TrailsIQ

DOCUMENTATION

How TrailsIQ works

The complete TrailsIQ manual in one document, for reading offline or printing. It is the same documentation you find inside the app and at trailsiq.com/docs.

56	13	November 24, 2026
articles	sections	last updated

Contents

Every article, grouped by what you are doing. In a PDF reader, tap a title to jump to it. The newest version is always at https://trailsiq.com/docs.

GETTING STARTED

Getting started: your account and your first week 5

Reading your Dashboard 8

FIELD APP

TrailsIQ Field App: install it, sign in and use it every day 11

Offline downloads: take a network with you 21

TRAILS

How to create a network 25

How to create a trail 29

Import trails: GPX, KML, KMZ, GeoJSON and bulk uploads 36

Sharing one trail with a builder 42

Trail Planner: record, draw or find a sustainable line 45

Clients and the job pipeline 63

Contracts for won jobs 66

Handing a job to another organization 72

Inspecting trails 74

Jump calculator: sizing jumps, berms and rock gardens on a planned trail 78

Winter operation and grooming 87

MAINTENANCE

How to create a maintenance item 90

Discussions 97

Checklists 100

Projects and work planning 104

Archiving finished tasks 110

INFRASTRUCTURE

How to create and edit infrastructure 111

Inspecting structures 117

How to create and edit points of interest 122

Bridge materials calculator: a lumber list from a bridge record 127

Trail counters: use numbers from the trail itself 134

Lifts: chairs, gondolas, T-bars and daily status 137

DAILY REPORTS

Daily report: day notes, timeline and your website 141

The annual report 147

TEAM

Members, roles and permissions: invite your team 149

Work hours, expenses and time logged on tasks 158

Inventory: stock, equipment, checkouts and reservations 169

Job costing: estimated against actual 178

Recording volunteer hours 180

MAPS

The TrailsIQ map 185

Map overlays: streams, wetlands, public land and property lines 190

Terrain analysis: slope, aspect and contours 192

SETTINGS

Workspace modules: show only the sections your team uses 196

Plans and limits 200

How to enable weather automation 203

Email preferences 209

Public reports setup 212

Custom domain: your public pages on your own address 216

Bring your own Mapbox token 219

Passkeys: confirm with your device instead of a password 222

Photos 224

Your brand color 225

WEBSITE

Website builder: pages, blocks and templates 226

News: write, publish and show articles on your site 239

Events: sign-ups, waivers, waitlists and reminders 243

QR code builder: branded codes for signs and print 253

Files and uploads 255

Website templates, donations and forms 257

PUBLIC REPORTS

TrailsIQ Go 263

UMBRELLA ACCOUNTS

Umbrella accounts 268

Running an umbrella account 272

CLIMBING

Crags and climbing routes: topos, grades and fixed gear 280

GETTING STARTED

Getting started: your account and your first week

Create an account, see what comes with it, and work through the six steps that turn an empty account into one your crew can use.

Read this first. It covers creating an account, what comes with it, and the few steps that turn an empty account into one your crew can use.

It takes about ten minutes to get to something useful, and most of that is deciding what to call your networks.

Create your account

Go to **Sign up** and fill in one short form. There is no trial to start, no card to enter and no sales call. The free plan is a real plan, and you can stay on it.

Four things are asked for:

- **Your name:** how you appear to your crew.
- **Organization name:** your club, department, business or land trust. Your whole account is named after it, so use the name your team knows rather than an abbreviation.
- **What does your team do?:** covered below.
- **Email and password:** what you sign in with.

When you press **Create account** we email you a six-digit code, and a **Confirmation code** box opens on the same form. Type the code in and press **Create account** again. Your account is created and you are signed in. The code works for 15 minutes. If it does not arrive, check your spam folder or press **Send a new code**. Somebody who followed an invitation link does not need a code, because the invitation already went to their address. Sign up with an email address you will keep. Temporary inbox services, which give you an address for ten minutes, are not accepted, because password resets and account notices are sent to that address.


The sign-up form, showing name, organization name, the three "What does your team do?" choices, and email and password

Signing up creates two things at once

Many tools make you create a login and then create an organization. Here it is one step. Sending that form creates your **sign-in** and your **organization** together, and makes you the owner.

This matters later. If you ever need a *second* organization, you create it from inside the app instead of signing up again with another email. See the last section.

What "What does your team do?" changes

Your answer decides which sections your sidebar starts with, so the app opens on the work you actually do instead of everything it can do.

- **Trail organization:** you run and maintain a network. Trails, maintenance, infrastructure, conditions and your public pages come first.
- **Trail builder:** you build for other people. Clients, jobs, quotes and handover come first, and the pages for visitors are tucked away.
- If you do some of both, pick your main work. Anything from the other side can be turned on with one switch.

Your answer does not lock anything. It only sets the starting layout, and has nothing to do with your plan. You can turn every section on or off later in **Settings → Workspace modules**. If your sidebar is missing something you expected, look there first, not in Billing.

Follow the setup guide

Once you are in, the dashboard shows a **Setup guide**. It is a checklist of the six things that make your account useful, in an order where each step makes the next one easier. It ticks steps off as you do them, and you can leave and come back.

You can reach it any time from the top of **Documentation**, and dismissing it does not delete anything.

The steps are worth reading in order even if you skip some:

1. **Tell us where you work:** the region your trails are in. It sets up the map and the weather.
2. **Create a trail network:** the area your trails belong to. Most organizations start with one.
3. **Add your first trail:** import a GPX, draw it, or record it in the field.
4. **Invite your team:** the people who will report and fix things. Sending one invitation ticks it off, even before anyone accepts.
5. **Customize your organization:** name, logo and color. They appear on your public pages and on anything you export. The step is ticked off once you add a logo, a phone number, a public email or a website.
6. **Install the mobile field app:** the part of TrailsIQ your crew uses most. Its link opens **Settings → Mobile apps**, which has the App Store and Google Play links for the field app and for TrailsIQ Go.

A trail builder gets different middle steps. If you answered **Trail builder** to *What does your team do?*, the network and trail steps are replaced by four steps for winning and running a job: **add your first client**, **start a job**, **record or draw a trail** in the trail planner, and **send your first proposal**. The other steps stay, worded for a building company, so the guide has eight steps instead of six. A trail organization that turns on Clients keeps its own steps, and those four are added after them.

The Setup guide on the dashboard, with its six steps and their progress

The order that saves you work

Two of those steps are worth doing before the others, and it is not obvious which.

Create a network before a trail. Every trail belongs to a network. If you make the network first, you do not have to edit every trail later to put it in one.

Try it yourself before you invite your team. Walk one trail with the field app on your own phone first. You will find out what your crew is going to ask you, and the conversation is much shorter when you already know the answers.

Where to go next

- **The TrailsIQ field app:** the app your crew installs, and how they use it day to day.
- **How to create a network** and **How to create a trail:** getting your real trails into your account.
- **Import trails:** if you already have GPX files, start here instead.
- **Members, roles & permissions:** inviting people and deciding what each of them can change.
- **Plans and limits:** what the free plan includes, and when you might need more.

A second organization

Somebody who volunteers for a club and also runs a trail-building business needs two separate organizations.

Settings → Advanced → New organization creates another one. There is no limit and nobody has to approve it. Each organization is completely separate, with its own trails, team, settings and billing. Once you have more than one, a switcher appears at the top of the sidebar.

You are asked "What does your team do?" again for the new organization, because the answer is usually different.

The Get started screen for creating an additional organization from inside the app

Common gotchas

Your sidebar shows less than the documentation. That is your answer to *What does your team do?* at work. **Settings → Workspace modules** turns sections on and off. Three of them can never be hidden (Organization details, Workspace modules, and Roles & permissions), so you can always get back.

Signing up again with a second email does not give you a second organization. It gives you a second sign-in that shares nothing with the first. Use **New organization** instead.

Renaming your organization does not change its web address. You can change the name at any time in **Settings → Organization details**, and it updates everywhere your team and visitors see it. Your public pages' address comes from the name you typed when you signed up, and it does not change. So use your real name on that first form, not a placeholder you plan to fix later.

People you invite do not need to sign up first. The invitation email has its own sign-up link that takes them straight into your organization with the role you chose. If you send somebody to the public Sign up page instead, they end up in an empty organization of their own.

GETTING STARTED

Reading your Dashboard

The four numbers at the top of the Dashboard, the Trail Health table below them and the column beside it: what each column counts, why a trail can show as closed without anybody closing it, and how to find the trail that needs you today.

Dashboard is the first screen after you sign in, and it answers one question: what needs a decision today? It has four numbers across the top, a table of every trail you look after with its status and outstanding work, and a column beside it showing what those numbers are made of and what has happened lately.

Everything on the page is a link. Tapping a number takes you to the list it counted. If the number is a single item, it takes you straight to that item.

The Overview page: four tiles across the top and the Trail Health table beneath

The four numbers at the top

Open tasks is work somebody still has to go and do: maintenance tasks that are *Open* or *In progress*. Reports waiting for a decision are not included. They appear on the line underneath as *to review*, because deciding to accept a report is a separate step from doing the work.

Under the big number: how many of those open tasks are marked **critical**, and how many are **overdue**. A task is overdue when it has a **Do by** day and that day has passed while the task is still open or in progress. A task due today is not overdue yet. The tile turns red for either, and its flag names the more urgent one: critical first, then overdue.

Structures at risk is every piece of infrastructure rated **Poor** or **Failed**. It counts bridges, signs and gates whether or not they are attached to a trail, so it can be larger than the total in the trail table below. The difference is infrastructure at a trailhead or parking area rather than on a trail. Tapping it opens your infrastructure list with the **At risk** filter already on.

Expenses to review is the count of submitted expenses waiting on an approval. You only see this tile if you are allowed to approve expenses. If you are not, the same spot shows **Awaiting review** instead: reports from the public that need checking before they become work.

Closed trails counts trails that show as closed *to a visitor right now*. That is not the same as trails somebody closed by hand. A trail set to follow its area takes its status from the area, and then from its network. So closing a whole network closes every trail in it, and this number goes up to match. The line underneath adds how many are on caution.

The four tiles — open tasks, structures at risk, expenses to review, closed trails

The column on the right

Four things sit beside the table, in the order you are likely to need them.

Network status has one row per network, showing its condition. Tap a row to change it. This is the only place on the page that tells you whether a whole valley is closed, so glance at it before reading the table. When a network is closed, every trail in it shows as closed without anybody touching them.

Three breakdowns split up the biggest tiles. They add up to the numbers above them. If a breakdown ever disagrees with its tile, trust neither and tell us.

- **Open tasks by type** is the same open work split by what kind of job it is: blowdown, drainage, signage, whatever your types are. It is the fastest way to see that half your season is one recurring problem.
- **Open tasks by priority** is that work ranked. A tall critical bar is the one reading on this page that should change what you do this week.
- **Structures at risk by type** splits the poor and failed infrastructure by what it is. Six failed signs and one failed bridge look the same on the tile, but they are completely different jobs.

Long lists show nine bars, and the rest are grouped into a gray **Others** bar. They are still counted, so the numbers still add up. **Press a bar to open its list**, filtered to exactly what that bar counted. You can press anywhere on the row, so a short bar is as easy to hit as a long one. The gray

Others bar does not open anything, because it covers several kinds and there is no single list for it. A breakdown with nothing in it shows a gray outline and says so.

Recent activity shows the last few changes anywhere in your organization, such as a condition changing, a bridge being updated or a task being filed. Each one links to what changed.

Trail health

Trails are grouped by network. A band across the top of each group sums it up: how many trails there are, how their statuses break down, the open work and whether any infrastructure is at risk. Each row below it is one trail, with its name, status, open work and structures.

A trail in more than one network is listed once, under the first one. That is also the network it takes its status from, so the band above a trail always names the network its status came from.

Every trail carries its difficulty icon in front of its name, in the same shapes and colors the Trails list uses. The shapes depend on what the trail is mainly used for. Mountain bike trails get the familiar circle, square and diamond, alpine and nordic trails get the ski area signs, and everything else gets a plain colored circle. A trail with no difficulty set shows a gray circle, so the names still line up.

Status

The **Status** column shows the status visitors actually see, which may not be what was set on the trail itself. A trail with no status of its own takes the worst status of any area it is in, and if there is none, its network's status. Hold the pointer over a status to see where it came from, such as *Set on this trail*, *From area: Wet Bottom* or *From network: Cedar Butte*.

Press a status to change it. It opens **Trail Conditions** (under Operations in the sidebar) with that trail in view and outlined. It is the quickest way to fix a trail that shows the wrong status. It works the same way in the field app, where the editor opens on top of the list.

A trail that belongs to no network is the one exception: there is no band for it on Trail Conditions, so its pill opens the trail's own settings instead.

This matters more than it sounds. A trail that looks open in its own settings can be closed to the public because its whole valley is closed, and this column is the only place on the row where you can see that.

A status pill showing the condition was inherited from the network

Open tasks

This is the work on that trail somebody still has to go and do: *Open* plus *In progress*. It counts the same way as the tile at the top of the page, so the column adds up to that tile.

A dash means there is none.

Next to it, you may see a **review** label. That counts reports filed on the trail that nobody has accepted yet. They are not in the main number, because a report does not become a job until somebody accepts it.

Tapping either one opens what it counted: the task itself if there is one, or that trail's filtered list if there are more.

Structures

This column shows a label for each condition rating worth knowing about, **Failed**, **Poor**, **Marginal** or **Fair**, with how many structures have it. The ratings come from your inspections. An inspection filed from the field app sets the structure's condition from the answers.

Anything in **Failed** or **Poor** is on the **Structures at risk** tile above.

Two short forms keep the column easy to read. A trail whose structures are all in good shape shows **N good** instead of four zeros. A trail with no structures shows **None**, because an empty cell would look like the row failed to load.

Tapping a label opens what it counted: the structure itself if there is one, or your infrastructure list filtered to that trail and rating if there are more.

The Structures columns with failed and poor counts highlighted

Finding one trail quickly

Two controls sit in the panel's header:

- **Find a trail** filters the table as you type. It only searches names, and it filters what is already on the screen, so there is no waiting.
- **Needs attention** shows only trails with something to act on: anything not fully open, any outstanding work, or any structure rated Poor or Failed. The number next to the button tells you how many.

A line at the bottom of the panel says how many of your trails you are looking at. When a filter is hiding rows, it has a **Show all** link, and there is also a link to the full trail list.

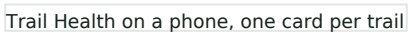


The Needs attention filter narrowing the table

On a phone

The table becomes one card per trail, showing the difficulty icon, the name, the status, any counts that are not zero, and the network underneath. A trail with nothing outstanding still shows its status, so no card is ever blank.

Everything else works the same way. Search still filters, **Needs attention** still narrows, and the numbers below the table stack into one column in the same order.



Trail Health on a phone, one card per trail

What you see depends on your role

The tiles follow what you are allowed to do. Somebody who cannot approve expenses does not get an expenses number they can only look at; they get the submissions queue instead. The rest of the page is the same for everybody in the organization.

If a whole section of TrailsIQ is turned off for your organization under **Settings → Workspace modules**, its numbers do not appear here either.

FIELD APP

TrailsIQ Field App: install it, sign in and use it every day

The app your crew carries on the trail. Install it on an iPhone, Android or from the browser, sign in with your TrailsIQ account, change trail and lift conditions, file tasks with photos, add points of interest, record GPS lines, and keep working without signal.

The **TrailsIQ Field App** is the app your crew carries on the trail. It opens on a map and it works without signal. From it you can change trail conditions, warn about a hazard, file a maintenance task with photos, record a GPS line for a new trail, put a lift on wind hold, log your hours, or add a note to the daily report. Anything you do with no signal is sent when you are back in range.

What the Field App is

The Field App is TrailsIQ laid out for a phone. You sign in with the same account you use on the dashboard, and you see the same data with the same permissions. There is no desktop sidebar. A slim header runs across the top and a bar runs along the bottom, so it feels like a phone app even in a browser.

You can put it on a phone in three ways: from the App Store, from the Play Store, or by installing it from the browser as a web app. All three are the same app with the same features.

The App Store and Play Store versions talk to the phone's GPS directly. That is what makes recording reliable: a browser drops readings when the screen locks and can hand back old positions, which makes a recorded line look scrambled. They can also scan paper forms with the camera.

Installing the app

iPhone and iPad: Search "*TrailsIQ*" on the App Store, or open apps.apple.com/us/app/trailsiq/id6766642278. It is a free download.

Android: Search "*TrailsIQ*" on the Play Store, or open play.google.com/store/apps/details?id=com.trailsiq.fieldapp. It is a free download.

From the browser: Open your organization's dashboard in Safari on an iPhone or Chrome on Android and tap "*Open field app*". Then:

- **Safari on iPhone:** tap the Share button, scroll down and tap *Add to Home Screen*. Safari also shows a banner pointing you to the App Store version.
- **Chrome on Android:** tap the three-dot menu, then tap *Install app* (or *Add to Home Screen*).

The browser version installs with the green TrailsIQ icon, opens like any other app and works without signal.

For most crews the **App Store or Play Store version is the better choice**. It keeps recording GPS with the screen off, it gets push notifications, and its camera is the quickest. The browser version is a good fallback when you cannot install apps on a device, such as a shared tablet.

Field App home tab with time-of-day greeting, weather cards, and action tiles

Signing in

The app uses your normal TrailsIQ email and password. If you can sign in to `app.trailsiq.com`, you can sign in to the Field App. There is no separate account.

The first time you open it:

1. You see the **Crew sign in** screen.
2. Sign in with your email and password.

3. If you belong to **more than one organization**, pick the one you are working for today.
4. The app opens on the home screen.

The home screen

At a glance sits at the top of the home screen. It shows four numbers in two rows: **Open tasks**, **Structures at risk**, **Public hazards** and **Trails closed**. Open tasks, structures and closed trails are counted exactly the way the dashboard counts them, so the phone and the desktop always agree.

Tap a number to open the list behind it, already filtered. *Structures at risk* opens Infrastructure showing only what is rated poor or failed. *Trails closed* opens Trail Status showing only what is closed, with a chip you can tap to clear the filter.

Public hazards counts what the public is being warned about right now. That is every task and structure with **Warn the public** turned on, exactly as your public trail pages show them. Tap it to see the list with the most serious first. Each row shows its level, its trail and the day it was reported or inspected, and tapping a row opens the task or structure. Resolving the task takes it off the list and off your public pages at the same time. So does an inspection that rates the structure fair or good. *At risk* is only a condition rating. It means somebody should look at the structure, and nobody has necessarily taken the job on yet.

A dash in place of a number means the app has not been able to update it yet. That usually happens when you open the app with no signal. A dash does not mean zero.

Below that is the weather, with one card for where you are and one for each network. Under the weather are the sections and tiles that take you to the rest of the app:

- **Home:** weather, your recent work and the quick-action tiles.
- **Maintenance:** every open and in-progress task, with a *Pending Reviews* tab for public reports waiting to be checked.
- **Trail Status:** every network, area and trail with its status. Tap a trail's name to open its page.
- **Infrastructure:** bridges, signs, culverts, kiosks and every other structure your organization has listed.
- **Points of Interest:** trailheads, parking, viewpoints, water, campsites, shelters and landmarks.
- **Climbing:** crags and routes, if your organization uses climbing.
- **Daily Report:** read and post today's crew updates from the trail.

The home screen also has tiles for **Plan / Record Trail**, **Expenses** and **Work Hours**.

The header and the bottom bar

Two bars appear on every screen.

The **header** is the slim strip at the top. It holds your organization's logo, the search box, an offline sign when you have no signal, the sync queue button and the notification bell.

The **bottom bar** is how you get around. From left to right it has **Home**, your **account**, the green **+**, **Discussions** and the **menu**. Discussions shows a count when somebody is waiting on you. Three things are worth knowing about the bar:

- **Home always takes you back.** Most screens open on top of another one: the planner, a wizard, a sheet, or a task you are editing. Home closes whatever is open and takes you to the home screen. That is why it is always there and always lit.
- **The + changes with the screen.** On Maintenance it files a task. On Infrastructure it adds a structure, on Points of Interest a point, and on Climbing a crag or route. On a screen where there is nothing to add, the + is hidden and the other buttons spread out to fill the space.
- **The arrow on the right folds the bar away** so that only Home is left. That is useful when you want the whole screen for the map. Going back to the home screen opens the bar again. The bar also folds itself while you are adding something, so the only way forward is the screen in front of you.

The home screen has a Planned trails strip next to the maintenance one, showing your most recent planned trails. The picture on each card is drawn from the trail's own line. That means it shows up in a valley with no signal, and a line you just walked appears there before it has uploaded.

Tap a card to open that trail in the planner.

A workspace set up for a trail-building business shows this strip first. A workspace set up to run a trail network **starts with it hidden**. The planner is still there, and the **Plan / Record Trail** tile opens it. A club that plans one trail a season does not need a strip on its home screen that sits empty for the rest of the year. You can turn it on for yourself under **Customize home**, described below.

The order of the home screen depends on how the workspace was set up. A trail-building business opens on Planned trails with maintenance below it. A workspace that runs a trail network opens on maintenance. Both have both sections, because a builder still uses maintenance as the punch list before handing a job over. This order belongs to the workspace, and it is where everyone on the team starts.

You can rearrange it. At the bottom of the home screen, tap **Customize home**. Drag a row by its handle to move it, or use the up and down arrows if that is easier with gloves on. Tap the eye to hide a section you never use. Tap **Done** to save.

Each part of the home screen is its own row in the list, and maintenance has two. **Recent maintenance** is the strip of task cards. **Maintenance** is the bar under it with the wrench, the review count and the green **+**. They start next to each other but you can separate them. For example, you can put the buttons at the top and the cards further down.

Quick actions opens into its own tiles. Under that row there is one line per tile: Plan / Record Trail, Expenses, Daily Report and Work Hours. The same two controls work here. Drag or use the arrows to put them in the order you want, and tap the eye to take one out of the grid. If you hide every tile, the whole block disappears, and the list tells you so before you leave.

Most rows can move between the two. Every row has a small grid button. On a section, the button turns it into a square tile in Quick actions. A tile cannot hold everything a full-width bar can, so it usually loses its green **+**. On a tile, the button turns it back into a full-width bar, placed where Quick actions sits rather than at the bottom of the page.

So you can have Plan / Record Trail as a bar at the top of your home screen and Inventory as a tile in the grid, if that suits how you work. The button only appears where it makes sense. The two card strips and Quick actions itself always stay as sections.

Weather and Trails are two separate tiles. They start side by side in Quick actions. If you move either one out, it becomes a full-width bar like any other section.

The two card strips have one extra setting. They are marked **Slider** in the list, and each has a *Cards to show* setting from one to eight. A bar or a tile shows one thing, but a strip shows as many cards as you choose. Setting it to one does not turn the strip off. Use the eye for that.

Three more things to know:

- **Your layout is yours alone.** It follows you to any device you sign in on, and it changes nothing for anyone else. **Reset** puts you back on the workspace's order and keeps you on it if that order changes later. It asks you first, because it cannot be undone.
- **Hiding a section only hides it on your home screen.** The tab, the data and everyone else's home screen stay the same. The list only shows what your workspace uses, so a section your organization has turned off is not there to hide.
- **New sections still reach you.** When we add a section, it appears in your list even though you arranged your home screen before it existed.

Saving your layout with no signal works like everything else in the app. It waits in the queue and uploads when you have signal, and your home screen looks right on the phone in the meantime.


Field app Crew sign in screen with email, password and a link to the anonymous Report app

Changing trail conditions from the field

Open the **Trail Status** tab. Each network has a card with three status buttons: **Open**, **Caution** and **Closed**. Open a card to see its areas and trails underneath, each with its own status button.

Tapping a status button opens a short sheet. Nothing changes until you save. The status you tapped is already selected. Add a **public comment** if it helps, such as "*blowdown at km 3, needs a saw*" or "*tacky, ride carefully*", and tap **Save**. You can also set a trail or an area to **Same as network**, so it follows whatever its parent says. The button shows what that status currently is. This way a closure on a network closes every trail in it, except trails that have their own status. The line under the network's name counts those as *overrides*.

Tap a trail's name, rather than its status, to open the trail's own page. It shows the trail's status and where that status comes from, grooming, how wet the trail is, who looks after it and when it was last walked (once your organization uses either), the elevation profile, the trail's length, climb and grade, the latest inspection with a **Start inspection** button, and its open tasks. Drag a finger across the elevation profile to follow the trail on the map.

Wetness is the weather system's reading for that trail. It is the same number used for trail recommendations. It gives a word for how wet the ground is (*Bone Dry*, *Drying*, *Damp*, *Wet*, *Very Wet* or *Saturated*) and a percentage. Its color shows the status the weather system recommends for the trail. When that differs from the trail's actual status, the line underneath says so, for example *suggests Caution*. Wetness appears when weather automation is turned on for your organization, and it needs signal to load.

In winter, grooming is part of the same sheet for each trail: **Groomed**, **Partial** or **Not groomed**. In summer the grooming controls are hidden, and a trail closed for the season shows in gray as **Closed for winter**. If you have been given trails to groom tonight, a **My grooming** card at the top of Trail Status lists them, and **Done** marks each one groomed. See Winter operation and grooming. A groom counts as fresh for 24 hours. After that the trail stays open but is no longer shown as freshly groomed, so your website and TrailsIQ Go always show current information.

If you look after any trails, a **My sections** card at the top of Trail Status lists them, with when each was last walked. A section that has never been walked, or has gone longer than your organization's walk interval, is marked **Walk due** and moves to the top. The interval is the same one the dashboard uses, set under **How often each trail is walked** in **Settings → Trail inspection questions**. Both the card and the trail's page work offline from what your phone already holds.

Who can change conditions: field workers, managers and owners. Volunteers can see the statuses but cannot change them unless you give them the *Change trail conditions* permission in Settings → Roles & permissions.

Every change is recorded on the daily report. It is also sent to your crew as a push notification, such as "*{Trail Name} is now closed*" or "*{Trail Name} was just groomed*", and to anyone following your organization in TrailsIQ Go. To skip the notification, turn **Notify crew + TrailsIQ Go followers** off before you save.

Trail Status tab showing network / area / trail rows with condition pills

Recording a trail with GPS

Home → Plan / Record Trail starts the GPS recorder. It is built for real conditions on the trail: a slow first GPS lock, tree cover that makes the position jump around, and a phone going into a pocket. It cleans up the line as you go, so the result is usable straight away.

A recording has four stages:

- **Warmup:** the app reads your position and shows a colored label for how accurate it is. **Good** means better than 15 m and **fair** means up to 20 m. Above 20 m the app keeps waiting. The **Start tracking** button unlocks at 20 m. That is the same accuracy a reading needs to become a point on the line, so the button works as soon as the recording can actually begin. The line starts where you are standing when you tap it.
- **Recording:** the first point is the spot where you started, so the line begins at your first step. After that, the app adds a point for every reading that is accurate to 20 m and at least 3 m from the last point. Readings that would mean you moved faster than about 32 km/h (20 mph) are thrown away as glitches. That is well above a slow bike. In the first few seconds, a reading that far out moves the starting point instead of being thrown away, because a GPS that has had a few more seconds to settle knows better where you are. The app also averages nearby readings, giving more weight to the accurate ones, to smooth out the jumps you get under trees.
- **Paused:** carry on where you left off. The App Store and Play Store versions keep recording with the screen off. On an iPhone you will be asked to allow location access "*all the time*" so the recording does not stop when the screen locks.
- **Review:** the app removes points that add nothing to the shape of the line while keeping it true to where you walked. Then you can save it with a name, add tags, or publish it as a trail.

While you record, tap **Drop note** to pin a note to the line. Use it for hazards, junctions, ideas for signs or a good photo spot. Each note has a description ("*What did you see here?*") and up to four photos. On the dashboard, the notes show as pins on the planner map next to the line, and you can edit or delete them there.

A planned trail can also be sent to another organization from here. *Send to another organization* on the trail gives you a code, and **Receive a trail** on the planner list accepts one. It works the same way as on the dashboard, described in Trail Planner. Doing it from a phone lets two people sort it

out while standing on the ground. Both phones need signal, and the app tells you if you have none.

Open a note to find a **Show on the proposal page** switch. Notes start out visible. Turn one off and it stays here for you and your crew, but it is left out of the public proposal page completely. Use this for working notes that are useful to the crew but are not what a landowner should read first.

Draw on map on a saved line frames the map and lets you draw over it. Your marks are fixed to the ground rather than to the screen, so they stay on the right piece of hillside at any zoom. A drawing you save **shows on the map straight away** and every time you open that line again. If you turn its layer off, it stays off on that phone until you turn it back on, even after a restart. Each drawing is switched on or off separately.

While you are placing a line, for example drawing an alternate route or picking the two ends for **Suggest**, the note pins stop reacting to taps. That way they cannot catch the point you are trying to place. They stay on the screen, because a note saying *wet through here* is exactly what you want to see while you choose where the line goes.

Drawings also stay on the map while you draw, for the same reason. To get either out of the way, open the map layers button. Its **Planner** section has **Trail notes** and **Map drawings**, both on by default because they are your own work. Turning **Map drawings** off hides all of them, and it remembers which ones you had already switched off. When you turn the group back on, those stay off.

Building a loop? Recording, drawing and editing all have a **Close the loop** button that joins the end of the line to its start. When you are drawing or editing, it simply joins them, because you placed every point yourself. When you are recording, it shows the gap first (*Close the loop · joins 12 m*). It refuses if the gap is more than about 60 m, because the join is a straight line across ground nobody walked. A gap of ten meters is the GPS difference you can see on the screen. A gap of two hundred meters would be the app making up trail for you. Walk back closer, or draw the last section instead.

On a branch, the green **Close loop on parent** button does something different. It joins the branch back to the line it came off, rather than to its own start.

If you have no signal when you save, the recording waits in the queue and uploads when you are back in range.

A recording you save with no signal shows on the list and the map straight away, before it uploads. It is drawn in amber with **On this phone only** on its row, and the app opens on it when you finish. That means you can look at the line you just walked while standing on it. Tap it and the panel underneath explains what it is waiting for. The length is final. The elevation comes from the phone's GPS and is recalculated when the line uploads. Grade and sustainability appear once the line has uploaded.

Continue walking on that panel picks the line back up and keeps recording onto the end of it, the same way you extend a trail that has already uploaded. Deciding whether to walk more of a line is the reason to look at it in the first place, and you should not need signal for that. While you are walking, the app holds the recording back instead of uploading half of it. When you save, the whole longer line uploads in one piece. If you close the app partway through, it picks up the recording the next time you open it.

An extension waiting to upload for a trail that has already uploaded shows the same way. It appears as its own amber line marked **Extension queued**, drawn next to the trail rather than joined to it, until the queue has sent it.

GPS recorder in Warmup phase with the accuracy status pill

Filing a maintenance task

On the Maintenance tab, the green **+** in the bottom bar files a task. It fills the screen and asks one question per step. There are five steps for a task and four for infrastructure and points, which have no priority to set.

1. **What happened?** Pick the type. Once you have filed a few on this phone, the three you use most appear above the grid under *You log these most*. The grid below keeps its own order, so nothing moves under your thumb from one task to the next.
2. **Where is it?** The map fills the top of the screen. Below it, a card names the trail the pin is on, its network, the position and how accurate the GPS reading was. The card is green when the location is ready and amber when it still needs a trail. Drag the pin to move it, or tap **Use my GPS** for a fresh reading. **Change** opens *Choose location*, where you can search every network, trail, structure and climbing route, with the nearest to the pin first. Tap one to move the pin there. Tapping a network narrows the list to its trails. **Use my GPS** and **Upload from photo** are at the top of that sheet too. The photo option reads the location out of a picture you have already taken. On a trail, *How much trail?* lets you

choose between **A single point** and **A stretch**. Pick a stretch and a slider opens at the pin and grows in either direction along the trail. That is how you say "*200 ft of blown-out tread starting here*".

3. **Show it:** add photos. In the App Store and Play Store versions this step opens the camera, with the photos you have taken so far along the bottom and a count next to them. Tap one to mark it up, or tap **Skip**.
4. **How bad is it?** Answer two questions: *Is anyone likely to get hurt?* and *Can people still get past?* The app sets the priority from your answers. It tells you which priority it picked and what that means for the crew's task list. **Set it myself** lets you choose instead. This step is for tasks only. Infrastructure and points go straight to the last step.
5. **Anything to add?** Everything you have already chosen sits in a row of chips at the top. Tap the type or the location to go back and change it. The description comes first, because it is the one thing only you can write. The title is filled in for you, and you only need to change it when it should say more than the type does. You can also attach a project here, a route on a climbing task, and any custom fields your organization has set up.

At the bottom of that step is **The work**, which says what the job will take for whoever schedules it. Set **Est. hours** and **Crew · people** with the + and − buttons or type a number in. The line underneath multiplies them into person-hours. If either one is blank, it says so rather than showing a zero, because nobody has given that number yet.

+ Add tool and **+ Add material** open your inventory. Search it, filter by category and tap a row to add it to the list. Tap again, or use the + and − buttons, to add more than one. If you type something your inventory does not have, it is offered as its own row marked **Free text**. That way a saw you have never added to inventory still reaches the crew lead. This whole section is optional, and none of it changes the priority.

Under it are **Assigned to** and **Do by**. Pick a teammate to hand the task to them, or yourself to take it on, and they get a notification. Pick a day if it needs doing by then. Both are optional, and you can change either one later from the task's **Edit** screen. Neither is offered on a trail another organization has shared with you, because its crew is theirs.

An open task shows who it is assigned to (*You* when it is yours) and its **Do by** day. Once that day has passed and the task is still open or in progress, it reads **Overdue** in orange, and the row in the Maintenance list says **Overdue** too. Due today is not late yet. Tasks assigned to you say **Yours** in the list. To see only your own work, open **Filters** on the Maintenance tab and pick **Assigned to me** under **Show**. **Overdue** in the same group lists every late task.

From an open task you can **edit it, add photos, close it or reopen it**, and open the **Work log**. A work session records how long it took, an optional note about what you did, and everyone who was there. Tap **Add** under *Who worked?* to add the rest of the crew, and each of them gets their own entry for the same time. Helpers without an account go in as a number under **Volunteers not on your team**. Their time counts as volunteer hours, each for the full session. All of it adds up on the linked project's Hours worked tile on the dashboard.

Marking a task done asks for the hours first. Tap **Mark as Done**, or choose *Resolved* on the edit screen and save. The work log opens with the task still open and one question on it. Enter the time and tap **Finish task**, or tap **Skip logging** to close it without any hours. Both take one tap. **Not done yet** backs out and leaves the task exactly as it was. Nothing is closed until you confirm. If your organization asks for photos before a task is done, **Mark as Done** says how many more the task needs before the work log opens, so add a photo of the finished work first. A task that is already finished never asks again, so you can fix the title on a closed task without being interrupted.

If you open a task and see "*This task isn't in your current organization — it may have been moved, deleted, or you've switched orgs. Refreshing now…*", you have switched organizations since the task was saved on your phone. The app refreshes on its own.

Create New Task wizard on the Location step with GPS auto-snap and trail slider

Adding a point of interest

The same wizard opens from the Points of Interest tab. Step 1 asks what kind of point it is. The Field App comes with seven kinds of point:

trailhead, **parking**, **viewpoint**, **water**, **camp**, **shelter** and **landmark**.

Infrastructure such as bridges, signs, kiosks and culverts works the same way from its own tab. Step 1 lists your organization's own structure types under their categories, which you set up in Settings → Structure types.

The **+** adds whatever the current tab is for: a structure on Infrastructure, a point on Points of Interest, a crag or route on Climbing, and a task on Maintenance. There is one button to reach for and no menu in the way.

Moving between items without going back

When you open a maintenance task, a structure or a point of interest, you can **swipe left for the next one and right for the one before**. The card follows your finger and the next one slides in behind it. The map moves to whichever item you land on, and a small counter such as *4 of 18* shows where you are while you swipe.

It moves through the list you were looking at, in the same order and with the same filters. If you narrowed the list to one trail, swiping stays on that trail. At either end the card stretches a little and springs back, which tells you there is nothing further that way.

Everything else on the card still works. You can scroll down a long task as normal, and a swipe that starts on a row of photos scrolls the photos instead of changing the item.

Choosing which items come first

The Maintenance, Infrastructure and Points of Interest tabs each have a line above the cards that says how the list is sorted. A **Nearest / Latest** switch sits at the right of that line. The maintenance cards on the home screen have the same switch. To open the full list from there, swipe to the **Show all** card at the end.

Nearest puts the closest items first, both in the cards along the top and in the rows underneath, which are one list in one order. **Latest** puts the newest first. The app remembers your choice for all three tabs and the home screen's maintenance cards. You set it once for how you are working, whether that is walking the trail or catching up at the truck.

The line always tells you how the list is really sorted. If you choose Nearest before the app has your location, or when nothing is within about six miles of you, the list is sorted by newest and the line says *Latest*. When everything is equally far away, sorting by distance would not help.

Distances do not jump around. Two items a few steps apart keep their order while your GPS wanders. One only moves ahead of the other when it is clearly closer.

Photos

There are three ways to add a photo. All of them open the same editor, where you can crop the photo or draw arrows and marks on it before you save.

- **Take photo:** opens the phone's camera.
- **Choose from Library:** pick up to 10 photos at a time from the phone's photo library.
- **Upload a file:** in the browser version, the app uses the browser's file picker instead.

Photos upload through the queue and show their progress, so a slow connection never leaves you guessing.

If saving a photo to your phone shows "*Photo save is unavailable in this build.*", your copy of the app is too old to save photos. Update it from the App Store or Play Store.

Push notifications

The App Store and Play Store versions ask permission to send notifications the first time you open them. Allow it once and your organization's activity can reach your phone.

You get a notification for:

- **Trail condition changes:** "*{Trail Name} is now closed*", "*{Trail Name} is now open*" or "*{Trail Name} was just groomed*".
- **Lift status changes:** "*{Lift Name} is on wind hold*", "*{Lift Name} is closed*" and so on.
- **New maintenance tasks:** who added it, with the task's title.

- **Event reminders:** "*Reminder: {title} — today at HH:MM · {location}*", the morning of the event or the evening before, for events you signed up for in the app.
- **Your notification inbox:** anything that also appears under the bell.

Tapping a notification opens the app on that item, whether it is a trail, a lift, a task or an event.

Your phone's settings decide whether notifications are allowed. If you said no and change your mind, on an iPhone go to *Settings → Notifications → TrailsIQ → Allow Notifications*. On Android go to *Settings → Apps → TrailsIQ → Notifications*.

The browser version cannot receive push notifications, because phones do not deliver them to apps installed from a browser. Use the App Store or Play Store version if notifications matter to you.

Working offline

The Field App is built to work without signal. When you have none, a small offline sign appears in the header. Tap it to read "*You're offline. Saved actions will sync when you're back online.*"

The app keeps two kinds of information on your phone: what it saves for you automatically, and what you choose to download.

Automatically saved: the app keeps what you have already looked at. A screen you opened this morning can still be read this afternoon with no signal.

Downloaded: before a trip you can download a whole network. That includes its trails, tasks, photos, infrastructure, points of interest, and contour and slope shading. It covers the whole trail system whether or not you opened the right screens first, and it is the right move for anywhere you know the signal drops out. If your organization uses the TrailsIQ map, the base map comes with it. On other maps the background cannot be included in a download for licensing reasons, so pan around the area while you still have signal.

The two work differently. A **download** (*Offline downloads*) is something you choose. You pick a network, the app fetches everything for it, and it stays until you delete it. The **cache** (*Settings → Offline Cache*) fills itself. Every list you load while you have signal is kept, so it is still there the next time you open the app without signal. You do not have to plan ahead for the cache to help, but you do have to have opened the screen once. Each cache has its own switch and shows how many items it holds. Turning one off clears it straight away.

Planned trails are cached the same way. That covers the Trail Planner list and every planned trail you actually open. The second part matters, because a list you can see but cannot open looks as though the app lost your work. Open the lines you expect to work on before you lose signal, and they will be there with their notes, branches, options and analysis. A line you never opened says so: "*Open it once on signal and it'll be here next time.*"

What works offline:

- **Reading:** every task, structure, point, planned trail and photo that you downloaded or opened earlier can be browsed as normal. If nothing was downloaded or opened before the trip, the list says "*You're offline and no tasks were cached from a previous visit yet. They'll load once you're back online.*"
- **Saving:** every new task, structure, point, edit and photo you add offline goes into the sync queue. So do trail condition changes, lift status changes, daily report posts, new quick time logs, work hours and expenses with their receipt photos. In the trail planner, notes on a saved line and drawings made with **Draw on map** are queued too, photos included. Editing a work-hours or expense entry you already filed needs signal, because the entry has to load before you can edit it.
- **GPS recording:** the recorder works fully offline. The line stays on the phone until it uploads.
- **Planner notes appear instantly, with or without signal.** Tap Save and the sheet closes and the pin appears on the map right away. The upload happens in the background. With no signal, the note joins the queue and the pin stays where you put it. The only thing that removes the pin is the server turning the note down, and losing signal can never cause that.

Everything waiting to upload is counted in one place: the **N pending** badge in the header. It appears as soon as something is waiting, counts everything in the queue, stays put when you close the screen you were on, and opens the sync queue when you tap it. It covers everything the planner can queue: a note, a map drawing, an extension to a line, and a drawn or suggested line saved as a draft. If you save something with no signal and want to be sure it is being held, look at the badge.

When signal comes back, the queue sends everything on its own. You can also open the **Sync queue** from the header to see what is waiting, try a failed item again, or throw away something you no longer want to send.

Each item in the queue has a label, such as "Maintenance issue — Trail X" or "3 photos, 2.4 MB", the number of tries so far, and its own Retry and Discard buttons. An item that has failed 10 times turns red and needs you to look at it. Discarding cannot be undone: "*Discard {label}? The data won't be sent and can't be recovered.*"

Nothing you add leaves the queue until the server has it. That includes a new task, structure or point and anything with photos. If an item uploads and its photos do not, the photos stay behind as their own **Photo upload** row, named after the item, and go up next time. If the server turns something down, it is kept and marked so you can retry it or discard it yourself. A dropped connection, an expired sign-in or a Wi-Fi login page at the trailhead never counts as the server turning it down. If a photo is in a format the server does not accept, such as an iPhone HEIC photo from your library, or is too large, the phone converts it to a JPEG before sending it. If the server still turns it down, the phone tries once more with a smaller copy.

A tip for a long day without signal: open the sync queue before you lose signal so you know how the app is set. When you come back into range, watch the offline sign disappear and the queue empty.

App updates

The app only updates when you tell it to. It never updates overnight, when you reopen it or while you are halfway through a form. Whenever a newer version is available, an **Update available** row appears in the menu. Open the menu from the bottom bar and tap the row. The app downloads the new version and restarts on it. Until you do that, your phone stays on the version it has.

A banner at the top of the screen only appears when we have checked a version and think your whole crew should move to it. It shows once for that version. **Later** puts it away for good on that phone. The row in the menu stays either way, so you can update whenever you like without waiting for the banner.

Very occasionally a version has to go to everyone, because it fixes something important. The banner then says **Update required** and has no **Later** button, and your phone moves to the new version the next time you open the app. This is rare on purpose, so that nobody is interrupted for an ordinary improvement.

Updating needs signal, because the new version has to download before the app restarts. The app checks that the whole download arrived before it switches. On a weak connection you may see **Could not fetch the update**. Nothing is broken and nothing is half updated. The app you were using keeps working, and you can tap **Retry** when you have better signal.

Switching organizations and signing out

If you belong to more than one organization, the menu has an **organization switcher**. Tap it, pick another organization, and the app reloads with that organization's information, including its colors, logo and custom fields.

TrailsIQ staff see more organizations and an "*Act as a member*" option, which lets them help you from inside your organization.

Sign out is at the bottom of the menu. It signs you out and returns to the sign-in screen, ready for the next person or for you to sign in again. Just above it, the menu shows the app's version ("*Field App v{version}*"). Include it when you report a problem.

You do not need to close the app to save battery. The phone handles apps in the background. Only sign out when you are handing the phone to someone else or sorting out a sign-in problem.

Common gotchas

- **In a browser, the app and the dashboard share one sign-in.** Signing out of one signs you out of the other on that device.
- **The build price can include a trail's branches.** On a line with branches, *Report options* has *Include this trail's branches in the price*. It prices everything as one visit. Each branch is still measured on its own terms, but the machine is brought in once. The dashboard shows the same setting because it is saved on the trail, so both give the same figure.

- **You choose what a shared proposal shows first.** In *Report options*, *Top of the proposal page* lets you pick **Map image** or **Live map**. Map image shows your newest drawing exactly as you made it. Live map shows a real map the reader can pan and zoom, with the line, its branches and the numbered notes on it. The setting is saved on the trail, so the dashboard agrees. Live map is available on the TrailsIQ map. On other maps the page uses your map image.
- **Push notifications need the App Store or Play Store version.** The browser version installs and works offline, but phones do not deliver push notifications to apps installed from a browser.
- **Recording with the screen off on an iPhone needs "Allow all the time".** During a recording with the screen locked, the iPhone asks "*TrailsIQ needs 'Allow all the time' location access to keep recording when your screen turns off. Open Settings now to change it?*" Allow it once, or the recording stops partway.
- **The sync queue belongs to one phone.** If you move to a new phone, items waiting on the old one do not move with you. Let the old phone finish sending before you switch.
- **Queued work belongs to the workspace you saved it in.** If you work in more than one workspace and switch before signal comes back, those items wait instead of uploading into the wrong workspace. The sync queue marks them "*Saved in ...*", and they upload on their own when you switch back.
- **Discarding an item from the sync queue is permanent.** There is no trash to restore it from. Try Retry first and only discard when you are sure.
- **A task that will not open** has usually been moved to another organization or deleted. The app shows "*This task isn't in your current organization — it may have been moved, deleted, or you've switched orgs. Refreshing now...*" and refreshes on its own.
- **Volunteers can only view Trail Status** by default. Give them *Change trail conditions* in Settings → Roles & permissions if you want them changing conditions from the field.
- **Home screen weather goes out of date offline.** After a while the card is replaced with a "last updated" note, so you never mistake old weather for current weather.
- **If the app cannot finish starting** within 15 seconds, the start screen shows "*App couldn't finish loading.*" with a *Tap to retry* button. If it keeps happening while you are offline, it also says "*If this persists, open the app once with a connection so it can finish caching.*"
- **If notifications are not arriving, check the phone first.** Allow the notification prompt, then open the app once with signal so it can sign up for notifications again. If nobody on your team is getting them, the problem is on our side, so ask us.

What to do next

- Get the app on every crew member's phone. Send them to the App Store or Play Store and have them sign in with their TrailsIQ account. If they do not have an account yet, the *Members, roles & permissions* article explains how to invite them.
- Try Trail Status, Maintenance and Plan / Record together on a real trail. Ten minutes outside teaches more than an hour in the office.
- On days without signal, open the sync queue first so you know where things stand.
- If notifications matter to your operation, for example for weather closures or wind holds, make sure every crew phone allowed notifications the first time it opened the app.

FIELD APP

Offline downloads: take a network with you

Download a trail system to your phone before a trip with no signal, including trails, tasks, photos, infrastructure, points of interest and terrain shading. Also covers what cannot be downloaded, how to keep a download up to date and how to check one.

The Field App keeps what you have looked at, so a screen you opened this morning is still readable this afternoon with no signal. **Downloading a network** goes further. You choose a trail system before you leave, the app saves it to your phone, and it is there whether or not you happened to open the right screen first.

When to download

Download when you are heading somewhere with no signal and you want to be sure instead of lucky. The everyday cache only holds the screens you happened to open. A download covers a whole trail system, whether you opened it or not.

It is also worth doing before a day on a **weak** connection, not just no connection. The app uses downloaded content without asking the network at all, so a bad signal can't slow it down. See Using a download.

