box.



The screenshot displays a software interface for managing customer incident reports. A modal dialog box titled "Send Incident Report for Brianna Alcantara" is open, featuring an "Email" input field with the placeholder text "Enter email address". A yellow arrow points to this field. The background shows a table of incident reports with columns for "Repeat Offender", "Additional Info", "Main Customer Notes", "Assignee", "Submitted By", and "Actions".

Repeat Offender	Additional Info	Main Customer Notes	Assignee	Submitted By	Actions
No	Jumping on bus	N/A	Test 1	Test Driver 1	📧 ...
No				Test Driver 1	📧 ...
No				Test Driver 1	📧 ...
No				Test Driver 1	📧 ...
Yes				Test Driver 1	📧 ...
Yes			Test 10	Test 10	📧 ...
Yes	Testing smoke	N/A	N/A	Sophia Iaccino	📧 ...
Yes	Asperiores aspernatu 2	Asperiores aspernatu	Test 1	Test test 1	📧 ...
Yes	Student was standing o...	Student will get 3 days l...	N/A	Test Driver 1	📧 ...

## 07 Click "Send"

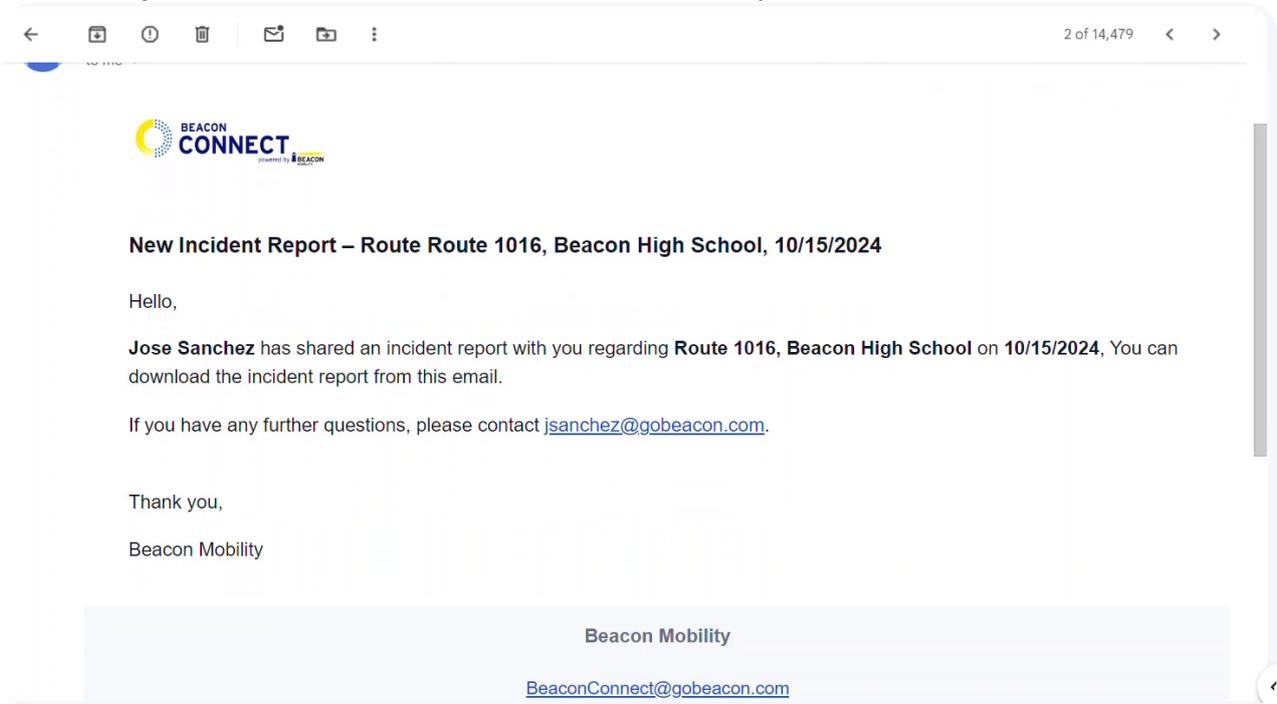
Finally, click the 'Send' button to send the incident report.

The screenshot displays a software interface for managing incident reports. A modal dialog titled "Send Incident Report for Brianna Alcantara" is open, featuring an "Email \*" input field and a "Send" button. A yellow arrow points from the "Send" button to the "Loading" text in the dialog. The background shows a table of incident reports with columns for Repeat Offender, Additional Info, Main Customer Notes, Assignee, Submitted By, and Actions.