Downloading a network

Open the Field App, go to the storage screen and tap **Download a network**. The sheet is titled *Download for offline*.

1. **Pick your networks.** Tap one or more in the Networks list. Everything below updates as you change your choice.
2. **Review what you'll download.** The *What you'll download* list shows every category, what it holds and how many megabytes it takes.
3. **Trim the large parts.** Photos and maintenance tasks each let you choose none, some or all. You can switch infrastructure, points of interest and terrain off completely.
4. **Check the total**, then tap **Download**.

While it runs, the bottom of the sheet shows *Saving N of M files...* with a **Stop** button. If you stop, everything already saved stays. Run the same download again and it carries on from there instead of starting over.

What you can include

Category	Choices	Notes
Trails	Always included	Names, routes and status. The smallest part of any download.
Maintenance tasks	None / Open only / All	"All" includes finished tasks too, which on an older network is most of the size.
Photos	None / Open tasks only / All	Smaller copies, about a tenth the size of the originals. Full size stays online.
Infrastructure	Include or not	Bridges, signs, culverts and the rest, with their extra fields.
Points of interest	Include or not	Waypoints, hazards and features.
Contours & slope shading	Include or not	Elevation lines and slope coloring. See Terrain analysis.
Planner recordings	Off by default	Planned and recorded lines, with their routes.
Projects	Off by default	Active projects and the tasks linked to them.
Inventory	Off by default	Your stock list and storage locations.

The last three work differently from everything above them, in two ways.

They cover your whole organization. Trails, tasks, infrastructure and points of interest come only from the networks you picked. Planner recordings, projects and inventory belong to the organization, not to a trail system. So their size doesn't change as you add networks, and two downloads for different networks each carry their own copy.

They are off unless you switch them on. A crew downloading a trail system wants its tasks, photos and a readable map. Adding every planner recording to every download would make each one bigger for something most people never open. Turn them on when you need them.

One limit on planner recordings: a download carries the list and each line's shape. That is enough to browse them and see them on the map. It does not carry the full elevation profile, which loads separately for each recording and needs a connection.

Terrain shading downloads along with everything else.

If your organization uses the **TrailsIQ map**, a download includes the base map itself too. Roads, paths, water and place names come with you and draw offline exactly as they do with a signal. That includes the **Base map** style picker, because all three looks are downloaded along with the tiles they share. See The TrailsIQ map.

What cannot be downloaded

Satellite imagery can't be downloaded on any plan.

The base map can't be downloaded if your organization uses Mapbox. Those tiles belong to Mapbox. Their terms allow the app to keep tiles as you pan around a map, but not to download an area in advance. Tiles you have already looked at stay available offline. Ground you have never panned over will not be there, so **pan around the area you care about while you still have signal**.

This is Mapbox's rule, not a technical limit, and it does not apply on the TrailsIQ map, where the same download includes the base map. The row in the sheet tells you which case applies to you, instead of a flat "no", and shows the size either way.

Where tiles are missing, trails, markers, contours and slope shading draw on a plain background. The map still works. It just has no backdrop.

On the TrailsIQ map, the base-map row can also read *Nothing harvested for this area yet*. That doesn't mean you can't have it. Map tiles are collected around trail lines as they are saved, so a network added a few minutes ago may not have any yet. The row still shows what the download would come to, so you can tell "not yet" apart from "not available to you".

Using a download

There is no offline mode to switch on. The app simply uses downloaded content wherever it applies.

One thing surprises people: **a download is used even when you are online.** That is on purpose. A downloaded terrain tile is exactly what the server would send, so fetching it again would gain nothing and cost a wait. That wait is worst where it matters most, on a weak signal at the far end of a valley. Reading from the phone is instant, whatever the connection is doing.

There is one catch. If the terrain is regenerated after you downloaded it, your phone keeps the older copy until you download again. Nothing else works this way, because everything else is treated as a new file when it changes.

Things added after you downloaded

A download is a snapshot. It never hides anything added afterwards. The new things just aren't in it yet.

- **Online**, everything new appears as normal. A task filed after your download shows up, its photos load, and terrain over new ground draws from the server. The download never hides anything newer.
- **Offline**, anything added after the download is missing until you download again.

The sheet tells you when a download is out of date. Open it with a connection and each saved download under *On this device* is checked against the live network. One that has fallen behind says so, for example "*12 new files · 3.4 MB*", with an **Update** button beside it.

You don't have to ask, and you don't have to guess from the size. If a download says nothing, it is up to date.

Updates only fetch what is new. Every file is checked before it is fetched, so an update skips everything already on the phone. It updates that download in place instead of making a second copy, so the same button also finishes a download that was interrupted.

The check is skipped when you are offline, or when the app judges the connection too weak to use. A trailhead with one bar is exactly when you don't want the app pulling data to answer a question you didn't ask. In those cases the sheet shows nothing instead of a wrong answer.

Managing space

The **On this device** section lists every download you have, the networks it covers and its size, with a **Remove** button on each.

Before a download runs, the app checks the total against the space actually free on your phone. If it would not fit, you get a clear warning. The warning names the single biggest category so you know what to turn down first. That is usually photos set to *All*.

There are two kinds of storage, and it is worth knowing which is which:

- **Records, photos and base-map tiles are stored as app data.** They stay until you remove the download or delete the app. Nothing the phone does on its own can remove them.
- **Contours and slope shading are stored in the browser's cache.** iOS and Android are allowed to clear that cache when the phone runs short of space. It isn't common, but on a nearly full phone the terrain shading can go missing while everything else stays.

Base-map tiles are kept as real files in app storage, like your photos, so a download keeps its map even when the phone is short of space.

The storage screen itself

The download sheet is one part of a bigger screen. **Storage** in the menu shows the whole app: what your queued uploads are holding, the photo and map-tile caches the app fills as you use it, the app itself and the total your phone reports.

Two buttons at the bottom clear things, and they do different jobs.

Free up iOS storage (or *Free up Android storage* on an Android phone) clears the hidden system cache. That is the copies the phone keeps of things the app has already loaded. iOS counts it under *Documents & Data*, and Android counts it as cached data. You can't see it from inside the app, and it is why an app can look much bigger than the data in it. Your downloads, your queued uploads and your login are not touched, and the app refills the cache as you work. **This now runs by itself after an app update**, because a new version makes the old version's copies useless. The button is there for the times in between.

Clear cached photos, tiles & shell is the heavier one, and it asks before it runs. It clears what the app saved as you browsed. Because they are kept in the same place, **the contours and slope shading from your downloads are cleared too**. Everything else in a download stays: trails, tasks, photos and base-map tiles are app data. Pending uploads stay, and you stay signed in. The app rebuilds the rest from the network as you use it, so don't do this just before you lose signal.

On older versions of the app, that button also cleared downloaded terrain and the app itself. Where that is still the case, the app tells you before it runs, and the next app update changes it.

That is why the sheet has a way to check.

Checking a download

Tap **Check downloaded terrain** in the download sheet. It reports one of these:

- **Nothing downloaded:** no download on this phone has terrain. There are three causes, and downloading again fixes only two of them. The download ran before terrain existed for the area, the category was switched off when it ran, or the terrain for that area still needs regenerating. The terrain row in the download sheet tells you which.
- **Downloaded and readable:** everything is fine.
- One of three more specific problems, each with a different fix: files recorded but not reachable, files present but unreadable, or files readable as images but blocked for the map.

This matters because "the shading isn't showing" has several causes that all look the same on the map. If you are about to report a problem with offline terrain, run this first and include what it says. It turns a guess into a diagnosis.

If it reports fewer files than the download sheet showed, the phone has cleared some of the cache, as described above. Download again to get them back.

The same button checks the **base map** separately, because the two can fail separately. The terrain can be fine while the base map has been cleared, and one answer covering both would be wrong about one of them. It reads back a real tile at the closest zoom you downloaded. A zoomed-out tile covers a whole region and could pass even when everything at the zoom you actually use is missing.

Common gotchas

- **Downloads are per phone.** Two phones need two downloads.
- **Base-map tiles are only included on the TrailsIQ map.** If your organization uses Mapbox, pan around the area while you have signal so the tiles you need are kept, and expect a plain background beyond that.
- **Routes from the planner come too.** A download covers your trails and, on the TrailsIQ map, the ground along your planned routes, whether you drew them, had them suggested or walked them, up to the 25 most recent. This is the case it was built for: you plan a line where there is no trail yet, drive out to flag it, and the map is there when the signal is not.
- **Base-map tiles are shared between downloads.** The map is the same for everyone, so two downloads over neighboring ground store one copy, and the second one adds almost nothing. Removing one download never removes a tile the other still needs.
- **Photos in a download are smaller copies.** They are sized for reading a task in the field, not for zooming into a crack. Opening a photo full screen offline shows the downloaded copy. The original needs a connection.
- **"All" on tasks and photos is where the megabytes are.** On an established network, the history of finished tasks is far bigger than everything else. *Open only* is the right choice for a work day.
- **Terrain has to exist for your area first.** If the category says *Nothing baked for this area yet*, there is nothing to download. Terrain is made along your trail lines, so a network with no trails has no terrain either.
- **Terrain you can SEE on the map is not always terrain you can download.** If the category says the tiles were *baked from the old source*, the contours and shading over that ground were made from an older elevation source. They still draw normally, but they are kept out of downloads on purpose. This is the one case where downloading again changes nothing, because the same files are left out every time. It clears once that area is regenerated. Ask us and we will do it.
- **A download doesn't freeze your data.** When you have signal, live data always comes first. The download only fills the gaps.
- **No "new files" line means the download is up to date.** The exception is when you are offline or on a very weak connection, where the check is skipped on purpose. If you want a definite answer before a trip, open the sheet somewhere with signal.

TRAILS

How to create a network

Networks group your trails by place. This article covers creating one, every setting on the form, adding trails, using areas for smaller groups, changing conditions and deleting a network.

Networks group your trails by place. Think of them as maps within your organization. A trail belongs to one or more networks, and anybody looking at a trail can see it alongside the other trails in the same network.

What is a network?

A **network** is a group of trails, usually by place: a mountain, a park, a trail system or a type of route. Every network has its own name, description, location, condition and access rules. Each trail in a network can have its own condition or **follow** the network's. That is how you close every trail in a region with one click when a storm comes through.

Networks can also contain **areas**. An area is a smaller group inside the network, so you can close or open part of it without touching the rest. For example, "North Ridge" or "Beginner Loop" inside a larger "Sugarbush" network.

Creating a network

Open **Networks** in the sidebar. If your organization has no networks yet, the page says "*No networks yet. Networks group your trails into manageable areas.*" and shows a **Create your first network** button. Otherwise, use the **+ New network** button at the top right.

Only **owners and managers** can create networks. If you do not see the button, ask an owner to change your role. TrailsIQ staff can also create them.

Networks index page showing the +New network button in the top right

The form is short. Only Name is required, and you can change everything later on the edit page.

Fill in what you know and press **Create network**. The network's page opens so you can start adding trails to it. Its web address is made from the name automatically, and it is always different from your other networks' addresses.

Network create form with the Name, Description, Location, Website, Status, Access, and Condition fields

Every network setting explained

Every field on the create and edit forms is covered below. Anything you skip when you create the network can be filled in later on its **Edit** page.

Name and description

- **Name:** required. It appears on the network card, in the sidebar filter, and on the public trail pages for trails in this network. You can change it at any time. The web address follows the name the first time you save.
- **Description:** optional. A short paragraph shown on the network's page and, if the network is Public, on your website's Trails page and on the network's own page there. A long description is shortened on the Trails page, with a **Read more** link to the network's page.
- **Location:** optional, for example "*Stowe, VT*". It appears at the top of the network's page and in search results.
- **Website:** optional, for example "*https://example.com*". It appears as a link wherever the network is shown publicly, which is useful for pointing riders to your club or land trust website.

Network Show page header with the identity fields and the Change condition button visible

Who can see it

Two separate settings decide who can see the network and who is allowed on its trails.

- **Status:** *Public* or *Hidden*. Public networks appear on the public trails map, in the sidebar and in search results. Hidden networks are for your team only. You still see them on the dashboard, but visitors and people who are not signed in do not. Your public pages never name a hidden network, whether on your trail status page, your website, the embedded widget or TrailsIQ Go. A trail keeps its own status, though. A public trail that is only in hidden networks still appears on those pages, under **Other trails**. Set the trail itself to *Hidden* to take it off them too.
- **Access:** *Public*, *Private* or *Pass required*. This tells people who is allowed to use the network's trails. It does not stop anybody seeing the network, so a Private network can still have a Public status. Use the two together. A *Private* and *Hidden* network is for your team only. A *Pass required* and *Public* network is on the map and marked as needing a permit.

Condition

- **Condition:** the current condition of the whole network: *Unknown*, *Open*, *Caution* or *Closed*.
- **Condition note** *(edit page only)*: a short explanation of the current condition, for example "*ice on north slope*". It appears next to the condition on the network's page and on every trail that follows the network.

Important: a network's condition only reaches the trails that follow it. Each trail either has its own condition or is set to *Inherit from area / network*. A trail set to inherit takes its condition from its area, and if there is none, from its network. So closing a network closes every trail that follows it, and trails with their own condition keep it.

Visitor details

(Edit page only.) Three short answers for people planning a visit, shown on the network's page on your website:

- **Season:** when the network is open or at its best, for example "*Year-round, upper ridge snowbound Dec to Mar*".
- **Fees:** what a visit costs, or *Free*.
- **Dogs:** your dog rule, for example "*On leash*".

All three are optional. A blank one is left off the page instead of being shown empty.

Add trails section on a network Show page — searchable multi-select and Add button

Adding trails to a network

There are two ways, and both work equally well.

From the trail's edit page. Open **Trails**, then the trail, then **Edit**. The **Networks** section lists every network in your organization with a checkbox. Tick the ones this trail belongs to and save. The trail ends up in exactly the networks you ticked, so saving with nothing ticked removes it from every network.

From the network's page. Below the trails table, **Add trails** lets you search every trail in your organization that is not already in this network. Start typing a trail name, pick one or more, and press **Add**. The trails appear in the table above straight away.

The **Add trails** section **disappears when every trail is already in the network**, because there is nothing left to add. If you do not see it, that is why. Add a new trail from Trails, come back, and the section reappears.

A trail can be in **several networks** at once. Adding a trail to a second network does not remove it from the first, so the same trail can be in, say, "Cross-country zone" and "Beginner trails".

From the Trails list. To put a lot of trails into a network in one go, tick them on the Trails list, press **Bulk update** and tap the network under **Networks**. Tap it twice instead to take the selected trails out of it. Either way, each trail keeps the other networks it is in.

Areas section with the inline create form (name + condition + colour picker) and the list of existing areas

Grouping trails into areas

Areas are groups **inside** a network. A network can have several areas, and each area can have its own condition. That is useful for closing "North Ridge" while the rest of the mountain stays open.

You create areas on the network's page. The form has three fields:

- **Area name:** required, for example "*North Ridge*".
- **Condition:** *Inherit*, *Unknown*, *Open*, *Caution* or *Closed*. Inherit means the area follows the network's condition. Anything else applies to the trails in that area instead.
- **Color:** used to show the area on the network map and in the trails list. It starts as a soft gray.

Press **Add area** to create it. You can then add trails to the area on the same page. A trail can be in a network *and* an area at the same time. Each trail's condition is worked out from the trail first, then the area, then the network, so the most specific setting wins.

Deleting an area does not delete its trails. The confirmation says "*Delete area "X"? Trails attached to it stay; only the grouping is removed.*"

Changing the condition

The top of the network's page shows a **Network condition** row with the current condition and a **Change** button. Pressing it opens:

- The condition list (*Unknown*, *Open*, *Caution* or *Closed*).
- A note field, for example "*ice on north slope*".
- **Save** to apply it.

Every condition change is recorded with the person who made it and whether it was made on the dashboard or in the field app, so you can look back and see who closed the network on which day.

Trailheads and parking

The network's page lists its **Trailheads and parking**. That is every point of interest marked *Trailhead* or *Parking* that is on one of the network's trails, or inside the network's area without being on a trail. Click one to open it on the Points of interest page.

You create them the same way as any other point. Open **Points of interest**, add a point, choose **Trailhead** or **Parking** as its category, and pick one of this network's trails, or place it inside the network's area. It appears on the network's page straight away. When a network has none yet, the card says so and links to the Points of interest page.

They also appear on the network's page on your website, each with a **Directions** link that opens the visitor's maps app.

The 3D network map

The **Network map** card on the network's page opens a 3D map of the whole network. It works on a phone too, where it fills the screen. The map shows the ground in 3D with every trail drawn in its difficulty color. Jumps, berms, rock gardens and bridges are drawn on their trails the same way the trail's own 3D views draw them, and every other structure on the network shows as a small colored post. A bridge without its measurements has no shape to draw yet, so it shows as a post until you fill them in. Nothing on the map is labeled, so the drawing stays clean.

- **Drag** to turn the map, **pinch or scroll** to zoom, and use **two fingers or the right mouse button** to move across the ground.
- **Find a trail** searches the network's trails by name. Pick one and the map flies to it.
- **Tap or click a trail** to open a small box with its name, difficulty, condition, distance, climb, descent and grades. **Ride 3D** in that box opens the 3D ride of that trail.
- **Tap or click a post** to see what the structure is: its name, its type, its condition and the day it was last inspected.
- **Light, Dark and Satellite** set what the map sits on. Satellite is on the Core plan and above, in the United States only, and the photos cover the ground near your trails.
- **Whole network** zooms back out to show every trail.

The map needs a connection, because it loads the ground when it opens. If the ground's elevation cannot be loaded, the map shapes the ground from the trails' own heights and says so at the bottom. To see the network on the regular flat map instead, use **View on map** at the top of the page.

Danger zone on the network edit page with the Delete network button and confirmation copy

Deleting a network

Open **Networks**, then the network, then **Edit**. Scroll to the **Danger zone** at the bottom. Pressing **Delete network** asks:

> "*Permanently delete this network? Trails stay but their pivot link to this network is removed.*"

That means:

- **The trails themselves are not touched.** They stay in your organization with all their settings, and you can still find them under Trails.
- **The trails are no longer in this network.** A trail that was only in this network is now in none, so add it to another one.
- **The network's areas are deleted with it.** The trails that were in those areas stay.
- **The history of the network's condition changes is kept** for your records.

You cannot archive a network. If you want to hide one for a while instead of deleting it, set its **Status** to **Hidden**.

Common gotchas

- **Networks do not have their own color.** Only areas do. Trail cards and lists use the difficulty colors, not a network color.
- **Status, access and condition are separate.** Any combination works. A network that is *Public*, *Private* and *Closed* is on the map, marked as private, and shows a red closed label.
- **A trail only follows its network if it is set to.** The trail must be set to *Inherit* on its edit page for the network's condition to reach it. Newly imported trails start set to *Inherit*. Some trails imported a long time ago may have their own condition and need changing by hand.
- **Each area belongs to one network.** You cannot share an area between networks. If you need the same group in two places, create it in both.

What's next

- Now that the network exists, add trails to it, or read *How to create a trail* if you do not have any trails yet.
- Set the condition and access on any trails that should follow the network to **Inherit from network**.
- Once you have a few networks, use the **filters** on the Trails page to see one network at a time for planning and reports.

TRAILS

How to create a trail

Three ways to add a trail to TrailsIQ: import a GPX, KML or GeoJSON file, plan one on the dashboard, or record it in the field. Also explains every setting on the trail edit page.

There are three ways to add a trail to TrailsIQ. Each one ends on the same trail page, where you can adjust the trail's settings:

1. **Import** a GPX, KML, KMZ or GeoJSON file you already have.
2. **Plan** a line on the map with the dashboard planner.
3. **Record** the line in the field by walking or riding it with the mobile app.

This article walks through all three, then covers every setting on a trail and how to change it later.

Method 1: Import from a file

Importing is the quickest way when you already have GPS tracks from another tool, such as Strava, a Trailforks export, a survey app or a map saved from Google Earth. You can import up to 25 files at once, each up to 20 MB.

Where to start

Open **Trails** in the sidebar. The **Import trails** button is in the top right. Only managers see it. If you don't, ask an owner to change your role.


Trails page header showing the Import trails button in the top right

Drop or browse for files

The import page has a drop zone that accepts `.gpx`, `.kml`, `.kmz` and `.geojson` / `.json` files. Drag them onto it, or use **Browse from your computer** to pick them.

- Each track's name inside the file becomes the trail's name. You can rename any trail later on its edit page.
- A file with several tracks is split into one trail per track. So a GPX with several tracks from a bike computer, or a Google Earth export of your whole network, imports as several trails in one go.


Trail Edit page — Name, Description, Status, Access, Lifecycle section

Set the defaults for the batch

Before you import, you can choose a few defaults that apply to every file in the batch. You can change any of them on each trail later. They just save you opening every trail to set the same values by hand.

- **Difficulty:** Easy, Moderate, Hard, Expert, plus Access (a service road or beginner connector) and Pro (double black).
- **Status:** *Public* (shown on the map to everyone) or *Hidden* (your team only). Trails that aren't ready yet usually start Hidden.
- **Access:** Inherit from network, Public, Private or Pass required.
- **Lifecycle:** Open, Planned, Under construction, Closed or Decommissioned.
- **Primary use:** mixed, hiking, mtb, gravel, running, equestrian, nordic, alpine, snowshoe, fatbike, ATV, snowmobile or walking. **This one matters.** It decides which set of difficulty icons is drawn on the map (see the settings below).
- **Add to networks:** tap any of your existing networks to add each imported trail to it.
- **Description:** one description added to every file in the batch. Leave it blank to leave the description empty.


Edit Trail Map page with a vertex being dragged on the polyline

What happens after you upload

- TrailsIQ reads each track and works out its distance, elevation gain and loss, and grade. If elevation correction is on, it also checks the elevations against terrain data, so the climbing and descending figures agree.
- If one file can't be used, for example an empty track or a damaged GPX, the rest of the batch still imports. The problem file is listed on the results screen beside the ones that worked.
- Importing a single file takes you straight to the new trail's page. Importing a batch takes you to the Trails list, with a message saying how many trails were imported.

Method 2: Plan a trail on the dashboard

If you don't have a track yet, because you are designing a new route, planning a reroute or scouting from aerial photos, use the dashboard planner. There are two ways to plan.

Suggest a sustainable line

Open **Trails → Plan trail → Suggest sustainable line**, or tap the badge marked *Experimental* on the planner overview. The planner searches the terrain for a route that follows the half rule. It prefers benching along the contour over shortcuts down the fall line, avoids stream crossings, and goes around wetlands, ponds and small lakes where that data is available. How hard it avoids wetlands depends on recent rain, so a soaked marsh counts for more than one in a dry summer. That uses the same weather readings as the wetness dashboard.

As well as the start and end pins, you can drop up to six **waypoints** the line must pass through. Tap **+ Waypoint**, then click the map. The pin gets a number, and you can click × on its chip to remove it. Waypoints let you send the route over a shared bridge, through an existing trail junction or past a viewpoint you must include. The planner works out one leg between each pair of points.

Turn on **Avoid trail crossings** to steer the route away from your organization's other trails. That helps when you want a loop on its own instead of a junction with the network. The results panel then adds an *Existing-trail crossings* box that counts any crossings left, shown as numbered dots on the map, so you can see the trade-off the planner made.

1. Tap the map to set a **start point** (green marker).
2. Tap again to set an **end point** (red marker).
3. Press **Find sustainable line**.

Each search covers up to about 1.5 km between points. For a longer trail, use the **Next leg from here →** button after each save to add another leg. The app joins them into one draft.

When you are happy with the result, press **Save as planner draft**. That saves a planner draft, which is not a trail yet.


Draw line page with the vertex-drop UI and the Save as planner draft button

Draw a line by hand

If the terrain data isn't good enough for suggestions, for example in dense forest, for custom-built features or when you are tracing an existing route, use **Draw line** instead.

- Click the map to add points. Each click adds a straight section from the previous point.
- Use **Load trail** to start from an existing trail or draft's line. This is handy for planning a reroute that stays close to the original.
- Nothing is smoothed or checked for sustainability here. What you draw is what gets saved.
- Press **Save as planner draft** when the line looks right. Like the suggestion, this makes a planner draft, which you then turn into a trail as described below.


Planner recording detail page with the green Export to trails button visible in the actions row

Turn a planner draft into a trail

Open the planner recording from the Planner tab. In the row of buttons at the bottom of its card, you'll see **Export to trails** (a green button with an arrow). Click it, and a box tells you what will be created. Press **Publish trail** to go ahead. Publishing:

- Creates a real trail from the recording's line, elevations and stats.
- Turns every planned structure on the line into infrastructure on the new trail. That includes the jumps, berms and rock gardens from the jump calculator, which come across as Trail Features. Notes you gave a point of interest type become points of interest.
- Takes you to the new trail's page.

After that, a green banner on the planner recording says **Already exported. Published to the trails tab on {date}.** with an *Open trail* → link, so you can always get back to the trail from the draft.

The button then reads **Export again**. Use it after you change the plan. It asks whether to save the plan as a new trail or replace the line of the trail you exported before. Replacing changes only the line, and the old line is kept in the trail's line history.

Trail Edit page — Name, Description, Status, Access, Lifecycle section

Method 3: Record a trail in the field

The mobile field app is the best tool when the trail is on the ground and you are on it. A GPS track is more accurate than any guess at a desk, and you can add photos and notes on the same walk.

Open the recorder

On the field app's home screen, tap **Plan / Record Trail**. If you don't see it, an owner needs to turn on the planner for your organization.

The planner has three buttons along the bottom:

- **Record:** walk or ride the line, and GPS captures every point.
- **Suggest:** the same sustainable-line search as on the dashboard, with the map already centered on where you are.
- **Draw:** tap to add points, for when you know the route but can't walk it.

Edit Trail Map page with a vertex being dragged on the polyline

Getting a GPS fix

The recorder always starts on a warm-up screen. It shows a live GPS accuracy dial and the words "*Walk to the start of your line. Tracking begins when you press the button.*"

The **Start tracking** button stays grayed out until your GPS accuracy is within 20 meters. That is the same accuracy a reading needs to become a point on the line, so the button unlocks exactly when the recorder can start capturing. It also stops a bad first reading from putting the start of the trail in the wrong place. That matters, because the first point is the spot you are standing on when you press the button. If the button won't unlock, give the phone 30 to 60 seconds under open sky.

Recording

Once you tap Start tracking, the screen switches to a live map with three figures: **Distance**, **Points** and **Accuracy**. There are two buttons:

- **Pause:** stops recording without ending it. Use it when you stop for lunch or check out a side branch on foot.
- **Stop:** ends the recording and moves to the review screen.

While recording, you can also tap **Drop note** to add a note at your current position. A note can mark a feature (a bridge, kiosk or hazard) or just describe something. Both save your current location and can have photos.

Review and save

Stopping opens the review screen. Give the recording a name (the placeholder is "*e.g. North Loop · Option A*") and press **Save recording**, or press **Discard** to throw it away.

- If you save with no signal, the recording waits in the sync queue and uploads by itself when the phone has a connection again.
- If you tap save twice, because you weren't sure the first tap worked or you tried again after a slow moment, you still get one recording, not two.

- A recording is a planned line, just like one drawn on the dashboard planner. So the same **Export to trails** button on its page turns it into a trail. That works from the field app or the dashboard.

Trail settings: every field explained

Once a trail exists, open **Trails**, pick the trail and press **Edit** to see all its settings. You can change any of the fields below at any time, and the change is saved as soon as you press Save.

Name and visibility

- **Name:** required, plain text. This is what shows on the trail card, the map label and every export.
- **Description:** optional. It is shown on the public trail page if the trail is public.
- **Status:** *Public* means the trail is drawn on every map your organization shows: your public site, the field app and the dashboard. *Hidden* shows it to your team only. That is useful for drafts or trails you are still building.
- **Access:** who is allowed to use the trail. The choices are *Inherit from network*, *Public*, *Private* and *Pass required*. This is for information, shown on trail cards and report labels. It doesn't block anybody.
- **Lifecycle:** where the trail is in its life: *Open*, *Planned*, *Under construction*, *Closed* or *Decommissioned*. It is separate from Status and Access, so a trail that is *Private*, *Under construction* and *Hidden* is perfectly valid.

Condition

- **Condition:** sets the trail's current condition. *Inherit from area / network* means the trail follows whatever its network or area is set to. Picking *Open (override)*, *Caution* or *Closed* fixes the trail's condition, whatever its network says.
- **Condition note:** a short note (the placeholder is "*e.g. Washed out after last storm — reroute at km 2.3*"). It is shown next to the condition on trail cards and in reports.

Difficulty

- **Difficulty:** Easy, Moderate, Hard, Expert, Access or Pro. The **set of icons** used to show the difficulty next to the trail name depends on the trail's Primary use. MTB, gravel and fatbike trails get the IMBA shapes (circle, square and diamond). Alpine uses ski-area signs, Nordic uses cross-country signs, and everything else gets a plain colored circle. So changing the primary use also changes the icon shape, without any warning.
- The colors come from your organization's difficulty colors. You can change them for each set of icons in **Settings**.

Uses and allowed activities

- **Primary use:** the main activity the trail is designed for. The choices are mixed, hiking, mtb, gravel, running, equestrian, nordic, alpine, snowshoe, fatbike, ATV, snowmobile and walking. The primary use decides the difficulty icons (above), the trail's default weather closure threshold and how its sustainability is judged.
- **Direction:** *Bi-directional*, *Downhill only* or *Uphill only*. One-way trails show arrows on the map, and the direction decides how uphill and downhill grades are analyzed.
- **Also allowed:** other uses the trail is open to, such as hiking on a trail built for mountain bikes. The primary use always counts too. Type a use into the search box at the top of the dashboard or the field app, such as *equestrian*, *horse trails* or *snowshoeing*, and the Trails group lists every trail that allows it, each marked **Primary use** or **Also allowed**. A trail type (*singletrack*, *flow trail*) or a feature (*rock gardens*, *creek crossings*) works the same way.
- **E-bikes:** this section only appears when a bike use is the Primary use or under Also allowed. It has two checkboxes, *Pedal-assist e-bikes (Class 1 / 3)* and *Throttle e-bikes (Class 2)*, which you set separately.

Trail type

This says what kind of trail it is and what a visitor will find on it. Your website's Trails page uses both, and both are optional:

- **Primary type**: the kind of trail it mostly is. The choices are singletrack, doubletrack, flow trail, technical trail, jump line, pump track, multi-use path, paved path, adaptive trail, connector, Nordic ski trail and snowshoe trail. Leave it on *Not set* and the trail is left out of the website's *Types of trail* block.
- **Also**: once you have picked a primary type, tap any other type that also fits. A singletrack can be technical too. The trail is listed under every type it has, and its own page shows all of them with the primary type first.
- **Features**: tap each one a visitor will meet on the trail: rock gardens, roots, rock rolls, berms and jumps, drops, skinny bridges, steep climbs, steep downhill, switchbacks, creek crossings, bridges, exposure, scenic viewpoints, shade and groomed snow. They show on the trail's own page and fill in the website's *Features by network* table. Horse access isn't on the list, because it already comes from the trail's uses. A trail open to horses counts as having it.

To set these on many trails at once, tick the trails on the Trails list and press **Bulk update**. There, each type and feature switches between add, remove and leave alone as you tap it, so whatever each trail already has stays unless you say otherwise. The trail's page shows its types with its key numbers, and its features in a *Trail features* box, each with a line explaining what it means.

Surface and drainage

The **Surface** and **Drainage** dropdowns feed into the weather closures and the field app's condition forecast. Keep them accurate, or the automatic weather closures won't suit the trail.

- **Surface:** clay, loam, gravel, hardpack, rock, asphalt or mixed.
- **Drainage:** poor, moderate or good.

The trail's line

Near the bottom of the edit page is a **Replace geometry** form. It accepts the same GPX, KML, KMZ and GeoJSON files as the first import, with one trail per file. Use it to swap the trail's line without losing any of the settings you have already made. It is also handy for uploading a fresh survey of a trail that has been rebuilt.

For **small edits**, such as nudging a point, adding a switchback or cleaning up GPS wobble, use the **Edit Trail Map** button on the trail's page. It opens a full-screen editor where you can drag any point, click a section to add a point, and shift-click a point to delete it.

Line history

Every time a trail's line is replaced, whether by Replace geometry, the map editor or a reroute, TrailsIQ keeps the line it had. The **Line history** card on the trail's page lists them, newest first, with the date each one stopped being the trail's line, its length and who replaced it. **Download GPX** gives you any earlier line as a file, so you can compare an old alignment with the current one in any mapping tool. **Restore this line** puts it back and recalculates the trail's figures. The line you restore over goes into the history too, so a restore can be undone the same way. The last 20 lines of each trail are kept.

Networks

Networks group trails by area, for example "North side", "Beginner loop system" or "Cross-country zone". A trail can belong to several networks at once. The edit page has a checkbox for each network, and whatever is ticked when you save becomes the trail's full list of networks.

To add many trails to a network at once, tick them on the Trails list and press **Bulk update**. Under **Networks**, tap a network once to add every selected trail to it, or twice to take them out of it. Each trail keeps the other networks it is already in.

If a trail's Access is set to *Inherit from network* and it belongs to several networks, the most restrictive network wins.

Who looks after it

The **Looked after by** card on a trail's page names the people responsible for it, such as a section volunteer or a crew lead. Anybody who can edit trails can add or remove names, and a trail can have more than one person. Only current members of your team can be picked, and somebody who leaves the team drops off the card on their own. Whoever is on that card also sees the public's reports on that trail while they wait for review, and is told when one arrives, so they can go and check. Approving or rejecting it is up to the Area leader or a manager, unless you let section leaders do it too: for everybody under **Settings → Issue types → Reports from the public**, or for one person under **Team**, in their Edit window, with

Reports on their trails. One person's setting outranks the default either way. Anyone can leave a comment on the report.

You don't have to use it. If your crew looks after every trail together, leave the card empty and nothing in the app asks about it. Once you name somebody on any trail, the Trails list shows who looks after each one, and a trail with no one reads **No one assigned yet**. The **Looked after by** filter then narrows the list to one person's trails, to your own with *Looked after by me*, or to *No one assigned yet*. That last option shows how many trails have no one, which is the quickest way to find the sections still waiting for a volunteer.

In the field app, a trail's page in **Trail Status** shows who looks after it and when it was last walked. Anyone who looks after trails gets a **My sections** card at the top of Trail Status, with the ones due for a walk first.

Every trail on one map

Map in the sidebar draws every trail, structure, open task and point of interest your organization has on one map, so a long trail split into many sections reads as one line. The map fills the screen, and a panel on the left decides what is drawn.

The top of the panel counts what is on the map and has a search box. Type part of a trail, task, structure or place name, pick it from the list, and the map flies to it and opens its card.

Area narrows everything at once:

- **Network** shows only the trails in one network, and the trail list beside it then offers just that network's trails.
- **Trail condition** shows only the trails marked open, caution or closed, or the ones with no condition set. A closed trail is drawn as a gray dotted line.
- **No one assigned yet** shows only the trails with no name on their Looked after by card. It appears once your organization has named somebody on at least one trail.

Tasks, structures and points follow the area you picked, so choosing a network shows that network's work and nothing else. The map zooms to whatever is left.

On the map has a switch for each kind of thing, with its count beside it:

- **Tasks** are colored by age, from green for this week to dark red for a month or more. Under the switch you can narrow them by status, priority and type, or tick **Overdue only**. A task is overdue when its scheduled day has passed.
- **Infrastructure** can be narrowed by category and by condition, for example only the structures rated poor.
- **Points of interest** can be narrowed by type, such as trailheads or parking.
- **Planned lines** shows the lines from the trail planner that have not been published as trails yet, as dotted lines. It appears when your organization uses the planner.

Overlays turns on streams, wetlands, public lands, weather radar and, where we have them for your state, property lines. These are the same overlays as in the layers button at the top right of the map, so turning one on in either place turns it on in both. Property lines show from zoom 14 and are not a survey.

Zoomed out, tasks, structures and points are small dots so a whole network stays readable. Zoom in close and each one becomes a full marker with its icon. Click any line or marker to see its details and a link to its page.

Reset filters puts everything back, and **Show all** zooms to everything that matches. The buttons at the bottom right zoom in and out, fit the map to what is showing, and center it on where you are. Hide the panel with the arrow beside **Map** to see more of the map, and bring it back with **Filters**. On a phone the panel opens from the bottom when you press **Filters**.

Print a map of a trail

Some volunteers would rather carry paper than a phone. **Print map** at the top of a trail's page opens a one-page sheet for that trail. It has the line on a map with contours and hillshading, a scale bar, every structure on the trail marked with a letter, and every task still to do marked with a number in its priority color. Under the map, the same letters and numbers lead a list of the tasks, with their descriptions, and a list of the structures with their condition and last inspection. There is space at the bottom for notes from the walk.

Pan and zoom the map to frame it the way you want, and use the layers button to change the base map or turn contours off. Choose **Portrait** or **Landscape** at the top. A trail that runs east to west starts on Landscape, and whichever you pick is remembered for that trail on that device. Then press **Print** and choose **Save as PDF** to keep a copy, or print it straight away.

The sheet lists the tasks someone still has to go and do. Reports from the public that are waiting for review are left off. A task with no location stays on the list without a number on the map. Tasks change, so print a fresh sheet before each walk.

Danger zone

- **Recalculate stats** (on the trail's page) works out every figure from the current line again: distance, elevation, grade, aspect and the time estimate. Use it after Replace geometry, when you want the numbers to catch up. A figure the new line can no longer support is **cleared**, not left at its old value. For example, if you replace a line that had elevations with one that has none, the elevation and aspect figures go blank instead of describing the line you removed. Recorded duration and average speed are the exception. The line itself has no times on it, so recalculating leaves those exactly as the original file set them.
- **Scan trail health** (also on the trail's page) checks the trail's sustainability, fall-line sections and side slope on demand. The result is shown on the page but not saved, so you can run it as often as you like.
- **Delete trail** is permanent, and asks you to confirm first. Any structures or points of interest added to the trail from notes stay where they are. Deleting the trail doesn't remove them.

Common gotchas

- **The difficulty icon shape follows Primary use, not Difficulty.** If you change a trail from MTB to Hiking, its icons switch from IMBA shapes to plain circles without warning. Change it back if you want the diamond back.
- **Status, Access and Lifecycle are separate.** You can have any combination, such as *Private*, *Under construction* and *Hidden*. If a trail seems to behave oddly on the public map, check all three.
- **Bike and e-bike settings come from Primary use and Also allowed.** There is no separate "bikes allowed" switch. Pick a bike use in either field and the e-bike checkboxes appear.
- **Imported trail names come from the track name inside the file**, not the file name. If a trail is called "Untitled" after import, the original track had no name. Just rename it on the edit page.
- **There is no "Create trail from scratch" button on the Trails tab.** Every trail starts as an import or an exported planner recording. That is on purpose, because a trail without a real line isn't useful yet.

What's next

- If you haven't set your organization's **difficulty colors** yet, do that in **Settings → Difficulty colors**, so imported trails show in your colors.
- Once you have a handful of trails, group them into **Networks** so your team can filter the map by area.
- For maintenance on a published trail, see *How to create a maintenance item* and *Inspecting trails*.

TRAILS

Import trails: GPX, KML, KMZ, GeoJSON and bulk uploads

Import trails in bulk from GPX, KML, KMZ or GeoJSON files: up to 25 files at once, several trails per file, with difficulty, primary use and networks set up front. Covers what is set automatically, error messages, reimporting a trail and turning planner recordings into trails.

Every new TrailsIQ organization starts with the same question: how do I get all the trails I already have into it quickly? For most, the answer is a bulk import. Drop up to 25 GPX, KML, KMZ or GeoJSON files at once, set a few details up front, and they arrive as real trails with distance, elevation and the other stats already worked out.

What you can import

TrailsIQ accepts four formats:

- **GPX** (`.gpx`): the standard format from Garmin, Strava, Trailforks exports, most handheld GPS units and any recording app.
- **KML** (`.kml`): Google Earth's own format. Both drawn paths and GPS tracks saved in Google Earth are read.
- **KMZ** (`.kmz`): what Google Earth and Google My Maps give you when you save or export a map. Upload it as it is. There's no need to unzip it first.
- **GeoJSON** (`.geojson` or `.json`): the usual format for mapping software, and what a lot of scripting tools produce.

Other formats, such as CSV, shapefile, TCX and FIT, aren't accepted. If your data is in one of those, convert it to GPX first. QGIS, GPSBabel and gpx.studio can all do this.

One file can hold your whole network

A file with several trails in it becomes **one trail for each**. A Google Earth export of four trails is one upload and four trails on your list, each with its own name, line and stats. Here is what counts as one trail:

- **KML / KMZ:** each placemark that has a line. If one placemark is drawn in several sections, those sections stay together as one trail. Pins and shapes are skipped.
- **GPX:** each track. Segments inside one track, such as a recording that was paused and resumed, stay together.
- **GeoJSON:** each line.

The options you pick for a file on the import page (difficulty, status, networks and so on) apply to every trail that comes out of it. To give the trails in one file different settings, edit them afterwards, or split the file before you upload it.

TrailsIQ reads the files strictly, so a file has to be well formed to import. In return, the same file always imports the same way.

Getting to the import page

Only owners and managers can import. Field workers and volunteers don't see the button.

There are two ways in, and both open the same page:

1. **The *Import trails* button** in the top right of the Trails page. Anyone with the manager or owner role sees it.
2. **The same button in the middle of the Trails page** when your organization has no trails yet, so a new organization has an obvious first step.

You can only upload trail files on this page. The map editor, a trail's page and the field app don't have an import button.

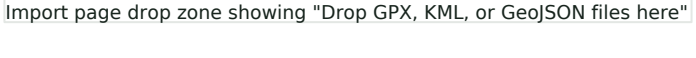

Trails page top-right corner with the Import trails button

Importing files, step by step

The page is a single form. The drop zone reads "*Drop GPX, KML, KMZ, or GeoJSON files here*", with "*or browse from your computer — up to 25 files, max 20 MB each*" underneath. You can drag files onto it or click to browse.

1. **Drop your files.** Each file gets its own row on the page, so if you dropped 12 GPX files you'll see 12 rows. The strip above them shows "*{N} file(s) selected · total {size}*", with a *Clear all* button next to it.
2. **Set details for each file (optional).** Each row has a small form for the trails that file will become: Difficulty, Status, Access, Lifecycle, Primary use, Networks and Description. All of them are optional. Anything left as — *default* — uses the normal default for a new trail.
3. **Import.** The button reads "*Import trail*", "*Import {N} trails*" or "*Importing…*", depending on how many files there are and whether it is running. A note at the bottom reminds you: "*Trail names come from each file's track / route name. You can rename later.*"
4. **See the result.** Importing a single file takes you to the new trail's page. Importing several takes you back to the Trails page. A message confirms what happened:
   - Single file: "*Trail imported: {name}.*"
   - Batch: "*{N} trails imported.*"
   - Some worked and some didn't: the message adds "*{N} file(s) skipped: {filename} — {reason}; …*"

One bad file doesn't stop the batch. It is skipped and named in the message. If every file fails, the page shows the first file's error.


Import page drop zone showing "Drop GPX, KML, or GeoJSON files here"

What is set automatically

TrailsIQ sets these for every imported trail without asking:

- **Name:** taken from the file. For a file with one trail, it uses the file's own title first, then the track's name, then the file name with `-` and `_` turned into spaces. For a file with several trails, each trail takes its own track or placemark name. One without a name is numbered after the file, for example "*MTB Trails 2*".
- **Web address:** made from the name. If another trail already has that address, `-2`, `-3` and so on is added.
- **The line:** latitude, longitude and elevation (where there is one) for every point in the track. In a GeoJSON file only lines are read. Points and shapes in the same file are skipped.
- **Source:** shown on the trail's page as *GPX file upload*, *KML file upload*, *KMZ file upload* or *GeoJSON file upload*, so you can always tell where the data came from.
- **Stats:** worked out from the line. They include distance, elevation gain and loss, lowest, highest, start, end, net and average elevation, average and maximum grade, start and end points, duration and average speed (if the file has times in it), an estimated walking time, and which way the trail faces (N, NE, E and so on). They are all on the trail the moment the import finishes.

The import also cleans up obvious elevation spikes, the kind a GPS gives when it first gets a fix. If a single point is more than 60% steeper than both its neighbors, *while those neighbors agree with each other within 30%*, it is replaced with their average. Genuinely steep singletrack is left alone.

Max grade is the steepest 25 m of the trail, measured on smoothed elevations. That is the same distance and the same smoothing the elevation chart on the trail page uses. So a pitch shorter than 25 m reads lower than it feels underfoot, because it is averaged with the ground either side of it. Any measuring distance would do the same. What you get is the steepest steady stretch, not the steepest single step, and that is the number that tells you whether a machine can get up there.

Elevation gain and loss are measured over the same 25 m, so they describe the trail and not the GPS. A recorded track has a point every few meters, and each point wobbles a little. If you added up every rise between neighboring points, most of the total would be the GPS wobbling, not the hill. Adding up in 25 m steps counts each stretch once, for what it really climbs.

This matters because the figure is now the same wherever you read it. A planned trail, that trail published to your network, and the same line exported as GPX and imported again all report one gain figure. **If you noted a trail's gain before September 2026, it will read lower now.** Nothing about the trail changed. The old figure counted GPS wobble as climbing, and the steeper and more carefully recorded the trail, the more wobble there was to count.

A loop ends at the height it started. When a trail finishes within 25 m (about 80 feet) of where it started, it is treated as a loop. Any difference between its starting and finishing elevation is treated as GPS drift, because a receiver's altitude wanders during a walk and the start and finish are the same ground. The difference is spread evenly along the trail, and the start stays where it was recorded. The elevation chart, gain, loss and net rise are all measured from the corrected line, so on a loop the gain and loss come out equal and the net rise is zero. The recorded elevations themselves are kept as they were. If you would rather the elevation came from the terrain than from the GPS, use **Sample elevation from terrain** on the trail's edit page.

Max grade used to be worked out differently, and could leave out the steepest stretches. On a mostly gentle trail with one hard climb out of a creek, a 30% pitch could be reported as 5%. The figure and the chart above it now measure the same thing, so trails with a short steep section will show a higher max grade than they did before. Nothing about those trails changed.

Trail Edit page "Replace geometry" section with the reimport drop zone

Details you can set on the import page

You can set these for each file on the import screen, so a bulk import doesn't need a second round of editing. Every field starts at *— default —*, which means a new trail's normal default.

- **Difficulty:** Easy, Moderate, Hard, Expert, Access or Pro. Useful when you are importing a folder of black diamond runs, so they arrive already marked.
- **Status:** Public or Hidden. Pick Hidden if you want to check the trails before anyone else sees them.
- **Access:** Inherit from network, Public, Private or Pass required.
- **Lifecycle:** Open, Planned, Under construction, Closed or Decommissioned. Pick Planned if you are loading a season's build list.
- **Primary use:** mixed, hiking, mtb, gravel, running, equestrian, nordic, alpine, snowshoe, fatbike, ATV, snowmobile or walking. **This one matters.** The difficulty icon shape on the map follows Primary use, not Difficulty. Set it here or you'll get plain circles instead of IMBA diamonds and squares.
- **Description:** free text. On a bulk import it is usually easier to add descriptions later on each trail's edit page.
- **Networks:** tap one or more of your existing networks to add the trail to them as it imports.

Everything else, such as surface, drainage, direction, allowed uses, e-bike settings, condition and condition note, and color, is set afterwards on the trail's edit page.

Elevation from the terrain

The import **uses the elevation in your file**. Whatever your GPS or software saved is what goes on the trail. The spike cleanup above catches obvious errors, but the import doesn't replace your elevations with terrain data *automatically*.

If the elevation in your file is poor, or missing altogether, the trail's stats will show that. Missing elevation is common with old handhelds, or with a GPX that went through a converter that dropped it. You have four options:

- **Sample elevation from the terrain (one click).** The trail's edit page has a **Sample elevation from terrain** button, and managers also get a link to it right under the trail's elevation chart. Use it whenever the chart or the gain looks wrong, not only when elevation is missing. A phone's GPS is least accurate up and down, and its reading drifts during a walk. The button looks up the terrain height for every point on the trail, using USGS elevation data in the US (about 10 m accuracy) and open global elevation data elsewhere (about 30 m). It saves those heights on the trail and works out gain, loss and grade again. You don't need to upload anything, and it works anywhere in the world. It replaces any elevation the trail already has, so think twice if your GPS elevations are already good.
- **Import a better file** with *Replace geometry* on the same edit page. See *Reimporting over an existing trail* below.

- **Record the trail again in the field** with the field-app planner. Planner recordings get their elevation from the terrain automatically when terrain correction is turned on for your organization. Ask us if you want it.
- **Leave it as it is.** For many public trails, the elevation on the map is close enough. The exact gain matters more to your team than to a visitor.

How accurate is terrain elevation? Expect **5 to 15 m** of error up and down on open ground, and **10 to 30 m** under thick tree cover, where the data can pick up the treetops. It is worst on cliffs and in narrow canyons. For a typical hiking or mountain bike trail in open country, the terrain figures are as good as a good GPS recording.

Planner recording Show page with the green Export to trails button

Common error messages

Every error appears on the import page above the drop zone. These are the most common:

- **"File too large. Maximum is 20 MB.":** Cut the file into sections (most GPS software can split a track), or open it in gpx.studio and export it again with fewer points.
- **"Only .gpx, .kml, .kmz and .geojson files are accepted.":** If you converted the file, check that its extension matches the new format.
- **"File content does not match its extension.":** A GPX file renamed to `.geojson`, or the other way round, causes this. Rename it to match what it really is.
- **"File contains too many entity definitions.":** This is a safety check against a kind of malicious file. If you didn't mean to upload anything unusual, export the file again from your software.
- **"Invalid GPX file: …"** or **"Invalid KML file: …":** the file is damaged. Open it in a text editor and check whether it is cut short or has the wrong header.
- **"No track points found in this GPX file.":** the GPX has no tracks and no waypoints.
- **"No trail lines found in this KML file.":** the KML or KMZ only has pins or shapes, so there is no line to make a trail from.
- **"Invalid KMZ file: it is not a readable zip archive."** or **"This KMZ file has no KML document inside it.":** the file was cut short on the way, or it isn't really a KMZ. Save it from Google Earth again.
- **"This file has 4 trails in it (…), and only one can go here.":** you used a file with several trails somewhere that takes one line, such as replacing a trail's line or the planner's *Import GPX*. Use Trails → Import for the whole file, or upload a file with just the one trail.
- **"Invalid GeoJSON file.":** the file is damaged, or it only has points or shapes and no lines.
- **"GeoJSON file has fewer than 2 coordinates.":** a line with only one point. Every trail needs at least two.
- **Plan limit:** if your organization reaches its plan's trail limit partway through a batch, the import stops and tells you how many trails made it in. The limit counts trails, so it can stop partway through one file, and it names the trails it didn't get to. Upgrade in Billing to keep going.

Importing the same file twice gives you two identical trails. The second one gets `-2` added to its web address. If that happens, delete the extra one from the Trails page.

Check the file if a trail looks wrong on the map. A stray point at latitude 0, longitude 0 is dropped, but other stray points are kept. A trail in Nebraska with one point off the coast of Africa will import exactly like that. It is worth a quick look at odd-looking files before you import them.

Reimporting over an existing trail

If you have surveyed a trail again, for example with a better GPS unit, after a reroute, or because a member sent in a cleaner track, you can **replace the line on the existing trail** without deleting it and starting over.

On the trail's edit page there is a section headed **"Replace geometry"**, which says: "*Upload a GPX / KML / KMZ / GeoJSON to overwrite this trail's coordinates and re-derive its stats. Name, status, and condition stay put.*"

The file has to hold **one** trail. A file with several is refused, and the message names the trails it found, instead of joining them into one line.

Drop the new file into that section and press **Reimport geometry**. Every figure is worked out again: distance, elevation and grade. The trail's name, description, difficulty, primary use, networks and condition all stay as they were.

Things that were on the old line move to the new one. A maintenance task, structure or point of interest that sat on the old line (within 15 m of it) is moved to the nearest point on the new line. So a bridge that sat at km 3 on the old survey lands at whatever point on the new survey is closest to where it was.

Things placed off the line stay where they are. A hut 60 m from the trail, a sign in the parking lot or a water tank down a side track was put there on purpose, so a new line leaves it exactly where it was. If the reroute is a big one, you may still want to move a few items by hand.

Turning a planner recording into a trail

Sometimes the trail you need isn't in a file. It is the one you just recorded with the field-app planner. There are two ways to turn it into a trail:

- **Dashboard:** open the planner recording's page and press the green **Export to trails** button in its row of buttons.
- **Field app:** open the planner recording's details. It has the same green button and asks the same question.

A box then tells you what will be created. If you marked features while recording, it says how many structures or points of interest will be made from them. If you didn't, it says none will be. The field app also shows the trail's difficulty and estimated build cost, so you can take one last look before you publish.

Press **Publish trail**, and the trail is created as **Hidden**, with the planner shown as its source. Feature notes become structures and points of interest, each with its own pin on the map. Hazard, decision and plain notes stay with the recording. They are notes from the field, not things to keep a record of.

Branches stay connected. If your recording is a branch of another trail, such as an alternate line, a reroute or a spur, the new trail keeps that link and the kind of branch it is, so the map still shows how the two are related.

After exporting, the recording's page reads "*Already exported. Published to the trails tab on {date}.*", with an "*Open trail* →" link. Its button changes to **Export again**, which asks whether to save the plan as a new trail or replace the line of the trail you exported before.

Common gotchas

- **The difficulty icon shape follows Primary use, not Difficulty.** Set Primary use on the import page, or your trails get plain circles.
- **Trail names come from inside the file, not the file name.** A GPX with no track name inside it is named after the file instead ("silver-fox-loop.gpx" becomes "*silver fox loop*"). If a trail is called "*Untitled*" after import, the file had no name in it. Just rename it on the edit page.
- **The import uses your file's elevation.** It doesn't replace it with terrain data *automatically*, so you get whatever elevation the file had. If the file had none, press **Sample elevation from terrain** on the trail's edit page to fill it in. Planner recordings get their elevation from the terrain automatically when terrain correction is turned on for your organization.
- **`.tcx` and `.fit` files from Garmin fitness devices aren't accepted.** Export to GPX from the device's software or from Strava first.
- **A GPX with waypoints but no tracks imports as one trail drawn through the waypoints in order.** That is rarely what you want. Waypoints are usually points of interest, and the field app has its own way to add those.
- **A KML or KMZ with only pins won't import.** It fails with "*No trail lines found in this KML file.*" You need a drawn path or a GPS track.
- **One file, many trails, one set of options.** Whatever you pick on a file's row applies to every trail in it. Split the file first if they need different settings.
- **A batch stops at your plan limit.** If your files hold 25 trails and your plan allows 20 more, the first 20 import and the rest are skipped, with a message saying so. Upgrade in Billing to finish.
- **Reimporting keeps everything except the line.** The name, difficulty, status, condition and every linked item stay. It is the safe way to update a trail you have surveyed again.
- **To import from a spreadsheet, convert it to GPX first.** If your data is a CSV of names, difficulties and coordinates, QGIS or a short script can turn it into GPX.

What's next

- Start with your five or ten most-used trails, so the map has familiar landmarks. Add the rest later.

- Once the first batch is in, go through the Trails page and check that each trail sits on the map where you expected. If one doesn't, survey it again with the field app.
- Read *How to create a trail* for a field-by-field guide to the trail edit page. The settings the import page doesn't have, such as surface, drainage, e-bikes and color, are all there.
- Set up your organization's networks before a big import, so the Networks choice on the import page has something to add trails to. See *How to create a network*.

TRAILS

Sharing one trail with a builder

Share a single trail with a contractor without giving them the rest of your account. They can view it and work on its maintenance, it stays yours, and you can end the share at any time.

Say you have hired a builder for two trails. They need to see those two trails and the maintenance tasks on them, and nothing else.

Sharing a trail does exactly that. You give them a code, and they get that one trail, view only, in their own TrailsIQ account. It stays yours, and you can take it back whenever you like.

Sharing a trail

Open the trail and use **Share with a builder**. You get a code that looks like `TIQ-XXXX-XXXX`.

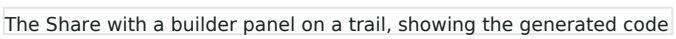
Send it however you like. They sign in to their own TrailsIQ account, open **Shared trails** and enter the code. The trail appears in their account straight away, and you are told that they have it.

That notice matters. Without it, you would have no way of knowing whether they used the code. You cannot see their account, and nothing changes on your own screens until they file something.

Two things about the code:

- **Treat it like a password.** Anybody who has it can claim the trail, so send it privately instead of posting it somewhere.
- **It stops working after 30 days if nobody uses it.** Once it has been used, the share does not expire. It lasts until you end it.

Only an owner or a manager can share a trail. Letting an outside business onto your ground is a bigger decision than changing a trail's condition, so it needs a different permission.


The Share with a builder panel on a trail, showing the generated code

What they get, and what they do not

They get **that one trail** and nothing else: not the network it belongs to, not your other trails, and not your team, costs, reports or anything else in your account.

It appears under **Shared trails** in their sidebar and opens on its own page, with the route on a map, its length and climb, its difficulty and condition, and your description. Every page says who owns the trail, so somebody working several jobs does not have to remember which trails are theirs.

They can only view the trail itself. They cannot rename it, redraw it, change its difficulty, condition or status, or delete it. Those stay with you. Their view of it has no edit buttons at all.

What they *can* do is the reason to share it. If you leave **Let them add and resolve maintenance items** ticked, they can work on the maintenance for that trail. That is the difference between handing somebody a map and hiring them.

They see **every outstanding task on that trail**, not just the ones they added, because somebody hired to work a trail needs to know what you already know about it. They can add what they find, start a task and mark it done.

Open work on a trail you shared also appears on their own **Maintenance** page, under *On trails shared with you*, labeled with your organization's name. It is a shortcut, not a second place to work. Each row opens the shared trail, where they add and finish tasks. Somebody hired for two trails with thirty tasks between them can see everything outstanding without remembering which trails they were given.

Both sides can turn these notifications off in the field app under **Settings → Notifications → Shared trails**. Everything a contractor does on your trail notifies your team the same way your own crew's work does. It is labeled with their company, never with a person's name, because you cannot look up somebody from another business in your own team list.

You can always tell their work from your own. Anything an outside organization adds or changes is labeled with their name on the task itself: "*Raised by Muslandia Trailworks, working a trail you shared with them*", and "*Last changed by …*" when they close something. Your own crew's work has no label, so a task without one is always yours.

One thing they cannot do is move a task to **Pending review**. That is your queue for checking new reports, and you decide what goes into it, not a contractor.

Anything they record stays with you. It is your trail, so it is your maintenance record, and it does not leave with them, even after you end the share.

Sharing is not the same as sending a copy

TrailsIQ has two features that both give you a `TIQ-` code, and they do opposite things:

	Share a trail	**Send a planned trail**
What they get	your trail, view only	their own copy
Who owns it	you, still	them
Your edits	they see them	they do not
Can you take it back	yes	no

Use a **share** for a trail that exists and stays yours, such as a builder working on your ground. Use a **transfer** when you are giving somebody work to keep, such as handing a finished job to the client who paid for it.

The screen where the code is entered says clearly which kind it is before anybody accepts it. Read that panel instead of guessing from the code.

Taking it back

Shared trails lists every trail you have shared and who has it. **Withdraw** ends a share, and their access stops the next time they click anything. There is no delay and nothing for them to confirm.

They are told, and that matters more than it sounds. If a trail simply disappeared from their account, it would look like the app had lost their work. A notice saying who ended the share makes it clear what happened.

You lose nothing. The tasks they added and the work they marked done were always yours. Ending the share only removes their view of it.

Ending a share does not delete it. It stays in your history, so you can still answer "who did we have on Granite Ridge last fall?"

The Shared trails screen listing a trail lent to another organisation, with a Withdraw button

In the field app, and how a withdrawal reaches a phone

A trail you have shared appears in the builder's field app next to their own trails, labeled as yours. They can find it on the map, open it and, if you left maintenance ticked, report and finish tasks on it from the hillside like any other trail. They cannot edit the trail or change its condition there either. Those buttons are missing, just as they are on the web.

One limit for now: photos cannot be attached to tasks on a shared trail. The report itself always goes through, and the app tells them at the time instead of quietly dropping the pictures.

Online, ending a share takes effect at once. A phone is different. A field app that has had no signal for days is working from what it last downloaded, and nothing you do can reach it.

So a shared trail stays on their phone for **14 days** at a time. Every time their app connects, the 14 days start again, so a builder who connects even now and then never notices. If a phone stays offline longer than that, the shared trail is removed and everything of their own stays. It comes back at the next sync if the share is still active.

So when you end a share, they lose access straight away if they are online, and within two weeks at most if they are offline. You cannot change this period, because it is there for your protection.

Shared trails can be **downloaded** too. In the field app, under **Storage → Download for offline**, a shared trail has its own row, *Shared with you*, next to the networks, and can be picked on its own. That matters because a builder hired for two of your trails does not belong to any of your networks. Without that row, they would have nothing to pick on the one screen they need before driving out of signal.

When to add them to your team instead

Sharing is for a builder working on a few trails, and it is kept narrow on purpose.

If somebody needs your whole network, with every trail, the daily report, the conditions board and your infrastructure records, they are working as part of your team. Add them under **Team → Members**. Invite them as a field worker. By default they can view trails and do all maintenance work, and you can change that in **Settings → Roles & permissions**.

Do not choose based on what is easier. Ask how much of your account this person really needs. Sharing exists so the answer can be "two trails".

Common gotchas

- **No Share with a builder panel on the trail.** It is owner and manager only.
- **They say the code does not work.** Check that it has not already been used, since each code works once, and that they are entering it in their own account and not yours.
- **"You already have this trail shared with you."** They already have it from an earlier code. There is nothing to do.
- **They cannot edit the trail.** That is expected. If they need to change the trail itself, they need to be on your team.
- **They opened your trail's usual address and got nothing.** That is also expected. They see the trail under **Shared trails**, not at the address you use, so a link copied from your browser will not work for them.
- **They cannot see your other trails.** That is also expected. Share those too, or add them to your team.
- **The trail disappeared from their account.** Somebody ended the share, and they were sent a notice about it. Check for that before assuming something is broken.
- **A task appeared that nobody on your team added.** Check its label. A contractor working on a trail you shared can add tasks, and anything they touch is labeled.
- **They say they cannot add anything.** The share was made without *Let them add and resolve maintenance items* ticked. End it and share the trail again with the box ticked.
- **A shared trail is missing from their field app while the share is still active.** Their phone has been offline for more than 14 days. One sync brings it back.
- **They say the download screen is empty.** They are looking for a network and have none. Shared trails are in the row below, labeled *Shared with you*.

TRAILS

Trail Planner: record, draw or find a sustainable line

Plan a trail before you build it. Record a line in the field, draw it on the dashboard, or let the route finder search the hillside for you. Covers activity profiles, the half rule, the terrain analysis, build cost estimates, editing and comparing options, walking a line more than once, public proposal pages, and publishing a finished plan to your live network.

The **Trail Planner** is where you work out a trail before anyone builds it. You get a line onto the map by walking it, drawing it, or letting the route finder suggest one. TrailsIQ then measures it against the ground underneath, prices it, and gives you something to show a landowner or a board. Nothing in the planner changes your live trail network until you choose to publish a line to it.

Three ways to start a line

Record it in the field. Open the Field App, start a Plan / Record session, and walk or ride the line. The App Store and Play Store versions use the phone's GPS directly rather than the browser's, so the recording keeps going when the screen locks. This is the most reliable way to plan, because you find the wet spot and the rock band while you are standing on them.

Draw it on the dashboard. Go to *Trail Planner → Draw* and click along the line on the map. Every click adds a point. The line is checked against the ground as you go, so you can see a stretch turn red before you commit to it.

Ask for it. Go to *Trail Planner → Suggest*. Drop a start and an end, pick what the trail is for, and the route finder searches the hillside for a sustainable line between them. See below.

All three give you the same thing, a planned trail, and everything after this point works the same whichever way you started.

Suggest: let TrailsIQ find the line

Suggest searches the ground between your two points. It weighs grade, side slope, how tight the turns are and whether the line runs down the fall line, and it returns the best line it can find.

The result shows two different things, and it helps to know which is which. *This line* describes the line you are being offered, measured exactly the way it will be once you save it. It shows how much of the line meets the half rule, how many feet run down the fall line, and the average slope of the hillside it crosses. *Search*, underneath, shows the route finder's own working: how many of the steps it tried ran into each limit while it chose between them. The first row describes the trail. The second describes what the ground made difficult. When they disagree, trust the top row, because it is about your line.

Line type sets what you are building and the color it shows on the map: Alternate, Reroute, Spur or Connector.

Preset sets how the search behaves:

Preset	What it aims for
Balanced	The standard search for a sustainable line
Flow	Sweeping curves and a moderate grade
Tech	Steeper grades and sharper turns allowed
Chill climb	A strict 5% grade limit, a gentle traverse, and no wetlands
Aggressive descent	Steep grades, with straighter lines allowed

Under the presets, each limit has its own slider, including the grade limit and the turn radius. A preset is a starting point that you can adjust.

When the route finder cannot meet your limits, it does not quietly bend them. It returns the best line it found and tells you plainly which limit it had to relax to get there. That message is the useful part of the answer. It tells you the ground will not allow what you asked for, which is worth knowing before you flag anything.

Those messages are checked against the line you got. *Steeper than your grade limit* appears whenever the suggested line goes over the grade limit for the search, whichever style you picked. It names the steepest grade on the line and the limit it went over. The grade limit guides the search but cannot always hold on steep ground, so this tells you where the ground did not allow it. Chill climb, which has a strict cap of its own, says *Preset grade cap relaxed* instead. Both use the same steepest grade the line's own figures show, and neither appears for a line that stays under your limit.

Search cut short is a separate message. It means the search ran out of time before it finished testing your limits, so the line came from a relaxed search and your limits were never proven impossible. The figures shown for the line are measured from the line itself and can be trusted. Putting the two ends closer together gives the search room to finish.

The result opens in a card beside the map, so you can pan and zoom around the suggested line (amber, dashed) while you decide. **Hide card** tucks it into a small button and keeps the line on the map. The suggestion also stays if you reload the page or go to the map editor and back. **Replace this recording with suggestion** makes it your line. **Open in map editor with suggested line** shows it next to your own line in the editor: press **Use the suggested line** to edit it instead of yours, or drag your own line toward it. Nothing is saved until you press **Save trail map**, and **Undo** puts your old line back. **Save as a second walk** keeps the suggestion beside your line as another walk of the trail, so you can compare the two, walk it, or adopt it later, and your own line stays exactly as it is. **Discard suggestion** takes it away.

The suggestion keeps your own line wherever yours is better. Where the suggested line touches or crosses yours, the two divide into stretches. On each stretch the route finder tries your line in place of its own and keeps whichever makes the whole trail measure better, counting how much of it meets the half rule, the steepest grade and the fall line. The card says how many places the lines meet and on how many stretches it kept yours. If yours was better everywhere, it says so, and the suggestion follows your line. This is skipped when you add waypoints, because your line might not pass them.

Trail Planner index listing recorded and drawn lines with their stats

Activity profiles

Picking an activity sets limits on what that kind of use can handle. It sets the tightest turn the line may make and the width of trail the cost estimate prices.

Activity	Min turn radius	Grade ceiling	Default width
Hiking	2.5 m	15%	2 ft
Trail running	4 m	12%	2 ft
Mountain biking	6 m	15%	3 ft
E-MTB	7 m	18%	3.5 ft
Adaptive / accessible	10 m	8%	5 ft
Equestrian	8 m	12%	4 ft
XC ski (groomed)	15 m	10%	10 ft
Snowmobile	20 m	15%	10 ft
ATV / OHV	12 m	18%	6 ft

These starting values come from the usual references: IMBA difficulty guidance, USFS trail class tables and standards for groomed trails. You can change every one of them with the sliders. Choosing **Any activity** removes these limits altogether.

The turn radius changes the shape of the result the most. A snowmobile trail and a hiking trail across the same hillside follow different lines, and the route finder plans them that way.

Suggest screen with start and end pins, preset picker and constraint sliders

How sustainability is judged

TrailsIQ uses the **half rule**: a trail's grade should stay under half the side slope of the hillside it crosses, so water runs off across the tread instead of down it.

On flat ground that rule alone gets things wrong. With no side slope there is nothing for water to run off across, and a bench or a valley floor would fail just for being level. So the real limit is:

> **the greater of** half the side slope, **or** 5%

A 6% side slope allows a 5% grade, which is the minimum. A 14% side slope allows 7%, where the half rule takes over. On gentle ground the problem is puddling rather than erosion down the fall line, and outsloping and knicks handle that well at 5%.

Fall-line alignment is flagged separately. A line running straight down the slope erodes even if it passes the grade test. This check only applies where there is a real fall line to follow, meaning at least 3% grade and at least 5% side slope. Below that, the flag would just be noise.

Both checks look at the trail over 25 meters at a time, not from one point to the next. A walked line has a GPS point every few meters, and a grade measured between two of them mostly shows GPS wobble rather than the shape of the ground. Grade and direction are both read over 25 meters, the same distance the hillside's side slope is measured over. That way the same trail gets the same score whether it was drawn on the map or walked with a phone in your pocket.

If you have lines recorded before this change, their scores will update the next time you open them. Most of them will show less amber and less red than before.

The same limits are used for the planner's analysis, the route finder's search and the red sections on the map. A stretch that shows red in one place shows red everywhere.

Elevation and grade profile with red half-rule violations highlighted

Reading the analysis

Every planned line has a terrain analysis, which updates whenever the line changes:

- **Grade:** how steep the tread itself is, as a percentage.
- **Side slope:** how steep the hillside is across the tread. This is what the half rule is based on.
- **Sustained grade:** how steep the line stays *over a distance* rather than at one point. A short 20% step over a rock is different from 20% held for 200 feet, and only the second one causes maintenance problems.
- **Fall-line sections:** where the line runs down the slope instead of across it.

Red on the profile means that stretch is over the half-rule limit. That does not rule the line out. Plenty of good trail has short steep sections, and armoring and structures exist for exactly that. Read the red sections as a list of places that will need attention, and the cost estimate prices them that way.

You can ask for a better line for one section at a time. On the dashboard, open a planned trail and expand *Unsustainable* or *Fall-line risk* under the map. Each section in the list has a **Suggest a better line** button. The route finder looks for a new route between the two ends of that section and leaves the rest of the trail alone, which is usually what you want when one stretch is the problem and the rest is ground you have already walked and like. It gives itself a little room either side of the section, so a short section is widened a bit before it searches.

The suggestion is drawn on the map in green, beside your own line, and the part of your line it would replace is marked with a dark dashed line. A small table under the section compares the two: length, how much of it meets the half rule, the average grade and the steepest grade. Both columns include 25 meters of your trail on either side, so the places where the new line joins yours are counted. The last row is the steepest grade

of the whole trail, now and with the suggestion in place, which is the figure the trail page shows once you use it. If another stretch of the trail is steeper, that row says so. **Use this line** puts the new route into your trail in place of that section. **Open in map editor** opens it in the editor for you to adjust first. **Save as a walk** keeps the whole trail with that section swapped in as another walk of the trail, without changing your line. If you have drawn a boundary, the walk keeps it, so a suggestion made from the walk stays inside the same ground. Your grade targets are not copied. **Discard** takes it off the map. It uses the style you last picked in the full **Suggest improvements** sheet, so change the style there if you want a different kind of line.

You can also pick any stretch yourself. Press **Suggest for a stretch** under **Suggest improvements**, then click the trail where the stretch starts and again where it ends. The route finder works between exactly those two points, so the ends stay where you clicked. A stretch shorter than about 150 meters is widened to that length, because over a shorter distance there is rarely a better line to find. The result appears in the same green line and table as a flagged section.

The Steepness box shows where the trail is steepest. It sits under the Sustainability box and lists every section steeper than 10%, with its steepest grade and whether it climbs or descends in the direction the line was drawn. Click the number beside *Steep sections*, or open the box, and the map colors the trail by grade: yellow for 10 to 15%, orange for 15 to 20% and red for anything steeper. The breakdown above the list says how much of the trail falls in each band. Grade is measured over every 25 meters, the same way as the steepest grade in the trail's stats, so the steepest section in the list matches that figure.

Each steep section has a **Suggest a gentler line** button. It works like the button on a flagged section, but it asks the route finder to keep the grade under 8% (or under your style's own limit, if that is lower) and to weigh grade more heavily than usual. On a hillside too steep for that, the finder relaxes the limit and still returns the gentlest line it can find. The table under the section shows how the new line compares. If the new line is not actually gentler once it is measured on the trail's own heights, the card says so above the table. That usually means the ground near the section has no gentler way through between its two ends. Press **Search a longer stretch** on the card to search again with more of the trail on either side, or **Pick the stretch on the map** to choose the ends yourself.

Suggested lines have rounded corners. Every bend is drawn as a smooth curve with a radius of at least 4 meters (or your activity's turning radius, if it sets one), and where the new line meets your trail the turn onto it is rounded too. A corner whose straights are too short for a full curve gets the widest one they allow.

Short lines are searched in much finer steps. When the two ends are less than about 320 meters apart, the route finder moves in 4 meter steps and never takes a step steeper than your grade limit. It only allows a switchback after at least 20 meters of trail since the last one, so every line it offers is a shape you could build, and it plans each switchback turn as a curve at your turning radius, the way it will be built. It looks first for the shortest line that stays under your limit. If no line between the two points can, it returns the gentlest one it can find and the card says so.

The card then shows what each grade costs in length, as a row of buttons such as "Under 8%: 750 m", "Under 9%: 530 m" and "Under 10%: 450 m". The one for the line on screen is marked. Tap another and the route finder searches the same two points again at that grade, so you can weigh a gentler trail against the extra length it takes without changing your settings. Your grade limit stays where it was, so a line picked steeper than it still shows as steeper than your limit on the card. The figures are for the legs between turns. A turn has to climb the width between its legs, so on steep ground a turn can read steeper than the legs. The finder puts turns on the gentlest ground it can reach, even if that makes the line longer, and any turn that is still steep can be built to grade (see below).

A switchback is only kept if it makes the line gentler. The turn of a switchback always points down the fall line for a few meters, so a turn that buys nothing costs grade. Before a suggestion between points further apart is shown, the route finder tries the line with each switchback taken out and with each corner moved a few meters, measures every version the way the trail page does, and keeps the best one. On a steep hillside the legs between turns hold the grade you asked for, and the steepest part of the line is usually a turn. Turns are drawn tight, at the turning radius, so they stay as short as possible.

You can choose to build a switchback turn to grade. Because a turn swings through the fall line, on steep ground it can be steeper than the grade you asked for even when the legs either side hold it. A crew can fix that by changing the ground instead of the line: they cut the upper side of the turn down and build the lower side up, so the tread runs through the turn at an even grade. When a whole-trail suggestion has turns like that, its card lists each one with its natural grade, the grade it would have built, how deep the cut and the fill would be, and how far along the trail the work reaches. Fill or cut deeper than 1 meter usually needs a rock or timber retaining wall, and the card says which turns do. It also gives the steepest grade of the line with the turns built, and what they add to the quote. The comparison table above the card then has two suggested columns, **Natural** and **Built**, so you can read the length, sustainability, grades and steep share of both options side by side.

You always choose. **Keep turns at the natural grade** saves the line as drawn and adds nothing to the quote. **Build the turns to grade** saves the turns with the line when you press Replace or Save as a second walk, and adds them to the build estimate as their own lines: one price for a turn under 1 meter of cut or fill and another for a turn with a wall. You can change both prices in **Settings → Trail build rates**. The trail page then shows the built turns above the build estimate, with a **Keep turns at the natural grade** button to take them off again. With turns built, the trail's headline max grade and average grade are the built tread's, because that is the trail you will have, and the natural ground's figure is shown under each one. The steep share in the summary is the built one too, with the natural figure beside it. The sustainability score, the flagged sections and the steep sections are measured on the built tread too, and the summary says so, because building a turn changes its grade and can change whether it meets the half rule. The field app shows the same built figures. Where the trail either side of a turn is steeper than your grade, the turn is built as gentle as that ground allows, and the card says it misses your grade. A turn that building would not make noticeably gentler stays at the natural grade. If the steepest part of the line is on a leg between turns rather than at a turn, the card says so, because building turns cannot change it. If you edit the line so it no longer passes a built turn, that turn comes off the quote.

Every suggestion is checked against everything, not just the problem you clicked. A gentler line that runs straight downhill, or a fall-line fix that breaks the half rule, has not fixed anything. So every section search keeps to the half rule and the fall-line limit as well as the grade, and the new line is then measured on all of them. If it still misses any, the search runs once more with twice the room and keeps the better of the two lines. The card lists anything the line still does not meet, with the fall-line distance and the points over the half rule in the table next to the grades.

The columns in the table cover the stretch the search rerouted plus 25 meters of your trail on either side, and the card says how long that is. A short section is widened before it is searched, so this can be a good deal longer than the section itself. For a steep section the card also gives the section's own length and steepest grade, so you can see both numbers.

Where the new line meets your trail, it joins in the direction it is already heading. If the search would arrive from the wrong side and have to double back onto the trail, the join moves a little along the trail instead, and the card says it did.

Line targets

Press **Edit** on a planned trail to set its **Line targets**: the steepest grade you want, the average grade you are aiming for, the fall-line angle, and whether the half rule must always be followed. Every suggested line on that trail follows them, together with the style you pick. Where the two differ, the stricter one wins, so a style that allows 20% grades still aims to stay under a 10% max grade you set here. Where the ground has no way through under it, the card says so. Leave a box empty to use the style's own limit. The targets show under the trail's description.

Search boundary

Press **Draw a search boundary** under **Suggest improvements**, or **Draw on map** in the Search boundary row of the Suggest improvements window. Drag around the ground a suggested line may use. You can draw it in several strokes: let go, press **Move map** to pan, zoom in or out with the scroll wheel, a pinch or the zoom buttons, then press **Draw** and carry on from where the outline stopped. **Undo** takes back the last stroke. Press **Done** when the outline goes all the way around. It is saved on the trail and shown on the map in blue, and every suggestion on the trail stays inside it, whether for a section, a stretch you picked or the whole trail. Use it to keep a line off a neighbor's land or away from a wet area you know about. To change it, press **Edit the boundary** (or **Edit** in the Suggest improvements window). The outline gets round handles at its corners: drag one to move that part of the outline. Click anywhere on the map to add a corner there, on the nearest edge, so a few clicks outside the area stretch the outline to take in more ground. Click a handle and press **Remove point** to take it out. **Undo** steps back, and nothing changes until you press **Save**. You can also draw it again to replace it, or press **Remove the boundary** to take it away.

Cost estimates

Every planned line gets an estimate of what it would cost to build. It is worked out from the line's own measured terrain rather than a flat price per mile. Tread on a side slope of 60% or more is priced as structural work, because that is what it is.

You can turn cost estimates off completely. *Settings → Workspace modules → Build cost estimates* removes them from the planner, from projects, from the field app, from the comparison table and from the proposal a client sees. Some organizations would rather not have the figure on the screen at all. It is an estimate rather than a quote, and a number read over somebody's shoulder gets repeated as if it were a quote. Nothing else about the planner changes: the line, the grades, the sustainability score and the drainage analysis all stay. The setting is on for every new workspace and is set per workspace, so a team that quotes for a living and a club that does not can share an account. See Workspace modules.

You set the rates yourself in **Settings → Trail build rates**:

- Tread building, split three ways by side slope: easy (under 25%), hard (25–60%) and structural (over 60%)
- Rock armoring, per foot
- Rolling grade dips, each
- Stream culverts, each
- Bridges, per foot
- A crew rate per hour, plus finishing hours per foot for each difficulty from Green to Double-black
- A width adjustment, a multiplier for hand building, the cost of bringing in a machine, and a contingency percentage
- For each build type, a features rate added on top of the itemized estimate, and a single all-in rate per foot

The build type is what you are building, and the terrain cannot tell you that. Side slope tells the estimate how hard the bench is to cut. It says nothing about a pump track, which sits on flat ground and takes far more work per foot than singletrack across a hillside. So every planned line has a **Build type** on its estimate card: corridor clearing, natural-surface singletrack, flow trail, jump line, pump track, skills area or surfaced path. A line with no build type set is priced as singletrack.

The build type changes the estimate in two ways. First, it adds a **Features & shaping** line for the extra work that kind of build involves: berms and rollers on a flow trail, lips and landings on a jump line, the whole shaped surface of a pump track, or the base and surfacing on a path. Second, it drops the lines that do not apply. Corridor clearing cuts no bench, so it has no tread building, rock armoring or drainage dips, only clearing and finishing. Water does not run down a pump track or a skills area, so neither gets rolling grade dips.

You can price a build type with one number instead. Many crews quote a pump track or a flow trail at a single all-in rate per foot, and the card lets you do the same. Under **Price it**, choose **All-in per foot**. The tread, rock, drainage, finishing and features lines are replaced by one line at your all-in rate for that build type. Stream crossings and the cost of bringing in a machine stay as their own lines, because they depend on the site rather than the length. Untick them if your rate already covers them. You can enter a different all-in rate for one trail, and the card then offers to switch back to your organization's rate.

Both prices are always worked out, and the card shows the one you are not using. Each option under **Price it** shows its price per foot, and the line under them shows what the other way of pricing would total and how far apart the two are. That comparison is the quickest way to a price you can stand behind. Set your all-in rates to what you actually charge. When the itemized estimate for a trail is far from it, one of the two is missing something about that ground.

The features rates and all-in rates for each build type are in **Settings → Trail build rates**, under **Build types**. The defaults are a starting point, so put in your own.

Tread width decides which machine can get in, and that decides the price. Machine work and hand work are priced differently, so the estimate has to decide which one each stretch gets. Width is checked first, because a machine can only cut a bench it is narrow enough to stand on.

Width also changes the cost directly. A wider bench means more dirt to move per foot and more finishing after it. The rates are set for a 3 ft singletrack bench, so a 6 ft tread costs about twice as much per foot to cut.

A second walk of a trail uses the first walk's tread width unless you set another one, because it is the same trail. This applies whenever you look at the walk, not only when it was saved. So changing the trail's width updates every walk of it, and walks recorded before you set a width are priced correctly from then on. If you set a width on the second walk, that width is used. A spur really can be narrower than the trail it leaves.

Tread	What can build it	Up to side slope	Up to grade
24″	Hand only	—	—
30″	Narrow-gauge mini-excavator	35%	20%
3 ft	Mini-excavator	45%	25%
5 ft	Standard excavator	60%	30%

Tread	What can build it	Up to side slope	Up to grade
8 ft	Full-size excavator or dozer	75%	35%

Beyond a row's limits the machine stops and that stretch becomes hand work. That is why a line often comes back as **Mixed**, with the gentle two thirds machine-built and the steep pitch and fall-line sections built by hand. Short machine stretches are counted as hand work along with the stretches on either side, because nobody brings an excavator in, walks it down and turns it around for a hundred feet.

A 30″ tread can be machine-built. The narrow-gauge machines trail crews actually own, with tracks pulled in to about 27″, cut a 30″ bench while sitting on the bench they are cutting. They have their own row instead of sharing the mini-excavator's, because they do not have its reach. A 40% side slope that a mini-excavator handles easily puts a narrow-gauge machine back to hand work. If your 30″ lines got cheaper and gained a line for bringing in a machine, this is why.

You can override all of it. The build-method setting on a planned trail can be *Auto*, *Hand*, *Machine* or *Mixed*, and you can mark individual stretches yourself on the map. The table is our best estimate from the numbers, and you are the one standing on the ground.

Branches can be priced together with their parent. On a line with branches, the build estimate card offers *Include this trail's branches in the price*. It prices everything as one job. Each branch is still measured on its own terms, so a hand-built spur off a machine-built trail is priced as hand work. But **the machine is only brought in once instead of once per line**, because one excavator gets hauled to the site once. The card shows how much this saves compared with pricing them separately, so the number holds up when somebody asks why it is lower than the parts added together. The list of costs splits into a section per trail, each headed with that line's name and its own subtotal, with the main trail first and then each branch. The setting is saved on the trail, so the dashboard, the field app and a shared public proposal all show the same figure.

A branch can have branches of its own, and each setting covers one level. If you put a reroute on an alternate, the reroute is priced into the alternate when the alternate's setting is on. It reaches the main trail's total when the main trail's setting is on as well. Turning a setting off removes everything below it, so an alternate left out of the price takes its own spurs out of the quote too. The trail's page always lists every connected line, with each branch labeled by the line it comes off, because the settings only decide what a line costs. The estimate card shows how many branches it actually priced, which is the number to check when the two differ.

Quoting part of a trail

You can price only the stretches you are actually building. Plenty of jobs are not new trail from end to end. You might be hired to fix two wet sections of an existing loop, or to cut one reroute around a washout. Draw or import the whole trail so the map makes sense, then open **What is being built** above the build method and choose **Only marked sections**.

Mark a section to build asks for two clicks on the line: where the work starts and where it ends. In the field app you tap the line twice. You can mark as many sections as you need. Only those sections are priced. Tread, finishing, armoring, drainage dips, stream crossings and built turns are all counted inside the sections and nowhere else, and the rest of the line is treated as trail that is already there. The map draws the sections in the trail's color with a yellow glow and the rest of the line in gray, on the trail page, in the field app and on the proposal. The estimate card and the proposal both say what the price covers, for example *2 sections, 740 ft of 5,200 ft*.

A short section is priced as hand work. Nobody brings in a machine for 100 feet, so a section under 150 feet that sits inside machine-built ground is priced as hand work with no haul-in charge. A stretch you set to machine yourself stays machine.

Mark old trail to close marks a stretch the job takes out of use. It is priced per foot at the **Close old trail** rate in *Settings → Trail build rates*. That rate covers blocking the ends, ripping up the old tread, putting the drainage back and brushing it in.

A reroute works the same way. Draw the reroute as a branch with *Line type: Reroute*. It is its own line with its own price, and it is added to the main trail's quote when branches are included. The **Reroutes** list on the main trail shows each reroute and how much of the trail it goes around, with a **Close the old stretch** button. Pressing it marks that stretch closed and switches the main trail to *Only marked sections* with nothing marked, so the quote becomes the reroute plus the work of closing the old line. Mark sections on the main trail as well if some of it is new work too.

Sections are measured from the start of the line. If you edit the line after marking them, look over the map afterwards, because a big change near the start moves where they fall.

Every line on the estimate has a tick box, and so does the contingency. The estimate is a model, and you can disagree with it. A crew that owns its own machine has no haul-in to charge. A club supplying its own rock does not want the armoring line in the client's total. A job with a signed fixed scope carries no contingency at all. Untick a line and it leaves the price. The card keeps it below the total under **Not in this price**, so you can see what you took out and add it back with one tick.

A line you turn off is left out of the proposal and the contract completely. It is not shown crossed out. Those are the client's documents, and a crossed-out row tells them exactly what you decided not to charge for. That is a conversation you should choose to have. Only your own estimate card shows the lines you left out.

Contingency has three settings, and the middle one is easy to miss. If you leave it alone, it follows your organization's rate, so changing that rate in Settings changes every trail. If you type a number, this trail keeps that number whatever Settings says later. If you untick it, the trail has no contingency, and that also stays when the organization's rate changes. When you have set it yourself, the card says so and offers a way back.

The setting is saved on the trail, so the dashboard, the field app, a shared public proposal and a contract draft all show the same figure. **A contract picks up changes while it is a draft and is fixed once you send it.** Changing what is left out afterwards cannot rewrite a document somebody has already signed.

On a line priced together with its branches, each row is the main trail and its branches added together, so one row can belong to more than one trail. The tick boxes are not shown there, and the card tells you where to find them: turn a line off on the trail it belongs to.

The default rates are reasonable US figures, but they are not a quote. Put in your own crew rate and material costs before you show anybody a number. The estimate is only as good as the rates behind it, and a board will ask.

Width affects the total, which is why the activity profile feeds into it. A 10-foot groomed corridor and a 2-foot hiking tread across the same ground are not the same job.

Compare screen with two proposed lines side by side

Editing a line

Open a planned trail and use **Map editor** to work on the line directly. You can drag points, add and delete them, and the row of figures under the map updates as you go: length, climb, descent, average grade, steepest grade and how much of the line is steeper than 10%. Under each figure is how much it has changed since you opened the editor, so you can see straight away whether moving a point made the trail steeper or gentler. If your organization takes elevations from the terrain map when a line is saved, and this line's heights came from GPS, the editor reads every height from the terrain map when it opens. The figures then match what the save will store, so they can differ from the trail page before you change anything, and a note under them says so.

When you move or add a point, TrailsIQ looks up the ground height where it now sits, and the grades update a moment later. Until then they are shown lighter. A line with no elevations at all shows only its length while you edit, and its grades are measured when you save. The sustainability score needs the hillside around the line as well as the line itself, so it is worked out when you save rather than while you drag.

Besides editing points, you can:

- **Reverse:** switch the line's direction. This is worth doing before you analyze a descent you recorded going uphill.
- **Append tail:** keep drawing from the end of an existing line.
- **Close the loop:** on Draw and in the Map editor, join the last point back to the first in one click to make a loop. There is no distance limit here, because you placed every point yourself. The Field App's recorder has the same button with a limit, because there the two ends are wherever you happened to stop walking.
- **Branch:** split a new line off an existing one, keeping the section they share.
- **Add branch:** open Draw or Suggest with the existing line as the parent. The parent's own work comes with it. Its **notes** appear as numbered pins, with a numbered list under the map so you can read what each one says. On these two screens the pins do not respond to clicks. Every click there places a point or an end, and a note pin on the parent line would otherwise catch the clicks aimed at the ground beneath it. The number is how you match a pin to its text. Its **map drawings** are shown too, fixed to the ground they were drawn on rather than to the screen, so they stay in place as you zoom. A row of buttons above the map turns either layer off. Both start on, and the usual reason to turn one off is a

drawing sitting exactly where the new line has to go. The pins also stop responding on the screen for splitting a line at a point, where they would otherwise cover the points you are trying to tap.

- **Splice:** join lines together.
- **Swap into parent:** make a branch the main line.
- **Recompute terrain / analytics:** measure the line again after an edit or after new elevation data has arrived.

Several trails built together belong in a project. The **Project** box on a planned trail groups it with the other lines being built on the same visit. Pick an existing project or start a new one right there, on the dashboard or in the Field App. The other trails in the project are drawn on the map next to this one so you can see the whole job, with a switch to hide them when they are in the way of the new line.

The reason to group them is the price. A project's estimate charges **for bringing in the machine once** across every trail in it, instead of once per trail, because the excavator is hauled in once. A project can also be shared as one public proposal for the whole job, with one link, one map and one number. See Projects and work planning.

You can correct notes from the dashboard. The **Notes** tab under the map lists every note with its number, and each one has **Edit**. Edit opens the note right there in the list, with the map still above it, so you can see where it sits while you rewrite it. A note typed with a thumb on a hillside is not always the note you want a landowner to read. **Delete** is inside the edit form. Deleting a note also deletes its photos and cannot be undone. The pins renumber straight away, so the map and the list always agree about which note is number three.

Map drawings show on the planned trail's own map. Each entry under *Map images* has a **Show on map** button that redraws it on the live map, fixed to the ground it was drawn on, so it stays in place as you zoom and pan. **Show all on map** shows every drawing. Drawings start switched on. Switching one off is saved on the drawing itself, not in your browser, so it is off for everyone, including anyone who opens the public proposal link. A drawing made before drawings were tied to map positions has its button grayed out, because there is no place on the map to put it.

You can rename a drawing in the list. Click its title, type, and press Enter. An empty title goes back to *Untitled map image*. To make a new drawing, use **Draw on map** in the right-hand column. It opens a full-screen map where you can add arrows, labels and freehand marks.

In the Field App, everything about the line is at the top of its page. The first card has the length, the climb and drop, and the average grade. Under them are the line's status, direction of travel, difficulty and activity, and whether the build cost shows on the proposal. **Edit** on that card lets you change any of them right there, along with the name and the description. Below it are the elevation and grade profile and the sustainability score. Tap the score to open the reading behind it: the stretches over the half rule, the fall-line stretches, the drainage, the streams and the side slope. The **3D** card has **Ride it in 3D** and **3D drawing**.

Edit this line has the six changes you make most: **Start branch**, **Extend trail**, **Edit line**, **Walk it again**, **Swap start / end** and **Draw on map**. **More actions** opens the rest, in groups. *Modify* has **Suggest improvements**, which reroutes the flagged sections using the style and settings you last picked under Suggest a new line. The result comes back as a card with the same comparison table and built-turns choice as on the desk. **Check it on the map** opens it in Cleanup, and Save keeps it along with your turn choice. *Modify* also has **Split trail at vertex**, which makes a new draft from the point you pick to the end of the line and leaves this line as it is. It also has **Refresh terrain**, which reads the elevations again and redoes the grades. *Add branch* draws or suggests a spur. *Share & export* has the report, the GPX download, the proposal page, sending a copy to another organization, adding the line to a project and turning it into a real trail. **Delete recording** is last, on its own.

Five tabs hold the lists. Notes has every note with its number, kind and distance along the line, with **On proposal** and **Edit** on each one. **Structures** has the structures planned on the line. **Lines** has the branches and the other walks of the same trail, and each walk can be shown or hidden on the map. **Estimate** has what is being built, the build method, the tread width and the priced breakdown. You can untick a line item to leave it out of the price, and change the contingency for this trail. **Images** has the map drawings, which you can rename, show on the map, edit, download or delete, and the photos for the proposal. The tab bar stays at the top of the screen as you scroll, and each tab shows how many things are on it.

You can also edit in the Field App, so you can fix a line while standing on the ground it crosses instead of trying to remember the problem until you are back at a desk. **Edit line**, on the *Edit this line* card, opens *Cleanup*, which fills the screen. The map takes up the screen, the line's name and **Save** float at the top, and the bottom of the screen shows one tool at a time.

Pick the tool first. The row along the bottom has **Vertices**, **Trim**, **Smooth**, **Redraw** and **Loop**. Tapping one shows its controls just above the row, such as the trim sliders, the smoothing amount or the button that closes the loop. Tapping the tool you are already on hides its controls and leaves you with the row and the map. Showing one tool at a time keeps the map as large as the screen, and all the same tools are still there.

The same five tools are on the desk. Edit line on the trail's page opens the map editor. It has **Vertices**, **Trim**, **Smooth**, **Redraw** and **Loop** in a row above the map, and **Undo** and **Reset** beside **Save trail map**. On the desk you click where the Field App asks you to tap.

A trim always cuts from the line as it is now. When you make any other change, such as moving a point, smoothing or redrawing a section, the trim sliders go back to zero. The next trim then cuts from the edited line, so it never brings back what you changed.

Length, gain and loss sit in a strip under the title and update as you edit. Tap the strip to open the full before-and-after table, which compares length, gain, loss, average grade and max grade as saved and as edited. Tap it again to shrink it. The two buttons below it undo your last change and throw away every change.

The rest of the app gets out of the way while Cleanup is open. The bar of buttons along the bottom of the app is hidden, because editing a line is one job with one way out. **Save** keeps your edits, and the **×** at the top left leaves without them.