Repeat Offender	Additional Info	Main Customer Notes	Assignee	Submitted By	Actions
No	Jumping on bus	N/A	Test 1	Test Driver 1	[Icon] [Menu]
No				Test Driver 1	[Icon] [Menu]
No				Test Driver 1	[Icon] [Menu]
No				Test Driver 1	[Icon] [Menu]
No				Test Driver 1	[Icon] [Menu]
Yes				Test Driver 1	[Icon] [Menu]
Yes				Test 10	[Icon] [Menu]
Yes				Sophia Iaccino	[Icon] [Menu]
No	Testing smoke	N/A	N/A	Test Driver 1	[Icon] [Menu]
Yes	Asperiores aspernatu 2	Asperiores aspernatu	Test 1	Test test 1	[Icon] [Menu]
Yes	Student was standing o...	Student will get 3 days l...	N/A	Test Driver 1	[Icon] [Menu]

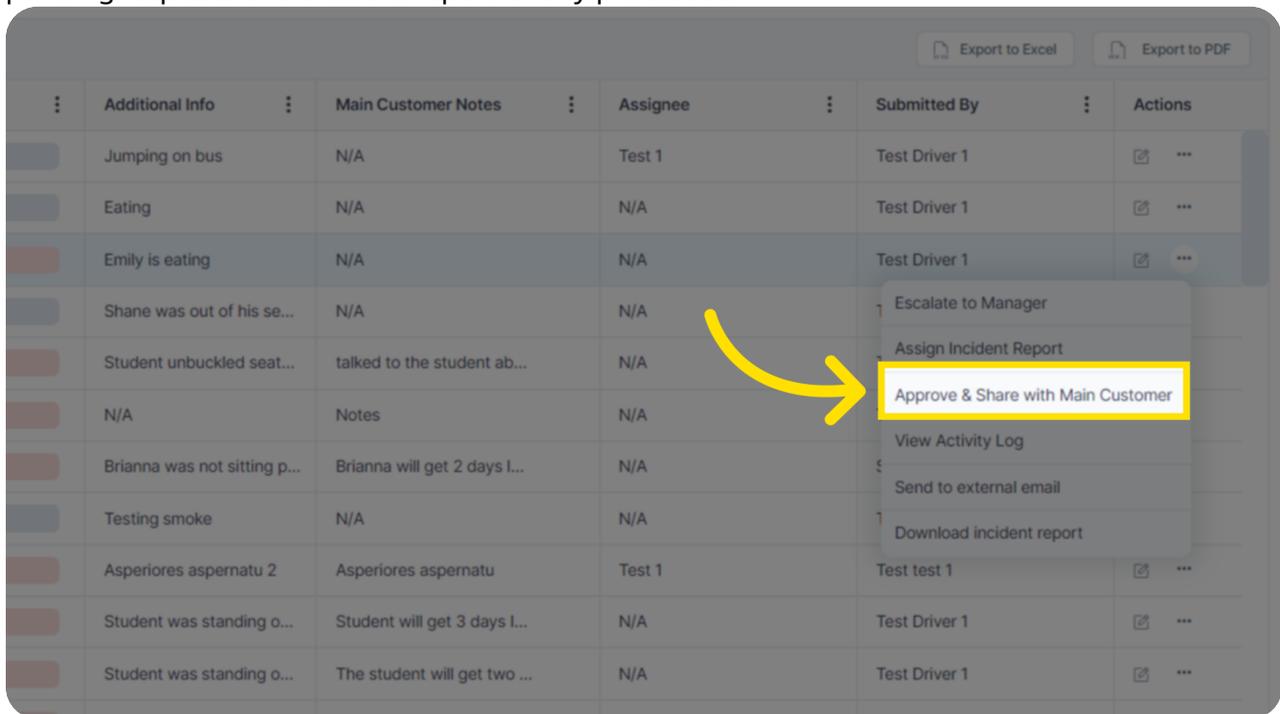
## 08 Incident report is sent

The recipient will receive an email that includes the route, school, and date of the incident report. Additionally, the email will contain a PDF version of the report for their reference.



## 09 Approve and share

After emailing the incident report, return to the 'More Options' section under the 'Actions' column and select 'Approve and Share with Main Customer.' This is a crucial step to ensure there are no pending requests and that the report is fully processed.



The screenshot shows a table with columns: Additional Info, Main Customer Notes, Assignee, Submitted By, and Actions. A dropdown menu is open for the 'Approve & Share with Main Customer' option, which is highlighted with a yellow box. A yellow arrow points to this option.

	Additional Info	Main Customer Notes	Assignee	Submitted By	Actions
	Jumping on bus	N/A	Test 1	Test Driver 1	✉ ...
	Eating	N/A	N/A	Test Driver 1	✉ ...
	Emily is eating	N/A	N/A	Test Driver 1	✉ ...
	Shane was out of his se...	N/A	N/A		Escalate to Manager
	Student unbuckled seat...	talked to the student ab...	N/A		Assign Incident Report
	N/A	Notes	N/A		Approve & Share with Main Customer
	Brianna was not sitting p...	Brianna will get 2 days l...	N/A		View Activity Log
	Testing smoke	N/A	N/A		Send to external email
					Download incident report
	Asperiores aspernatu 2	Asperiores aspernatu	Test 1	Test test 1	✉ ...
	Student was standing o...	Student will get 3 days l...	N/A	Test Driver 1	✉ ...
	Student was standing o...	The student will get two ...	N/A	Test Driver 1	✉ ...

That's it! You've successfully emailed an incident report from Beacon Connect. This simple process ensures that incidents reports are quickly shared, keeping everyone informed and improving communication. If you have any questions, don't hesitate to reach out for support!