One thing changes on the map while you are placing or moving points in the Field App: **note pins stop responding to taps.** They stay on the map, because a note saying *wet through here* is exactly what you want to see while deciding where the line goes. Tapping one just does not open it, so the panel cannot slide up over the line you are working on. The same is true while drawing and suggesting. To read a note, use the numbered list under the map, or leave the editor and tap the pin.

Tap the line itself to add a point. You can tap anywhere along it, and it does not have to be exact. Anything close enough counts, and the new point goes into the nearest section of the line. Tap an existing point in the middle to remove it, and drag any point to move it. The two ends can be dragged but not deleted.

On a long line, not every point has a handle. A walked recording has a point every few meters, so a two-mile line has thousands of them. That is far more handles than a thumb could aim at, and enough to slow the map down while you drag a trim slider. Cleanup shows handles for the points currently on the screen, up to a few hundred at a time, and tells you how many of the total you are seeing. Pan or zoom in to reach the others. Trimming and smoothing always work on every point in the line, whether or not it has a handle on the screen.

Comparing options

Trail Planner → Compare puts two or more lines side by side, showing length, climb, how the grade is spread, sustainability and estimated cost.

This screen is for the question you actually ask. It is rarely whether one line is good. It is whether this line is better than that one, by how much, and what the difference costs. Two reroutes around the same wet section are much easier to choose between with their numbers next to each other.

A ring marks the best value in each row, and the count under each column's name shows how many of the scored rows that line won. **When two lines tie, neither wins the row.** If two routes both have 120 ft of fall line, there is nothing to choose between them on that row, and it counts for neither. So the two counts usually do not add up to the number of rows scored. The difference is the rows where the lines agree.

The same screen answers a second question when you open it from a trail's **Compare walks** button. That question is whether several walks of the same route agree with each other. See Walking a line more than once.

Walking a line more than once

Ground changes, and first passes are rough. You might walk a line in April with the brush still up, come back in June once it is cleared, and want to know whether the grade through the wet section really holds. Both walks are worth keeping, and they are the same trail.

Pull down on the Field App's planner list to refresh it, the same as the maintenance list. Drag from the top and let go. This is worth knowing because the list is where a line recorded by another crew member shows up, and the app does not check for new lines by itself very often. **Compare** sits in that list's header, next to the close button.

Field App → open the planned trail → Walk it again. It records like any other session, and saves as a *walk* of that trail rather than as a new trail. Each walk gets its own color on the map, so two recordings of the same hillside are easy to tell apart. Each one keeps its own notes, photos, elevation profile and analysis. They appear under **Other walks of this line** on the trail, separate from branches, because they are a different kind of thing.

Each walk has a Show on map button on its row, and **Hide all on map** in the card's header hides them all at once. Five recordings of one ridge make a map hard to read. This is only a view setting: it is yours alone, it is not saved, and it changes nothing anyone else sees.

You can start a walk wherever you are. Unlike a branch, a walk does not have to start on the recorded line. A trailhead a hundred yards from the old recording is fine, and it is often where you actually park.

A walk is a record of the ground, not more trail. That is the whole point, and TrailsIQ enforces it so you do not have to remember:

- **It is never in a total.** Three walks of one trail is still one trail's worth of work. No setting changes this, including the one for including branches. A walk is left out of every estimate: on the trail, in the project and on a proposal. It does have a cost figure of its own, which is something different. See *What a walk would have cost* below.
- **It never appears on anything a client reads.** It is left off the public proposal, the report and the poster. A landowner reading a quote does not want three squiggles over the same hillside.
- **It does not count as a trail.** A project with three planned trails and six walks of them still says three.
- **It cannot be published to your live trail network.** That would put a second trail, with its own maintenance, on top of the first one on the same ground. Publish the planned trail it belongs to instead.
- **It does not count toward your plan's limit on planned trails.** Walk a line as many times as it needs.

The one place walks *are* included is the **GPX download**, where they are labeled as walks. That is on purpose: having your earlier recording on a handheld GPS while you walk the line again is most of the reason you kept it.

Saving with no signal

You usually record where there is no coverage, so saving has never needed signal. Tap **Save** with no signal and the line joins the phone's queue and uploads by itself later. Nothing is lost, and you can close the app.

It also shows on the list and the map straight away, in amber, marked **On this phone only**, and the app opens on that row. That way you can look at the line as soon as you finish it, which is when you decide whether to walk more of it. You make that decision standing on the ground, not later when you have signal.

Tap the row and the panel underneath shows what is already final. **The length is final.** It is measured from the points themselves and does not change when the line uploads. The elevation gain comes from the phone's GPS and is replaced by the terrain figure after upload, so treat it as rough. Grade, side slope and sustainability are worked out after upload, so they are left blank until then rather than shown as zero. A zero would look like a measured flat trail.

Continue walking picks the line back up and keeps recording onto the end of it, exactly like extending a trail that has already uploaded. It has the same warmup and the same check that you are standing near the line. While you are walking, the app holds the recording back instead of uploading half a trail. When you save, the whole longer line uploads in one piece. If the app restarts partway through, it picks the walk back up the next time you open it, and the extension is still part of the same line.

An extension of a trail that has already uploaded waits in the queue as its own amber line marked **Extension queued**, drawn next to the trail instead of joined to it. What has uploaded and what is still on your phone stay separate until the queue has sent it, and the map shows which is which.

Everything waiting to upload is counted in the **N pending** badge in the header, the same as any other offline work. See Field App.

In the rare case the server turns down a queued save, for example because of a validation error or because the workspace has changed since you recorded it, **the line stays on your phone**. The sync panel behind the pending badge marks it **Rejected by the server** with the reason, and offers **Retry** and **Discard**. A failed upload never deletes anything you walked. Discarding only ever happens when you tap it.

Every queued recording in that panel also has a **Save GPX** button, which works without signal. It sends the walked line out of the app through the share sheet, so whatever happens to the upload, you can keep the file and import it on the dashboard later.

Reading works the same way. **Open the planner once with signal and every planned trail is saved to your phone in full**, including waypoints, the elevation and grade chart and the build estimate, so they all open with no signal. It updates itself quietly every time you visit with

signal. The only line that can be missing offline is one somebody created after your planner last checked.

What a walk would have cost

A walk is a second measurement of the same hillside, and two measurements never agree exactly about length, side slope or grade. Those three are what the build estimate is worked out from, so *what would this walk have cost* is a real question. It is usually the one you went back to answer.

Open a walk and its card shows **What this walk would cost**, with the trail's own figure next to it and the difference between them, such as *+$4,180 (+14%)*. The difference in length is shown underneath, and it usually explains most of the gap. The cost lines are there too, broken down the same way as for any planned trail. A walk is priced the way its trail is: the same build type, the same choice of itemized or all-in, the same all-in rate, the same switched-off lines and the same contingency. That keeps the difference about the ground you walked. The card says how it is priced and links to the trail, which is where you change it.

Both figures are for one line each. The trail's figure here is the trail on its own, even if its page elsewhere includes its branches. Otherwise a bypass off the trail would show up as a difference between two walks of the same ground.

It is a measurement, not extra work, and TrailsIQ treats it that way. It is in no total, adds nothing to a project, and never reaches a quote, a proposal, a report or a poster. The trail is priced once, on the trail. Two settings that would suggest otherwise, *Hide build cost from shares* and *include this trail's branches*, do not appear on a walk, because there is nothing for them to do there.

If *Build cost estimates* is turned off for the workspace, none of this appears, the same as everywhere else.

Putting the walks side by side

Compare walks, on the *Other walks of this line* card, shows every walk of the trail against the trail itself. The lines are drawn together on one map in their own colors, with a column of numbers for each.

It reads differently from comparing two alternate routes, on purpose. Length, climb and the number of notes describe the **recording**, not the trail. A shorter reading is just a shorter reading, and one walk is not better than another at being the same piece of ground. Those rows show the difference from the trail's own figures, such as *+99 ft* or *same*, and are not scored.

Estimated build cost is one of those measurement rows, and here is why. Cost is worked out from the length, side slope and grade each walk recorded. Between two walks of one line, the cheaper column is just the cheaper reading, not a cheaper trail. It is shown as a difference from the trail's own figure and is never scored, and nothing in that row is extra work or belongs in a quote. The row appears on the dashboard. The Field App leaves it out, because filling it in takes a separate request for every walk and the number is already on each walk's own sheet.

The rows that are scored are the ones you walked the line again to settle: average and maximum grade, the share that is steep, sustainability, fall line and drainage breaks. If June's walk says the grade through the wet section holds and April's said it did not, that is the answer you went back for. The footer counts which walk does better on more of these rows.

A row where only one column has a figure is marked *not yet comparable* and is not scored. A walk's analysis arrives a moment after the walk itself, so a new walk can show its length and climb before any of its grade figures. The *Better on* count under each column only includes rows that could be compared, and it says how many there were. A walk saved a minute ago is not losing. It just has not been measured yet, and a score that does not say out of how many could not tell you that.

It is in the Field App too, on the same trail, under the map: *Compare this line with its walks*. The table opens as a panel with the map still on the screen, so the lines it describes stay in front of you. The walks are drawn over the trail in the same colors as their columns, and the table reads the same way it does on the dashboard: differences from the trail on the measurement rows, and a score only on the rows worth scoring. **Merge these walks** sits at the bottom of the panel, so you can act on what you see with one tap. Comparing two recordings of your own ground changes nothing, so unlike **Merge walks** it needs no extra permission. A volunteer who walked the line can see how their recording compares.

Adopting a walk

When one walk is clearly the better line, press **Use this walk**. It is on the comparison, on the walk's own page, and in the Field App as **Use this walk as the trail**. The trail's line becomes that walk's line, and everything attached to the trail, including its branches, its price and its proposal, follows.

Nothing is lost when you do this. The line that was there before is kept automatically as another walk named *previous line*, so you can go back with one click.

Merging sections of several walks

Adopting a whole walk assumes one walk is better all the way along, and often none is. June's recording might be better through the wet section because the brush was down, while April's is better over the rock band because the GPS had a clear view of the sky. **Merge walks**, on the same card, builds one line from a stretch of each.

The editor is a bar showing the trail from start to finish, split into sections. **Add switch point** cuts the longest section in two and gives the new half a different walk, so the line changes as soon as you press it. Drag a handle to move a switch point along the trail, double-click one to remove it, and click a section to choose which walk it comes from. The whole trail is always covered, so you cannot leave a gap in the line. The map above redraws the combined line in black over the walks every time you change anything.

If nothing on the map moves, every section still comes from the trail itself. Cutting a line into sections and joining them back together gives you the same line, so switch points between them change nothing and *Use this as the trail's line* stays grayed out. The panel tells you when this happens. Pick a walk for a section and the black line moves.

A switch point is a distance along the trail, not a point on a walk. Distance along the trail is the only thing the walks share. They are separate recordings with different numbers of points, wandering a few yards apart the whole way, so a point on one has no matching point on another. TrailsIQ takes the place you picked and finds the nearest point on each walk to it, measured across the line rather than along it. That way two walks that run side by side but start at slightly different places are still cut at the same spot on the ground.

Steps at the switch points are shown, not smoothed away. Where two walks join they are usually a few feet apart, and the panel lists every join with how wide the gap is. Small gaps are normal. A wide gap is a real jog in the finished line and is highlighted. Moving the switch point to where the two recordings cross usually closes it. Nothing is filled in to hide a gap, because a line that looks cleaner than the ground it came from does not help whoever builds it.

Merging keeps the trail. Its branches, its project, its proposal link and its notes stay exactly as they were. Only the line changes, because the merged line is a better description of the same trail. The line that was there before is kept as a walk called *previous line*. Which walk supplied which stretch is saved too, so **Merge walks** reopens where you left off, and you can move a switch point later instead of rebuilding the whole thing from memory.

It is in the Field App too, on the same trail, under the map: *Merge walks into one line*. It works the same way: **Add switch point** to make one, drag its handle to place it, and tap a section to pick its walk. The combined line is drawn in black over the walks on the map above the sheet. That is the main reason to have it on a phone. The person deciding which walk was better through the wet section is usually standing in the wet section and can look up from the screen to check.

Merging is the one planner action that **needs signal**. Everything else on the phone waits in the queue and uploads later. Merging cannot, because the line is measured on the server, and merging without signal would mean deciding without the numbers. With no signal, the app says so and keeps your sections while you wait.

Merging needs the **Manage the trail planner** permission, like anything else that changes a trail's line. Comparing walks does not.

The structures on a line

A planned trail is rarely just tread. A creek needs a bridge, a wet stretch needs a boardwalk, a steep pitch needs steps. Those decisions are made on the hillside, standing on the ground they are about, rather than back at a desk.

Drop a note on the line, give it a structure type, and it becomes a **planned structure**. It keeps its place on the map, it takes measurements, and the bridge materials calculator works from those measurements exactly as it does for a bridge you already have.

The Field App's planner has two tabs: Trails and Structures. Trails lists the lines. Structures lists everything being built on them, newest first, whichever line each one is on. So *what are we putting in this season* is one screen instead of a hunt through each trail's notes.

The amber button at the bottom of that screen is where you start both. It says *Add trail* on one tab and *Add structure* on the other, and either way it opens on *What are you adding?* with both choices. A trail can be recorded, suggested, drawn or imported. A structure can be any

structure type your organization has set up. Pick a structure, pick the line it goes on, and tap the map where it belongs. The note sheet opens already knowing what it is, with that type's measurement fields ready to fill in.

The sheet leaves the map on the screen, with your marker on it. As soon as you tap, a pin appears at that spot and the sheet opens below it instead of covering the screen. You can see where the structure is going while you describe it, and pan or pinch to check it against the creek before you commit. The pin shows whatever you have picked, so if you choose *Feature* and then *Bridge*, the pin becomes a bridge. **Drop here** at the bottom saves it exactly where the pin is.

Each row shows the structure's size and one or two labels:

- **Materials listed:** every measurement the calculator needs is filled in, so you can open it and get a cut list.
- **Needs measuring:** somebody has decided on it, but nobody has been back with a tape. The calculator will not work until they have, and this label tells you who to send.
- **On a planned trail:** it sits on a line somebody walked or drew, rather than standing on its own.

Tap a row to open the line it belongs to with the structure selected. That is where you enter the measurements and open the calculator.

On the dashboard, a planned trail has a Structures tab. It lists every structure planned on that line. Press **Add structure** and the first question is the same: what are you adding? Pick a type and click the line on the map where it goes. The form that opens asks for the same details a built structure of that type asks for, such as a bridge's length and width, along with a name, a description and photos. Fields your organization marked as required have to be filled in before it saves. When you publish the trail, the structure it becomes keeps those details. **Edit** on a planned structure changes them. The trail planner page has a **Structures** switch beside **Trails** too, which lists every planned structure on every line, like the Field App's tab. Click one to open its line.

A planned trail in the field app has the same Structures tab. It lists the line's planned structures with the details filled in, and its trail features under them. **Add structure** asks the same first question. Pick a type, tap the line on the map where it goes, and the note sheet opens with that type's own fields. Tap a structure in the list to open it on the map, where you can edit it or add it to your infrastructure list.

Jumps, berms and rock gardens are structures too. Choose **Trail Feature** in *What are you adding?* and the jump calculator opens, so you can size the feature for the spot. Each one you save is a planned structure of the Trail Feature type. It is listed with the rest, and it is published with the rest.

A planned structure is still a plan. It does not appear in your infrastructure list, no inspections are scheduled for it, and it has no structure code yet. All of that happens when you publish it. Publishing the trail turns every structure planned on it into infrastructure on the new trail, including each jump, berm and rock garden.

Sharing a proposal

You can publish a planned line as a **public proposal page**. It is a view-only page that shows the line on a map with its numbers, carries your organization's branding, and can be opened by anyone with the link, without a TrailsIQ account.

On a planned trail, turn sharing on and you get:

- A **share link** to copy.
- A **QR code** you can download as a PNG, for a trailhead sign, a public meeting handout or a printed proposal.

Sharing starts off and stays off until you turn it on. You can turn it off again at any time, and the link stops working.

Turning sharing on or off needs the **Manage the trail planner** permission. Owners and managers have it, and you can give it to anyone else in *Settings → Roles & permissions*. Anyone on the team can copy or show a link that is already live.

A rejected branch stays off the page. Mark an alternate as *Rejected* and it disappears from the shared proposal, from both the map and the list. The page is your pitch, and showing an option you have already turned down invites the reader to compare against it. If you want the reader to see both options, leave both as drafts or mark one as *Preferred*. Only *Rejected* branches are hidden.

Choose what the page shows first. *Top of the page* offers **Map image** or **Live map**. Live map shows a real map the reader can pan and zoom, with the line, its branches and the numbered note pins on it. It is the right choice when the question is *where does this actually go*. Map image

shows a still picture instead, which is better when the page will be printed or forwarded. This choice is on both the dashboard and the Field App, and it is saved on the trail so both agree.

You frame the picture yourself. Under *Proposal image*, **Capture from map** opens the map full-screen, zoomed to fit the whole trail and its branches. Zoom and pan to the view you want and capture it. The editor then opens on the picture so you can add arrows or labels before it goes public. Take it again after you change the line, or the proposal keeps showing the old shape. Until you take one, the page shows a simple outline drawing instead.

Live map opens where you framed the picture. The two options are meant to be two views of the same ground, and the picture is the one somebody composed. So the live map starts at the center and zoom you captured from, instead of zooming out to fit every line. A reader can still pan and zoom from there, because it is only a starting view. Proposals without a captured picture, including any whose picture you have cleared, open zoomed to fit the whole trail. A reader on a much wider or narrower screen sees a little more or less around the edges. The scale and the center are what stay the same.

Shared links that have no captured picture yet show your newest drawing at the top until you capture one, so nothing already in somebody's inbox has turned into an outline sketch.

A proposal can include photos as well as the map. Under the proposal card there is a **Proposal photos** box. Add the site photos that explain the job: the creek crossing, the staging area, the rock band the price assumes, or last season's finished trail to show what your crew builds. Each photo can have a description. The reader sees a grid of thumbnails and can tap any of them to open it full size with its description. The same photos go into the PDF.

You can also add a map image you have already drawn, without exporting and uploading it again. Pick it from *Add a map image* and the proposal uses the original. If you reopen that drawing and change an arrow, every proposal showing it changes too. It also uses no extra storage, because the file is already yours and is only counted once. Uploaded photos do count toward your organization's storage, and the box shows which kind each picture is.

Removing a photo you uploaded deletes the file and frees up the space. Removing a map image only takes it off the proposal, and the drawing stays on the trail it belongs to.

A project's photos are kept on the **project**, and a single trail's photos on that trail. That matches everything else about the two kinds of proposal: each page shows its own.

You can add photos from the field app, on the planned trail's own sheet under *Proposal photos*, which is usually where the picture is taken. The button opens the camera, and the photo is on the proposal by the time you walk back to the truck. This needs signal. A proposal photo uploads straight away instead of waiting in the queue with your tasks, so the app tells you up front rather than queueing something that might sit there.

The reader can download the proposal as a PDF. Every proposal page has a **Download PDF** button, and it needs no account and no permission. It is there for whoever you sent the link to. The PDF starts with the map, then shows the trails and their options, the notes you chose to publish, and the estimate if the page shows one. It is the same page in a form somebody can keep. A link can be forwarded and lost, and you can stop sharing it, which is right for the live page. A client deciding between your quote and two others needs a copy that stays put.

The map at the top of the PDF follows what the page shows. If you framed a proposal image, that is the picture in the PDF, because you composed it on purpose and nothing a reader does on the page changes it. If the page is on **Live map** and you have not taken a picture, the PDF uses the map as the reader had it on screen, at their zoom and position, with your drawings included. So two readers can get slightly different covers from the same proposal, each showing what they were looking at.

The figures in the PDF come from your records, not from the reader's screen. Trail names, lengths, grades, notes and the price are all taken from the same records the page uses, so a downloaded proposal cannot be edited into a document that still looks like it came from you.

Your drawings can be included. *Show map images on the proposal* shows them on the ground they were drawn on, so they stay on the right piece of hillside at any zoom. On the live map they are a layer the reader pans around with. In a captured picture they are part of the image. This is on by default when you have drawings, and you can change it from the dashboard or the Field App.

The Live map option is only available on the TrailsIQ map. See The TrailsIQ map. A proposal link is one you give away on purpose. It can be forwarded, printed as a QR code, and opened any number of times by people you never sent it to. On other maps every one of those opens would use up your organization's monthly map-load allowance on views you never made. So instead of offering a setting that would quietly do that, the

page shows your map image. Switch your organization to the TrailsIQ map and the option appears, including on lines where you had already chosen it.

You decide which notes a reader sees. Every note has a *Shows on the proposal page* switch, on the dashboard and in the Field App. Notes start visible. Turn one off and it stays in the app for you and your crew but is left out of the shared page completely. It is not hidden in the page, so there is nothing for anyone to find by looking at the page's code. Use this for working notes that are right for the crew but not the first thing a landowner should read, such as *wet through here* or *check with the neighbor before the survey*.

The trail's own notes box stays private unless you choose otherwise. Notes on map pins are one thing. The free-text *Notes* field on the trail is another, and it tends to collect working comments, including the line TrailsIQ adds to a suggested or imported draft. It only appears on the proposal page if you turn on **Show trail notes on the proposal** in the share panel. If you shared a proposal before this setting existed, its trail notes are no longer on the page, so turn the setting on if you meant people to read them.

For printed versions there is also a **report**, which is a full write-up also available as markdown, and a **poster**, which is a single-page layout built around the map. You make both on the dashboard, unlike the proposal PDF, which the reader makes for themselves. Between them, the same line covers a landowner conversation, a grant application and a public meeting without being redrawn for each.

Sending a trail to another organization

A proposal link lets somebody read about a trail. Sending a trail gives them a copy to work on: the line, its notes and photos, its branches and its map images, added to their own Trail Planner as a draft they own.

This is useful when a consultant plans a line for a club, when two clubs share a boundary and one has scouted the connector, or when a contractor hands the finished route back to the land manager.

Creating, withdrawing and accepting transfer codes all need the **Manage the trail planner** permission. A copy of your planning is real information leaving or entering your organization, and that is a decision rather than field work. Anyone can look up what a code contains, so a crew member who is handed a code can still see what it is and pass it on to the right person.

How it works. On the trail, choose *Send to another organization → Create a transfer code*. You get a code like **TIQ-K4RM-9XPT**, and you can add a message to go with it. Send the code however you normally talk to them: by email, by message or out loud. They open their own Trail Planner and choose **Receive a trail**. On the dashboard it is the panel under the list. In the Field App it is inside **Bring in a trail**, which is the sheet behind Import, found in the Add sheet with Record, Suggest and Draw, next to the option for importing one of your own trails. Either way, they type the code and see what is in it before agreeing to anything: who sent it, what it is called, how long it is, and how many notes, photos, branches and map images come with it. Then they accept it and it arrives.

Both halves work from the **Field App** as well as the dashboard, so two people standing on the ground the trail crosses can read a code out to each other over the phone. The moment of sending or accepting needs signal. A code has to be created on the server to mean anything, and accepting one copies real files, so neither queues for later the way a note or a drawing does. The app tells you so instead of pretending it worked.

It is an offer. Nothing appears in anybody's account until a person there accepts it. That is on purpose. One organization should not be able to add things to another's account, any more than you can let yourself into somebody's office to leave a folder on their desk.

A code works once, expires after 30 days, and can be withdrawn at any time before it is used. Sending the same trail to three organizations takes three codes, which also keeps a clear record of who received what.

They get their own copy. Editing it changes nothing on your side, and editing yours changes nothing on theirs. The photos become their files and count toward their storage, so nothing breaks if you later delete the original. Their copy carries a **From {your organization}** badge. That matters more than it sounds, because the numbers on it were worked out with your build rates, and its notes were written by people they cannot ask.

What does not come with it, and why:

- **The project** it was grouped in. That grouping is about your work.
- **Any live proposal link.** A share link cannot be passed on. They can create their own if they want one.
- **The proposal image**, which is a picture of your map with your settings.
- **Its status.** It arrives as a draft however you had it marked, because "preferred" is a decision about your work, not theirs.

Send the main trail, not a branch. Branches go with their main trail automatically. Sending a branch on its own is refused, because half a trail is not something anybody can work on.

Turning a plan into a trail

When a line is agreed and built, or when you simply want it in your live network, use **Export to trail**. That creates a real trail from the planned line. From then on it works like any other trail, with conditions, maintenance, infrastructure, your website and everything else.

The planned trail stays where it is. Publishing copies the line across rather than using it up, so the planning history behind a trail can still be read afterwards.

You can also **import an existing trail** into the planner to work on a reroute of something already built, without changing the live trail until the reroute is settled.

Publishing needs the **Manage the trail planner** permission, because it creates a real trail with everything that comes with one.

GPX in, GPX out. *Download GPX* on a trail's page gives you the line, its branches (each as its own named track) and every note as a pin. It is the file you hand an excavator operator, load onto a handheld GPS, or open in Gaia or Avenza to find your way to the flag line. The planner list's *Import GPX* button works the other way. A `.gpx`, `.kml` or `.kmz` file with one trail in it, such as a consultant's proposed route or a track recorded on any device, arrives as a new draft. If the file has no elevations, they are filled in from terrain data, and the line gets the same analysis as any drawn line.

Common gotchas

- **Deleting a trail keeps its branches.** They become separate planned trails. The scouted lines survive, and they are just no longer branches of anything. Deleting or changing the line of somebody else's planned trail needs the *Manage the trail planner* permission. Your own are always yours to delete.
- **The planner is not your trail network.** Nothing you draw appears on your website, in trail conditions or in the field app's trail list until you publish it. This is on purpose, because the planner is a place to try ideas out.
- **A relaxed result is telling you something.** When Suggest says which limit it had to loosen, that is the ground answering your question. If you loosen the limit yourself and run it again, you get the same line without the warning, which is worse.
- **Estimates use your rates, and the defaults are not yours.** Set Settings → Trail build rates before you quote anybody.
- **The first line on ground you have never worked is slower, and the map overlays take a while to appear.** This only applies to new ground, somewhere well away from your existing trails that nobody in your organization has planned on before. On and around your own network it does not apply at all. Everything there is already prepared, and Suggest comes back as fast as anywhere else. On new ground the numbers are still right: grades, side slope, sustainability and the cost estimate are measured against real elevation wherever you plan. What it costs you is time, because the elevation has to be fetched the first time, so the first Suggest there can take most of a minute. Contour lines and slope shading are the part that is not there yet. They stay blank over ground nobody has planned on, even with their switches on. Drawing there starts the preparation by itself, and the overlays fill in within a few minutes, with no reload and nothing to press. Every line after the first one on that hillside is quick, for you and for everyone else in your organization. See Terrain analysis. The base map works the same way. On the TrailsIQ map, opening the planner over ground that has no map yet downloads the area around it, and every line you save brings in the ground along it. Until it arrives, the map says *This area isn't downloaded yet*. See The TrailsIQ map.
- **If elevations are missing, the planner tells you, so believe it.** When some points could not get an elevation, the result says how many. Those sections were measured as if the ground were flat, so their grades are not real. On Suggest, the shape of the line through them is not real either. It usually means the elevation data for that area is still being prepared. Wait a moment and run it again rather than acting on the numbers.
- **Recording uphill and analyzing downhill.** Whether a grade is shown as up or down depends on the line's direction. If you walked it the wrong way, use Reverse before you read the profile.
- **Grouping trails changes the price, on purpose.** Once two machine-built trails are in the same project, the project's estimate charges for bringing in the machine once instead of twice. Each trail's own page still includes its own haul-in, because that is what it would cost on its own. So the two figures differ, and the project's card shows the difference instead of leaving you to find it.

- **A transfer is a copy, and the two trails are separate after that.** Once they accept, changes on one side do not reach the other. If you fix a mistake on yours after sending it, they will not see the fix, so send a new code or tell them.
- **A shared proposal really is public.** Anyone with the link can see it. That is the point, but check that the line is one you want seen before you print the QR code.

TRAILS

Clients and the job pipeline

For teams who build trail for other people: keep a record for each client, attach jobs to it, and follow each job from lead through quoted, building and handed over. A job's stage and whether it is archived are separate, and a client with jobs cannot be deleted.

If you build trail for other people, two questions come up all the time that most trail software does not answer: **who is this job for**, and **how far along is it**. Clients and the job pipeline answer both.

Both are turned on with one switch, **Settings → Workspace modules → Clients & job pipeline**. It is on by default for an account that builds trails and off for one that runs them. See Workspace modules.

Adding a client

Open **Clients → New client**. The only required field is the name you would put on an invoice. The other fields are there when you need them:

- **Contact name, email and phone** for the person you actually deal with.
- **Website** and **address**.
- **Notes**, such as access arrangements, who signs off and where the gate key is kept. Notes are **internal**. They never appear on a proposal or anywhere else a client can see.

The client list shows **open jobs** first, because that is usually what you are looking for. The total number of jobs is shown beside it.

The client list showing open jobs alongside total jobs for each client

Attaching a job to a client

A job is a **project**. When you create or edit a project, pick the client from the **Client** list. Only active clients are listed.

You can leave it blank. Your own work, such as a demo loop, a trade-show build or maintenance on your own ground, has no client, and a project without one works exactly as before.

Open a client to see every job you have done for them, split into current and finished jobs, each with its stage. It answers "what have you done for us before?", which a client will usually ask you face to face.

A client page with their contact details and their jobs split into open and finished

The pipeline stages

Stage	What it means
Lead	Someone has asked. Nothing priced yet.
Quoted	A price is with the client and you are waiting.
Won	Agreed, but work has not started on the ground.
Building	Crew is on it.
Complete	Built and finished. The records may still be yours.
Handed over	The client has the trails, the as-builts and the structure records.
Lost	Quoted and did not win it, or the client shelved it.

A request from the **Quote request** form on your website arrives here on its own. It becomes a job at **Lead**, with everything the visitor wrote in its description, under a new client for them. A second request from the same email address goes under the client already on file. See Website templates, donations and forms.

Two of these need a little more explanation.

Lost is worth using. A bid you did not win has to leave the pipeline somehow. If the only way out is deleting the project, you can never answer the question every builder asks: *how much of what I quote do I actually win?* Mark the job as lost and keep it.

Handed over is a stage most job trackers do not have. They stop at complete. For a trail builder, the work is not really finished until the client has the records: the as-built lines, the structures and the inspection dates. If you are passing the trails into the client's own TrailsIQ account, this stage marks that moment.

A project card carrying its client name and pipeline stage

Stage and archiving are separate

A project has **two** separate settings, and each does a different job:

- **Status** is Active or Archived. It decides whether the job is on your list at all.
- **Stage** runs from Lead to Handed over. It says how far along the work is.

We kept them apart on purpose. A job can be **Complete** and still **Active** while you chase the invoice. An archived job from three years ago still reached a stage, and that history is worth keeping. Combining the two would lose information either way.

The dashboard's **Job pipeline** card follows the same split. The stages a job is still moving through, from Lead to Building, count active jobs only. **Complete** and **Handed over** also count archived jobs, because finished jobs are usually archived. Tapping one of those opens the jobs list with archived jobs shown, so you see the same number of jobs the card showed.

Archiving and deleting clients

Almost every time, you will want to **archive** a client. Set their status to Archived and they leave the client list and the job picker, while every job you did for them stays where it is. Use it for somebody you no longer work with.

You can only **delete** a client who has no jobs at all, and the edit page tells you this before you press anything. Deleting a client with jobs would leave a pile of finished jobs with no client on them. The projects would look fine, but nobody could ever work out who they were for.

What the client sees

When a project has a client, its shared proposal page shows one extra line under the title: **Prepared for [client name]**. Nothing else about the client is shared.

The contact details, the address and especially the **notes** stay with you. Anyone who has a proposal link can open it, so the client sees their own name and nothing you have written *about* them.

Common gotchas

- **Clients is not in the menu.** The module is off. Turn it on in Settings → Workspace modules. It is off by default for an account that runs trails.
- **A client is missing from the job picker.** They are archived. Archived clients stay on their existing jobs but are not offered for new ones.
- **"This client has jobs on record and cannot be deleted."** That is expected. Archive the client instead.
- **Every job says Lead.** New projects start there. If you created several at once, set the stage on each one. You cannot change them all at once yet.
- **Older projects show Building or Complete instead of Lead.** Projects that existed before this feature were real work, so active ones were set to Building and archived ones to Complete.

- **Changing a stage does not archive anything**, and archiving does not change the stage. They are separate on purpose.

TRAILS

Contracts for won jobs

A contract built from the job, with the parties, trails, price and payment schedule, and your own terms underneath. You sign it, then the client signs from a link with no account. It is locked and fingerprinted at signing, both sides can download it as a PDF, and you can do all of it from the field app.

When a job moves to **Won**, a **Contract** button appears on the project page. It builds a contract from what is already in the job: the parties, the trails, the price and the dates. It puts your own terms underneath and gives you something the client can sign from a link.

TrailsIQ does not write the legal wording, and never will. Terms written for every customer would be wrong in most states and in every other country. You add your own terms once, in Settings, and the same terms are printed on every contract you send. Have them reviewed before you send the first one.



The Contract button on a won project

Before the first one

Contracts are one of the modules you can switch on and off. They are **off by default for a trail organization and on for a builder**. If you don't see the Contract button and the fields below, switch contracts on under **Settings → Workspace modules**. See Workspace modules.

Then fill in these under **Settings → Organization details**, once:

- **Legal entity name.** The name that signs, which is often not the name your customers know you by. Leave it blank and your organization's name is used instead.
- **Registered address.** It is printed in the Parties section. A contract that names a party with no address is weaker than one that gives it.
- **Your standard numbers.** Warranty period, payment days, cure period and governing state. They are used wherever your terms mention them. See Placeholders in your terms.
- **Your contract terms.** Change orders, site access, insurance, warranty, dispute resolution, or whatever your own lawyer drafted. Paste them in as plain text, and they are printed exactly as written.

Without terms, TrailsIQ won't send a contract, because that would just be a payment schedule with nothing under it. A price list somebody signed is not a contract.

What the contract says

Everything except the terms comes from the job, so the contract can't disagree with it:

- **The parties:** your legal name and address, and the client from the job.
- **The scope:** the planned trails in the project, by name.
- **The price:** see The price, and what it promises below. This part needs a decision from you, not just a number from the estimate.
- **The payment schedule:** deposit, milestones and retainage. This is the one part nothing can work out for you, because it is the part that gets negotiated.

A job with no client, or no priced estimate, can't produce a contract. Both take a minute to fix, and it is much worse for the person receiving the contract to find the gap.



A contract on screen: parties, scope, price and payment schedule

The price, and what it promises

The build estimate gives you a number. **It is a starting point, not a promise.** Round it, add your margin, or lower it to win the job. Whatever you type in *The price on the contract* is what the client signs for, and every percentage on the payment schedule is worked out from it. Leave it blank to use the estimate.

Then say what kind of price it **is**, because that decides the sentence printed under it. That sentence has to agree with your own terms:

- **Fixed price:** one price for the scope above. The cost breakdown is **not shown to the client**. A fixed price is a price. Showing every line of your working invites a line-by-line negotiation over figures that stopped mattering once a number was agreed. The estimate's contingency is part of the price and isn't shown as its own row. On a fixed price it is your safety margin, not something the client is buying, and if it were listed it would be the first thing they ask you to take off.
- **Not to exceed:** a ceiling. Work is billed as it is done, anything not spent isn't charged, and going over needs a signed change order. The breakdown **is** shown, because a ceiling with nothing behind it looks like a number you made up.
- **Estimate:** not a fixed price. The actual cost depends on what the ground turns out to be like. The breakdown is shown.

Check this against your terms. Many standard trail-building terms say something like "*unless otherwise stated in the Agreement, the project is billed at a fixed price.*" This contract **is** the Agreement, so this setting is what states otherwise. If your terms say *fixed price* while the line under the total says *this is an estimate*, the contract is unclear. Unclear wording in a contract is usually read against whoever wrote it, and that is you.

Whichever you pick, the estimate's own total is also kept with the contract, out of view. So you can always look back and compare what the estimate said with what you actually agreed.

Tax

Set your tax rate, what you call it and your registration number in *Settings → Organization details*. With a rate set, a contract prints three lines instead of one: the agreed price before tax, the tax itself with the rate beside it, and the total including tax. Your registration number appears under your address, where an accountant looks for it. Proposals do the same.

Leave the rate blank if you don't charge tax. Blank means no tax lines at all. That is not the same as a rate of zero. Zero is a rate you chose, and it prints a row saying so.

The price you type is always the price before tax, and every percentage on the payment schedule is worked out from it. The same goes for the build estimate everywhere it appears in TrailsIQ. Tax is a line on the documents your client reads, not a second version of every number in the app.

A signed contract keeps the rate it was signed with. If you register later, or a rate changes, contracts that are already signed open exactly as they were. Only new ones use the new rate.

The assumed quantities on a contract, with no costs beside them

What the price assumes

Standard trail-building terms usually include a line like "*the Contract Price assumes conditions described in the Agreement.*" On a fixed price that line matters. It is what turns *the ground wasn't what we thought* into a change order instead of a cost you swallow. **It only works if the contract actually describes those conditions**, and a list of trail names and lengths doesn't.

So every contract includes a **What this price assumes** section, in two parts.

The measured part fills itself in. It lists the length and tread width of each trail, and the quantities the estimate was built from: feet of machine-cut bench, feet of hand work, rock armoring, drainage dips and stream crossings. Nobody types them, so they can't drift from the number they explain.

Money is left out of that part on purpose. That is why a fixed price can hide its cost breakdown and still show this section. Your rates and costs are your own working. The *quantities* are the scope, and the scope is what a change order is measured against. Saying "2 stream crossings" promises nothing about price, but it settles what happens when there turn out to be five.

The written part is yours. The access route, the staging area, who gets the permits, the season you can work in and what is not included are not recorded anywhere in TrailsIQ, and nothing can work them out. Write them once under **Settings → Organization details → Standard assumptions and exclusions**. They are copied onto every new contract as a starting point, and you can edit them for each job. Placeholders work here too.

Like the terms, this section is **locked when the contract is sent**. Changing your standard text next year can't change what somebody has already signed.

The client's signing page with the signature pad

The payment schedule

The payment schedule covers the deposit, milestones and retainage. It is the one part of a contract nothing can work out for you, because it is the part that gets negotiated.

You write each row **as either a percentage or a fixed amount**. Tap the `%` / `$` button to switch. Both are normal. "20% on signing" and "$5,000 on signing" mean the same to the two people agreeing them, and which one you use depends on the conversation. A percentage is turned into an amount from the contract total when the contract is signed, and **both** are printed on it. The percentage is what was negotiated, and the dollar figure is what gets paid.

Under the rows, you can see what the schedule adds up to compared with the contract total. That is there for you to look at. It is **not a rule**, because retainage, holdbacks and a schedule that deliberately bills only part of the job are all normal. But a schedule adding up to 90% of a job is usually a typo, and nothing else on the screen would tell you.

You can also mark each row as **Deposit**, **Progress payment** or **Final payment**. That is not decoration. It is how your terms refer to the row. See below.

On an estimate or a not-to-exceed price, one row is marked `?`. That is the one that settles the balance.

A deposit is due on signing, before anybody breaks ground. The only total that exists that day is the estimate, so a deposit of 25% of it is a fixed amount you can know and pay. The same is true for anything due partway through the build. **Only the row marked Final payment can change**, because it is the only one due after the final cost is known. That is how a build is usually billed: a deposit, some progress payments, and a final balance that takes up whatever the ground turned out to cost.

So the schedule reads "*Deposit · 25% of the estimated total — $2,374*" with no mark, and "*Final payment · 75% of the estimated total — ≈ $7,122*" with one. A line underneath says the final payment settles the balance and every payment above it is fixed. On a fixed price nothing changes at all, and every share is stated against the contract price. A row written as a **fixed amount** is never marked, because a stated amount stays the same whatever the total does.

If the price is an estimate or a not-to-exceed and **no row is marked Final payment**, the draft warns you. Without one, every payment is a fixed amount and nothing covers the difference between the estimate and the final invoice.

Placeholders in your terms

Your terms are the same on every contract, but some of the numbers in them aren't. Write `{{deposit_percent}}` where the deposit percentage goes, and it is filled in from that job's schedule.

There are two forms:

- `{{name}}` is replaced with the value.
- `{{#name}}` … `{{/name}}`: the text in between is **left out completely** when that value is empty. That is how a job with no progress payment loses that bullet, instead of printing "…% due at ." with a gap in it.

Placeholders are filled in when the contract is sent, not when it is read. A signed contract keeps the words it was signed with. If you change your standard warranty period next year, every contract already sent still says what it said.

A contract won't send while any placeholder in it has no value, and it tells you which one. A clause reading "within days of Contractor's invoice" is worse than a contract that failed to send, because that one gets signed. It also catches a misspelled placeholder. Settings can't fix `{{warranty_dayz}}`, so it is named separately.

The full list is under the terms box in Settings, in two groups:

- **From the job:** `{{company_name}}`, `{{client_name}}`, `{{project_name}}`, `{{contract_reference}}`, `{{contract_price}}`, and the schedule ones: `{{deposit_percent}}`, `{{deposit_amount}}`, `{{progress_payment_percent}}`, `{{progress_payment_amount}}`, `{{progress_milestone}}`, `{{final_payment_percent}}` and `{{final_payment_amount}}`. These are read from the contract and **can't be typed in** anywhere. That is on purpose. If a number could be entered in two places, the wording and the schedule printed under it could end up disagreeing, and nobody would notice, because both would look intentional.
- **Your standard numbers:** `{{final_payment_days}}`, `{{warranty_days}}`, `{{breach_cure_days}}`, `{{late_fee_monthly_percent}}`, `{{governing_state}}` and `{{entity_type}}`. You type these once under Organization details. TrailsIQ has no way of knowing them, because they are decisions your business makes.

`{{governing_state}}` is worth using even if you only ever work in one state. Terms usually name the state four or five times: for the governing law, the courts, the interest cap and an agency. The day a job crosses a state line, that is five edits hidden in legal wording, and one of them gets missed.

Who "Contractor" and "Client" mean

Standard terms are written in shorthand, such as *Contractor will perform...* and *Client is responsible for...*. They define the shorthand, but they don't name the parties.

The contract itself names them, at the top, in the **Parties** section. Your legal entity name and registered address are on one side, and the client from the job is on the other. Each is labeled with the shorthand the terms below use. The Parties section is on the screen the client signs, and on the PDF both sides keep.

So terms that say "*between {{company_name}}, a {{governing_state}} limited liability company ("Contractor"), and the client identified in the Agreement ("Client")*" are correct here. The Agreement is this document, and it names both parties.

Fill in your **registered address** under Organization details. A contract that names a party with no address is weaker than one that gives it.

Signing, and why it is one button

You sign the contract and open it to the client in one step. There is no way to send an unsigned contract, and that is on purpose. It would be an offer nobody had committed to, and you could still edit it while the client was reading it.

Signing locks the document. From then on, nothing that happens to the job changes it: not a new rate, another trail or a fresh estimate. The contract keeps the numbers it was signed with, which is the whole reason to have one.

If you have drawn a signature in your profile, it appears on the contract. If not, your typed name is used.

Sign your own name, not the company's. A company can't hold a pen. The party to the contract is the legal entity from Organization details, and a person signs on its behalf. The signature block on the contract says so:

```
CEDAR COUNTY TRAILWORKS LLC
By  Sam Rivera
    Member
```

Your title is worth filling in, even though it is optional. It shows the role you are signing in. It makes clear on the document that you signed for the business and not personally, which is most of the reason the business is a separate entity at all. Use whatever your operating agreement calls you, such as Owner, Member, President or Managing Member.

The same is true on the client's side. If the client is a parks department or a land trust, a person signs for it, and their signing page says so.

The client's side

The client gets a link. They don't need an account or to sign up. The person signing is often a landowner or a parks officer who has never used TrailsIQ, and asking them to sign up before they can see the document would lose you contracts and gain nothing.

They read the same document you did, type their name, can draw a signature if they like, and tick a box agreeing to sign electronically. Their name, the time and the internet address they sign from are recorded with the contract, and the page tells them so before they sign.

Once both parties have signed, the link becomes their copy. If they open it again later, it shows the signed contract instead of asking them to sign again.

You are told the moment they sign. You get a push notification in the field app, a notification in the app, and an email with the reference, the price, who signed and when. It goes to everyone on your team who can manage jobs, which is everyone who could have sent the contract. Anyone who doesn't want it can turn off the **Contracts signed** switch in their notification settings.

If the client gave an email address, they get their own copy too, with the signed PDF attached, not just a link. The email field on the signing page stays optional. A signature is valid without one, and a required field in front of somebody about to commit is a reason for them not to.

The push notification leaves out the money on purpose. It reads "*Cedar County Parks signed Cedar Butte Expansion*" and nothing else. Whoever is standing nearby can read a lock screen, and the contract total is the one number on the document that is nobody else's business. The amount is in the email and one tap away in the app.

The fingerprint

Every contract has a short code near the bottom, something like `A4F0 91C2 7B33 D019`.

It is worked out from the document and the terms together, so any change to either one gives a different code. Months later, it answers the one question anybody really asks about a contract: **is this the document that was signed?** Two copies with the same fingerprint are the same contract. Two with different fingerprints are not.

Your copy, as a file

Both sides get a **Download PDF** link: you on the project page and the client on their signing page. It is there from the moment the contract goes out, not only once it is signed. Somebody deciding whether to sign is exactly the person who wants to send it to a partner or a lawyer first.

The file is built from the locked document, so it doesn't change when the job does. It also includes two things the screen keeps short:

- **The signing record:** for each signature, the name, the email if one was given, the time, the internet address it was signed from, the device, and the sentence each party agreed to. It is printed on the document instead of being kept only by us, because a record only one side can produce is weaker.
- **The full fingerprint:** all sixty-four characters of it, not just the short code.

From the field app

A job is usually won in a conversation on site, so you can do the whole thing on your phone too. Open the project in the field app. A **Contract** section sits under the public proposal. You can prepare the contract, edit the payment schedule while you are still negotiating it, read it through and sign it for your organization.

Then tap **Client signs here**. It shows a QR code. The client scans it with **their own phone** and signs there. That matters for more than convenience: the internet address and device recorded with their signature are theirs, not yours borrowed for a minute.

The contract section needs signal every time, and tells you when there isn't any. It is the one thing in the field app that is never read from the offline copy. A contract is only worth anything if both parties are looking at the same locked document, and an out-of-date copy on a phone is exactly how that stops being true.

Withdrawing one

You can withdraw a contract the client hasn't signed yet. The link stops working straight away.

It is **withdrawn, not deleted**. The record stays, with its fingerprint and your signature. "We never sent that" is the kind of thing that gets said in a disagreement, and a deleted contract can't answer it.

A contract signed by both parties can't be withdrawn or edited at all. To replace one, send another.

TRAILS

Handing a job to another organization

One code hands a whole job to another organization: every planned trail with its branches, waypoints, notes and photos, as their own copy in their own TrailsIQ account. Only planned trails are sent. Your maintenance tasks, your costs and your client notes stay with you.

A trail builder's job does not end when the machine leaves. It ends when the client has the records: the as-built lines, the branches, and the notes and photos from the build. Those are what they will be looking after for the next thirty years.

Handing over gives them all of it with one code. They get their own copy in their own TrailsIQ account, and the job on your side moves to *Handed over* on its own.

This is not only for builders. Any account with the trail planner turned on can send a job to another organization. A club can hand a build to the contractor doing it, and a land manager can hand new trail to the club that will look after it. If your account does not track clients, the panel is called **Send to another organization**, and everything below works the same way.

Only planned trails can be sent. A project can hold maintenance tasks as well as planned trails, but maintenance tasks are never sent (see What stays with you). A job with no planned trails on it cannot be handed over.

Creating the handover code

Open the job and use **Hand over to the client**, or **Send to another organization** if your account does not track clients. You get a code that looks like `TIQ-XXXX-XXXX` and works for 30 days.

The panel appears once the job has at least one planned trail on it, and only for people who can manage the planner.

A code is only created when you ask for one. Anybody who has the code can take a copy of the job, so TrailsIQ never makes one just because somebody opened a project page.

Send the code however you like: by email, in a message, or written on the back of the invoice. The client signs in to TrailsIQ, opens **Trail Planner → Receive a trail** and types it in.

Each code **works once**. After it has been accepted, nobody can use it again. You cannot take it back either, because the copy now belongs to them.

The hand over to the client panel on a project, showing the generated transfer code

What the client receives

Everything on the job that describes the ground:

- **Every planned trail** in the project, with its route and analysis
- **Branches**, such as spurs, reroutes and options, still attached to their parent trails
- **Waypoints and notes** recorded during planning and building
- **Photos** attached to the trails

Everything arrives as one **project** in the client's account, with the name you gave it, so they get one job instead of a pile of loose lines to sort out.

The copy belongs entirely to them. They can edit, rename, export or delete any of it, and nothing they do changes your records.

The receiving side previewing a whole job — trail count and the trails it contains — before accepting

What stays with you

Three things are never sent. It helps to know them up front, because a handover cannot be undone.

Your maintenance tasks. A project can have maintenance tasks linked to it as well as planned trails, but only the trails are handed over. A maintenance task is work *your* crew does on ground *you* look after. In their account it would arrive unassigned, with no date, and reported by somebody who is not on their team. The handover panel tells you how many linked tasks will stay with you before you create the code.

Your money. The build estimate, the hours, the expenses and everything else on the job-costing screen stay with you. What the job cost you is your business, and once you share your margin with a customer you cannot take it back.

Your client record. The contact details and especially your internal notes stay with you, such as access arrangements, who signs off and anything you wrote about working with them. That record is your contact book, not theirs.

The project in their account also starts at the beginning of their pipeline instead of arriving marked *Handed over*. For you the job is finished. For them the trail is something new to look after, so your job history does not belong on it.

If the client has no TrailsIQ yet

They need an account to receive a handover, and a free one is enough.

Send them to the sign-up page and ask them to create an account for their organization, choosing **Trail organization** when asked what their team does. Their account is then set up for looking after a network, which is exactly what they are about to do. Then send them the code.

This is worth doing even for a small job. A client whose trails are in TrailsIQ can report problems, track conditions and come back to you with a record instead of a phone call. Your next job with them starts from that record instead of from scratch.

Handing over one trail instead

You can still send a single trail. Open a planned trail and use **Send to another organization**. It uses the same kind of code, which also lasts 30 days and works once.

Use it when you are giving somebody one route rather than a whole job, such as a reroute you designed for a club, a single connector or a favor. Use the job handover when you are delivering the work you were paid for.

You cannot send a branch on its own either way. Send its parent trail and the branches go with it.

Common gotchas

- **There is no handover panel on the job.** Three things must be true: the trail planner is turned on for your account, you are allowed to manage the planner, and the job has at least one planned trail. A job with only maintenance tasks never shows the panel, because nothing on it can be sent.
- **"This job has no planned trails on it yet."** This has the same cause. Link the planned trails to the project first. Linking maintenance tasks does not make a job ready to send.
- **The maintenance tasks did not arrive with it.** They are not meant to. See What stays with you.
- **The client says the code does not work.** Check that it has not already been used, and that they are typing it into their own account. The organization that made a code cannot accept it.
- **The job did not move to Handed over.** That happens when the client accepts the code, not when you create it. Nothing is sent until they type it in.
- **They want it again after accepting.** Create a second code. The first one is used up, and they keep the copy they already have.
- **Photos count against their storage, not yours.** They receive their own copies of the files.

TRAILS

Inspecting trails

The tap-only trail inspection in the Field App, and what its wetness answer does: a recent walk outranks the forecast in the trail-status engine, fading out over about ten days when it reads wetter and four when it reads drier.

Open a trail in the Field App and tap **Start inspection**. There are five questions, one per screen, and you answer every one with a tap. There is nothing to type, so it works with gloves on and in the rain. Add a photo on any question and it stays with that question. It does not end up in a pile at the end.

It is the same wizard as Inspecting structures, asking about a trail instead of a bridge. One of the questions does something the others do not, and the last section explains it.

The five questions

- **Is the trail usable right now?** This comes first, because it is the only answer that changes what somebody does in the next ten minutes. If the inspector is interrupted halfway through, you still have the answer that matters.
- **How wet is the tread?** Dry and dusty, firm and dry, damp but firm, soft or greasy, or puddles and running water.
- **Tread:** holding up, normal wear, rutting or braiding, or washed out.
- **Anything in the way?** Clear, blowdown you can get past, or blocked.
- **Drains and water bars:** running clear, silting up, blocked or ponding, or none on this trail.

Every answer carries its own grade of Good, Marginal or Poor, and the record takes the **worst** one. A trail with four good answers and a washout is not "mostly fine". It is a trail with a washout. The record says which answer set the grade, so a manager reading the queue knows what to bring before they leave.

Tread and **Anything in the way?** also offer **Doesn't apply**, for a section the question is not about. It grades nothing. Passing over a question cannot move the walk's rating either way, and it is never named as the answer that set the grade. It still stays in the record, and that is the point: "we looked, and there is nothing of that kind here" is worth as much as a grade.

The first two questions never offer it. Every trail is either usable or not, and every trail has a surface. The wetness answer is also what reaches the trail-status engine, so a walk that skipped it would tell the engine nothing. **Drains and water bars** does not offer it either, because **None on this trail** already says the same thing, and it carries a grade, so it says more.

What happens when you save

A record is kept. It holds who walked the trail, when, every answer and the photos. It is never edited, because a record you can go back and change is not evidence of anything. If you made a mistake, inspect again. That is also what happened on the ground.

The app offers to file work. It never files it for you. If the answers add up to Marginal or Poor, the app offers to **Create a maintenance task** with the failing answers already written in. You are standing at the problem, which is the easiest moment it will ever be reported, so it takes one tap. The box starts unticked. Under it, the app names any task already open on that trail, so you can see whether somebody has already reported the same thing.

The box lists the findings it will write in, so you can see what the task says before you tick it. A question you passed over is not among them.

Notes (optional) sits above both boxes. Use it for what you saw and what it will take, in your own words. The note belongs to that inspection and shows on that walk's row in the history. It does not change the task or reach anybody's task list.

The trail's own status does not change unless you ask. That is on purpose, and the next section explains why. It is also why an inspection is graded Good, Marginal or Poor instead of Open, Caution or Closed. A walk records what the ground is like. It is not a decision to close a trail, and the different words make it clear which of the two you are doing.

When you want both, the review step offers a second box: **Set the trail's status**, with Caution and Closed beside it. Like the maintenance box it starts unticked, and for a stronger reason. Filing a task adds work to a list somebody sorts through. Changing a trail's status is a public statement that changes what riders and hikers do today. Tick it and the trail changes as soon as the inspection lands, so it works with no signal like everything else here.

Two things are worth knowing before you rely on it. Only people who can already change trail statuses see it. That is the same permission as the Trail Conditions screen, so volunteers record the walk but do not set the status. And **an inspection can set Caution or Closed but can never reopen a trail.** Walking one stretch and finding it fine does not prove that whatever closed the trail has been dealt with. Reopening is still a decision somebody makes on the Trail Conditions screen, with the whole picture in front of them.

If your account has weather automation set to open **and** close trails, the box tells you so. The next weather check writes whatever the forecast says, so a status you set by hand can be replaced within the hour. Switch the setting to close only if you want your decision to stand.

The wetness answer goes to the trail-status engine

This is the part worth knowing.

If you use weather automation, TrailsIQ keeps a running estimate of how much water your ground is holding. It is built from months of daily rainfall, snowmelt and drying. See How to enable weather automation.

An inspection measures the thing that estimate is guessing at. So when somebody reports how wet the tread is, the engine stops estimating for that day and starts from what was seen. It then adds the real rain, snowmelt and drying since. The forecast is not thrown away. It just starts from a better place.

The effect is what you would want. Say the weather points to closing a network, and somebody walked one of its trails yesterday and found it firm and dry. The engine will recommend closing the others and leaving that one open. The recommendation says so in plain words: "*Conditions good. Trail wetness 12% from Dana's walk on Aug 30 …*"

Only the wetness answer does this. Skip that question and the inspection is still a full record. It simply tells the engine nothing, which is right. An inspection that skipped the question is not a report of average ground.

How long your walk outranks the forecast

A reading does not last forever. It fades out gradually instead of stopping on a set day, and it lasts longer in one direction than the other.

On the day you walk the trail, its conditions are your reading. Each day after, a little more of the forecast comes back. Eventually your walk no longer moves the number and stops being counted:

- A reading **wetter** than the forecast fades out over about **ten days**.
- A reading **drier** than the forecast fades out over about **four**.

It fades gradually so that conditions never change with no weather behind them. If a walk counted in full yesterday and not at all today, it would look like the app had changed its mind.

The difference between ten days and four is on purpose. Somebody reporting soft or greasy ground has stood in it. That report is specific, and nobody files it by accident. Somebody reporting firm and dry ground is describing the whole trail from wherever they happened to be. That is often the drained ridge, and rarely the low, wet corner that decides the call. Being wrong in the wet direction costs a ride. Being wrong in the dry direction costs tread that takes a season to grow back.

Two things follow that are easy to misread:

- **Rain since your walk still counts.** A dry reading does not keep a trail open through a storm. The storm is added on top of what you saw, and the trail closes.
- **"Wetter" and "drier" are compared with what the forecast would say today**, not with how wet the ground felt to you. A dusty reading in August usually agrees with the forecast instead of correcting it, and a reading that agrees is not holding anything up.

Walk the trail again and the new reading counts in full from that day.

Reading the history

In the Field App, open **Trails** and tap the trail. Its **Inspection** card shows the latest walk. Tap it to open every walk in its own sheet, newest first, with the rating each one came back with. The question that matters on the trail is whether it is worse than last time, so each walk also shows what changed since the one before. Worse is in red and better is in green. Tap a row to open the answers as they were worded that day, with the photos taken on each one. The history works with no signal from what your phone already holds, and it tells you when you are looking at the stored copy. A walk still waiting to upload appears in the list too, marked as waiting. So if you file one at the far end of a trail and the history looks unchanged, you can see the walk is still on its way.

You can still fix a recorded walk's photos from there. Expand the walk and each photo has **Remove photo**, with **+ Add photo** at the end. A stored photo is never quietly replaced. You add a photo or take one off, so the record shows what happened instead of looking as though it had always been that way. This part needs a connection.

On the trail's own page, an Inspections panel lists the most recent walks, newest first. Each shows the rating it came back with, who did it, what the tread was like and the answer that set the rating. Where an inspection created a maintenance task, the row links straight to it.

Trails → Inspections shows the same records across every trail at once. Open it when your question covers more than one trail: what the crew walked last month, what came back Marginal or Poor, who has been doing the walks, and where somebody found standing water. You can narrow it by date range, trail, rating or who walked it. **Needs attention** collects everything that came back Marginal or Poor, so you don't have to pick both.

Due for a walk, beside the list, names the trails nobody has inspected for a while. Trails that have never been walked come first, then the ones walked longest ago. The standard is 14 days. Change it under **How often each trail is walked** at the bottom of **Settings → Trail inspection questions**. A long-distance trail walked once a quarter might use 90 days, and a busy bike park might use 7. A trail shows in red once it has gone twice that long. The field app uses the same interval: a trail's page in **Trail Status** says when it was last walked and whether it is due, and the **My sections** card lists the trails you look after with the due ones first.

Answers read as they were **worded at the time**. If you reword a question next season, every past record still reads correctly.

Photos stay with the question they were taken on. The photo of the washout sits under *Tread*, not in a gallery where somebody has to guess.

Share in the header holds both exports. Each one gives you what you are looking at, filtered exactly as it is on screen. **PDF report** has one row per walk, on your organization's letterhead. Send it to a land manager who has asked what you have on record. **CSV spreadsheet** has one row per answer instead, so you can sort individual answers.

Asking your own questions

The middle of the form is set up in **Settings → Trail inspection questions**. Add a question and word it the way your crew talks. Give it between two and six answers, and mark each answer as Good, Marginal or Poor. The worst answer given sets the inspection's rating. Move questions up and down to change the order they are asked in. **Use the standard questions** puts our set back.

Two questions are always asked and are not in the editor. The page shows them anyway, so you can see the whole form. **Is the trail usable right now?** comes first because it is the only answer that changes what somebody does in the next ten minutes. If an inspector is interrupted, you still have it. **How wet is the tread?** is a measurement, not an opinion. The trail-status engine reads it to work out whether recent weather has left your ground rideable, so we set its wording and its levels.

Editing the questions never changes what has already been recorded. Every inspection keeps the questions as they were worded on the day it was done. A question you reword this season still reads correctly against last season's walks. A question you remove stays on the records that answered it. It just stops being asked.

Changes reach the Field App the next time it opens with a connection.

Common gotchas

- **The trail's status is yours to set.** An inspection recommends and records. It never opens or closes the trail by itself. Where weather automation is on, the automation sets the status, and if two things set it you could not tell which one changed it last.

- **A trail nobody has walked is scored on the forecast alone**, exactly as before. Nothing changes for an account that never inspects.
- **Filing late is fine.** Walk a trail with no signal and the inspection waits in the queue. It records the day you were on the trail, not the day it reached us, and the engine uses the day of the walk.
- **A back-dated record does not move anything backwards.** Catching up on a paper log will not overwrite the date of a more recent walk.

TRAILS

Jump calculator: sizing jumps, berms and rock gardens on a planned trail

Pick a spot on a planned trail and a type of jump. See how fast riders arrive, where they land and how hard it feels, whether the spot suits a jump, and the lip height, lip angle, gap and landing that suit it. Pick a turn and get the bank angle and height for a berm, or plan a rock garden and the rock to bring.

The **jump calculator** helps you size a jump for a spot on a planned trail. Pick where the jump goes and what kind it is, and it works out how fast riders arrive, where they land, how hard that landing feels, and whether the spot suits a jump at all. It also suggests a lip height, lip angle, gap and landing angle that suit the speed riders carry at that spot. It sizes berms and rock gardens too: see Berms and Rock gardens below.

On the dashboard, it is in a planned trail's **Structures** tab, under the map and elevation profile. The field app has the same **Structures** tab on a planned trail. Every jump, berm and rock garden you save is a planned structure of the Trail Feature type, listed with the trail's other structures and published with them. Saved jumps are also marked on the dashboard's elevation profile, so you can see where each one sits on the climb.

The sizing works with no signal, so you can stand at the spot and size a jump on the phone. If you save with no signal, the field app keeps the jump on the phone and uploads it when you are back on signal. It shows in the pending uploads list until then.

Adding a jump

On the dashboard, press **Add structure** and choose **Trail Feature**. Then press **Pick the spot on the map** and click the trail where the lip will be. The field app works the same way: **Add structure**, then **Trail Feature**, folds the panel down so you can see the map, and you tap the trail. You can also drag the **Where on the line** slider. The jump shows on the map as a numbered dot.

Then set:

- **Ridden toward.** Which way riders go through the jump. It starts on the downhill direction.
- **Ridden as.** The trail's rating sets how fast riders are willing to go. It starts on the rating the planner worked out for this trail, and you can change it for a jump line that is rated differently.
- **Type.** Tabletop, double, triple, roller, gap, step-up, step-down or drop. Each button shows the shape from the side. Doubles, triples and rollers are covered in Rollers, doubles and triples below, and drops in Drops.
- **Lip height and lip angle.** Both are measured from level. The calculator tells you how long the kicker comes out for that height and angle.
- **Table length or gap, and landing angle.** For a step-up or step-down, also how much higher or lower the landing is than the lip. A step-down is a step-up turned around: a built landing whose top sits below the lip. Its landing always keeps at least 1 ft (0.3 m on metric) above the trail. If you ask for a bigger drop than the ground allows, the calculator holds the landing there and says so.

Press **Save feature** to keep it. Saved jumps are listed at the top of the tab, numbered J1, J2 and so on, with the lip and how far along the line each one is. The tag on the right names the type of jump. Click a jump to open it, and click its row again to close it. How hard the landing feels is in the open jump.

Structures tab on a planned trail with a jump selected and its position, type and size controls

Suggested for this spot

As soon as you pick a spot and a type, the calculator suggests a lip height, a lip angle, a table or gap length and a landing angle for it. For a step-up or step-down it also suggests how much higher or lower the landing should be. It tries shapes until it finds the one that lands the most riders softly at the speed this spot gives them, leaning toward sizes that suit the trail's rating. Press **Use these** to copy the suggestion into the jump, and adjust from there.

The suggestion changes when you move the jump, change its type or direction, or change the rating, because those change the speed riders bring to it. Moving a size slider does not change it, so it always shows what suits the spot.

Fitted to your changes

Once you move a size slider yourself, a second box appears under the suggestion. It keeps every size you set by hand and works out the others to suit them. Set a steeper lip angle, for example, and it shows the lip height, table length and landing angle that go with that angle. Each number says what you have now, and the box says how a typical rider lands with the new sizes. Press **Use these** to copy them in. Your own settings stay as they are.



Build dimensions

Build dimensions draws the jump from the side at true scale, the way you would sketch it for whoever builds it. The tan shape is the dirt you add, and the dashed line is the trail as it is now. The drawing is labeled with the lip height, the lip angle, the kicker length and the table or gap.

Under the drawing are the numbers to take to the spot:

- **Lip height** above the trail, and **lip angle** from level.
- **Kicker length**, from the start of the ramp to the lip.
- **Transition radius**, the curve of the ramp. A tighter curve kicks riders up harder. *Straight* means the ramp has no curve.
- **Table length** or **gap**, and the **landing** angle and slope length. A drop with no built landing shows how far it is to the ground instead.
- **Footprint**, from the start of the ramp to the end of the landing.
- **Dirt**, a rough volume for a jump 4 ft wide (1.2 m on metric). Use it to plan how many loads to bring, not as an exact figure.

Build it

A radius is hard to hold with a tape, but a height at a mark is easy. **Build it** turns the drawing into two tables you can take to the spot, one for the kicker and one for the landing. The section starts closed. Tap **Build it** to open it.

- **Kicker** lists distances from where the ramp starts, ending at the lip. The kicker's radius and lip angle are shown above the table. The **Angle** column is what a straight board about 2 feet (60 cm) long reads when it is laid on the finished kicker at that mark.
- **Landing** lists distances from the top of the landing down to where it meets the trail. A drop with no built landing has no landing table.

Lay a tape along the trail from the start of each part and mark the distances. At each mark, shape the dirt to the height in the table, measured straight up from the trail as it is now. The marks are every 1 ft on a small jump (25 cm on metric) and spread out on bigger ones.

To make a template for the kicker, tie a string as long as the radius to a stake, swing it in an arc across a sheet of plywood and cut along the line.

Measure the angles with your phone

On a phone, each table has a button that turns the phone into an angle finder: **Measure the lip** and **Measure the landing**. Lay a straight board along the trail across the part, then lay the phone flat on the board with the screen up. The screen shows the board's angle from level and how far it is from the plan, in green when it is within a degree.

- Your phone may ask permission to use its motion sensor the first time. Press **Start measuring** and allow it.
- A phone case can tilt the reading. Lay the phone on something level and press **Zero on level** once. The phone remembers the zero.
- **Hold this reading** freezes the number, so you can pick the phone up and read it.

On a curved kicker, a board laid with its end on the lip sits along the curve just below the edge, so it reads a few degrees less than the lip itself. **Measure the lip** checks against what the board should read and says so on the screen.

Check the radius you built

A phone cannot measure a curve directly, but it can tell you what radius you built. On a curved kicker the angle grows steadily from the start of the ramp to the lip. A tighter curve gains angle faster and a looser one gains it more slowly.

Press **Check the curve** under the kicker's table and work along your tape marks:

1. Center the board on the mark. At the start and at the lip, put the end of the board on the mark instead, so the board stays on the ramp.
2. Lay the phone flat on the board and press **Save this mark**. The meter moves on to the next mark.
3. After three marks or more, the meter works out the radius from your readings and compares it to the plan.

Each mark's button turns green, amber or red to show how close its reading is to the plan, and the kicker's table gains a **Yours** column with your readings. A tighter curve than planned throws riders harder and more upright. A looser one throws them flatter and softer. Rework the marks that are furthest off, then check them again.

The phone cannot tell uphill from downhill. The first marks on a kicker that starts on a downhill trail can slope down, and their readings are matched to the plan's direction. Marks planned within 2° of level are left out of the radius.

How it works out speed

The calculator rolls three riders down the trail's own elevation to the jump: a cautious rider, a typical rider and a fast rider. Downhill speeds them up. Rolling on dirt, the air and climbs slow them down, and they pedal a little on the flat. Each rider also brakes:

- **for the trail's rating**, because riders on a green trail let the bike run slower than riders on a black one, and
- **for bends**, because nobody arrives at a tight turn at full speed.

The kicker itself costs speed too, because riders climb its height before they leave the lip.

Speed in and out

The **Speed in and out** box draws the whole thing in one picture: the run-in, the jump, the landing and the trail after it, with the speed a rider carries along it. It marks the speed at the start of the run-in, halfway, at the foot of the kicker and at the lip, then where the rider touches down, at the end of the landing and further on. Under the drawing it says how steep the run-in and the run-out are and what each does to the rider's speed.

The table under the drawing gives the same speeds for all three riders. Tap a rider to show their speeds on the drawing. Heights in the drawing are stretched so the slope is easy to see, and the box says by how much. Run-out speeds assume the rider neither pedals nor brakes after landing.

Reading the side view

The **Jump profile** shows the jump at true scale: the trail's ground, the kicker, the table or gap, and the landing. Each rider's path through the air is a dotted line in their own color: blue for the cautious rider, amber for the typical rider and red for the fast rider. A label points to where each one lands:

- **short** means they come up short and land on the table, and by how much.
- **lands in the gap** or **hits the landing** means they come up short on a gap.
- **drop**, as in *Typical · 1.6 ft drop*, is how hard the landing feels. It is the height of a drop to flat ground that lands just as hard, not a distance.
- **flat** means they overshoot the landing onto the flat.

The **Feels like** meter beside it turns the landing into the height you would have to drop to flat ground to land that hard, and calls it soft, firm or harsh. A rider who lands on a landing that matches their path feels very little. A rider who overshoots onto the flat feels nearly the whole fall. The dashed line marked *knee* is about 5 ft, where most riders' knees start to object. Hover over or tap a rider in the list under the profile to see their reading on the meter.

Jump profile of a tabletop with three dotted rider paths and the Feels like meter

Is this the right spot?

Under the profile, the calculator lists anything about the spot worth knowing, worst first. Each item is tagged **Problem**, **Check** or **Good**. It checks for:

- **a turn before the lip.** Riders need about a second of straight trail before the kicker, or they reach the lip still turning.
- **a turn after the landing.** Riders need room to settle after they land, and more of it the faster they land.
- **a bend through the jump itself.** Riders fly straight, so the jump needs a straight piece of trail.
- **a climb into the lip or after the landing.**
- **speed that does not match the jump.** It tells you when a typical rider arrives too slow to clear it or fast enough to overshoot it.
- **a cautious rider who does not clear a gap.** A tabletop catches them instead.
- **a jump that is big for the trail's rating**, and gaps on green trails.

How speed changes the landing

The **How speed changes the landing** chart shows how hard the landing feels at every speed into the jump. It is not a picture of the trail. Left to right is the speed a rider hits the lip at, and the line is how big a drop the landing feels like at that speed, so it climbs because faster riders land harder. The three colored lines mark how fast each rider arrives at this spot. The shaded band is the speed window where riders land cleanly. Slower than that and they come up short, and faster than that they overshoot and land harder. The three riders are marked on it, so you can see how much room each one has. Hover over the chart to read any speed.

Same jump, just faster shows the jump twice, at the typical rider's speed and 10 mph faster (15 km/h on metric). Each card says how the landing feels and how far past the lip the rider lands. Use the **−** and **+** buttons to change the difference. A few miles per hour is often the difference between a soft landing and a hard one.

How speed changes the landing chart with the clean speed window shaded

Ride it in 3D

Press **Ride it in 3D** in the **3D** box, in the column beside the map, to watch a rider go down the planned line. In the field app, the button is in the **3D** card on the planned trail's page, under the elevation chart and the sustainability score. A published trail has the same two buttons, at the top of the trail's page and in the field app under **3D** on the trail's panel. They build the trail features and bridges saved on that trail. The 3D views need a connection to load the trail and the ground under it. They work on lines up to 25 kilometers long. A longer route opens with a note saying so, and you can split it into sections and open each one. The trail is drawn on the real ground from the side, so you can see how steep it is and where it rolls. The rider moves at the same speed the calculator works out for the line: they pick up speed on the steep parts, brake before tight turns and lean into them. The jumps, berms and rock gardens you saved are built on the trail.

At each jump the view slows down and moves beside it. You see the takeoff speed, the rider's path through the air, how far they fly and where they touch down, with the same result the calculator gives for that rider. The card in the corner adds the airtime, the highest point above the ground and how hard the landing feels.

Berms are built to the same shape the Berm panel draws, with the bank easing in and out through the turn. The rider rides up the face and carries the speed the panel works out, instead of braking for the turn. If the bank is too flat for that speed, the rider brakes to the fastest speed the bank holds, and the ride says so. The view slows down for a berm too and looks at it from the inside of the turn, and the card shows the bank, the speed through the turn, the speed a flat turn would allow and the range of speeds the bank holds.

A roller is rolled, never jumped, so the rider follows it over the top. Doubles and triples work the same way as in the calculator: a rider who rolls through the dips there rolls through them here, and only a rider fast enough to leave the lip flies it. The card shows the speed over the top, the range of speeds that roll it cleanly, and where the wheels would leave the ground if the rider is going too fast for it.

A rock garden is laid out rock by rock, in the same places the calculator plans them. The rock slows riders down, by the same amount the calculator shows, so a rider comes out of a garden slower than they went in.

A bridge on the trail is built across the gap board by board, from its materials list. The ride runs the same bridge calculator that opens from the bridge, with your organization's lumber and spacing, so the decking boards, the gaps between them, the stringers under the deck and the footings at each end are the size and number the list asks you to buy. The bridge sits where its pin is, runs along the trail for its full length, and its deck goes straight from the trail at one end to the trail at the other. The ground under it is kept clear of the beams, so you see the creek or the dip it crosses. The rider rides across the deck, and the ride says **Crossing** with the bridge's name while they do.

The ride builds a bridge you planned on this line, and a bridge already built on the trail this line was published to or brought in from. A bridge needs its length, width, decking thickness and decking board width filled in, because those are what its materials list is worked out from; the ride names any bridge it leaves out for missing them. A jump, berm or rock garden saved on top of a bridge is left out and named too.

The controls sit in one bar along the bottom, so the trail gets the rest of the screen. It shows the play button, the speed, how steep the trail is under the rider (an up or down arrow and a percentage, measured over 25 meters the way the trail's own grade figures are), the time and distance, the profile of the line and a button for each feature. It stays in place while the ride plays, so the speed is always on screen.

- **Follow rider** at the top keeps the camera beside the rider. **Whole trail** shows the full line, and you can drag to turn it.
- The speed button sets how fast the ride plays: half speed, real speed, twice or four times as fast. On a phone, tap it to step through them. While the ride plays slower than real life, a **Slow motion** badge says how much slower.
- Tap the profile to jump to any point, or tap a feature's name to watch it again.

The rest is under **Options**:

- **Cautious, Typical and Fast** switch the rider, the same three riders the calculator uses.
- A two-way line starts at the end it was drawn from, and the swap button rides it the other way. A one-way line is always ridden the way it goes.
- **True height, 1.5× and 2×** set how much the heights are stretched. The ride opens at 1.5× so slopes are easier to read. The numbers on the screen are always the real ones.
- **Slow down at jumps and berms** turns the slow motion on or off.
- **Color the trail by speed** paints the trail blue where the rider is slowest and red where they are fastest.
- **Color the trail by grade** paints it by steepness instead, with a key along the bottom of the view.
- **From the top** starts the ride again.

A jump or berm is only built in the direction it was saved for. When the ride leaves something out, a dot shows on **Options**, and the sheet names what was left out and why. If the line's own elevations do not match the terrain around it, the ground is shaped from the line instead, and Options says so.

The 3D drawing

Press **3D drawing** beside **Ride it in 3D** to see the whole trail as a line drawing on the same ground, with the contour lines of the hillside behind it. There is no rider. The view is yours to move: drag to turn it, pinch or scroll to zoom, and drag with two fingers (or the right mouse button) to move along the trail.

- The tread is drawn with both edges, a line across it every meter and its center line. Every tenth cross line is heavier, so you can count distance along the trail.
- Each berm is drawn to the same cross-section the Berm panel shows, every half meter through the turn. Lines run along the berm wherever its shape changes: where the dirt starts, where the rounded foot meets the straight face, the top edge and the back of the berm. White lines across it mark where the bank starts, where it reaches its full angle, where it leaves it and where it ends. Those are the places to set out stakes.
- Each jump is drawn with its top edges, its sides and a line across it every half meter, with brighter lines at the toe, the lip and the ends of the landing.
- Each rock garden is outlined on the tread with a white line where it starts and ends, and every rock is drawn where the calculator places it, at its real size and height.
- Each bridge is drawn piece by piece: every decking board, every stringer and the footing at each end, at the sizes and spacing its materials list gives. The tread stops at each end of the bridge, because the deck is the trail across it.

- **Wireframe and Solid** switch how it is drawn. Wireframe is the line drawing described here. Solid draws the trail, its features and the ground as solid shapes, the way the ride does. The drawing opens in Solid until you pick Wireframe, and the app remembers your choice on that device.
- In Solid, **Speed colors** colors the trail by riding speed. It starts off, so the trail is drawn as plain dirt.
- In Solid, **Grade colors** colors the trail by how steep it is: green under 10%, yellow from 10 to 15%, orange from 15 to 20% and red over 20%. These are the same bands as the Steepness card on the trail page. While it is on, a key along the bottom of the view shows what each color means. Speed colors and grade colors take turns, so turning one on turns the other off.
- The ground in the 3D views is shaped from terrain map data, but the grade readout and the grade colors come from the trail's own saved elevations, measured the same way as on the trail page. So the steepest stretch reads the same number in both places, even where the ground drawn around it is a little smoother or rougher.
- **Light, Dark and Satellite** set what the drawing sits on: the light sky, a dark background with dark ground, or aerial photos laid on the ground. Satellite is on the Core plan and above, in the United States only, and the photos cover the ground near your trails. Where there are none yet, the ground is drawn plain and the drawing says so.
- The features are listed under the drawing in the order you reach them along the trail. Each berm's chip gives its bank angle, and its label on the drawing gives its name.
- Tap a feature's name to fly to it, and **Whole trail** to go back out. **True height, 1.5× and 2×** stretch the heights the same way they do in the ride.

Like the ride, the drawing shows the features saved for one direction at a time, and the swap button shows the other.

Ride it in 3D beside a tabletop, with the takeoff speed, the flight and the touchdown marked

Rollers, doubles and triples

These three are built to be rolled as well as jumped, so slower riders can ride them without leaving the ground.

- **Roller.** A smooth hump with no lip. Riders roll up and over it and pick up speed on the way down. Set its **Height** and its **Length, base to base**. A longer roller is rounder over the top, so faster riders stay on the ground.
- **Double.** A tabletop whose table dips down between the lip and the landing. Fast riders jump the whole length, as they would a tabletop. Slower riders roll down into the dip and up over the landing.
- **Triple.** A double with a small roller in the middle of the table, so the table has two dips with a hump between them. The hump comes back up to the height of the lip.

For a double or a triple, **Lip to landing** is the length of the table, and **Dip depth** is how far the dips sit below the lip. The dip depth follows the lip height until you set it yourself. **Follow the lip height** puts it back.

The last hump of a double or a triple rolls over into the landing in a rounded edge, about 60 centimeters either side of the top of the landing, the way you would shape it with a shovel. Past that the landing is the straight ramp at the angle you set. The drawing, the build tables and the 3D views all show the same rounded shape, so the heights you measure match what you see.

Rolled or jumped

For these three, the calculator rolls each rider over the shape as well as flying them off the lip. A rider rolls cleanly when they are fast enough to get over each hump and slow enough that the lip or the top of a hump does not throw them into the air. The panel gives the range of speeds that roll it and, for a double or a triple, the range that clears it when jumped.

Between those two ranges there is usually a band of speeds that is too fast to roll and too slow to clear. A rider in that band is thrown off the lip and lands in the dip. **Is this the right spot?** warns you when the typical rider arrives in that band. Moving the jump, or changing the dip depth or the table length, moves the band.

For a roller, the suggestion is the shortest roller a typical rider can roll at the speed this spot gives them. A faster rider may get light over the top, and the calculator says so. That is part of the fun of a roller.

The build sheet tables the heights of the whole shape, including the dips and the way down a roller, so you can mark it out with a tape from the start of the kicker.

Drops

A drop has no kicker. Riders roll along a level runway to a straight edge and drop straight down, so there is no lip angle and no curve to build. The calculator draws about 8 ft (2.4 m) of level runway before the edge, and a ramp up to it at 18° where the trail is lower than the edge. Set the **Drop height**, which is how far the edge stands above the trail.

Drop off says what the edge is made of:

- **A natural rock** is a ledge or a boulder that riders roll off.
- **A wooden deck** is a built deck on posts with X bracing under it.

The two ride the same way. The setting changes the side view under **Build dimensions** and the 3D ride, so the drawing you hand a builder shows the rock or the deck you plan to use.

Building up the landing

Off a drop onto flat ground, every rider feels the whole height. When the ground below is too flat for a smooth landing, **Is this the right spot?** says so, and the suggestion builds the landing up instead of making the drop smaller. A drop of about 3 ft or less lands on the ground as it is.

Choose **Build a landing** to add one yourself. Then set how far out from the edge the landing starts, how far below the edge its top sits, and its angle. The landing is drawn in tan as dirt to build, and **Build it** tables its heights like any other landing. Choose **The ground as it is** to take it away again.

Berms

A berm is a banked turn. Choose **Berm** as the type and pick a spot anywhere in a turn. You do not need to find the apex. The calculator reads the line on both sides of your spot and finds the whole turn: where it starts, where it ends, how far it turns and its radius. The turn is drawn on the map as a dark band, and the numbered dot stays where you picked.

If the turn it found is not the one you mean, move **Turn starts** and **Turn ends**. **Use the turn the line shows** puts them back. An S-bend is two turns, so it takes two berms, one for each way the trail bends.

The bank and the height

The calculator rolls the same three riders through the turn. On a flat turn riders brake for the corner. A berm lets them keep their speed, so the berm is sized for the speed they carry with it. Each rider gets the bank angle that holds them through the turn without needing any sideways grip from the tires. Faster riders and tighter turns want a steeper bank.

- **Bank angle** starts on the typical rider's angle. Tires grip, so a bank holds a range of speeds rather than one. The green band shows that range for the bank you set, with a dot for each rider. A rider who is too fast for the bank slides up the face, and one who is too slow slides down it.
- **Berm height** is the outside edge of the berm above the trail as it is now. **Face width** is the length of the banked face from the tread up to the top. Round off the foot where the trail meets the face, so a wheel rolls up onto the bank instead of hitting a corner. The cross-section shows how big a radius to give it. The bank angle is for the straight part of the face above it.
- **Turn radius** comes from the line. On a line drawn with a few clicks, a turn can be one sharp corner, so the radius is a guess, and the calculator says so. Pace out the turn you will build and set the radius yourself.

The calculator warns you when a turn is too tight to ride well at speed, when riders arrive too fast for any berm you would build, and when a turn is gentle enough that it barely needs one.

Build the berm

Like a jump, a berm has a **Build it** table that stays closed until you open it. Lay a tape along the middle of the trail from where the bank starts. At each mark the table gives the bank angle and the height of the outside edge. The bank builds up into the turn, holds through the tightest part and eases off on the way out.

On a phone, **Measure the bank** turns the phone into an angle finder. Lay a straight board about 2 feet (60 cm) long across the straight part of the face, above the rounded foot, and lay the phone on it. **Check along the berm** walks you through the marks one at a time and tells you which ones are off.

Rock gardens

A rock garden is a stretch of trail set with rock. Choose **Rock garden** as the type and pick the spot where it should start. It runs from there in the direction riders go, for the **Length** you set. The stretch is drawn on the map as a dark band.

The rock size and the width

- **Tallest rock above the trail** starts on what the trail's rating allows. A green trail keeps rocks to about 2 inches (5 cm), a blue trail to about 8 inches (20 cm) and a black trail to about 15 inches (38 cm). These follow the IMBA Trail Difficulty Rating System. The calculator tells you when a rock is taller than the rating allows, and when it is so small that riders will hardly notice it.
- **Width** starts wider on easier trails, so riders have room to pick a line.
- **Rock size across** starts on a size that suits the rock height: a little wider than the rock is deep. Set it to the rock you can actually get. Bigger rock covers the same share of the tread with fewer rocks, and the label shows how many that is. A rock is never narrower than it stands out of the trail, because a rock like that is a post and levers itself loose.
- **How much rock** sets how much of the tread is covered. Scattered is a rock here and there, set is about half the tread, and packed is rock nearly edge to edge.

The calculator also reads the stretch itself. It warns you when the stretch is too steep to ride down through rock, when riders come in fast and have to brake hard for it, when it sits in a tight turn, and when it is on a climb steep enough that riders will stall in it. Rock is also good armor on a steep trail, and the calculator says so when the grade calls for it.

How riders slow down

Riders slow down in a rock garden, and how much depends on the rock. Taller rock slows them more, and so does rock set close together: scattered rock leaves clear lines between, packed rock leaves none. Riders on a harder trail take the same rock faster than riders on an easier one. **Riders through it** shows, for each rider, the speed they come in at, the speed they slow to in the rock and the speed they leave at. Riders brake before the first rock, and nobody is slowed below walking pace by the rock alone.

Riders carry that lower speed out of the garden, so a jump or berm after it is sized for slower riders. The 3D ride slows through the rock the same way. A rock garden on a climb also takes momentum out of riders, and the calculator warns you when they are likely to stall in it.

Rock to bring

The calculator works out how many rocks the stretch needs, how big each one is and how much they weigh together. The side view draws every one of them at its size, so the picture shows the same number the count does. Rocks farther across the trail are drawn lighter, behind the near ones. Each rock is set at least half into the ground, so it is about twice as deep as it stands out of the trail. Rock that sits on top of the ground rolls out the first time somebody rides it. Open **Build it** for the steps: turn water off the trail first, work from the bottom up, and set the first and last rocks lower than the rest.

The count and the weight are estimates to plan a haul with. Real rock comes in every shape, so pick each one on site to suit the line riders will take.

Common gotchas

- **These are estimates.** They come from the trail's elevation, its rating and typical riders. Real riders differ, and so do surfaces and berms. Ride the spot or watch a few riders through it before you build, and shape the landing to what you see.
- **The elevation comes from the planned line.** A small kicker is smaller than the detail in terrain data, so the ground under the jump is a smooth version of the real ground. Look at the spot before you rely on the numbers.
- **A jump keeps its distance from the start of the line.** If you redraw the line, open the jump again and check that it is still where you want it.
- **Hips are not modeled.** The calculator works along the line of the trail.
- **Pumping is not modeled.** A rider who pumps a roller or a dip carries more speed out of it than the calculator shows. The rolling speeds assume no pumping, no pedaling and no braking.
- **A berm before a jump does not speed up the jump's riders.** Riders are slowed for every bend on a jump's run-in as if the bend were flat. A jump just after a well-built berm can see faster riders than it shows.

TRAILS

Winter operation and grooming

Switch between summer and winter operation, see which trails need grooming from the forecast, hand grooms to a groomer, and print a winter map for each network.

TrailsIQ runs in one of two seasons, **summer operation** and **winter operation**. In winter, grooming comes out everywhere it belongs: a **Grooming** screen under Operations, grooming status on the field app, on TrailsIQ Go and on your website, and a printable winter map for each network. In summer all of it is put away, so a summer crew never wades through snow settings and a summer visitor never reads that a trail was "not groomed".

The **Winter grooming** module turns the whole feature on or off. It is on by default for trail organizations; find it under Settings → Workspace modules.

Switching seasons

Open **Settings → Winter operation**. The card at the top says which season you are in and since when, and one button switches to the other.

Below it you can set **Winter starts** and **Winter ends** dates. Set both and the season changes on its own every year, early on those mornings in your organization's time zone. Only the month and day are kept, so you set them once.

The dates and the button work together. Switch by hand whenever the snow comes early or melts late. A switch you make by hand stays in place until the next date comes around. If you switch back to summer on the morning of your start date because the snow has not arrived, the app does not put you back in winter an hour later.

What each trail does in winter

Every trail gets a winter role on **Grooming → Winter trails**:

- **Groomed:** on the grooming list, checked against the forecast, and drawn in its own color on the winter map. Pick what a groom sets: *Classic*, *Skate*, *Classic + skate*, *Fat bike*, *Snowshoe packed* or *Multi-use packed*.
- **Open, not groomed:** open in winter, never on the grooming list.
- **Closed for winter:** grayed and labeled **Closed for winter** on the field app, on TrailsIQ Go, on your website's trail map and on the winter map.

A trail you have not set reads as open. Tick **Winter only** for a trail that exists only in winter, like a ski loop laid across a summer field: it is hidden from the public in summer and appears when you switch to winter.

The page takes bulk changes too. Select several rows and set them all at once, which is the quick way through a large network at the start of the first winter.

Tonight: what needs grooming

Operations → Grooming opens on **Tonight**, a list of every groomed trail with a forecast chip beside it:

- **Groom tonight:** enough new snow has fallen since the last groom, or the longest gap between grooms has passed, and tonight is cold enough to set up.
- **Groom after the snow:** more snow is on the way and a groom now would be buried by morning, so the chip names the night to go out.
- **Hold:** too warm. A groom tonight would turn a soft base to slush.
- **Not enough snow:** there is not enough on the ground to groom at all.
- **Not needed:** recently groomed and nothing coming.
- **No forecast:** the forecast for that ground has not been fetched yet. The check says so rather than guessing.

Each row also shows when the trail was last groomed and by whom, and whether somebody has already been handed it tonight.

Handing a groom to a groomer

Tick the trails that need doing. A bar appears at the foot of the screen: pick the groomer, the night, and an optional note ("*start from the north lot, the gate is locked*"), then press **Assign**.

Each trail becomes a grooming task for that person, one for each trail each night. Assigning the same trail twice for the same night updates the task you already have rather than filing a second one. The groomer gets one notification listing their trails, not one per trail.

On the field app, a groomer sees a **My grooming** card on the trail status screen with tonight's trails on it. Tapping **Done** on a trail marks it groomed, closes the task, and records the groom in the log, exactly as setting it **Groomed** from the trail sheet does. Finishing a task needs a connection. Grooming a trail from the trail sheet still works offline.

Grooming tasks stay off your ordinary maintenance list, the trail health numbers and the public reports, so a busy winter does not bury the summer backlog. **Remove from tonight** takes a task back off the list before anybody has done it. A groom that is already done stays in the record.

The forecast, and changing what it checks

Grooming → Forecast shows the next days for each network: hourly snow, temperature and wind as a strip, and a day-by-day table under it. The forecast comes from the same weather your trail conditions already use. It needs weather turned on for your organization; see How to enable weather.

Every number the check uses is yours to change, under **Settings → Winter operation → Forecast check**:

- **New snow that needs a groom** (default 5 cm) — fresh snow since the last groom before a trail is due again.
- **Snow needed to groom at all** (default 10 cm) — below this on the ground, the check says there is not enough base.
- **Wind that drifts snow** (default 40 km/h) — gusts above this with loose snow on the ground can drift exposed sections in.
- **Too warm to groom** (default 2 °C) — above this overnight, the check says hold.
- **Cold enough to set up** (default −2 °C) — after a thaw, groom once it drops below this or the trail sets up icy.
- **Longest gap between grooms** (default 4 days) — a groomed trail is due after this long even with no new snow.
- **How far ahead to look** (default 36 hours) — how much of the forecast the check reads when it picks the best night.

Organizations in the United States see inches, °F and mph. Each field has its own **Reset**, and **Reset all to defaults** puts every one back.

The afternoon heads-up

At 4 pm your time, on a day when the forecast says at least one trail needs a groom, the people who groom or plan grooming get one notification naming those trails. Nothing is sent on a day when nothing needs doing, and it goes out at most once a day.

Turn it off for yourself under the field app's notification settings, **Grooming forecast**. That switch, and **Trail grooming changes**, only show in winter. **Tasks handed to you** covers a night of grooming somebody assigns you, in any season.

Winter maps

Grooming → Maps draws one winter map per network: groomed trails thick in their own color, open trails thinner, and closed trails as a gray dashed line labeled **Closed for winter**. Tap a trail for its grooming type and when it was last groomed. **Print** gives you a clean page for the trailhead kiosk or the warming hut wall.

The grooming log

Grooming → Log lists every groom this season: when, which trail, who, and whether it came from a task, the field app or the dashboard. The cards at the top count grooms per trail; tap one to see just that trail.

Who can do what

Two permissions, both under Settings → Roles & permissions:

- **Mark trails groomed:** set a trail **Groomed**, **Partial** or **Not groomed**, and finish grooming tasks. It does not let somebody open or close a trail, so a contracted groomer can have it on its own. Anyone who can change trail conditions can groom as well.
- **Plan grooming:** assign grooms, set each trail's winter role, and use the winter maps.

Switching seasons and changing the forecast check stay with owners and managers.

What your visitors see

In winter, your website's grooming block and trail map, and your organization's page in TrailsIQ Go, show each trail's grooming and its grooming type. A trail counts as **freshly groomed** for 24 hours; after that the website still shows **Last groomed** with the day, so a visitor can tell a trail groomed yesterday from one groomed last week. Closed trails are grayed with **Closed for winter**, and winter-only trails appear.

In summer the grooming block is not shown on your website at all and winter-only trails are not listed.

MAINTENANCE

How to create a maintenance item

File maintenance tasks from the field app, a climbing route or a public report. Covers every field on the form, reviewing reports from the public, how open tasks show their age on the map, warning the public about hazards, and filtering and exporting.

Maintenance tasks are how you keep track of everything that needs doing on a trail: downed trees, erosion, broken bridges, faded signs and drainage that has failed. Everyone on your crew can file one, and so can trail users if you turn that on. The dashboard is where you manage the list.

What is a maintenance task?

A maintenance task is one job on one trail, or at one point on the map. Every task has a title, a description, a location, a status and a priority. You can also link it to a specific trail, structure (such as a bridge, kiosk or boardwalk), climbing route, lift or project. That way a "fix the bridge on the North Loop" task can be found from either side.

Every task also keeps a history: who filed it, who changed its status, who added photos and when. That history is permanent. Even when a task is deleted, its history is kept, for legal and accountability reasons.

It also has a **discussion**, for what the history can't hold: what you found when you got there, what you tried and what it will take. See Discussing a maintenance item.

You can assign a task to one person. Pick them under **Assigned to** when you edit the task, on the web or in the field app. The field app also asks on the last step of filing a task. They get a notification on their phone and an email with the task's trail, priority, **Do by** day and a link to open it, and their name shows at the top of the task. Both follow the **Tasks handed to you** switch in the field app's notification settings, so somebody who turns it off gets neither. The link at the foot of the email turns the same switch off for anyone who does not use the app. Leave it empty and the task stays on the shared list, where anyone with the right role can pick it up. The **Assigned to** filter on the Maintenance list narrows it to **Me** or to one person, so crew members can see their own list in one tap.

You can give a task a day to be done by. Set **Do by** when you edit it, on the web or in the field app. The task shows *Do by* with the date at the top. Once that day has passed and the task is still open or in progress, it says **Overdue** instead, and it counts toward the overdue figure on the Overview page. To see every late task at once, open **Filters** on the Maintenance list and pick **Overdue** under **Scheduled**. In the field app, **Filters** on the Maintenance tab has a **Show** group with **Assigned to me** and **Overdue**. Days are counted in your organization's own time zone, so a task due today never shows as late before the day is over.

Statuses and priorities

Every task has one of four **statuses**:

- **Open:** filed but not started. This is where anything a crew member files starts.
- **In progress:** someone is working on it.
- **Resolved:** done. It is kept, with its history, and included in reports.
- **Pending review:** sent in by a trail user through TrailsIQ Go. It is hidden from the main map and list until a manager approves or rejects it.

Tasks also have a **priority**: Critical, High, Medium (the default) or Low. The priority is for information. You can filter and sort by it, but it doesn't block anything.

How open tasks show their age

Open tasks change color on the map and in every list as they get older, so a month-old backlog looks different from a task filed this morning. The color moves through five weekly steps:

- **This week (0 to 6 days):** green, labeled **NEW**.
- **1 week old (7 to 13 days):** yellow, labeled **OPEN**.
- **2 weeks old (14 to 20 days):** orange.
- **3 weeks old (21 to 27 days):** red.
- **4 weeks or older (28 days and up):** deep red.

The colors only apply to open tasks. Once someone starts a task and its status changes to *In progress*, its marker turns blue, however old it is, so an old task that is finally being worked on doesn't stay red. *Resolved* tasks fade to gray, and *Pending review* tasks are gray too.

In the field app, a small color key sits under the Status filters on the Maintenance filter page, with the same steps and colors. The marker on the map, the status label in the list and the chip on the sliding task cards all use the same colors, so a glance at any of them tells you how old the backlog is.

Creating one in the field app

In the mobile field app, tap the **Maintenance** tab, then the big round **+** button in the bottom right. It is labeled **"Create New Task"**.

The wizard takes you through these steps:

1. **Issue type:** pick from the chips: *Blowdown, Water, Erosion, Drainage, Signage, Surface, Overgrowth, Broken structure, Trash, Hazard, Service / Repair* and *Other*, plus climbing types if your organization has climbing turned on. If you pick *Broken structure*, the wizard asks which structure later on.
2. **Location:** the app starts at your GPS position, and you can drag the pin if you are off the trail. The trail is picked up from what is nearby. For most types you need a trail before you can go on, because a task with no trail is missing from that trail's own list of open work.
   Service / Repair is the exception. It is work on something you own, not on a stretch of trail. A machine might be in a shed, on a trailer or in somebody's yard, so a pin on its own is enough. You still have to drop one, because a task with no location never appears on the map.
3. **Photos:** take photos or pick them from your camera roll. They are optional but strongly recommended, because the person doing the work needs to see what they are walking to.
4. **How bad is it?** Two questions, *is anyone likely to get hurt?* and *can people still get past?*, which together set the priority. Under the answers is a **Warn the public** switch. It is off unless you turn it on, and it isn't offered when the answer is *No risk*. See Warning the public about a hazard.
   This step is skipped for Service / Repair, because neither question makes sense for a machine. That type starts at Medium, and you can change the priority on the task afterwards.
5. **Details:** Title (optional), Project (optional), Structure (only if you picked *Broken structure*), Description ("What's going on?") and **The work**: hours, people, tools and materials, all optional. The priority comes from the previous step. To change it after filing, open the task and edit it.

If you have no connection, the task waits in the app's queue and sends itself later. Photos upload separately, after the task is created.

Starting from a machine is quicker. **Log service or repair** and **Report a problem** on an equipment item open the same wizard with the type already set and the machine attached. The location and urgency steps are skipped, because the item you tapped already answers them, and the pin comes from the machine's home location.

Creating one from a climbing route

If your organization has climbing turned on, every climbing route has a **Report issue** button on its card. Tapping it opens the maintenance form with the route, location and default type already filled in. You just add a title and description and save.

Tasks linked to a route also show on the route's own maintenance list, so anyone looking at the route sees them next to its stats and photos.

Public reports from trail users

If you have turned on **public reports** in Settings, trail users can send reports through TrailsIQ Go, with no account needed. The app asks whether they are at the spot or working from an earlier photo, takes or reads the photo, works out the trail, and asks what's going on. See *TrailsIQ Go* for

the full flow.

Every public report arrives as *Pending review*. It doesn't appear on the public map, in the main list or on the trail's page until a manager approves it. This is your chance to check reports first. See *the pending-review list* below.

Managers get a notification in the app as soon as a public report arrives. If they have turned on the *Public reports* email preference, they get an email too. The number of reports waiting shows as a red badge on Maintenance in the sidebar.

Every field on the create form

The field-app wizard covers every field a task can have, spread across its steps. Public reports use fewer. The labels below match what you see on screen.

- **Title:** optional, plain text (the placeholder is "*Downed tree at junction*"). This is what shows in the list and in notifications. If you leave it blank, the wizard fills in a short title from the type and trail, so there is always something readable in the list.
- **Description:** optional, but strongly recommended. Say what is wrong, what is needed and anything else that helps. This field is for the person doing the work. The more they know, the less back and forth there is about what tools to bring.
- **Trail:** an optional dropdown, set to "*— not on a specific trail —*" by default. Tasks without a trail go on the general maintenance list. Tasks with a trail also appear on the trail's page.
- **Type:** a set of chips. Every organization starts with *Blowdown, Water / Mud, Erosion, Drainage, Signage, Tread Repair, Clear Corridor, Broken Structure, Machine Work, Adaptive Improvements, Trash / Litter, Hazard / Wildlife, Service / Repair* and *Other*, plus four climbing types when climbing is turned on. Under **Settings → Issue types** you can add your own types, rename any of them, hide the ones your team never uses and decide which TrailsIQ Go may file a report under. A hidden type is not offered when anyone files or edits a task, on the web, in the field app or in TrailsIQ Go. Tasks already filed under it keep it, and it stays in the type filter while any of them are left. Picking **Broken Structure** shows the **Linked structure** field.
  - **Broken Structure and Service / Repair answer different questions.** The first means *this is broken*. The second means *this is ours to keep running*, such as a gate that no longer latches, a kiosk panel or a machine due for a service. One is something that went wrong, and the other is upkeep on a schedule. If you file upkeep as a breakage, that difference is lost.
  - **TrailsIQ Go does not use Machine Work, Adaptive Improvements or Service / Repair at first.** Somebody walking past can't tell whether a machine is due for a service, and a choice a reporter can't judge only collects guesses. You can turn any of them on with **Use for TrailsIQ Go reports** in the same settings screen.
- **Priority:** a dropdown with *Critical*, *High*, *Medium* and *Low*. Medium is the default.
- **Linked climbing route:** a dropdown, only shown when your organization has climbing. It is already filled in when you come from a route's "Report issue" button.
- **Linked structure:** a dropdown, only shown when the type is *Broken Structure*. It links the task to a bridge, kiosk or other structure, so it shows on that structure's own page.
- **Location:** required. It is filled in from the map or from your GPS in the field app. You can also enter it by hand, for example when you are at a desk logging something somebody phoned in.
- **How the location was set:** TrailsIQ records whether the pin came from a GPS fix or was placed by hand, so later reports can tell the two apart.
- **Reporter:** optional. The name of whoever spotted the problem. The person who filed the task is always recorded (you, or "Anonymous" for public reports). This field is for a *different* name, such as a caller who phoned it in.
- **Est. hours** and **Crew · people:** optional, under **The work**. How long the job will take and how many people it needs at once. The app multiplies them into person-hours under the two boxes. If you leave one blank, it says so instead of showing zero, because a job with no estimate and a job estimated at nothing are different things on a planning screen.
- **Tools needed** and **Materials needed:** optional lists, also under **The work**. **+ Add tool** and **+ Add material** open your inventory. Search it, filter by category, tap an item to add it, and use the stepper to set a quantity. Anything you type that isn't in your inventory is added as its own row, labeled **Free text**, so nobody has to add a saw to the inventory first. Adding a tool here doesn't reserve or move any stock. It is a packing

list, not a checkout.

What happens after you file

- The task's history records who filed it and when. The same history records every later status change and every photo added.
- If the task came in as *Pending review* (a public report), every active owner and manager gets a notification in the app. Those who have turned on the *Public reports* email preference get an email too.
- If the task came in as *Open* (filed by your team), nobody is notified. The task appears on the Maintenance list, and the crew picks it up next time they look.
- Any later status change appears in your organization's activity feed. Members who have turned it on also get it as a push notification and an email.

Editing and status changes

Open the task's page and click **Edit** in the top right, or tap the pencil on its row in the list. Anybody on your team can edit a task, from the task's panel on the web or its **Edit** screen in the field app: the title, type, priority, location, project, description, who it is assigned to and its **Do by** day. Three changes need the **Triage maintenance reports** permission, which owners and managers have by default: reopening a finished task, approving or rejecting a report from the public, and turning **Warn the public** on or off.

Quick status changes. Every row in the list has buttons to mark it *In progress* or *Resolved* in one click. Moving a resolved task back to *Open* or *In progress* needs the **Triage maintenance reports** permission, which owners and managers have by default. The one exception is undoing your own. For 15 minutes after you mark a task resolved, you can put it back to its previous status, which is what **Undo** does in the field app.

The detail panel. Click a task on the Maintenance list and it opens on the right, with three tabs:

- **Details:** the description, the trail, when it was reported, where it is, any linked structure and its photos. **+ Add photo** adds photos from your computer. A manager can remove one with the × in its corner.
- **Discussion:** the conversation about the work. See Discussing a maintenance item.
- **Work log:** the time spent on it. Log a session with its date and minutes, and tick anyone who worked it with you. Each person gets their own entry for the same time. If the task is linked to a volunteer workday, the workday is listed at the top with the hours it has already counted. The form warns you before you log the same day again for somebody the workday already counts.

At the bottom, **Mark complete** finishes the task in one click, and anyone on the crew can press it. A finished task shows **Reopen** instead, which is for managers. **Edit details** opens every field for a manager, and **Delete** removes the task.

You can link tasks that belong together. Under **Related tasks** in the task's panel, press **+ Link a task**, search by title or trail, and pick one. The link shows on both tasks, and pressing a related task opens it. Use it for jobs that are about the same problem, such as a washout and the blocked drain that caused it, or a sign missing at both ends of one section. A link changes nothing about either task: each keeps its own status, photos and history. Press × to remove a link. If two tasks are really one, merge them under **Settings → Duplicate records** instead.

Your organization can ask for photos before a task is done. Under **Settings → Issue types → Finishing a task**, a manager picks how many photos a task needs, from none to five. Until a task has that many, **Mark complete** says how many more it needs instead of finishing it, here and in the field app. Every photo on the task counts, including one taken when it was reported, so pick 2 if you want a photo of the problem and one of the finished work. Grooming tasks are not affected.

Who approves reports from the public. Area leaders and managers approve or reject them. Under **Settings → Issue types → Reports from the public**, a manager can let the people named under **Looked after by** on a trail do it too, for that trail only. They can then approve or reject, but not reopen or delete a task. To make an exception for one person, use **Reports on their trails** in their Edit window under **Team**.

Pending-review tasks have their own buttons on the task's page:

- **Approve:** changes the status to *Open*, adds it to the main list and clears the notification. It asks "*Approve this report and move it to Open?*" first.

- **Reject:** deletes the report permanently. It asks "*Reject and delete this report? This cannot be undone.*" first. Its photos are deleted with it, along with every notification about it.

The work (hours, people, tools and materials) is edited on the phone, from the task's own **Edit** screen in the field app, in the same form the wizard uses. On the web it is shown on the task, not edited. Open the task and it is listed under **The work**, so whoever plans the week can see what to put in the truck without opening a form.

You can also change a task's status between open, in progress and resolved from its details in the field app's Maintenance tab. The same permissions apply.

Warning the public about a hazard

Trail status says whether a trail is open. It can't say "*open, but there is a tree down across the second climb*", and closing a whole trail for one hazard is usually the wrong answer. So you can publish a maintenance task as a **public hazard**.

Turn on **Warn the public** on the *How bad is it?* step of the field-app wizard, on the task's **Edit** screen in the field app, or on the task's form on the web. Only members with the **Triage maintenance reports** permission (owners and managers by default) can turn it on or off. When anybody else saves the task, the warning stays as it was and the rest of their changes save as usual. It is off by default. It is only offered on a task that is on a trail, because the public pages list each hazard under its trail. It also isn't offered on a task whose safety risk is **No risk**, because a public warning about something your crew judged harmless would contradict itself. Change the safety risk and the switch appears. Set it back to No risk and the warning comes down.

The level comes from your two answers about the danger, so there is nothing else to fill in:

Safety risk	Can people get past?	The public sees
Serious risk	No	**Danger**
Serious risk	Yes	**Warning**
Minor risk	No	**Warning**
Minor risk	Yes	**Caution**

The priority doesn't change the level, because priority is also about when the crew gets to it, and that is your team's business. Only a task where the safety question was never answered uses its priority instead: Critical shows as **Danger**, High as **Warning**, Medium as **Caution** and Low as **Notice**. Change either answer later and the public level changes with it.

Where it shows: in an **Active hazards** list at the top of your public trail page, on each trail's and network's public page, in the trail-status widget you embed on other websites, in TrailsIQ Go on your organization's page and on the trail itself, and on your website. A trail's page also marks each hazard on its map, as a warning sign in the level's color. On your website, the **Active hazards** block lists them automatically, and the **Trails** block shows each one under its trail. Hazards show even if you have hidden trail status from the public, because each one is something your team chose to publish.

What the public sees: the task's title, its level, whether people can still get past (*Passable with care* or *Trail blocked*), the trail and the day it was reported. **The description is never shown.** It stays as your crew's notes.

Your crew can see it too. While a hazard is showing, the field app marks the task with a **Public hazard** badge in its lists, and a label under the priority on the task itself showing the level the public sees, such as **Public · Caution**.

It comes down by itself as soon as the task is marked resolved. To take it down sooner, turn the switch off. A report from the public that is still waiting for review is never shown as a hazard, even if somebody turns the switch on. Approve it first.

On a trail another organization has shared with you, the switch isn't offered, because the public pages belong to the trail's owner.

Filtering, exporting and the pending-review list

The Maintenance list on the dashboard has a filter panel behind the **Filters** button:

- **Status:** chips at the top of the panel. The default view is "*Unfinished only*", which shows open, in-progress and pending-review tasks, so pending reviews don't get lost. Switch to *All*, or filter to a single status.
- **Priority:** *Any*, or Critical, High, Medium or Low.
- **Trail:** only tasks on one trail.
- **Issue type:** the same types as the create form.
- **Network:** tasks on any trail in one network.
- **Crag / Climbing route:** only shown when climbing is turned on.

Every combination of filters is part of the page's web address, so you can bookmark it or send it to a colleague and they see the same filters.

Share in the header opens both exports, and both use the filters you have set, not just the page you are on. **PDF report** is the one to hand to somebody. It has your organization's name, logo and color at the top, the filters you used underneath, and the tasks in priority order. **CSV spreadsheet** is the same list as plain rows. Each row also carries the description, who the task is assigned to, its planned date, links to its photos and a link back to the task, so you can send it to a land manager and they can act on it without coming back to ask.

Tasks are handled one at a time. The list doesn't let you select several tasks and change them together.

The pending-review list. Maintenance in the sidebar shows a red badge whenever reports are waiting for review. In the field app they have their own **Pending Reviews** tab. Approve or reject each one. Nothing reaches the public map until you do.

Sharing a task

Every task has a **Share** button in the Field App, which offers two things:

- **Link:** opens the task in TrailsIQ. It is for your own crew, because it needs a login.
- **Photo card:** a tall image, sized for social posts and messaging apps. Anyone can look at it, with no login or account.

The photo card is built from the task itself: its status, its details and a background you choose, either one of the task's own photos or the map. It is the answer when a board member, a funder or a member who will never open a trail-management dashboard asks "show me what you've been doing".

The obvious use is a before and after. Make a card of the reported hazard, make another when it is resolved, and the pair tells the story of the work better than a status change in a list ever could.

A photo card is public once you send it. It is an image on somebody's phone, and you can't take it back. Before it leaves your hands, check the background photo for things like a license plate, a face or a house. If you aren't sure, use the map background.

Planner lines have the same button with more options: proposal link, photo card, PDF report and QR code. See Trail Planner.

Common gotchas

- **A task has one assignee at most.** For a job that needs a crew, assign whoever leads it and name the others in the description, or group the tasks in a **Project**.
- **Grooming tasks aren't on this list.** Grooming handed out from the Grooming screen in winter lives there. See Winter operation and grooming.
- **Public reports always need review.** Even a report an owner sends while signed in to TrailsIQ Go arrives as *Pending review*, because every report through the public app is checked first. If you don't want it reviewed, file it in the field app or on the web.
- **Rejecting a public report deletes it.** There is no way to just hide it from the list. Rejecting removes the report, its photos and every notification about it. If you aren't sure, approve it.

- **A field worker can't reopen a resolved task.** Only a manager can, apart from undoing your own **Mark complete** within 15 minutes. If a resolved problem comes back, for example a tree falls again in a storm, a field worker files a new task and mentions the old one in the description.
- **A trail's page has no "Add issue" button.** The list on a trail's page is for viewing only. Use the Maintenance tab, the round **+** button in the field app, or the route's own Report issue button for climbing routes.
- **Add your own types in Settings.** If your organization tracks something the standard types don't cover, add it under **Settings → Issue types**. Custom types don't get their own icon on the map.

What's next

- Set up **Projects** to group related maintenance tasks. See the *Projects and work planning* article.
- Set up **email preferences** for your team, so managers hear about the things they care about, such as pending reviews and status changes.
- Turn on **public reports** in Settings once you are comfortable reviewing them. For most organizations, they are the biggest single source of reports from the ground.

MAINTENANCE

Discussions

The conversation on a maintenance item, a structure or a planned trail: where to find one, who can add and remove messages, how a partner organization is shown, what being named with @ changes, how to mute one, and what happens to a message typed with no signal.

A discussion is the conversation about a thing: what you found when you got there, what you tried, what it will take, and what somebody should bring next time. The change history can record that a status moved, but not that the creek is still too high to work in. That is what a discussion is for.

You can start one on a maintenance item, on a piece of infrastructure, and on a planned trail.

Opening a discussion

Each of those three has a **speech bubble button** on its detail screen. It opens the conversation full screen, with the box you type in at the bottom and the newest message in view.

- **A maintenance item:** open Maintenance, then the item. The button is beside Edit and Work log.
- **A structure:** open Infrastructure, then the bridge, gate or sign. The button is beside Inspect and Edit.
- **A planned trail:** open Plan / Record Trail, then the trail. The button is at the top, beside Edit.

The number on the button is how many messages the conversation has. It turns **amber** when there are messages you have not seen, and stays gray otherwise, so the color only means something when there is something new.

Finding one you were not looking at

A conversation lives on the thing it is about. That makes sense, but it also means you can miss one: you will never see a remark on a bridge you had no reason to open.

Discussions is the speech bubble button in the bar at the bottom of the field app's home screen. It lists every conversation in your organization, newest activity first, whatever it is attached to. Each row says what the conversation is about, who spoke last and what they said, and tapping it opens the conversation.

The button shows a number when a conversation has something new for you, and no number when it does not. So an empty button means you are caught up, not that nobody has said anything. It sits in the bottom bar so you can see the number without scrolling.

The list only shows conversations that have started. It does not list every task that could have one, because nobody would scroll through the whole maintenance backlog.

Saying something

Type, and press **Post**.

You can attach up to four photos to a message, and a photo can be a message on its own, with no words. In the field app they come from the camera or your library like every other photo, and you can draw on them before they go: tap the thumbnail in the box.

After you send a message, each of your photos has a ×, so you can remove a wrong picture with one tap instead of deleting the message and typing it again. If you remove the last photo from a message with no words, the whole message is removed, so there is no blank line left behind. You cannot change somebody else's message. A manager who objects to a photo can remove the whole message, and everybody can see that it was removed.

Tap **@** to name somebody on your team. Their name is highlighted in the message, and their notification is different, as described below.

Anybody on your team can add a message, including volunteers. Anyone who can see a problem should be able to say so, so no permission is needed.

Removing one

You can always remove your own.

Removing somebody else's depends on what the conversation is about:

- **On a maintenance item,** you need the **Triage maintenance reports** permission.
- **On a planned trail,** you need the **Manage the trail planner** permission.
- **On a structure,** owners and managers can, the same people who can edit the structure.

Owners and managers have all three. You can grant the two permissions to other roles under Settings → Roles & permissions.

We split it this way on purpose. "I said that and I want it gone" is a different request from "that should not be on our record". And if anybody could quietly edit a conversation, it would not be a reliable record.

Who said it

A message is signed with the name of the person who wrote it, and each person's messages carry their own color so you can follow one voice down the screen.

There is one exception, and it sometimes confuses people. A message from a business working on one of your trails through a **share** is signed with the *company's* name and has a **Partner** label. Tasks follow the same rule. An outside crew is named by who they work for, because a personal name you cannot find in your own Team list tells you nothing about who is on your ground.

A share covers a trail and its maintenance, so a partner can join the conversation on a task on that trail. Structures and planned trails are not shared, and their conversations cannot be seen outside your organization.

Who gets told

Everybody on the team is notified when a message is added. The notification includes the message itself, not just "somebody commented", so you can decide whether it needs you without opening the app.

If you were **named with @**, the notification says so: "*Dana mentioned you*" instead of "*Dana sent a message*". A direct question is different from a conversation carrying on, and you should be able to tell which it is without opening the app.

To mute one conversation, open it and tap the **settings** button at the top. The panel that opens has one switch, and it stops that conversation reaching you. It works on every device, because it is saved to your account rather than to your phone. Everybody else still hears about it. A silenced conversation shows a dot on the settings button so it is clear why it went quiet, and reads **Muted** in the Discussions list.

To stop the emails for every discussion instead, turn off **Maintenance discussion** under Profile → Email preferences. Every notification email carries an unsubscribe link for its own kind, so you can also switch this one off from the footer of one you have just received.

With no signal

A message typed in the field app with no connection is saved on the phone. It appears in the conversation straight away marked **Waiting for sync**, and it sends itself the next time the phone has a connection. You do not have to come back to it, and the conversation stays open while it waits.

Its photos are sent with it, all together. A message saying "look at this" that arrived hours before its photo would be worse than one that waits.

You can see everything waiting to send under the sync icon at the top of the field app. A waiting message is listed there as **Message**.

Reading one you have already downloaded

The field app keeps each conversation you open, so opening it again out of signal shows what it knew at the last sync. The Discussions list does the same, and says **Showing the last list this device saw** when that is what you are reading.

Something you have never opened on that phone has nothing to show. It says so rather than sitting on a spinner.

Muting a conversation needs a connection, and the app tells you if you have none. The setting is saved to your account, so it cannot be saved on the phone for later.

MAINTENANCE

Checklists

Write down the work that comes round every year, once. Covers where each task needs doing (once, every trail, every structure or the places you pick), starting a fresh copy each season, checking things off, what flagging a line files for you, working with no signal, machine services and repeating a checklist on a schedule.

Every trail organization has work that comes round every year: the spring opening, the fall close-down, the check before a race. A checklist is that list written down once, so it stops living in one person's head and becomes something a crew can pick up, check off and hand over half-finished.

Three words cover all of it. A **checklist** is the list you write. Each line on it is a **task**. When you **start** a checklist you get a fresh copy for this season, which is **in progress** until everything on it is checked off and then **finished**.

Writing the list

Go to **Maintenance → Checklists → New checklist**. Give it a name, a season if it has one, and how often it repeats if it comes round on a schedule (see On a schedule below). The season is only a label. Nothing starts by itself on a date. If an empty copy appeared every April whether or not anybody went out, your team would soon learn to close them without reading them.

Then press **Edit** and add the tasks. Each one has what needs doing ("Clear the drainage") and, if it helps, what *done* looks like ("water runs off the tread at every drain dip"). The crew sees that line when they open the task.

Where does this need doing?

Every task answers that one question, and the answer decides how many checkboxes it makes:

- **Just once**: one checkbox. "Restock the map box at the trailhead."
- **Every trail**: one checkbox per trail. "Walk the trail and note winter damage" on a system with forty trails is forty things to check off. That way a crew can hand it over half done and everyone knows exactly what is left.
- **Every structure**: one checkbox per bridge, gate, sign and so on. Pick a kind to keep it to, say, bridges only, and press **On all trails** to keep it to the structures on certain trails. "Check the deck boards" can then cover the bridges in one valley and not the ones across the ridge. Leave every trail box clear to cover all of them.
- **Only the ones I pick**: exactly the places you tick, in two tabs, **Trails** and **Structures**. Any mix works. "Clear the drainage" can be three trails and two culverts, and nothing else.

Under the task a green line says what you will get, for example *This adds 5 checkboxes: Ridge Loop, Creekside Connector, Lower Flow, and the structures Mill Creek Culvert and Beaver Pond Boardwalk.* Each task on the list shows its count, and the bottom of the editor shows the total. A checklist with a task you set to **Only the ones I pick** and then picked nothing for will not save, and says which task it is.

Writing one in the field app

You can also write a checklist on your phone: **Checklists → New checklist**. Give it a name, choose whether it repeats, and add the tasks, each with the same four answers to *Where does this need doing?*. For **Only the ones I pick**, tap **Pick places** and tick trails and structures from the two tabs. **Save checklist** saves the name, the schedule and every task together, and the new list is ready to start straight away.

Saving needs a connection, the same as starting one. Changing a checklist you already have, its wording, its tasks or its schedule, is done on the dashboard.

Writing the list needs the **Triage maintenance reports** permission. Checking things off does not; see below.

When a task finds nothing

A task can end up with nowhere to go. You kept it to bridges and this area has none, or the places you picked are not in the area you started the checklist for. It still appears, as a single line saying which of those happened. It does not just disappear, because a crew reading a shorter list would have no way to know something was left out.

The reasons are worth telling apart. "*None of the places this task covers are in this area*" is not a problem: a spring opening in one valley can skip a task about another. "*The places this task was picked for have been deleted*" is one to go and fix, because the task will find nothing in any copy until you pick new ones.


The start-a-sweep dialog, with the name and the network to cover

Starting a checklist

Start takes a copy of the list as it stands today. Name it (leave the name empty and it uses the checklist's name and the year) and choose **Which area?**: all trails, or one network.

You can start one from either place: **Maintenance → Checklists** on the dashboard, or **Checklists → Start a checklist** in the field app. The phone is usually where you want it, because a spring opening tends to begin at a trailhead rather than at a desk. It takes the same permission as writing the list, so a volunteer sees the checklists in progress but not the button.

Starting one needs a connection, and the app says so. The checkboxes are built from the trails and structures in the area, and that needs a connection to TrailsIQ. Checking things off on a checklist you have already started works with no signal at all, and that is the part that matters on the hill.

Two things about that copy are worth knowing before you rely on it.

It keeps the wording it was started with. Rewording a task next winter changes what the *next* copy asks for and nothing about what this one recorded. Somebody may read this record a year later to find out what was checked and when, so it has to stay the way it was walked.

Its places are fixed the moment you start. A task for every trail covers the trails that exist right now. A trail added in June does not appear in April's copy, so a finished checklist stays finished.

Checking things off

The same screen is on the dashboard and under **Checklists** in the field app.

At the top, **Up next** shows the first thing nobody has checked off yet, with a big **Check off** button. Under it the whole list is grouped two ways, and a switch flips between them:

- **By place** puts every task for one trail together, including the structures on that trail, so a crew can walk one trail at a time and finish it. Just-once tasks sit at the end under **Anywhere**. The field app opens this way and remembers your choice.
- **By task** puts each task together with its places underneath ("Clear the drainage, 1 of 5"). Good for a crew doing one job everywhere.

A group folds away when everything in it is checked off. Tap its header to open it again.

Tap a box to check it off as done. Tap it again to take that back. The **⋯** beside each line opens everything else:

- **Done**: checked off, nothing more to do.
- **Not needed this time**: you looked, and it does not apply this year. Perhaps the gate is already off its hinges and being rebuilt, or the trail is closed. This counts as checked off.
- **Needs work**: you looked, and it is not right. This checks it off and files a maintenance task. See below.
- **A note and photos.** Type what you found and add up to four photos. They go with whichever answer you tap.

Anyone on the team can check things off. Writing the list is a manager's job and walking it is the crew's. If only two people could answer a checklist, it would not get done.

Each line's photos show on the line. Open the ••• to see them with a × on each, and remove one that came out wrong. A finished checklist is a record, so a manager reopens it first.

When the last box is checked

A checklist finishes by itself. There is no button for it. The moment nothing is left to check off, it closes and records the date. If somebody had to remember to close it, it would sit open all summer. And if it could be closed with boxes still empty, it would say work was done when it was not.

Needs work counts as checked off. You looked, it is not right, and the job has moved to the maintenance queue, so flagging the last open line finishes the checklist just as checking it would.

In the field app a finished checklist moves into **Finished recently**, and the app tells you it has happened and what it raised. It stays there for two weeks so you can read back what you just walked. After that the dashboard is where it lives, along with every one before it.

If you answered something wrongly, open its ••• and tap the answer you meant. A line can be answered any number of times, and a line you had flagged updates the maintenance task it raised rather than filing a second. **Undo** (or tapping a checked box) puts it back to unanswered, on the phone as well as on the dashboard, with or without signal. Undoing the line that finished a checklist reopens it.

Undoing a **Needs work** line does not withdraw the maintenance task it filed. By then somebody may have triaged it, commented on it or assigned it to a project, and a checklist is not the authority on work that has left it. Close the task from Maintenance if it should not have been raised. Flagging the line again picks that same task back up. See *What "Needs work" does* below.

What "Needs work" does

Marking a line **Needs work** files a maintenance task for it and links the two, so the thing you found is in the queue before you have walked to the next one. The task carries your note and your photos, is typed as coming from a checklist, and names what and where: "*Boulder Creek Connector — Clear the drainage*".

Answering the same line again updates that task rather than filing a second. Changing your mind and marking the line **Done** afterwards unlinks it and **leaves the task alone**. By then somebody may have triaged it, commented on it, or fixed it.

Flagging that line again later picks the same task back up rather than filing another. This is the sequence it exists for: you flag a blocked drain, somebody clears it while you are standing there, you mark the line **Done**, and next season it is blocked again. One task, with both visits on it, rather than two with the same title.

The exception is a task somebody has already called finished. If it has been **resolved**, or moved to **pending review** because a crew member reported it fixed, a fresh flag is a new finding rather than more of the old one, so it gets its own task and the closed one is left exactly as it was.

You can find everything a checklist turned up from the Maintenance list: filter by type **From a Checklist**.

When it is finished

A checklist closes itself the moment nothing is left to check off, and reopens if you take an answer back afterwards.

Finished checklists stay on the checklists page under **Finished**, and deleting the checklist they came from does not delete them. They keep their own name and their own wording, so what was checked in April survives whatever happens to the list in November.

With no signal

The field app keeps every checklist in progress, and the lines of any you have opened, so you can work through one with no signal. Answers, notes and photos are queued on the phone and send themselves the next time it has a connection. The line shows your answer straight away either way, and a photo still waiting says so under the line.

A checklist you have never opened on that phone has nothing to show. Open each one you plan to walk while you still have signal.

You can see everything queued under the sync icon in the field app header. A waiting answer is listed there as **Checklist answer**.

A machine's service

A checklist can also be the service a machine gets every time it comes due: sharpen the chain, clean the air filter, check the brake. Write it once, then open the machine in the field app's inventory, tap the pencil and pick it under **Service checklist**. One checklist can serve every machine of the same kind.

The machine's page then shows **Start service**. Anybody on the crew who can see the inventory can start it, not only managers, because the list was chosen when it was linked. The copy is named for the machine and its hour reading, such as *Stihl MS 261 · service at 146 h*, and every task on it is one checkbox, whatever *Where does this need doing?* says, since a service is about the machine in front of you.

- **Checking off the last task logs the service.** It is recorded on the machine at the hour reading taken when the service started, shows as **Last serviced** on its page, and moves the next service on by the machine's interval, exactly as closing a *Service / Repair* task does.
- **Needs work files the problem on the machine**, so it shows under that machine's tasks. Fixing it later does not count as another service.
- **Only one service of a machine runs at a time.** While one is in progress the button reads **Continue service** and opens the same copy, so two people cannot log the same service twice. Taking an answer back and finishing again does not log it twice either.

A service counts in hours of use, so it works on machines with an hour meter and a service interval set. Starting one needs a connection; checking it off works offline like any other checklist.

On a schedule

Some lists come round on the calendar rather than with the season: the trailhead check every two weeks, the gate inspection every month, the fire extinguisher every year. Set **Repeats** when you create the checklist, or later under **Edit** at the bottom of the list: pick days, weeks, months or years, then how many, and press **Save schedule**.

The next due date counts from the day the last copy was **started**, not finished, so a check that takes a few days to walk does not push every later one back. "Every month" from the 31st lands on the last day of a shorter month rather than spilling into the next one. A checklist that has never been started is due straight away.

- **The checklists page shows where each one stands**: its interval, and *Due today*, *Due Oct 14, 2026*, or *Overdue by 3 days*. **On a schedule** down the side lists them all, soonest first, with a **Start** button on each.
- **The field app lists the due ones** above **Start a checklist**, under **Due to start**, for anybody who can start one. Tapping **Start** opens the usual start screen with that checklist already picked.
- **Managers get one notification when a checklist comes due**, on their phone and in the notification list, not before 7 in the morning your organization's time. It is sent once per due date, not every day it stays overdue. Anybody who would rather not get it can turn off **Checklists due** in the field app's notification settings.
- **While a copy is in progress it is not due**, whatever the date. Starting the next one resets the count.

Nothing is started for you. The due date is a reminder to a person, who still decides to start it, so a copy in the list is always one somebody meant. A machine's service from the same checklist does not count as the checklist being done, since it runs on that machine's hours instead.

Your organization's time zone decides which day a copy was started on. Set it under **Settings → Organization details** if the dates look a day out.

MAINTENANCE

Projects and work planning

Group maintenance tasks and planned trails into projects, so you can track a "spring rehab" or a "ridge expansion" as one thing. You get one page with every task, the trails on a map, total hours, a combined build estimate that charges machine mobilization once, and one public proposal link for the whole job.

Projects group related work under one name, such as a "spring rehab", a "storm cleanup", a "ridge expansion" or a "bridge rebuild grant". Two kinds of work go in: maintenance tasks your crew finishes, and planned trails you are about to build.

There are two types. A **project** is work your organization does for itself, such as a volunteer workday, a cleanup week or a set of drainage fixes. A **job** is build work you are pricing, with planned trails, a client, an estimate and a proposal. Both live on the same Projects page and work the same way. A job just asks for and shows more.

Grouping work gives you one page that shows the status of every task in it, the trails on a map and the total hours your crews have logged. On a job, you also get **one combined build estimate that charges machine mobilization once instead of once per trail**, and a single public proposal link for the whole job.

What is a project?

A project is a simple way to group work. It has a name, a color, an optional description, optional start and end dates, and a status of either **Active** or **Archived**. It has no phases or assignees. The point isn't to copy a project-management tool. It is to have one place to see every task that belongs to a piece of work, and where each one stands.

Every project belongs to your organization, and it can hold two kinds of work:

- **Maintenance tasks:** the tasks your crew finishes.
- **Planned trails:** lines from the Trail Planner that are going to be built on the same visit.

A project can hold either kind, or both. "Ridge Expansion" might be three new trails to build and five drainage fixes to make while the machine is already up there. Structures and areas aren't added to projects directly.

Each task and each trail can only be in one project at a time. Moving one to another project takes a single click.

Projects and jobs

You pick the type when you create it, and you can change it later on the edit form.

- **Project:** for work you are not pricing for anybody. The page shows progress, the map, hours and actual spending. There is no client, stage, build estimate, contract or public proposal, so a volunteer workday isn't asked which client it is for. A project can still hold planned trails. A volunteer day that builds a new line can include that line, drawn on the map beside the tasks, just not priced.
- **Job:** for build work. It has everything a project has, plus planned trails priced as one job, the client and the stage the job is at (from lead to handed over), estimated against actual spending, a contract once the job is won, and a proposal you can share.

The type choice appears when you have any of *Clients & job pipeline*, *Build cost estimates* or *Contracts* switched on in *Settings → Workspace modules*. With all three off, a job would add nothing, so everything is a project. That includes one you create from a planned trail's **Project** box.

Switching a job back to a project hides its client, stage, estimate and proposal controls without deleting them. Switch it back and they return. There is one exception. A proposal link that is already shared stays on the page until you stop sharing it, so a public page is never left running with no way to take it down.

On the Projects list, a **Projects / Jobs** filter appears once you have both, and the stage filter only counts jobs.

Creating a project

Open **Projects** in the sidebar. The header has these buttons:

- **Show archived / Hide archived:** shows or hides archived projects in the list. Only active ones are shown at first.
- **New project:** opens the create form. Only managers and owners see it. Field workers and volunteers don't have the "manage projects" permission by default.
- **New job:** the same form with *Job* already picked. It appears when your organization can make jobs.

In a new organization, the page says "*No projects yet. Create one to bundle several maintenance items under a single banner.*", with a **Create your first project** button.

The button at the bottom of the form reads **Create project** or **Create job**, to match the type you picked, and **Creating…** while it saves. When it is done, you land on the project's page with the message "*Project created.*"

Projects list page header with the New project + Show archived buttons

Every field on the form

- **Type:** *Project* or *Job*. See *Projects and jobs* above.
- **Name:** required, plain text, up to 120 characters. The placeholder is "*e.g. Spring volunteer workday*", or "*e.g. Ridge flow trail build*" for a job. This is what shows on the projects list, in the project dropdown on maintenance tasks, and at the top of the project's page.
- **Description (optional):** what the work covers. The placeholder is "*What's the scope? Who's leading? Anything the crew should know up front.*" It is shown as the top card on the project's page, which helps anyone opening the project for the first time.
- **Maintenance items (optional): + Link a maintenance item** opens a search of your open and in-progress tasks, by title, trail or category. Press Enter to take the first match, or Escape or **Done** to close it. A task that is already in another project says so on its row, and adding it here moves it.
- **Planned trails (optional):** on a job only. **+ Add a planned trail** works the same way for your planned trails, and they are priced together once the job is saved.
- **Color:** eight swatches, plus **+** for any color you like. The color is used for the project's badge on the maintenance list, for the markers on the project's map and for the sidebar chip. If you are running several projects at once, pick colors that are easy to tell apart on the shared list.
- **Starts:** optional. The day the project starts.
- **Ends:** optional. The day the project finishes. It must be on or after **Starts**.
- **Contract work:** on a job only, and only when the Clients module is on. It folds out to show the **Stage** (Lead through Handed over, or Lost) and the **Client**. **New client** adds a client by name without leaving the form, and picks them. You can fill in the rest of their details on the Clients page later.

The **Status** field only appears on the edit form, because a new project always starts as Active. The choices are *Active* and *Archived*. See *Editing, archiving and deleting* below.

Project create form with the Name, Description, Color, Starts, Ends fields

Adding work to a project

Maintenance tasks

There are three ways, so use whichever suits the moment. The first is the create form itself (see above), so a project can start with its work already in it.

From the maintenance task's edit page. Every maintenance task has a **Project (optional)** dropdown near the top, set to "*— not in a project —*" by default. The text under it reads "*Group this item with others under a project so progress shows on the project page.*" Pick a project and save, and the task now belongs to that project. A task can only be in one project, so choosing a second project moves it out of the first.

From the project's page. Under **Add maintenance items** there is a search box that says "*Type to search, or pick from the recent items list above.*" You can only find **open** and **in-progress** tasks there. Resolved tasks aren't shown, because you are planning work, not filing it away. If you pick a task that is already in another project, a red badge on its row reads "*Moves from other project*", so you don't take it by accident. It still moves, but you see the badge and can change your mind.

Whichever way you add it, the task ends up linked to the project and appears on the project's page. To remove one, press the × on the project's list of tasks. It asks "*Unlink this item from the project? The item itself is kept; only the project link is cleared.*"

Planned trails

There are two ways, and they work the same in both directions:

From the trail. Open a planner recording and use the **Project** box. Pick an existing project, or type a name and press **Create + add**. You don't have to go to the Projects screen and back. This works in the Field App too, from the planner's detail panel.

From the project. *Planned trails → + Add planned trails* searches every planned line in your organization. A trail already in another project is shown with a **Move** badge instead of being hidden. Moving one is a perfectly normal thing to do, and a list that leaves out a trail you know exists just looks broken.

Branches come with their parent. You can't add a branch, such as an alternate line, a reroute or a spur, to a project on its own. The app tells you so if you try. A branch belongs to its parent trail and joins the project through it. This is not fussiness. If a branch were also added on its own, it would be counted twice in the price: once inside its parent's estimate and again by itself.

That holds however many levels deep they go. An option on an option is still part of the trail it hangs off. It is drawn on the project map, listed with the trail and included in the project's estimate. On a shared proposal it appears under *Options on this line*, labeled with the option it belongs to, not as another alternative to the main line. Which of them are in the price is decided by the include-branches switches, one level at a time. See The trail planner.

Maintenance item edit page showing the Project dropdown with "— not in a project —" default

What the project page shows you

The project's page has four parts:

- **Description card:** whatever you wrote in the description, or an empty placeholder if you left it blank.
- **Hours worked:** the total of every hour logged against a task in this project. If your team logs time on each maintenance task in the field app, this adds it up automatically. It is zero until somebody logs time.
- **Progress bar:** three colors showing how many tasks are *open*, *in progress* and *resolved*. When every task is resolved, the bar fills up and the project is effectively done. Its status doesn't change to "completed" by itself. Archive it yourself when you are ready.
- **Map:** a marker for every task, in the project's color. The project's planned trails are drawn on it too, each in its own color, with their branches dashed. If a project only has planned trails, the map opens around those. If nothing on it has a location yet, the map opens on your organization's own area.

Below those come **Planned trails**, then the list of tasks, each with its status, its priority and an × to remove it. Click any row to open that task.

The progress bar only measures maintenance. A planned trail isn't resolved or unresolved. It is either built or still a plan, so adding trails into that percentage would make it mean two things at once. The number of trails is shown beside it instead, on the project card and the project page.

Project Show page with Description card, Hours tile, Progress bar, and the map + linked items list

Planned trails, priced as one job

This is the reason to group trails at all, and it happens on a **job**. A plain project that holds a planned trail lists it and draws it on the map, but doesn't price it. Switch the project to a job to get the estimate.

Three new trails on the same hillside are three lines and **one job**. The excavator is hauled in once for all of them. If you price them separately and add up the totals, you bill your customer for hauling the same machine in three times. That is a number you would have to defend, and you

couldn't.

So a job's build estimate charges **machine mobilization once** across every trail in it. The estimate card shows the difference: what the same trails would cost priced separately, and how much the shared haul-in saves. That is the line you want when somebody asks why the job costs less than its parts added up.

Some details worth knowing before you quote from it:

- **Only mobilization is shared.** Tread, armoring, drainage dips, culverts and labor all depend on the trail in front of them, so they are simply added up. The question is not "is it a fixed cost?" but "is it charged once per visit?"
- **A hand-built trail never had a haul-in to save.** You can mix hand-built and machine-built trails in one job. The saving only shows up where two machine-built trails would each have had one.
- **A trail's branches are only included if that trail says so.** The *Include this trail's branches in the price* switch on each trail still decides. If you have turned it off, you have marked that spur as a maybe, and the job won't quietly put it back in front of a landowner. That gives you one sentence that explains the total: **the job total is what each trail's own page quotes, with the haul-in charged once.**
- **The rates are yours.** They are the same *Settings → Trail build rates* the single-trail estimate uses. Set them before you quote anybody.
- **You can switch the whole estimate off.** *Settings → Workspace modules → Build cost estimates* removes it here, in the planner, in the field app and on the shared proposal. A project with costs switched off still shows its trails, its map, its tasks and the hours logged against it. The money panel becomes *Actual spend* instead of *Estimated vs actual*, because there is nothing to compare against. See Workspace modules.

The numbers on a phone

The estimate is in the **Field App** too. Go to *Projects* and open a project. Under the planned trails you get the total length of the job, the number of branches on each trail and whether they are in the price, then the **build estimate**, and **estimated vs actual**. That last one shows what has been spent against what was quoted, the percentage used, and hours worked against hours estimated.

That last panel is the one worth having in your pocket. Somebody on site deciding whether to keep going is exactly the person who needs to know there is 8% of the budget left, and exactly the person who isn't at the dashboard.

Two things to know about it:

- **The percentage isn't capped.** A job at 130% of its estimate says 130%, in red. Rounding it down to 100 would hide the one case where the number changes what somebody does next.
- **Hours and expenses waiting for approval are listed, not counted.** The panel says how many entries are waiting, under the totals. Recorded work has been done, whether or not the paperwork has caught up. But counting it as "actual" before it is approved would make the figure disagree with your books.

The numbers are saved on the phone when you open a project, so they are there next time with no signal, which is when you need them. A project you have never opened with signal shows its trails and no money, instead of a row of zeros that would look like a job worth nothing.

One link for the whole job

Public proposal → Share this project creates a single page with your organization's branding, covering every trail in the job, with the combined price. It is the same kind of page a single trail's proposal uses, one level up. That is the link to hand to a landowner or a council: one address, one map with all the lines on it, one card per trail with its own elevation profile, and one number.

Sharing is off until you turn it on. **Stop sharing** turns the link off for good. Turning sharing on again makes a new link, so any copies of the old one already going round stay dead. Everything a single-trail proposal respects is respected here too. Notes you switched off stay off, and *Hide build cost from shares* is a switch on each project for when the job is going out to tender. Each trail's own *Hide build cost* setting is respected too, and one is enough. If any trail in the job hides its cost, the job page shows no estimate at all. A total that quietly left out one trail would look like the full price. Each trail's section is labeled with its name.

The reader can also download the whole thing as a PDF. The project proposal has a **Download PDF** button, just like a single trail's. It gives one document covering every trail in the job, with the map at the top, each trail and its options, and the combined estimate if the page shows one. Whoever you sent the link to can keep a copy, and they don't need an account. A link can be forwarded and lost, and *Stop sharing* turns it off. That

is right for the live page, but wrong for the copy a council is making its decision from. Anything the page leaves out, the document leaves out too, so a hidden cost stays hidden in both. See The trail planner for how the picture at the top is chosen.

There is a QR code as well. Next to *Open page*, the **QR code** button shows the link as a code and lets you save it as a PNG. Use it on a site hut wall, a public meeting handout or the back page of a printed tender. It is a picture of the same link, not a second one, so *Stop sharing* takes the code down with it.

All of it works from the Field App. Go to *Projects*, open a project and tap **Public proposal**. You get the same four actions: share, copy the link, show the QR code and stop sharing. It is one switch, not two. Turn sharing on from a phone and the dashboard shows it on, and the other way round. It matters because the person with the landowner on the hill usually isn't the person at the desk, and "*I'll email it tonight*" is a worse answer than holding up a phone.

Sharing is **owner or manager only**, on both the dashboard and the field app. A volunteer who taps it is told exactly that, not shown an error code.

Offline, the field app still shows a link that is already live, and can copy it or show its QR code. A link that exists keeps working, and the code is drawn on the phone itself. **Creating** a link needs signal, because it is made by TrailsIQ. The app says "*You're offline. Creating a proposal link needs signal.*" instead of pretending to work.

The button only appears on a job with at least one planned trail. An empty job has no proposal to show, and a plain project isn't pitched to anybody.

Editing, archiving and deleting

The **Edit** button is next to the name on the project's page. You can edit every field on the create form, such as the name, description, color and dates, and you also get the **Status** choice of *Active* or *Archived*.

Archiving a project doesn't delete it or change any of its tasks. It just hides the project from the Projects list. The **Show archived** button in the header brings it back into view. Archived projects still appear in the project dropdown on maintenance tasks, so tasks in an archived project still show which project they are in.

Deleting a project asks "*Delete "…"? Linked maintenance issues will be unlinked but kept.*" The message is the same whether you delete from the project or from the danger-zone card on the edit page. It means exactly what it says:

- The **maintenance tasks themselves stay**. Every task keeps its title, description, status, location, photos and history.
- They are **no longer in a project**. They show on the main Maintenance list without a project badge.
- **Time logs stay on each task.** The project total is gone, because the project is gone, but each task's own logs remain.

If you only want to hide a project but keep it, archive it instead of deleting it.



Common gotchas

- **Changing the type loses nothing.** A job switched to a project keeps its client, stage and proposal settings. They are only hidden until you switch it back.
- **A maintenance task or a planned trail can only be in one project at a time.** Choosing a second project moves it out of the first. The badge in the list is your warning.
- **You can't put a branch in a project on its own.** Alternate lines, reroutes and spurs belong to their parent trail and join the project through it. Adding the parent brings them. Adding a branch by itself is refused, because it would be priced twice.
- **Deleting a project doesn't delete its trails.** They stay, outside any project, and you can group them again. The same goes for maintenance tasks.
- **The shared haul-in only applies where it is real.** Two machine-built trails in a job are charged one mobilization. A hand-built trail never had one to save, and a job with one trail saves nothing. The estimate says so, instead of showing a saving of zero as if something happened.

- **Projects are a simple way to group work.** They have no phases or assignees, on purpose. They are for reporting and planning. If you need more than that, you are probably looking for a project-management tool.
- **Only open and in-progress tasks appear in the project search.** Resolved tasks don't. To add a resolved task to a project afterwards, go to the task's edit page and pick the project from its dropdown.
- **Archived projects still appear in the task dropdown.** So a task in an archived project keeps its project badge. If you want the task out of the project, remove it before archiving.
- **Color matters.** The project's color is used for the markers on the project's map *and* in the project column of the maintenance list. Pick one that stands out against your base map.
- **Hours worked depends on time logged in the field app.** If your team files tasks but never logs time, it stays at 0. That isn't a fault. There is just nothing to add up.

What's next

- If projects are new to your team, start with a single one. A two-week cleanup week is easier to try out than a year-long backlog.
- Once you have a few projects going, use the project filter on the Maintenance list to see one project's tasks at a time.
- Read *How to create a maintenance item* for the other side of this: filing the work.

MAINTENANCE

Archiving finished tasks

Completed tasks archive themselves after two weeks and still count in every report. Close a past period to free the storage its photos take, and keep its annual report.

Finished tasks pile up. **Archiving** clears them off your Maintenance list without losing them from your reports, and **closing a period** frees the storage their photos take once you no longer need them.

Both are done by owners and managers. An owner can give the right to other roles, or take it away from managers, under **Settings → Roles & permissions → Archive finished tasks**.

Archived tasks

A task is archived automatically **14 days** after it is marked complete. Archiving takes it off the Maintenance list and the map, and nothing else changes: its photos, notes, discussion and logged hours all stay, and it still counts in the annual report, the week and month overview and everything else that adds up your work.

To archive a completed task straight away, open it and press **Archive**. To archive every completed task at once, open **Maintenance → Archive** and press **Archive completed tasks now**.

To see archived tasks, open the filters on the Maintenance page and pick **Archived** under *List*. Open one and press **Unarchive** to put it back on the list. Reopening an archived task also puts it back, because it is work to do again.

90 days after a task is completed, its full-size photos are replaced with smaller copies, sized to look sharp on a phone or laptop screen. That frees most of the space photos take while the task keeps its pictures.

Closing a period

When a season or a year is behind you, close it. Closing a period **permanently removes the photos, map snapshots and discussions** of every task completed in it. The tasks themselves stay, with their title, notes, type, trail, dates and logged hours, so every report still counts them, including a custom range that runs across the closed period.

1. Open **Maintenance → Archive**.
2. Under **Close a period**, pick the start and end dates, or press **All of** last year. The period has to end before today.
3. Press **Preview**. You see how many completed tasks, photos and discussion messages are in the period, and how much storage closing it frees.
4. If you want to keep the pictures, press **Download the photos first**. You get a ZIP with a folder per task.
5. Type **CLOSE** and press **Close this period**.

Only completed tasks are affected. Open and in-progress tasks are never touched, however old they are. Completed tasks in the period that were not archived yet are archived as part of closing it.

Closing a period cannot be undone. A closed task opens as usual and says that its photos and discussion were removed when the period was closed.

The saved report

When you close a period, its annual report is saved exactly as it reads that day. Find it under **Closed periods** on the Archive page and press **View report**. It has the same pages and the same **Download PDF** as the live annual report, and it keeps the names of trails even if they are renamed or removed later.

The live annual report keeps counting the closed tasks too, so the two agree unless something about the period changes later, such as hours approved after you closed it.

INFRASTRUCTURE

How to create and edit infrastructure

Structures such as bridges, kiosks, signs and counters are filed from the field app and edited on the dashboard. This covers the starting types, the extra fields for each type, the bridge materials calculator, the trail-feature jump calculator, inspections and what deleting does.

Infrastructure is anything on the trail that isn't the trail itself: a bridge, a stair set, a kiosk, a trailhead sign, a trail-map board or a counter. TrailsIQ calls each one a *structure*. Every structure has its own location, a condition, inspection dates and photos. It can be attached to a trail, or stand on its own before the trail exists.

What is a structure?

A structure is something built on the trail that stays there, permanently or for a long time. Every structure gets its own code, such as `BR-0001` for your first bridge. It also has a name, a type, a location, an installer, an install date, an inspection schedule, a condition, photos, extra details for its type, and an optional link to a trail or network.

Structures are private to your organization. They show up on the dashboard and in the field app, but not on the public trail pages or the public map. The one exception is a warning: when a structure on a trail is in bad shape, you can choose to warn the public about it. See *Every field on the create form* below.

The web address says `/structures`, but everywhere on screen it is called **Infrastructure**: the menu, the page header and the section on each trail's page. It is the same thing under two names.

Structure types and categories

Every structure has one **main type**. The main type decides:

- The name shown on screen, such as "Bridge", "Kiosk" or "Trail Counter".
- The **prefix** of the structure's code. A bridge gets `BR`, so bridges are numbered `BR-0001`, `BR-0002` and so on. A kiosk gets `KI`.
- The **inspection interval** in months, which is how often the next inspection comes due.
- The **category** the type belongs to: *Built structures*, *Signage & Navigation*, *Monitoring*, *Amenities* or *Trail features*.
- The **extra fields** the wizard shows for that type, such as span length for a bridge or sign height for a signpost.

A structure can also count as **other types at the same time**. A kiosk often carries a trail map, and a gate can hold a sign. Tick those under **Also** when you edit the structure, on the dashboard or in the field app. The structure then shows up under every one of its types: in the type and category filters and their counts, in exports, and on any seasonal checklist that covers every structure of a type. Its code, icon, extra fields and inspection still come from the main type.

A structure can also belong to a **place**. A kiosk at a trailhead is linked from the trailhead's point of interest (see *How to create and edit points of interest*). The structure's panel then shows the trailhead under **Part of**.

Every structure's panel, on the dashboard and in the field app, says when it was added and who added it, for example *Added Oct 7, 2026 by Sam Rivera*. Infrastructure added before October 2026, or brought in by an import, shows only the date.

Every organization starts with eight types:

Type	Prefix	Category	Default inspection
Bridge	BR	built	12 months
Stairs	ST	built	12 months

Type	Prefix	Category	Default inspection
Sign	SI	signage	24 months
Kiosk	KI	signage	24 months
Trail Map	TM	signage	24 months
Trail Counter	TC	monitoring	6 months
Culvert	CU	built	12 months
Trail Feature	TF	natural	12 months

If you had already made a type of your own with the prefix CU or TF, you keep yours and the default does not appear beside it.

You can add, edit or delete types in **Settings → Infrastructure types**. A type you add there appears in the type picker on step 1 of the field-app wizard. Changing a type's extra fields changes what the wizard shows on step 4.

To rename a type, click its name on that page, type the new one and press Enter. Every structure of that type takes the new name straight away, and nothing else about them changes. The prefix stays as it is, so codes already on signs, maps and reports still match. Renaming one of the eight starting types changes it for your organization only.

To change the prefix of a type you added yourself, click **Change prefix** under it, type the new prefix and confirm. Before you confirm, the panel tells you how many structures use the type, because their codes change too: `HUT-0007` becomes `CAB-0007`. Each code keeps its number unless that code is already taken, in which case it gets the next free number and TrailsIQ tells you how many did. A code you typed in yourself is not changed. Codes written down elsewhere, such as printed tags, task notes and past reports, still show the old prefix. The eight starting types keep their prefixes, but you can still rename them.

Settings Infrastructure types page listing the six default types with their prefixes

Creating a structure

The dashboard has no form for creating a structure. You create every structure with the field-app wizard, either on your phone out on the trail or in the field app in a desktop browser tab. The **+ New structure** button on the Infrastructure page opens the field app in a new tab, which takes you into a four-step wizard.

The four steps are:

1. **Pick a type.** You see a grid of your organization's structure types, such as Bridge, Stairs, Sign and Kiosk. Tap one to move on.
2. **Photos.** Take 1 to 10 photos with your phone camera, or pick them from your camera roll. Photos are optional but strongly recommended, because whoever does the next inspection will want to see what it looks like now.
3. **Confirm the spot.** The pin starts at your current GPS position. Drag it if you are off. If GPS isn't available, tap the map to place it.
4. **Details.** The fields are covered in the next section.

Anyone who is an active member of your organization can create a structure, whether they are an owner, manager, field worker or volunteer. Only managers see the **+ New structure** button on the dashboard, but that is just about the screen. Field workers use the round **+** button on the Infrastructure tab of the field app.

Importing a spreadsheet of structures

If you already keep your huts, bridges or signs in a spreadsheet or a mapping tool, you can bring them all in at once. Owners and managers see **Import CSV** at the top of the Infrastructure page.

The file needs a heading row and one row per structure. Two things are required:

- **A name**, in a column headed *Name*.

- **A position**, either as *Latitude* and *Longitude* columns in decimal degrees (for example -34.5538 and 116.1815), or as one *WKT* column such as `POINT (116.1815 -34.5538)`. Google My Maps writes WKT when you export a layer as CSV, so a My Maps export works as it is.

These columns are read too if they are there: *Type*, *Code*, *Section* or *Trail*, *Condition* (good, fair, marginal, poor or failed), *Install date* and *Notes*.

When you choose the file, you see what will happen to every row before anything is saved. Nothing is added until you press **Add**.

- A **type** you don't have yet, such as Hut, is created for you, and the preview names it first. A row with no type comes in as Other. You can rename a type and set its inspection interval in Settings afterwards.
- A structure goes on the **trail** named in its Section or Trail column. A section written as a number, such as 064, matches the trail with that number in its name. With no trail named, it goes on the nearest trail within 250 meters. Anything farther away is added without a trail, and the preview says how far it is from the nearest one.
- A row that matches a structure you already have, by its code or by the same name in the same spot, is skipped. Importing the same file twice adds nothing twice.
- A code that is already in use is not kept, and that structure gets the next code for its type instead.
- A row with no name or no position is skipped, and the preview says which line it was on.


Structure edit slide panel with the Type-attributes section (bridge with dimension fields visible)

Every field on the create form

Step 4 of the wizard collects the details. The labels below match what you see on screen.

- **Type:** the type you picked on step 1, shown view only. To change it, go back and pick again.
- **Name (optional):** plain text, with the placeholder "*Name this structure*". This is what shows in the list and on the trail's page. You can leave it blank, because the code (for example `BR-0001`) already identifies the structure. A name like "North Fork bridge" is friendlier, though.
- **Extra fields for the type:** whatever the structure type defines. See *Type-specific details* below.
- **Condition:** a dropdown with *Good, Fair, Marginal, Poor* and *Failed*. Pick the state the structure is in **today**. Later inspections update it, so you can follow how it changes over time.
- **Warn the public:** offered when the structure is on a trail and you rate it Marginal, Poor or Failed. Turn it on and the structure is shown as a hazard on your public trail pages until an inspection rates it Fair or Good. Leave it off and only your team sees the condition.
- **Installer (optional):** plain text, with the placeholder "*Volunteer crew, contractor, ...*". Record who built or placed it. This helps with warranty conversations later.
- **Install date (optional):** a date picker for when it was placed.
- **Description (optional):** a text box, with the placeholder "*What is this and why does it matter?*". Add anything the next inspector needs to know.

There are no fields for latitude and longitude. The location comes from step 3, *Confirm the spot*. TrailsIQ also notes whether the spot came from a live GPS fix or was placed by hand, so later reports can tell the two apart.

Tap **Save** to create the structure. The wizard closes, the new structure appears in the Infrastructure list, and TrailsIQ gives it its code: the type's prefix and the next four-digit number.


Trails Show page with the Structures section listing attached structures

Type-specific details

Each structure type has its own list of **extra fields**. The wizard shows them on step 4, beside the standard fields above. These kinds of field are available:

- **Text:** a single line of text.
- **Textarea:** several lines, for longer notes.
- **Number:** a number, with an optional minimum and maximum.

- **Date:** a date picker.
- **Select:** a dropdown with set choices, such as "Concrete / Wood / Steel".
- **Checkbox:** a yes or no switch.
- **Dimension:** a field for physical measurements. Bridges use it for length, width and decking thickness, so the materials calculator can read them.

You set these up in **Settings → Infrastructure types → Edit type → Attributes**. Adding a field to a type doesn't change structures you have already saved. They show the new field as blank until somebody next edits them. Changing a field's kind, for example from a number to a dropdown, *can* leave old values behind, so do that with care.

What you enter is kept with the structure itself, so it goes wherever the structure goes. On the dashboard, the slide-out panel shows the values view only in a **Details** block. The edit form shows the same fields, so a manager can change any of them.

Photos, codes and inspections

Photos. Each structure can hold up to **20 photos**. You can upload up to 10 files at a time, up to 5 MB each, as PNG or JPEG. When you add a 21st photo, the oldest one is dropped so the total stays at 20. On the dashboard, the photos appear as a grid in the slide-out panel. Tap any photo to see it full size.

Codes. Every structure gets a code made of its type's prefix, a dash and a four-digit number, such as `BR-0001` for a bridge. The number is unique within your organization. The code appears on the structure's card, in exports and next to its name on trail pages. If you change a structure's type, it gets a new code in the new type's numbering, so a Trail Features item changed to a bridge goes from `TF-0001` to the next free `BR` number. A code you typed in yourself is kept.

Inspections. Each structure type has an **inspection interval** in months. A new structure's first inspection is due that long after its install date. Filing an inspection from the field app moves the due date forward and sets the structure's condition from the answers. See *Inspecting structures*. Overdue structures show an **Overdue** chip in the slide-out panel, and you can filter the Infrastructure page to show only them. That is your task list for the next round. Next to it, **At risk** shows everything rated *Poor* or *Failed*, whether or not it is due for an inspection. That is the same set the Dashboard's **Structures at risk** tile counts, so the number and the list always agree.

Inspections are filed from the field app. On the dashboard, the slide-out panel's **Inspections** tab lists every inspection on record, newest first. Each one starts with what changed since the inspection before it.

Viewing and editing a structure

A structure doesn't have a page of its own. It opens in a slide-out panel on the Infrastructure page. Click a structure's card, or open a link to it, and the panel opens with that structure selected.

The top of the panel shows the structure's type icon and name, with chips for its type, its code and its condition. An **Inspection overdue** chip joins them when the next inspection date has passed.

Below that are two tabs:

- **Details:** the description, the trail it is on (or *Not on a trail*), the next inspection date, the location, the extra fields for its type (view only), the **Calculate replacement materials** button for bridges (see the next section) and the photo grid.
- **Inspections:** every inspection on record, newest first. Each one starts with what changed since the one before it. **Show all answers** opens the full set, with any photo taken on a question shown beside that answer.

Managers see **Edit details** and **Delete** at the bottom of the panel. **Edit details** opens the form in the Details tab, with **Save changes** and **Cancel** at the bottom until you are done. You can edit every field, including the structure's type. That is on purpose, so a type picked by mistake can be fixed without creating the structure again. Field workers see the panel as view only. They file structures from the field app and rely on a manager to correct a name or update a condition.

Bridges: the materials calculator

Bridges have a tool of their own. In the slide-out panel, managers see a **Calculate replacement materials** button. It opens a materials sheet that reads the bridge's length, width and decking thickness from its extra fields. From those it works out a materials list, with the number of decking boards, structural stringers and hardware. You can also download the list as a PDF to hand to a lumber supplier.

The calculator needs all three measurements. If one is missing, the button tells you which, so you know what to fill in. The lumber sizes and hardware it uses come from the choices in the structure's edit form, in the **decking picker** and **structural picker** fields.

Once the calculator has valid measurements, the sheet shows a link to download the list as a PDF.

Trail features: the jump calculator

A **Trail Feature** is something shaped into the tread, such as a jump, a berm or a rock garden. Open one and go to its **Feature** tab on the dashboard, or tap **Set up this feature** in the field app, to say what it is. When you add a Trail Feature in the field app, the last step has a **Design it in the feature calculator** button, so you can set it up before you save.

Pick **Jump, berm or rock garden** to size it with the same calculator you use on planned trails. Choose the type (tabletop, double, triple, roller, gap, step-up, step-down, drop, berm or rock garden) and set its shape. The calculator works out how fast riders arrive, where they land and whether the spot suits the feature. It reads the trail the feature sits on, at the spot where its pin is, and uses the trail's rating unless you pick another. To move the feature along the trail, move its pin.

The calculator needs the feature to be on a trail that has elevation, and its pin within about 40 meters (130 feet) of that trail. In the field app, the calculator works without a connection. It reads the trail from your phone, the same copy the map draws.

Pick **Something else** for a feature the calculator does not size, such as a wall ride, a skinny or a log ride. Give it a name, and use the description and photos for its details.

Linking to trails, networks and maintenance tasks

A structure can be in one of three states:

- **On a trail:** it appears on that trail's page under **Structures**, with its code, name, type and condition. If you delete the trail, the structure stays and simply stands on its own.
- **On a network:** useful for a kiosk at a trailhead that serves several trails. If you delete the network, the structure again stands on its own.
- **On its own:** not linked to a trail or network. This is common for structures created before the trails they belong to were imported.

You can attach a structure or move it to another trail from the edit form, using the **Trail** dropdown. "— None —" is a valid choice. You never need to create the structure again.

Maintenance tasks. You can link a maintenance task to a structure with the *Broken structure* type. See the *How to create a maintenance item* article. Deleting a structure doesn't delete the maintenance tasks linked to it. They lose the link and stay on the maintenance list.

Deleting a structure

The **Delete** button is at the bottom right of the slide-out panel. Only owners and managers can use it. The confirmation reads "*Delete this structure? This cannot be undone.*"

When you delete a structure:

- The structure is removed.
- Any maintenance tasks linked to it lose the link, but the tasks themselves stay.
- **Its photos go with it.** They are removed and stop counting toward your storage. You don't need to clear them first.

If you only want to set a structure aside for a while, take it off its trail and leave it standing on its own. There is no way to hide a structure without deleting it.

Common gotchas

- **The dashboard has no form for creating a structure.** Every structure is filed with the field-app wizard. The **+ New structure** button on the dashboard opens the field app in a new tab.
- **The menu says Infrastructure and the web address says structures.** They are the same thing. The address kept its older name so existing bookmarks and links still work.
- **Structure codes never change and are never reused.** Deleting a structure leaves a gap in the numbering, and that is on purpose.
- **Deleting a structure deletes its photos.** They stop counting toward your storage at the same moment.
- **The bridge materials calculator needs three measurements.** If the bridge's length, width or decking thickness is missing, the button tells you which instead of showing a lumber list.
- **You can safely change a structure's type.** If the wrong type was picked when it was created, edit the structure and pick another. The code and the map color change to match the new type. Tasks and inspections stay linked, but a description that quoted the old code still shows it. Whether the extra details carry over depends on whether the two types share those fields.
- **Field workers can create structures but not edit them.** They file structures from the field app, and a manager corrects any typos or updates the condition afterwards.

What's next

- Set up your organization's structure types in **Settings → Infrastructure types**. Add the ones you will actually use, delete the ones you won't, and set up each type's extra fields, such as measurements for bridges or sign height for signposts.
- Read *How to create a maintenance item* for the *Broken structure* task type. That is how you report "the bridge decking is rotting" against a specific structure.
- Points of interest, such as viewpoints, campsites and hazards, are a separate thing. See *How to create and edit points of interest*.

INFRASTRUCTURE

Inspecting structures

The tap-only inspection wizard in the field app. Covers one question per screen, photos per question, what the answers add up to, when it offers to file the work for you, working with no signal, and writing your own questions for a structure type.

An inspection is a visit somebody makes to a bridge, a gate, a sign or anything else you look after on the ground, and they answer every question with a tap of the thumb. It sets the structure's condition and moves its next inspection date. When the answers call for it, it also files the work at the same time.

Doing one

Go to **Field app → Infrastructure**, tap the structure and tap **Inspect**.

You get one question at a time, each with three to five answers to tap. Tapping an answer records it and moves on to the next question. A bridge in good order takes a handful of taps. There is no scrolling and nothing to type anywhere in the form.

That is a deliberate choice. The form has to work on a phone with cold, wet hands. Typed notes also can't be compared, and the value of an inspection is that you can read it against the last one. That only works if the answers mean the same thing both times.

Safe to use right now? is always the first question. It is the only answer that can change what somebody does in the next ten minutes, so it comes before the detail. If the inspector is interrupted halfway through, you still have the answer that matters. **Vegetation and drainage around it** is always last. Everything in between depends on what kind of structure it is.

The bar of segments across the top shows where you are. Each segment is a question, and you can tap any of them, so going back to change an answer from four questions ago takes one tap. The last segment is the review.

Tapping an answer you have already chosen clears it. Every question has to be answered before you can file the inspection. Read six months later, a question nobody answered looks the same as a healthy one. The review names any you missed and takes you to them.

When a question doesn't fit this structure

Questions are written for a kind of structure, and structures differ. A bridge may have no railing, or a sign no post to check. Every question except **Safe to use right now?** offers **Doesn't apply** as its last answer, so you can pass over it without making up an answer or leaving it blank.

It grades nothing. A question you pass over can't make the structure's condition better or worse, and it is never named as the answer that set the result. It is still part of the record. "We looked, and there is no railing" is worth as much as a grade, and it reads that way in the history.

A few questions already cover this with an answer of their own, so they don't offer it. A railing question offers **None fitted**, which is the better answer, because it records a bridge that was built without one instead of a question that was skipped.

Safe to use right now? never offers it. It applies to anything with a deck, a post or a tread, and it is the answer that changes what somebody does next.

Photos of what the question is about

Every question has its own camera button, and a photo taken there belongs to that question. You can add three per question and six in total.

This is worth doing even when you are in a hurry. A photo taken on **Deck boards** shows up beside *Deck boards: soft or splitting* when somebody reads the inspection back. Nobody has to work out which of six photos shows the deck. Photos on older inspections, from before this worked that way, are still there. They are shown as photos of the whole inspection instead of against one question.

Tap a photo you have added to **mark it up**, with the same drawing tools as everywhere else in the app, so you can circle the split you mean. The marks can still be edited afterwards, so the next person can move them.

You can still fix the photos on a recorded inspection. Open the inspection history on the structure and expand the inspection. Each photo has **Remove photo** next to it, with **+ Add photo** at the end. A stored photo is never quietly replaced. You add a photo or take one off, so the record shows what happened instead of looking as though it had always been that way. This needs a connection.

One step of the inspection wizard: a question, its answers as full-width buttons, and the camera button below them

Inspecting a structure as you add it

Go to **Field app → Add → Infrastructure**. On the details step there is an **Inspect it now** button. It opens the same wizard described above, and the answers are filed against the structure the moment it is created.

It is optional on purpose. Most of the time, somebody adding a bridge just wants to record that it exists. Making them assess it at the same time turns a two-minute job into one they won't do at all. Skip it and the structure is added with no inspection.

Two things are worth knowing. **The photos you add in the wizard belong to the structure**, not to individual questions. A photo per question is what the full Inspect flow does, on a structure that already exists, and the wizard tells you so where you add them. And **you never lose the structure because the inspection failed**. If the answers can't be filed, the structure is still saved and the app tells you the inspection wasn't, so you can record one against it there and then.

With no signal, the two go into the queue as one item. The structure and its first inspection arrive together or not at all, so there is never a structure in the list whose first inspection is still catching up.

What the answers add up to

Every answer carries a condition of good, fair, marginal, poor or failed, and **the worst answer given becomes the structure's condition**. One cracked stringer makes the bridge poor, however sound the rest of it is. That is the point. A summary that hides the one reading you needed is worse than no summary, because people believe it.

As you go, the form shows what your answers add up to and names the answer that is setting it, so the result is never a surprise at the end.

Filing an inspection sets three things on the structure: its condition, the date it was last inspected and when it is next due. The next due date comes from the inspection interval on the structure's type.

The review step, listing every question with the answer given

What it looked like last time

Every structure keeps its inspections, and you can see them in both places you open one.

On the phone, open a structure and look at **Last inspection** in its summary. That tells you when somebody last stood there, and tapping it takes you straight down to the inspections themselves. An overdue structure still says **Overdue** on that line. The due date itself is on the list rows and in Edit.

Inspection history is where you land. It shows the newest first, each row dated with its rating beside it and the answer that set that rating underneath. Tap a row to see every answer. Under each row, in red or green, is **what changed since the inspection before it**, for example *Railing: Firm → Loose*. That is the question somebody standing at a bridge actually wants answered.

If nobody has inspected a structure yet, the history says so and offers **Inspect it now** right there, so you don't need to go back up the panel to find the button.

The history works with no signal. It is stored on the phone as you open each structure, and the panel tells you when you are looking at the stored copy. An inspection you file out of range appears in the list straight away, marked **Waiting to upload**, with its answers and rating already worked out. So an inspection you have just done never looks like one you haven't.

On the dashboard, the same history is on the structure's own panel under **Infrastructure**.

Every inspection at once

Infrastructure → Inspections lists every inspection across all your structures, newest first, with the same detail on each row: the rating, the answer that set it, what changed since that structure's previous inspection and a link to any task it raised.

You can narrow it by date range, rating, infrastructure type or who did it. **Needs attention** is the one shortcut worth knowing. It collects everything that came back marginal, poor or failed, so you don't have to pick those three one at a time.

Share in the header holds both exports. Each one gives you what you are looking at, filtered exactly as it is on screen. **PDF report** has one row per inspection, on your organization's letterhead. Send it to an insurer or a land manager who has asked what you have on record. **CSV spreadsheet** has one row per question instead, so you can sort individual answers.

The inspection history on a structure in the field app: dated rows with their ratings, one showing what changed since the previous walk

When something is wrong

If the answers come out marginal, poor or failed, the form offers to **Create a maintenance task**. The inspector is standing at the problem, which is the easiest moment it will ever be reported, so it takes one tap. But you make that tap yourself. The box starts unticked.

The task writes itself from the answers. Its title names the part as well as the problem, for example *Boulder Creek Bridge — Stringers / beams: Cracked or sagging*, not *Bridge — cracked*. Its description lists every answer that came out worse than good, so somebody reading the task list doesn't have to open it to see what is wrong. You don't type any of it.

A clean inspection raises nothing. A task filed after a healthy inspection would just clutter a list somebody has to sort through, so the offer only appears when the answers call for it.

The box also names any tasks already open on that structure. A bridge with soft decking is very often a bridge somebody has already reported soft decking on, and whoever sorts the second report is never the person who filed it. Sometimes two tasks on one bridge are exactly right, because a railing and a stringer are different jobs. So the app shows you what is there and leaves the decision to you. The list only counts work somebody still has to go and do. A public report still waiting for approval is not on it.

The box also lists the findings it will write in, so you can see what the task will say before you tick it. A question you passed over is not one of them. *Doesn't apply* means you looked and there is nothing there, so there is nothing for anybody to fix.

Notes (optional) sits just above it. It is the one part of an inspection the questions can't cover: what you actually saw and what it will take. The note belongs to that inspection. It shows on that inspection's row in the history and nowhere else. It doesn't change the task, open anything or reach anybody's task list. It is there to say more about what you found. Leave it empty and nothing changes.

Warning the public

Under the task box, a structure on a trail also gets a **Warn the public** switch. Turn it on and the structure is listed as an active hazard on your public pages until it is fixed. That includes the trail's own page (with a warning sign on its map where the structure is), the network page, the trail-status widget, your website and TrailsIQ Go.

The level comes from the rating, on the same scale as hazards filed from maintenance tasks:

Rating	Shown to the public as
Failed	**Danger**, with *Do not use*
Poor	**Warning**
Marginal	**Caution**

The public sees the structure's name, what kind of structure it is (*Bridge on the trail*), the level and the day it was inspected. They also see what the newest inspection found wrong, in the answers' own words, worst first and at most three, for example *Decking: Soft underfoot · Railing: Loose*. Answers rated fair or good are left out. Your notes and photos stay with your team.

The warning stays up until an inspection says otherwise. The next inspection that rates the structure fair or good takes the warning down by itself, so there is nothing to remember to switch off. An inspection that finds it worse raises the level. The switch starts on for a structure that is already shown, so inspecting it again never hides it by accident. An inspection you back-date to catch up a paper record doesn't change what the public sees, for the same reason it doesn't change the structure's condition.

You don't need an inspection to post a warning. When you add or edit a structure, in the field app or on the dashboard, the same switch appears under **Condition** as soon as you pick marginal, poor or failed for a structure on a trail. Use it when you already know a bridge is out and there is no time for a full inspection. It comes down the same way: at the next inspection that rates it fair or good, or when you set the condition back to fair or good yourself.

To take a warning down without inspecting again, turn the switch off in the edit form, or open the structure on the dashboard and press **Take off public pages**. Structures with a **Public hazard** badge in the infrastructure lists are the ones the public can see right now.

The offer to raise a maintenance item, ticked, after a failing answer

It works with no signal

The questions come with the app when it opens, so the form works at the far end of a trail with no bars. Filing uses the same queue as everything else in the field app. The record is saved on the phone, dated the moment you did the inspection, and it files itself the next time there is a connection. The photos go with it in the same upload, with your drawings on them and the question each was taken on. So an inspection never arrives without the photos that show what it found.

You can watch the queue empty from the sync badge in the header.

Catching up a paper record

Filing an inspection dated in the past records it and leaves the structure's current condition alone. An inspection from last spring is history. Treating it as the structure's condition today would say the bridge is fine now because it was fine then.

So the history builds up correctly in whatever order the records arrive, and the structure always reflects the most recent inspection.

Writing your own questions

Go to **Settings → Infrastructure types** and choose **Edit inspection questions** on any type.

Every type starts with a set of questions that works from the day it is created, so a type you added this morning can be inspected this afternoon. Bridges, gates, signs and trail counters come with questions written for them. Everything else gets a general set. The badge beside the button tells you which you are using: *Standard questions* or *Your own questions*.

For each question you set its answers and the condition each answer means. Order the questions with the arrows, and give each one two to six answers. **Safe to use right now?** and **Vegetation and drainage** are not listed, because they are asked of everything and can't be removed or duplicated.

Rewording a question or an answer is safe. Past inspections still read correctly, because each record keeps the questions exactly as they were asked. Deleting a question stops it being asked from now on. It isn't removed from records already taken.

Reset to standard questions puts a type back to the built-in set. It is also how a type with your own questions picks up an answer we add to the standard set later. We never change a set you have written, so it stays exactly as you wrote it until you reset it.

A trail counter is graded on whether it counted

The counter questions ask about what you can see: the power, what the sensor is looking at, the post, the inside of the case and any signs of tampering. They also ask one thing you can't see: **has it counted since the last visit?** Answering *nothing recorded* fails the counter outright, even when every other answer is good.

That is on purpose, and it is the only place in an inspection where something undamaged is graded as failed. A counter that is straight, dry and unmarked but has recorded nothing for six weeks is not in good condition. It is just a post. Grading it on looks alone would mark it as healthy, and

you would only find the gap in your season's numbers at the end of the year.

INFRASTRUCTURE

How to create and edit points of interest

Points of interest such as viewpoints, campsites, water, trailheads and parking are filed from the field app and edited on the dashboard. This covers the nine starting types, extra fields, photos, linking to trails, what the public sees and what deleting does.

Points of interest are the places trail users might want to know about that aren't built infrastructure: viewpoints, campsites, water sources, trailheads and parking lots. Every point has a location, a type, a name, an optional description, optional photos and extra fields for its type. A point is simpler than a structure, but you record it in much the same way.

What is a point of interest?

A point of interest is a labeled pin on the map. Every point has a name, a type (Trailhead, Viewpoint, Water, Campsite and so on), a location, an optional description, optional photos and optional extra fields for its type. It can be attached to a trail, in which case the trail's page lists it, or it can stand on its own.

Most points are **private to your organization**. Your team sees them on the dashboard and in the field app, but they are not on your public pages. Trailheads and parking are public unless you say otherwise, and you can make any point public with its **Show on public pages** switch (see *Visibility* below).

Points are simpler than structures. They have no condition, no inspection schedule, no link to a network of their own, no code and no materials calculator. Use them for anything you want a labeled pin for.

Types and categories

Every point has one **main type**. The main type decides its name on screen, the icon and color of its map marker, the category it falls into and any extra fields the wizard shows.

A point can also count as **other types at the same time**. A trailhead is often a parking lot too, and an overlook can have a water spigot. Tick those under **Also** when you edit the point. The point then shows up under every one of its types: in the type filter and its counts, on the field app's type chips, and in a network's **Trailheads and parking** list. Its marker keeps the main type's icon and color.

A point can also name the **infrastructure standing at it**, such as a trailhead's kiosk and its trail map. Edit the point and tap them under **Infrastructure here**, on the dashboard or in the field app. Only infrastructure within 300 m (about 1,000 ft) of the point is listed, nearest first, with its distance. The point's panel then lists them, and each one's panel says which place it is **Part of**, so you can go from one to the other. On a trailhead or parking lot, the public card on your network pages also lists the types of each linked piece of infrastructure, including its Also types. Deleting either one removes the link and nothing else.

Every point's panel, on the dashboard and in the field app, says when it was added and who added it, for example *Added Oct 7, 2026 by Sam Rivera*. Points added before October 2026, or brought in by an import, show only the date.

Every new organization starts with nine types:

Type	Category
Trailhead	access
Parking	access
Viewpoint	viewpoint
Water	amenity

Type	Category
Campsite	amenity
Restroom	amenity
Shelter	amenity
Gate	feature
Other	feature

The four categories (*access*, *viewpoint*, *amenity* and *feature*) group points on the filter chips and color their markers on the map. Access is blue, amenity is green, viewpoint is amber and feature is gray.

You can add, edit or delete types in **Settings → POI types**. A type you add appears in the type picker on step 1 of the field-app wizard. Fields you add to a type show up on step 4. Each type also has an **Icon** picker, so a custom type like *Bike repair station* can use any icon from the built-in set (Trailhead, Parking, Gate, Shelter, Campsite, Restroom, Water, Viewpoint, Trail map, Hazard, Other) instead of a plain map pin.

Settings POI types page listing the ten default types with their categories

Creating a point of interest

It works the same way as infrastructure. **The dashboard has no form for creating a point.** You create every point with the field-app wizard, either on your phone out on the trail or in the field app in a browser tab. The **+ New point** button on the Points of Interest page opens the field app in a new tab, which takes you into a four-step wizard.

The four steps are:

1. **Pick a type.** You see a grid of your organization's point types, such as Trailhead, Viewpoint and Water. Tap one to move on.
2. **Photos.** These are optional. You can upload up to 10 files at a time, up to 5 MB each. A point holds up to 20 photos in total, and the oldest is dropped when you add more.
3. **Confirm the spot.** The pin starts at your GPS position. Drag it, or tap the map to place it.
4. **Details.** The fields are covered below.

Any active member of your organization can create a point. Unlike the Infrastructure button, the **+ New point** button on the dashboard is shown to everyone.

Trails Show page with the Points of interest section listing attached POIs

Every field on the create form

The fields on step 4, with their labels as you see them:

- **Name:** required, plain text, up to 255 characters. If you leave it blank, the wizard stops you with "*Give the POI a name.*" Unlike a structure, a point has no code to fall back on. The name is what shows on the map label and on the trail's page.
- **Description (optional):** a text box for more detail, such as what you can see from the viewpoint, whether the water needs treating, or whether the lot fills up on weekends.
- **Extra fields for the type:** whatever the type defines. See the next section.

There are no fields for latitude and longitude. The location comes from step 3, *Confirm the spot*. The type is picked on step 1 and shown view only after that. The location has to be a real one, and the type has to be one your organization actually has: one you added under **Settings → Point of interest types**, or one of the nine TrailsIQ starts you with if you haven't changed them.

Tap **Save** to create the point. It shows up right away on the Points of Interest page and on the page of any trail it is attached to.

Type-specific details

Each point type has its own list of **extra fields**, just like structures. These kinds of field are available:

- **Text:** a single line of text.
- **Textarea:** several lines, for longer notes.
- **Number:** a number.
- **Date:** a date picker.
- **Select:** a dropdown with set choices.
- **Checkbox:** a yes or no switch.

Points don't have the *Dimension* field that bridges use, because you don't measure a point the same way.

Some common uses:

- **Water:** a *Filtered / Treatment required / Untreated* dropdown and a *Seasonal* checkbox.
- **Campsite:** the number of tent sites, whether there is a fire ring, and whether a permit is required.
- **Parking:** capacity, seasonal access, and gravel or paved.

What you enter stays with the point. On the dashboard, the slide-out panel shows the values view only in its **Details** block. The edit form shows the same fields, so a manager can change any of them.

You set up the fields in **Settings → POI types → Edit type → Attributes**.

Photos and location

Photos. Each point holds up to 20 photos. You can upload up to 10 at a time, up to 5 MB each, as PNG or JPEG. When you add a 21st, the oldest one is dropped. Photos appear as a grid in the slide-out panel. Tap any photo to see it full size.

Location. Step 3 of the wizard sets the location. You can set it in two ways:

- **GPS:** the app uses your phone's current position. This is the quickest way when you are standing at the point.
- **Tap to place:** you drop the pin on the map yourself. This helps when you are not there, or the GPS signal is poor.

TrailsIQ remembers which of the two you used, so a later report can tell a point marked on foot from one marked at a desk.

You can move a point after you create it. Edit the point and drag its pin, or tap the map where it belongs. It only needs to stay within your organization's map area to display sensibly.

Viewing and editing a point of interest

A point doesn't have a page of its own. It opens in a slide-out panel on the Points of Interest page. Click a point's card, or go to a direct link like `/points/{id}`, and the panel opens with that point selected.

The top of the panel shows the point's type icon, in the same color as its map marker, and its name. Chips show its type and how it was placed, by GPS or by hand. Below that you see:

- The description.
- The trail it is on, or *Not on a trail*, and its location.
- The extra fields for its type, view only.
- The photo grid. Tap any photo to see it full size.

Managers see **Edit details** and **Delete** at the bottom of the panel. **Edit details** opens the form in the panel, with **Save changes** and **Cancel** at the bottom until you are done. You can edit the **Name**, the **Type** (you can change it, just like a structure's), **Also** (tap any other type that also fits; the main type is marked and can't be ticked twice), the **Trail** (with "— None —"), the location, the **Description** and the extra fields. Field workers

see the panel as view only.

Any active member of your organization can create a point. On the dashboard, only owners and managers can edit or delete one.

Linking to trails

A point can be attached to a trail or stand on its own.

- **On a trail:** pick the trail in the edit form. The point then shows on the trail's page under **Points of interest**, with its name, type, description and location. A trail with no points says "*No points of interest on this trail.*"
- **On its own:** leave the Trail dropdown at "— None —". The point still shows on the Points of Interest page and in the field app's list. It just isn't attached to a trail.

If you delete a trail, its points stay and simply stand on their own. A point belongs to a network through its trail, not directly. So a point attached to a trail that is in both Network A and Network B shows up under either one.

Visibility: what the public sees

Each point has a Show on public pages switch. Edit the point on the dashboard or in the field app to find it. Until you change it, the point's type decides. Trailheads and parking are public, and every other point is private. Once you set the switch yourself, your choice wins, whatever the type.

A public trailhead or parking point appears on its network's public pages, on the map and as a card under **Trailheads**. The card shows its name, address, parking, the trails that start there, what is on site and directions. A trail counts as starting there when one of its ends is within 75 m (about 250 ft) of the point, or when the point is attached to that trail. So if a trail's line starts further away, attach the trailhead to it to get it listed. The card also lists the point's other types (a trailhead that is also a viewpoint shows *Viewpoint*). It lists the types of each piece of infrastructure linked under **Infrastructure here** too, including their **Also** types (a kiosk that is also a trail map shows *Kiosk* and *Trail map*). If the network is hidden, none of this is shown.

A public point attached to a trail also shows on that trail's own page. It appears as a pin on the trail's map, which opens a card with its name, type and description when a visitor points at it or taps it. It is also listed in a *Points of interest* box under the trail's details. A point on a hidden network stays off the page, whatever its switch says.

Every other point stays in the field app and on the dashboard until somebody switches it on. Keep a point private when it holds something your organization would rather not publish, such as a gate on private land, a water source nobody checks, or a campsite that needs a permit. The switch is for a viewpoint or a spring that visitors should know about.

Switching a trailhead off takes it off its network's page and its trail's page at the same time. And before you tick another type under **Also** on a trailhead, or link infrastructure to it, remember that the public card will name it.

Deleting a point of interest

The **Delete** button is at the bottom right of the slide-out panel. Only owners and managers can use it. The confirmation reads "*Remove "{POI name}"?*".

When you delete a point:

- The point is removed.
- Nothing else is affected, because nothing else depends on a point. It has no maintenance tasks linked to it and no inspection history.
- **Its photos go with it.** They are removed and stop counting toward your storage. You don't need to clear them first.

If you only want to set a point aside for a while, take it off its trail and leave it standing on its own. There is no way to hide a point without deleting it.

Common gotchas

- **The dashboard has no form for creating a point.** Every point is filed with the field-app wizard. The **+ New point** button on the dashboard opens the field app in a new tab.
- **Everyone sees the "+ New point" button.** The Infrastructure button is shown only to managers, but any active member can create a point, so this button is shown to everyone.
- **Only trailheads and parking are public until you say otherwise.** Turn on **Show on public pages** to show any other point on its trail's page, or turn it off to hide a trailhead. Only trailheads and parking get a card on the network page. A trailhead's card names its other types and the types of its linked infrastructure.
- **A point belongs to a network through its trail.** Attach it to a trail and it appears under whichever network that trail is in. Move the trail and the point moves with it.
- **Points have no condition or inspections.** A viewpoint doesn't wear out the way a bridge does. If you need to track the state of something, it is probably a structure.
- **The name is required.** The wizard won't save a point with a blank name.
- **Deleting a point deletes its photos.** They stop counting toward your storage at the same moment.
- **You can change a point's type.** If the wrong type was picked, edit the point and pick another. The marker's color and icon update by themselves.

What's next

- Set up your organization's point types in **Settings → POI types**. Add the ones you will actually use, delete the ones you won't, and add extra fields where they help.
- If you are thinking about trailhead kiosks or bridges, read *How to create and edit infrastructure*. Those are structures, not points of interest.
- Points are filed one at a time through the wizard. You can't bulk-import them from a KML or GPX file. When there is a lot to record, two phones on the trail work better than one browser tab at a desk.

INFRASTRUCTURE

Bridge materials calculator: a lumber list from a bridge record

Turn a bridge's recorded measurements into deck boards, stringers and fasteners, and export them as a PDF for quotes and work orders. It explains the spacing and stock length it assumes, and where a span becomes a job for an engineer.

The **bridge materials calculator** turns a bridge's recorded measurements into a lumber list. It tells you how many stringers and deck boards you need, at what lengths, and roughly how many fasteners. It answers the everyday question "what do I put on the truck to replace that?" from the record you already have.

What it needs from you

It needs four measurements from the bridge record:

- **Length:** the span.
- **Width:** the deck width.
- **Decking thickness.**
- **Decking board width.**

These are the standard measurement fields on a Bridge structure, so if the bridge is recorded properly the calculator has everything it needs. If a number is missing, fill it in on the structure rather than guessing here, because the record is what is worth getting right. On a maintenance task whose bridge is missing one, the notice in place of the calculator has an **Add them now** link that opens that structure's edit form, in the field app and on the dashboard.

Measurements are stored in millimeters and shown in your own preferred units, so it does not matter which you think in.

One choice is worth making on purpose: **rough cut or dressed (S4S)**. You set it separately for stringers and for decking. A rough 2× board is a full 2 inches thick and a dressed one is 1½ inches, and that difference goes straight into the span table. So the same bridge is sized differently depending on which you pick. A build can mix the two, and often does.

Everything else on the sheet starts from a sensible default, and each one is a tap on its own row. The row opens an editor for that one setting, rather than a form full of fields you did not come for. **Override the details**, at the bottom of the list, puts all the same settings on one screen for when you are changing several. **Reset** there puts them all back to what the bridge record says.

Some of those changes are saved to the bridge and the rest are not, and the editor tells you which before you pick. Your **lumber types**, the **stringer size** and the **stringer stock length** are facts about the bridge. Picking one saves it to the structure's record, and it is there the next time anyone opens the calculator. **Stringer spacing, the decking gap, board thickness and width, the decking stock length and the center support switch** only apply to the estimate in front of you, and are gone when you close it.

What it gives you

On the phone, the calculator opens full screen with two tabs. **Setup** is the numbers going in. **Materials** is the list coming out, and its tab shows how many lines are on it.

On the dashboard, it opens as one wide window with the same two halves side by side. The settings are a column on the left, each a row with its control beside it. The answer is on the right: the live plan, any warnings, what is already in stock, a card for each part and the cutting list. They update as you type. **Plans** is a tab of its own beside **Calculator**. The bottom of the window shows the total volume and what is left to buy, with **Copy list** and the PDF. On a small screen the two columns stack.

Both put the span editor under **Structure**: **Split into another span**, a box for each stretch's length, and a posts switch for each stretch. These are described under *When one bridge crosses two kinds of ground* below.

Setup opens on a **plan of the bridge drawn from those numbers**. It shows every deck board and every stringer run, to scale, with the drainage gap at the width you set. A count is easy to read and hard to check. A spacing that puts three stringers under a deck where you expected four is obvious in the drawing and invisible in the number.

The drawing shows **how each run is built, not just where it goes**. A span longer than the boards you are buying is drawn as the boards it is really made of, at their real width. It is one board thick along most of the run, two where a lapped pair runs side by side, and three where a scab is bolted across a butt joint. It also shows how far the deck runs **past the outer stringers**, which is the part nobody can check from a list of quantities.

Tap the magnifier on it and the plan fills the screen. There you can pinch to zoom and drag to move around. It is worth doing on a long crossing. The mark on a run where its boards butt is tiny on a page you are scrolling past, and full screen is where you can see which run each one is on. It is the same view the figures on the **Plans** tab open into.

- **Decking:** how many boards, at what stock length.
- **Stringers:** how many **boards**, at what size, and at what length or lengths. On a span longer than the boards you are buying, that is more than the number of stringers. A run is built from several boards, and the card breaks the total down so you can check it. **An order is not always one length.** Where the short ends of the runs come off a shorter board, the card says so instead of naming one size, and the cutting list below it names both.
- **Fasteners:** a rough count of deck screws and joist hangers.
- **A total volume:** board feet if you work in feet and inches, cubic meters if you work in meters. This is the number a supplier will actually price. **How it's figured** shows the pieces it was added up from.

Each line also says whether you already have it. If your lumber is set up in **Inventory** with a matching lumber type and size, the sheet shows what is in stock and what is left to buy. If nothing matches, it says so and tells you what it was looking for. That way a yard you have not set up reads as "not matched" rather than "not owned".

When your yard covers part of what Stringers or Decking needs, the card shows **two labels**, such as *In stock 7* beside *Buy 4*. The boards you do not have to fetch are as much a part of the answer as the ones you do. The two add up to what the job needs, so a card with only one label is either fully supplied or all to be bought.

When a material is ordered in more than one length, you get a line for each length, labeled with the length it is about. For example, a spliced run buys long boards for the full pieces and one short board for the ends. These are separate questions, because ten 12 ft boards on the rack do not cover a need for one 6 ft board.

Where something is in stock, **Reserve** holds it for the work you opened the calculator from. The next person to look at that shelf can see those boards are spoken for. It holds what is actually on the shelf today. The button says how many, and if that is short of the job, it says how many still need to be bought. Where the order has two lengths, it holds both, and tells you if one of them could not be held. Reserving needs a connection. A reservation nobody can see is not worth making, so without a connection it tells you so.

What you get is a materials list you can take to a supplier, as a PDF for a quote, a work order or the cost breakdown in a grant application. On a phone, the button reads **Share or save PDF** and opens the share sheet, which is also where *Save to Files* is. On a computer it downloads. On the dashboard there is also a **Copy list** button, which copies the list so you can paste it into an email.

The drawings go with it. The PDF has the plan view, the side view and the cross-section on their own page after the list, so the yard sees the same bridge as whoever is at the saw. You do not have to open the Plans tab first, because they are included whether you have looked at them or not. If they could not be drawn for some reason, the download tells you, rather than handing you a shorter document without a word.

Bridge materials sheet showing deck boards, stringers, fastener counts and the board-foot total

What it assumes

These are spelled out because they decide whether the answer fits your bridge:

- **Deck boards run across the full width**, butted end to end along the length. It picks the stock length that wastes the least per board. For a 4 ft deck that is 8 ft or 12 ft, which both cut with nothing left over, rather than 10 ft, which throws away 2 ft every time. Between lengths that waste the same, it picks one **you already have in stock**, and after that the shorter one. It does not try anything clever with ripping boards or joining offcuts. Trail bridges are short and boards of one length are normal. If you build differently, the board count still holds but the lengths will not.
- **Stringers are spaced 406 mm (16 inches) apart, center to center.** The number needed comes from the deck width, and the deck overhangs the outer stringer on each side by half a spacing, which is 8 inches on a 4 ft bridge. This follows home deck guidance, which most trail crews work to. It is cautious: light foot bridges often carry wider spacing perfectly well.
- **You can set that overhang yourself.** If you leave it, it is worked out as above. If you give it a number, the outer stringers sit that far in from each edge, with the rest spaced between them, which usually changes how many you need. **Zero is a real answer.** It means a stringer on each edge of the deck, and the calculator treats it that way rather than as "not set".
- **The stringer size comes from a span table**, sized for the length you entered.
- **Fasteners are a rough guide:** two deck screws per board at each stringer it crosses, and two joist hangers per stringer. The exact hardware depends on details TrailsIQ does not record, so read these as "how many boxes", not as an exact count.

Where it stops

Once a span is longer than the biggest beam in the span table, the calculator stops sizing stringers and tells you so.

With the standard dressed lumber list, that happens at about **43 feet / 13.1 meters**, where an 8×16 runs out. Rough-cut stock is stronger for the same nominal size, so its table reaches further. The warning names the size it ran out at, so you do not need to remember either figure.

This is a deliberate limit. Past it you need engineered beams, such as LVL, PSL, glulam or steel, and picking one from four measurements would be guessing at something that carries a load rating. The calculator still gives you the deck, the layout and the fastener numbers. The beam has to come from an engineer.

Well before that hard stop, you will meet a softer one. When the span is longer than the longest **stock length** you have set, the calculator keeps sizing the beam but warns that each run has to be joined. That is a note about how the bridge gets built, not a refusal. Every one of these joints is a structural detail, though, so it belongs in the same conversation as the beam itself.

How a run gets joined

When the boards are shorter than the span, something has to carry the run across the gap between them. There are three ways to do it, and **the calculator picks one by measuring, not by preference.**

With the **Center support posts** switch on, each run is butted end to end over a post, and every piece sits on something solid. That is the simplest answer wherever the ground allows a footing.

Turn the posts off, for example over water or a ravine, and the run has to carry its own joints. Then the board length decides:

- **Boards that are long enough are lapped.** Lay two boards past each other far enough and the overlap is the joint. Bolt through it and you are done, with nothing cut and nothing added. A 20 ft span on 16 ft boards works out exactly like this. Each board reaches 6 ft past the middle, and the run is two boards.
- **Shorter boards are butted, and a scab carries the joint.** The same 20 ft span on 12 ft boards can only lap by 2 ft, which is not enough. So the boards are cut to 10 ft and meet end to end, with a **scab** bolted across the joint. The scab is the only thing crossing that line, which is why it gets its own length rather than a piece count.

When one bridge crosses two kinds of ground

A long crossing is often more than one problem. The middle is over water, where there is nowhere to put a footing. The approaches are over dry bank, where a post is easy. The **Center support posts** switch gives one answer for the whole structure, and a bridge like that needs two.

Split it instead. **Split into another span** divides the bridge into stretches, and each stretch has its own posts setting. The stretch over water can carry its own joints, while the stretches over the bank butt over a post.

A few things follow from that, and the third is the reason to bother:

- **The spans divide up the length. They do not replace it.** The bridge is as long as the structure record says, so the last span is whatever is left over. It is shown rather than typed. Change the bridge's length and the spans divide it again.
- **Where two spans meet, something carries the line.** That is what makes them two spans rather than one: an abutment, a pier or a sill. The drawing marks the change of ground with a dashed line and puts a bearing on it, and every run breaks there. So the piece count goes up by one per run at each boundary, which the cut list already includes. The **Center support posts** setting on a span is about posts *inside* that stretch, not about its ends.
- **The stringer size is set by the longest span, not by the whole bridge.** This is the whole point of saying where the ground is. A 38 ft crossing sized as one clear span needs a very heavy beam, or falls off the span table entirely. The same crossing as a 24 ft span over water and a 14 ft span over bank is sized for 24 ft. If you cannot say where the supports are, do not split it. A span with no support that you have described as supported is a bridge sized for a load path it does not have.
- **Every span gets the same size.** Different depths would put the tops of the stringers at different heights, so the deck would step at each change unless every bearing were shimmed to match.
- **The stock length works the other way: on Auto, each stretch gets its own.** A 12 / 16 / 10 ft crossing buys three 12 ft boards, three 16 ft and three 10 ft, and wastes nothing. **If you pin a stringer stock length, every stretch uses it.** The same crossing on a pinned 16 ft buys nine 16 ft boards and cuts six of them down, leaving 30 ft of offcuts. Pin one only when that really is all your yard carries. Otherwise leave the row on Auto, where it reads *one per span*.

Short end pieces **are** shared between the spans. Three 13 ft stretches on 12 ft boards leave a 1 ft end on each run. That is nine of them, and a 6 ft board holds six, so the bridge buys two short boards rather than three. Ends of *different* lengths still get a board each. Working out which odd lengths could share one is a packing puzzle, and the calculator does not pretend to have solved it.

Set the joint reach to what your own detail calls for. It is one number: how far a lap or a scab has to reach past the joint on *each* side. It decides both which kind of joint you get and how long the scab is. The default suits ordinary trail bridge timber, and a longer reach means a heavier joint.

More generally, **this is a materials estimator, not a structural design.** It does not know your timber's species or grade, the load it has to carry, your snow load, the state of your abutments, or whether a machine will cross. Anything people walk on that carries a load needs someone qualified to sign it off. Use this to plan the shopping and the budget, and to have a sensible conversation with whoever does the design.

Long-span warning where the calculator declines to size stringers and names the size it ran out at

The plans

Plans is the third tab, beside Setup and Materials. It is the same bridge drawn from above, from the side, and cut through the deck, with the measurements on the drawings rather than in a list beside them.

Nothing on it is a separate answer. Every line comes from the same setup as the materials list, so changing the deck width or splitting the crossing changes the drawings straight away.

Opening a drawing full screen

Tap the magnifier on any drawing, or on the plan on the **Setup** tab, and it fills the screen. You can pinch to zoom and drag to move around, and the buttons zoom in steps for when one hand is full. A wide drawing is **turned a quarter** so it uses the whole of a phone held upright. The button beside the zoom turns it back if you prefer it the other way.

Share or save sends any of the three drawings to your phone as a picture, through the usual share sheet, so it can go into a message, an email or your photos. It is a proper image of the drawing at the size it was drawn, not a screenshot of your phone.

What each drawing tells you

- **The plan view** is the deck from above, with the stringer runs under it and a mark on each run wherever its boards butt. Every place the crossing is supported, meaning the two abutments and each span boundary, is drawn as the sill under the deck. The key under the drawing

explains every mark on it.

- **The side view** has two rows of measurements, and they answer different questions. The lower row is the **spans**, which is where the bridge is supported. The upper row is the **boards** on each run, which is where the timber starts and stops. On a crossing split into a 2 m and a 4 m stretch, cut from 3 m boards, those rows read 2.00 and 4.00 against 2.00, 3.00 and 1.00. The second row is the one you cut from.
- **The cross-section** is taken where there is deck to cut through. That is inside the first bay rather than at the middle of the bridge, because on a crossing split in two, the middle is a bearing, and a section through a bearing shows a support instead of the deck.

A boundary is both supported and broken

Where two spans meet, two things are true at once and the drawings show both. Something supports the line there, and every stringer run stops and starts. So a span boundary gets the bearing mark *and* a joint mark on each run.

Both drawings mark it the same way, and they are worth reading together. A bar across the deck shows wherever the bridge stands on something: the two abutments, every span boundary and every mid-span post. A small mark on each run shows wherever that run breaks. A break carried by a bearing and a break carried by a post look alike because they *are* alike. The sentence under the drawing says which is which, so you do not have to work it out from the marks.

A joint away from a boundary is different again. It stands on a **mid-span post** only when that stretch allows one. A stretch over water is butted and scabbed precisely because there is nowhere to put a footing, so no post is drawn under it and the note does not claim one. **The scab is drawn there instead**, on the plan and on the side view, reaching past the joint on both sides. It is the only part crossing that line, so a drawing that showed the break without the plate would show a beam with a gap in it. On the plan, the scab is drawn *beside* the run rather than over it, because that is where it is bolted: one plate down one side for a single scab, or one on each side for a double. Drawing it on top would hide the run and the overlap.

The Setup drawing counts **supports** rather than bearings for the same reason. The two abutments, every span boundary and every mid-span post are all places the structure stands, and the sentence under the drawing names which is which. So a crossing of a 2 m and a 4 m stretch on 3 m boards reads *carried at both abutments, the span boundary and 1 mid-span post*, over *3 boards per run — 1 joint butted over a mid-span post, and 1 break landing on a bearing where the ground changes*. A break at a boundary needs no detail from you, because the bearing under it is the detail.

Deck height above the bed

Deck height above the bed, on Setup or under Structure on the dashboard, is measured from the walking surface straight down to the ground or the water. Fill it in and the side view draws the ground and gives the bearings their real length. Leave it blank and the side view marks where the bridge is supported and stops there. Drawing a four-foot post under a bridge that actually sits on bedrock would be a drawing of a different bridge.

It **adds nothing to the order**. No board, fastener or stringer size depends on it, and the materials list does not change when you change it. Only the drawings use it.

A height too small to fit the deck and the beam under it is refused rather than drawn, because it describes a bridge buried in its own streambed.

This and each span's length open the same panel as every other measurement on Setup, so you can enter either in whatever unit your tape reads: feet and inches, or meters.

The scale is a bar, not a ratio

The drawings are on a screen and get printed on whatever paper you use, so a printed *1:50* would be a promise nobody can keep. The bar under the drawings is a real length you can hold a tape against, whatever size it ends up.

The drawings are still an estimate. They are generated from your numbers, not designed by anyone, and the same rule applies as for the materials list. Anything people walk on that carries a load needs someone qualified to sign it off.

Cutting and offcuts

The materials list ends with **what you cut from what**, one line for each kind of board you take to the saw.

The big figure on each line is what is left over, given as pieces, such as *3 × 1.00 m* rather than *3.00 m*. Three ends a meter long and one three-meter end are the same amount of wood but not the same pile. The first is timber you can use on the next job, and the second is a board. The total is under it in small type as *Total: 3.00 m*, and a line with nothing left over says **none**.

Beside that, also in small type, is what you bought and what comes out of each board. A line reading *used whole* is a board that goes in as it comes. A line reading *cut to 10 ft* is one you will be trimming.

The leftover pieces are not always the same length on a line, and that matters. When a line's boards are all cut the same way, each leaves the same end. When they are not, the last board is only partly used and leaves a longer piece. For example, sixteen planks cut into two deck boards each cover thirty-one deck boards, so the sixteenth plank gives up one and keeps the other. That half plank shows as its own piece rather than being averaged in with the rest.

The figure at the top of the section is every line added together, so it always agrees with the lines. Each line's pieces add up to its own total for the same reason.

The same rows are on the PDF, so whoever is at the yard and whoever is at the saw are reading the same list.

Setting your stock lengths

Settings → Bridge materials calculator holds the stock lengths and stringer sizes the calculator can choose from.

Set these to what your supplier actually stocks. The default list is a reasonable general set. But a calculator that recommends a length nobody near you sells gives you a list you cannot buy, and the swap then happens at the yard without anyone writing it down.


Settings screen listing available stock lengths and stringer cross-sections

Common gotchas

- **Bad measurements give a bad list.** The calculator is only as good as the four numbers on the structure record. Measure the bridge rather than guessing from a photo.
- **It is not an engineered design.** For anything with a long span, anything a machine crosses, or anything over water people could fall into, get it designed.
- **On long spans, no stringer size is given on purpose.** That warning is the answer, not a failure.
- **A splice warning is not the same as a refusal.** "Spliced over mid-span support posts" means the calculator sized the beam and is telling you it will not arrive in one piece. Check that a center post can actually go there. Over water or a ravine it often cannot, and the **Center support posts** switch is how you tell the calculator.
- **Count boards, not stringers.** Three stringers on a span that needs two boards each is six boards, and a butted run needs a scab over every joint as well. The quantity is what you buy, and the drawing shows the runs. They are different numbers on purpose, and the card shows how it got from one to the other.
- **A scab is cut, not bought whole.** Its length depends on how far it has to reach past the joint, so the list gives you a cut length and the number of boards those cuts come from. That is usually fewer boards than scabs.
- **If a span is a few millimeters longer than a whole number of boards, you are told to shorten it.** The last piece of a run is whatever is left over. When that piece is shorter than the beam is deep, it is a block, not a piece of beam, and nobody would buy a board to cut three of those off it. The calculator says how far over you are and what shortening the bridge by that much would save. It does not change the order for you, because the length on the record is the bridge you said you were building. The extra board disappears by itself once you change it.
- **Fastener counts are approximate.** Buy round numbers and expect some left over.
- **The last piece of a run is not a whole board.** A span is rarely a whole number of boards, so the last piece is whatever is left. The list buys it as the shortest board it fits in, and cuts every run's short piece from the same board where they fit. A 38 ft bridge on 12 ft boards is three runs of four pieces: three 12 ft boards and a 2 ft end each. The three ends come from one 6 ft board, so it buys ten boards rather than twelve. **Pieces and boards are different numbers on a spliced run, and the headline counts boards**, because that is the number you take to a supplier.

- **An estimate for a bridge exactly as long as a stock board may now be different.** For a span that matched one of your stock lengths exactly, such as an 8 ft bridge on 8 ft boards or a 14 ft deck on 14 ft boards, the calculator used to step up to the next length. On a pinned length, it also said the run needed splicing over mid-span posts. It now buys the length the bridge is. If you saved or printed a materials list for a bridge like that, open the calculator again and get a fresh one. It will be one length shorter and the post note will be gone.
- **Set your stock lengths first**, or the list will be right in principle and impossible to buy.
- **A length you already have only settles a tie.** The calculator checks your lumber inventory for the size it is about to buy. When two stock lengths cut the board equally well, it plans around the one on your shelf. It will not waste timber to use up the yard: a length that wastes more, or that needs a joint in a board somebody walks on, still loses. One thing it cannot see is the last plank of the order. 40 boards is exactly twenty 8 ft planks but thirteen and a third 12 ft planks, so the 12 ft order rounds up and the last plank gives you a couple of spares.
- **A longer board can stand in, and the card tells you when one does.** The stock check accepts any board that is long enough, so eleven 12 ft planks can count toward a line asking for 8 ft. They are not eleven of what the line asks for, though. Cut for a 4 ft deck, each one gives three boards rather than two. So the card names the length it found and how far it goes, rather than adding it into the count.
- **Decking thickness matters more than people expect.** It affects both how far apart the stringers can be and how much deck weight they carry.
- **A size marked *auto* is still a real size.** Those rows show what the calculator picked from the span table and the stock list. The tag says where the number came from, not that it is waiting for one. Set your own in **Override the details** when you are building from what is already in the yard.

INFRASTRUCTURE

Trail counters: use numbers from the trail itself

Add your counting units, attach them to the network, trail or infrastructure they sit on, import readings by serial number, and read the numbers honestly, including what a counter cannot tell you before you quote it to a funder.

Counters are the infrared or inductive units you put out on a trail to count the people passing. TrailsIQ keeps each unit, its location and the readings you download from it. Your trail use numbers then sit next to the trail they describe, instead of in a spreadsheet somebody has to find.

Adding a counter

You do not have to add a counter by hand. **Importing a file creates any counter TrailsIQ does not recognize**, using the serial number, name, mode, battery voltage and download time from the file itself. For most people, the first import adds the counter.

Add one yourself from *Counters* → *New* if you want to name it and attach it to a trail before its first download. Either way, a counter has:

- **Name:** what you call it. "Lower Oak Ridge trailhead" is more useful than "Counter 3". Once you set a name on the dashboard, later imports keep it and do not replace it with the name in the file.
- **Serial number:** as printed on the unit. Everything else is matched on it.
- **Mode:** how the unit counts. Updated with each import.
- **Battery voltage:** updated with each import.
- **Last download time:** updated with each import.

Because those last three update with every import, they tell you how a unit is doing. If a unit has not been downloaded in three months, it may have nothing new to report or it may have stopped working, and you cannot tell which from your desk.

The way to find out is to go and look at it. If you keep your counters as infrastructure as well, inspecting one asks whether it has counted since the last visit, and answering *nothing recorded* fails it — see Inspecting structures. A unit can be straight, dry and undamaged and still have counted nothing since spring.

Counters list showing name, serial, attachment and last dock time

Where a counter lives

A counter can be attached to a **network**, a **trail** or a piece of **infrastructure**, such as the trailhead sign or bridge it is strapped to.

Attach it to the most specific thing you can. A counter on a trail gives you that trail's numbers. One attached only to a network tells you people came through the area, but not where. Attaching it also helps you find the unit again. More than one organization has lost a counter that was "somewhere near the north end".

Getting readings in

Readings come in by **importing** a **TRAFx data file**. Download the unit, save the data file from the TRAFx software and upload it with **Import TRAFx file** on the *Counters* page. Only that format can be imported, so a file from another make of counter will not work. If yours is a different make, ask us.

Everything is matched by the **serial number** in the file. One file can hold data from several counters, and each set of readings goes to the right unit.

You can safely import a file that overlaps an earlier one. Each reading is matched by counter and time, so a reading that arrives twice is only stored once. That matters because a download usually contains everything on the unit, not a tidy date range. You can download and import as often as you like without inflating your numbers. After each import, the summary shows the **new readings** separately from the counter's **total**, so

you can see exactly what that file added.

A serial number belongs to one account. If you run more than one organization, the same file can be imported into each of them separately. A second-hand unit, or one you move between two accounts you manage, needs nothing from us. Each account keeps its own counter and readings for that serial number, so changing a number in one never changes the other.

It also means that importing into the wrong account leaves a counter there. Delete it from *Counters* and import the file into the right account. The other copy is not affected.

Counter import screen with a readings file selected

Reading the numbers

Open a counter to see its readings. Pick a range at the top, such as 7, 30 or 90 days, the season so far, everything, or your own dates. The page then shows:

- **Totals** by the day, the week or the month, with weekends picked out. Turn on **Compare** to draw the previous period or the same dates last year over them.
- **When people ride:** the average number of passes per hour for each day of the week, with the busiest hour named.
- **Day of the week**, and the share of the traffic the weekend carries.
- **The year to date**, against last year on the same date.
- **Busiest days**, and **Data coverage**, which shows the days the counter has readings for. A gap left by a flat battery shows up as a gap, instead of looking like a quiet week.

Keep two things in mind when you read them:

- **Most counters count passes, not people.** Somebody walking out and back passes the sensor twice. Whether you halve the number depends on your unit's mode and where it sits. Decide once and do the same in every report.
- **A counter only counts its own spot.** If a trail has three entrances and you count one of them, your total is too low by an amount nobody can work out later. Note where the gaps are before you give a total to anybody who will repeat it.

Counter statistics showing passages over time

Exporting

Two buttons on the counter's page export the date range you have selected, so you can put the numbers into a grant application, a board pack or whatever format your funder wants.

Both are under **Share** at the top. **PDF report** is the one to send. It has your organization's name, logo and color, the range you picked and the readings, with the total count, the number of readings and the busiest single reading at the top. The total is usually the number an application asks for.

CSV spreadsheet contains only the raw readings. Anybody running their own statistics on your numbers wants to add them up their own way, and a summarized file is the one they would ask you to send again.

What counters are good for

Counts give you evidence that stories cannot:

- **Funding.** Funders respond to "this trail sees 40,000 passes a year". They do not respond to "it's busy".
- **Deciding what to work on first.** Maintenance is best spent where the traffic is, and people guess the busiest trail wrong more often than they expect.
- **Showing the difference you made.** You can see a new connector's effect in the counts on both sides of it.
- **Managing heavy use.** Seasonal and daily patterns show when a trail is under strain, which helps you decide when to close it or harden it.

Common gotchas

- **A mistyped serial number creates a second counter without any warning.** An import creates a counter for any serial number it does not know. If you type a serial number wrong and then import, you get two counters with the readings split between them. If a unit's numbers look halved, look for a near-duplicate in the list.
- **Download your counters regularly.** Battery voltage and download time only update when you import, so the battery shown is what the unit reported last time. The list shows a counter that has not been downloaded for two weeks under **Needs a visit**.
- **Passes are not people.** Decide how you count once, and say so wherever you publish a number.
- **Moving a counter starts a new history.** If you move a unit, the readings before and after describe two different places. Make a note of it, or the trend line will mislead you later.

INFRASTRUCTURE

Lifts: chairs, gondolas, T-bars and daily status

Add and manage lifts in TrailsIQ, from the lift's seasonal status to the "wind hold" an operator sets from the top station during the day. Covers inspection schedules, how lifts appear on the map, and the field app's update sheet.

Lifts have full records in TrailsIQ. Chairlifts, gondolas, trams, T-bars, platters, J-bars, rope tows, magic carpets and funiculars are all in one list, on the same map, with the same inspections and day-to-day status. The **Serves** tags cover both winter skiing and summer lift-served bike parks.

How TrailsIQ describes a lift

Every lift has two separate statuses:

- **Status** is for the *season*: **Operational**, **Seasonal closed**, **Maintenance** or **Decommissioned**. You set it once for the season. It drives the filters and the label on the list.
- **Operational state** is for *today*: **Open**, **Wind hold**, **Mechanical hold**, **Closed** or **Maintenance**. Lift operators change it during the day, for example when a gust puts a chair on hold or a haul rope needs checking. Every change is recorded and appears in the daily report and the dashboard's recent activity. If you tick *Lift status changes* under Settings → Live from the trails, it also appears in the **Live from the trails** block on your website.

The two never conflict. A lift can be **Seasonal closed** while its operational state is **Open**. That is unusual but allowed, for example on opening day before anybody has changed the seasonal status.

Each lift also has an **inspection schedule**, with a last inspection date and a next inspection due date. It works the same way as for structures, so the overdue inspections list on the dashboard shows lifts and structures together.

Adding a lift

Only **owners and managers** see the **+ New lift** button at the top. Click it and a panel opens on the right with the full form. Nothing is saved as a draft, so **Cancel** leaves without a trace.

In a new account, the list says "*No lifts yet. Chairlifts, gondolas, tramways, and surface lifts live here.*" The New lift button at the top is still the way to add one.

The panel is titled **"New lift"** while you create it. When you save, you see "*Lift created.*" and the panel reopens on your new lift.

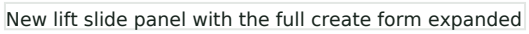
Lifts page header with the New lift button, chip strip, and sticky map on top

Every field on the form

- **Name:** required, up to 255 characters. It appears in the list, when you point at the lift on the map, and everywhere else the lift is mentioned, such as the daily report, the dashboard's recent activity and the field app.
- **Type:** *Chair, Gondola, Tram, T-bar, Platter, J-bar, Rope tow, Magic carpet* or *Funicular*. It starts as **Chair**. The filters at the top of the list are by type.
- **Status:** *Operational, Seasonal closed, Maintenance* or *Decommissioned*. It starts as **Operational**. This is the seasonal status, not whether the lift is running today.
- **Length (m)** and **Vertical (m):** whole numbers, both optional. **Length fills in by itself** from the base and top locations as you type them. Once you type your own length, it stops updating, so a measured length is never overwritten. You always enter Vertical yourself.
- **Capacity (pph):** people per hour, up to 20,000. It is for information only.
- **Manufacturer:** optional, for example *Doppelmayr*, *Leitner-Poma*, *Skytrac* or whatever the plate says.
- **Install date:** optional. Useful when somebody asks how old the lift is.

- **Base lat / Base lng** and **Top lat / Top lng:** the base and top locations as decimal coordinates. These are how a lift created on the dashboard gets onto the map. TrailsIQ draws a straight line from base to top unless a detailed route has been imported. An imported route with several points is always kept as it is.
- **Serves:** tags for *ski, snowboard, mtb, sightseeing* and *foot*. Tag whatever the lift actually carries. A summer bike park chair might get *mtb* and *sightseeing*, and a T-bar might only get *ski*.
- **Description:** up to 5,000 characters. It appears in the lift's panel below its numbers. It is a good place for loading tips or notes like "closes early on windy days from the northwest".

If something is wrong when you save, a red **"Couldn't save:"** box at the top of the form lists the problems.


New lift slide panel with the full create form expanded

Editing a lift

Open any lift from the list. The panel shows a summary: its type and status, the operational status card, its length, vertical, capacity and manufacturer, its install and inspection dates, its Serves tags and its description.

Below the summary is **Edit details**. Click it and the form opens with the current values filled in. Save to update the panel. You see "*Lift updated.*" and the page does not reload.

Managers also see a red **Delete** button at the bottom of the panel. It asks "*Delete "...”? This cannot be undone.*" and then shows "*Lift removed.*" The lift leaves the list, but anything in the dashboard's activity or the daily report that mentions it still shows its name correctly.


Lift detail panel showing the Operational status card with the 5 state buttons

Operational status for today

The **Operational status** card is at the top of the lift's panel, for everybody who can see the lift. This is where lift operators record changes on the mountain during the day. The card is headed **"OPERATIONAL STATUS"** and shows how long ago it was updated, such as "Updated 12m ago" or "Updated 3h ago", or a date after 30 days.

There are five buttons: **Open**, **Wind hold**, **Mechanical hold**, **Closed** and **Maintenance**. Pick one, and if you like, fill in:

- **Wait minutes (optional):** for busy Saturday mornings, when you want TrailsIQ Go to show a wait of about 15 minutes. Any number from 0 to 600.
- **Note (optional):** for example "*Brief note for today's report*". It is saved with the change and appears in the daily report. Use it for notes like "gust to 45 mph at the top station" or "power dip, reset the drive".

Press **Save status**. The button says "*Saving...*" and then a green "*Saved.*" appears.

Any active member can change the operational state, not just owners and managers. On a busy day, the person at the top station needs to be able to change it. If you press Save without changing the state or the wait time, nothing is recorded. A note on its own does not count as a change either, so you need to change the state or the wait time for it to be saved.

The **field app** has the same five buttons. Tap a lift line or one of its end points on the field app map, and the update sheet opens with the same options. If saving fails, it says "*Could not save lift status. Check your connection and try again.*"

Every real change sends a notification to members who follow lift status changes. It also appears straight away in the dashboard's recent activity, on the daily report's "Lifts — right now" card, and in the lift list on your organization's page in TrailsIQ Go. With *Lift status changes* ticked under Settings → Live from the trails, it also appears in the **Live from the trails** block on your website.

Recording an inspection

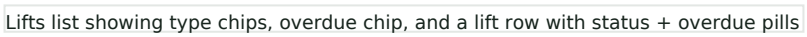
The bottom of the lift's panel has a **Mark inspected** button, which any active member can use. On the dashboard it asks "*Record an inspection for today?*" When you confirm, it sets the **last inspection date** to today and moves the **next inspection due** date 12 months ahead, which matches the usual annual state tramway inspection.

The button always records today with a 12 month gap. For any other date or schedule, such as a past inspection or a weekly pre-operation check, set **Last inspection date** and **Next inspection due** on the lift's form instead. An inspection date cannot be in the future, and the gap can be anywhere from one month to sixty.

A lift is overdue once its next inspection date has passed. An overdue lift gets:

- A red **Overdue** label in the list.
- An orange **Overdue inspection** label at the top of its panel.
- A place in the **Overdue inspection** filter at the top of the page. Click it to see only those lifts.
- A place in the dashboard's overdue inspections list, alongside overdue structures.

After saving, you see "*Inspection recorded.*"



The Lifts page

The Lifts page is a list with a panel that slides in from the side. Links to a particular lift, from the daily report, the dashboard's recent activity or the overdue list, open the page with that lift's panel already open.

The map stays at the top. Every lift is drawn as a dashed black line, the usual way ski maps show a lift rather than a run. Each end has a round white marker with a lift icon. Click a marker to open the lift and move the map to it. On a phone, drag the handle at the bottom of the map to make it bigger or smaller.

Filters. There is one filter for each type of lift in your list, with the most common type first, such as "*Chair (12)*" or "*Gondola (3)*". The one you pick is highlighted. Next to them, an orange **Overdue inspection** filter shows only overdue lifts. The search box at the top searches names, manufacturers and descriptions.

The list. Lifts are not grouped, so a resort with 12 lifts sees 12 rows. Each row shows:

- **Line 1:** the name, the status and an "*Overdue*" label if it applies.
- **Line 2:** type, manufacturer, length in meters, vertical in meters and capacity in people per hour.
- **Line 3:** the *Serves* tags.

When the list is empty, it says one of two things:

- With filters on: "*No lifts match the current filter.*"
- With no filters and no lifts: "*No lifts yet. Chairlifts, gondolas, tramways, and surface lifts live here.*"

Where else lifts appear

- **Daily report:** the "*Lifts — right now*" card on the right shows every lift with its current state and wait time. The main timeline shows every lift status change alongside trail conditions, grooming, maintenance and weather. Clicking a lift opens it on the Lifts page.
- **Your website and TrailsIQ Go:** your organization's page in TrailsIQ Go lists each lift with its state and wait time. Once *Lift status changes* is ticked under Settings → Live from the trails, the **Live from the trails** block on your website shows each change. Your public visibility settings still apply. See the Daily report article for those.
- **Dashboard recent activity:** every operational change appears with the lift icon and a link to the lift.
- **Every other dashboard map:** the Structures, Points of interest, Trail Conditions, Maintenance and main Dashboard maps all show the same dashed lift lines and end markers, so lifts are visible wherever you are looking. The Climbing map is the exception, because lifts would only get in the way there.
- **Field app:** tapping a lift on the field app map opens the update sheet, with the same five states, wait time and note.
- **Overdue inspections:** the dashboard's overdue list shows overdue lifts and structures together.

Common gotchas

- **A lift needs both a base and a top location** to appear on the map. Fill in Base lat, Base lng, Top lat and Top lng, and TrailsIQ draws the line from base to top. If any of the four is missing, there is no line on the map.
- **Length fills in from the base and top locations** until you type your own. After that, changing the locations does not change the length. A new lift starts with length filling in by itself. An existing lift that already has a length does not.
- **Saving the operational status without a change records nothing.** If you press Save status without changing the state or the wait time, nothing is saved and nobody is notified. A note on its own does not count as a change either, which keeps the timeline free of empty entries.
- **Mark inspected on the dashboard always records today.** For a past inspection or a different schedule, such as a weekly pre-operation check, set the two inspection dates on the lift's form instead.
- **Only managers can edit a lift, but everybody can change its operational state.** The seasonal status, the details and the locations are for owners and managers. Any active member can change today's operational state, so lift operators can update it from the top station without a manager role.
- **An imported lift route is kept as it is.** If somebody imports a detailed route from a GPX file or the map editor, changing the base or top location on the form does NOT redraw the line, because TrailsIQ cannot tell whether the imported route was adjusted by hand. To go back to a straight line, import the lift again without the detailed route, then edit the base and top.
- **The daily report's "Lifts — right now" card always matches the lift's own history.** The card shows the current state, and the history shows how it got there.

What's next

- New to lifts in TrailsIQ? Start by adding your busiest chair with its base and top locations. The map line and the daily report card will appear straight away.
- Once one lift is in place, show the crew at the top station how to change its operational status from their phones in the field app.
- Read the *Daily report* article next. Every lift change you make appears on that page.

DAILY REPORTS

Daily report: day notes, timeline and your website

Read, write and publish the daily report, the running story of what is happening across your trails and lifts. Covers posting day notes, the timeline that fills itself in, and how your website's Live from the trails feed shows the same information behind your visibility switches.

The **Daily report** is one page per organization per day. It is part activity feed and part crew log. It shows what is happening across your trails and lifts, and gives the team a place to post short notes as the day goes on. Managers work from it during the day, and the public sees a filtered version of it on your website.

What the daily report is

Every organization gets one report per day, based on its own timezone (see below). The page brings two things together:

- **Day notes:** short posts written by the crew, such as "trail crew just cleared the south switchbacks", "kiosk needs new paper" or "bear sighting on Blueberry". Any active member can post. Publishing a note to the public needs a permission (see *Making updates public*).
- **Timeline:** rows added automatically when something happens. That covers trail condition changes, grooming, lift status changes, network and area status changes, new and resolved maintenance tasks, new infrastructure, and weather. Nobody has to file these.

The two are mixed together in time order. The result is one page that tells the story of the day without anyone having to write it up.

There is no button to publish the daily report. The report exists as soon as the day starts, and each event and each post appears as it happens. What you publish is individual **day notes**, along with the automatic rows your public settings let through.

Opening today's report

Open **Daily report** from the sidebar to see today. The header shows the day, with a *Today* tag when it is today. Beside it, ← and → move one day at a time, and the date button between them opens a calendar so you can jump to any past day. You cannot go past today, because a future day has nothing in it yet. **Day / Week / Month** sits beside it. Week and Month open the weekly and monthly reports. **View public page** opens your public report in a new tab. Everyone on the team sees both.

The page has two columns. The composer and the timeline fill the left. The right-hand column holds three cards:

- **Weather**: the day's forecast, the network it was measured at, and **High / Low**, **Rainfall** (or **Snowfall**), **Peak gust** and **Hours of data**. A day with gaps reads, for example, "*12 / 24*", so a gap in the weather is easy to spot.
- **Public page**: the link to your public report with a **Copy** button, and how many people follow your trail status and your daily report in TrailsIQ Go.
- **Right now**: how many trails are open (a trail on Caution counts as open), a bar with one segment per trail, each trail's current condition and grooming, and the state of every lift. **Manage** opens Trail Conditions.

The page always shows the latest. You can leave it open and reload it to see new crew posts, lift changes and weather.

Past days work the same way. Go back a week to see what the crew posted last Friday, or copy the page's address to send someone a link to a particular day.

Daily report page header with the calendar picker and Prev/Next stepper

Day notes: posting an update

The **Post a crew update** card sits at the top of the page, with "*Posting as {your name}*" beside the title.

The composer is one large text box with the prompt "*What's happening on the trail right now?*". Write whatever fits, up to 5,000 characters. Below it is one row of controls: **Network** and **Trail** buttons, **+ Photo** (up to 6 photos, 5 MB each at most), a **Public / Crew only** switch, and **Post update**. Updates start as **Crew only**. A line along the bottom of the card says what your choice will do. Public posts show on the public page and go to daily report subscribers. Crew-only posts stay on this page. With **Public** picked, a **Show my name on it** checkbox appears beside that line. It starts ticked, so a public post shows *Posted by* with your first name and last initial in TrailsIQ Go, and your name on the public page. Untick it to post under the organization's name instead.

Press **Post update** and the post appears at the top of the timeline straight away. While photos upload, the button reads "*Posting...*" or "*Posting... 63%*". Any active member can post. You do not need to be a manager.

The newest posts are at the top. You can edit or delete your own posts, but there are no replies or threads. The usual pattern is several short posts through the day.

Settings → Public report showing Exclude from public, Show weather, Show trail status, and Public timeline kinds

Adding photos, a network or a trail

Photos. Tap the photo button and pick up to 6 pictures. Each one has to be 5 MB or smaller. They upload when you press Post, and the button shows the progress. Deleting the post deletes its photos too. You can also add and remove photos after posting. See *Editing and deleting your posts*.

Network and trail. The **Network** and **Trail** buttons each open a list you can search by typing. Pick a network first and the trail list narrows to that network's trails. It says "*Showing trails in {network}*". Pick a trail directly and its network is filled in for you. Both are optional. Leave them empty when the post is about the whole organization, such as the weather, an office note or the kiosk.

When a post is tied to a trail, the timeline row shows the trail's name and links to its page. Tying a post to a network without a trail is useful for news about the whole network, such as "groomed Zone C this morning".

Photo storage. If your plan's storage is full, the upload is refused with a message about your plan limit and the post is not saved. Upgrade your plan or free up some space, then try again.

Editing and deleting your posts

Your own posts show **Edit** and **Delete** links. Managers and owners see them on every post, so they can tidy up a post a volunteer filed by mistake.

Edit puts a text box in place of the post. You can change the wording and the "*Share publicly*" checkbox in one save. On a public post, a second checkbox, "*Show who posted it*", takes your name off or puts it back. **Save** keeps your changes and **Cancel** throws them away.

You can change the photos there too. While you are editing, each photo on the update has a **×**, and **+ Add photo** adds another. To swap a blurry shot, remove it and add a new one. The update keeps its time, its author and anything the crew has already read. Changing photos needs a connection. The composer, which is what you use out of signal, still saves everything to send later.

Delete asks you to confirm: "*Delete this update? Photos attached will also be removed.*" If it fails, you see "*Could not delete the update.*" Deleting is permanent, and the update and its photos are gone. A push notification that has already reached people's phones cannot be taken back. If the wording matters, post again.

Public or crew only on each row. Every row on the timeline, posts included, has a switch on the right that reads **Public** or **Crew only**. Managers can change it. When a row is public, its tooltip reads "*Showing on the public page. Click to hide it.*" When it is crew only, it reads "*Crew only. Click to show it on the public page.*" Everyone else sees the same label without the switch, so they know what the manager decided. Crew-only rows are drawn slightly faded, and the timeline's heading counts how many rows are public.

Public hub page (/hub/{slug}) rendered on a mobile viewport with weather + trails + lifts sections

Posting from the field app

In the field app, **Daily Report** opens full screen with two tabs: **Post** to write an update, and **Messages** to read today's. The number beside *Messages* is how many updates the crew has posted today. It opens on **Post**, unless you tapped a notification about somebody's update, in which case it opens on **Messages**.

Post has three parts:

- **The note.** A large text box, **Dictate** to speak your note instead of typing it (on phones that support it), and a row of photos. **Photo** adds up to 6, tapping one opens it so you can mark it up, and **×** removes it.
- **Where. Network** and **Trail** open in place with a search box, so you can type a few letters and pick. Pick a trail and its network is filled in. When the app can tell you are standing on a trail, it fills in both for you and says so underneath. **Clear** empties both, for an update about the whole organization.
- **Who can see this. Crew only** means people on your crews. **Public** means it shows on your trail status pages and goes to daily report subscribers. Every update starts as crew only. If your role cannot publish, this part says so instead. Pick **Public** and a **Show my name** switch appears under it, turned on. The post then carries *Posted by* and your name. Turn it off to post under the organization's name. When you edit a post, the same choice is called *Show who posted it*.

The button at the bottom says what it will do: **Post to crew** or **Post publicly**. Until you have written something it reads *Write something to post*, because an update needs words even when it has photos. Once a post goes through, you are taken to **Messages** with yours at the top. With no signal, the post is kept on the phone and marked *Waiting to upload* until you are back in range.

Switching to **Messages** and back keeps what you had written. On **Messages**, your own updates have **Edit** and **Delete**, the same as on the dashboard, and **New update** takes you back to **Post**.

What appears on the timeline automatically

Eight kinds of event appear on the timeline. The daily report only shows them. It never creates them.

- **Trail condition changes:** every time someone changes a trail between Open, Caution and Closed. An edit that only adds a note, without changing the condition, shows with a "Comment" tag.
- **Trail grooming:** shows "*Groomed*" under the trail's name when the grooming state changes, or "*Groomed again*" when a fresh groom left the state the same.
- **Lift status changes:** every change made from the lift's page or from the field app's quick update sheet. The wait time and the operator's note come through too.
- **Network status changes:** shows "*{from} → {to} · {n} trails affected*" under the network's name.
- **Area status changes:** shown the same way, and linked to the Trail Conditions page, because areas do not have their own page.
- **Maintenance tasks:** the task's title with "*New issue*" under it when it is filed, or its new status (for example "*Resolved*") when that changes, along with the trail it is on. A public report still waiting for review shows with an amber "*Pending review*" tag, and critical or high priority shows as its own tag. An edit that only adds photos does not appear here. You can still see it in the trail's history.
- **New infrastructure:** the structure's name with "*New {type} · {trail}*" under it when a structure is added. Edits to existing structures are left out, so the timeline stays focused on what is new.
- **Weather:** the hourly weather, grouped into spells for each network. Fair weather (clear, mostly clear, partly cloudy and overcast) is left out, so a calm day does not fill the timeline. A **"Today's forecast"** row always appears at 5 AM your time, so even a sunny day has a weather row. Each weather row names its source, such as "NWS" or "NOAA GFS".

Nothing else appears automatically. Points of interest, photos taken outside a day note and edits to structures do not show up. If one of those matters for the day, post a day note about it.

Making updates public, or keeping them crew only

What the public sees is controlled by a stack of switches. They work from the top down, and each one can only hide more. None of them can show something a switch above it has hidden.

1. **Organization-wide switches.** *Settings → Public visibility* has **Exclude from TrailsIQ Go**. It sits on its own so you can reach it even without the daily report. It hides your organization from TrailsIQ Go, including the report wizard, "near me", favorites and notifications, and leaves your website alone. Right below it, **Hide public website** takes your website offline, along with the public daily report and your listing in search engines. The embeddable widget and the Website API keep working. For an organization that wants nothing public, turn both on.
2. **Switches for each kind of information.** Trail status sits with the switches above in *Public visibility*, so you can reach it even without the daily report. Weather is under *Live from the trails*.
   - **Show weather:** the day's forecast and any rain, snow or storms, in your website's *Live from the trails* feed and in TrailsIQ Go. Turn it off to hide all of it.
   - **Show trail status publicly:** turn it off to hide the condition of each trail, and every trail, network and area status change, on your website and in TrailsIQ Go.
   - **Show trail status in TrailsIQ Go:** turn it off to hide status in TrailsIQ Go only. Your trails are still listed there, so a visitor can pick one to report a problem on, but the condition and grooming labels disappear and the "Conditions" summary reads "*Trail conditions not published*". This is useful when you want status on your website but not in TrailsIQ Go. The switch is grayed out when *Show trail status publicly* is off, because then TrailsIQ Go already hides your trails and their status.
3. **Which events join the feed.** *Settings → Live from the trails → Also show* is a list of the automatic events that can appear next to your crew's posts: *Trail status changes*, *Trail grooming*, *Network status changes*, *Area status changes*, *Lift status changes* (if you have lifts), *Maintenance items, new and resolved* and *New infrastructure*. A new organization starts with none of them ticked.
4. **Public or crew only on each post.** A crew update is public only when the post itself is marked public. No setting does it for you. Every new update starts as crew only, on the dashboard and in the field app.
5. **Public or crew only on each row.** Managers can switch any automatic row between public and crew only. That choice beats the list in step 3. When a switch higher up hides that kind of row completely, the row's switch is locked, with the tooltip "*Hidden from the public page by a sharing switch in Settings*".

Who can publish a post publicly. That takes the **Publish day notes publicly** permission. It is on by default for owners, managers and field workers, and off for volunteers. Without it, the composer shows *Crew only* instead of the **Public / Crew only** choice, on the dashboard and in the field app. TrailsIQ enforces this itself, not only by hiding the switch, so a volunteer cannot publish a post in any other way.

Where the public sees it

Public updates appear on your **website** in the **Live from the trails** block. It is one feed, newest first, of public posts, weather and the automatic events you chose under *Settings → Live from the trails*, all filtered by the switches above. Each row has a tag for its kind ("*Update*", "*Weather*", "*Trail*", "*Grooming*", "*Lift*", "*Maintenance*", "*Network*", "*Area*" or "*Infrastructure*"), says who or what it is about, and shows the time. Photos open full screen. Public posts show the author's name, or your organization's name if the author unticked **Show my name on it**. Your starter website already has this block on its home page. See How to use the website builder.

Your website has taken the place of the separate public daily report page. Its old address, and your organization's TrailsIQ Go link when it is opened in a browser, now go to your website, so links people saved still work. Inside TrailsIQ Go, your organization's page still shows today's trails, weather and lifts.

The trail status widget. *Settings → Live from the trails → Trail status widget* gives you a snippet of code to paste into another website. You choose which networks it shows and how tall it is. A partner ski school, a bike shop or a club website can then show your trails and their status. It updates by itself.

When **trail status** is switched off, the widget and your website still list your trails, but without their status. Active hazards still show, because each one is something your team chose to publish.

The public only sees today. Visitors cannot go back to earlier days. Use the daily report in TrailsIQ to look back.

Notifications for hikers. When you make a post public, and your organization is not excluded from TrailsIQ Go, everyone who has made your organization a favorite and turned on "*Notify me on daily reports*" in TrailsIQ Go gets a "*Daily report*" notification. It shows the first 120 characters of the post.

Timezones and "today"

The report follows your organization's timezone, the one you set in the Setup guide or in Settings. "Today" starts at midnight your time, not at midnight UTC.

This matters because a lot happens in the evening. For an organization on Eastern time, 8 PM in summer is already the next day in UTC, so without this an evening lift change would show up on tomorrow's report. TrailsIQ works out where your day starts and ends, so the report matches what happened on the mountain that day.

If your organization's timezone is not set, TrailsIQ uses UTC, which is almost never what you want. Set it in the Setup guide or in **Settings → Organization details**, and pick the timezone your operation actually runs on.

Your website's live feed follows the same rule. A hiker who opens it at 11 PM sees today's updates in your timezone, wherever they are in the world.

Common gotchas

- **You publish posts, not the report.** There is no button to publish the whole page. Every post you make public, and every automatic event your switches let through, appears on your website as it happens.
- **Points of interest and loose photos do not appear.** Points of interest and photos taken outside a day note are not added to the timeline. If something the crew did in the field app matters for the day, post a day note about it.
- **Switches higher up beat the switch on a row.** If *Show trail status publicly* is off, no row switch can put a trail change on your website. The row's switch reads **Hidden** and is locked, with the tooltip "*Hidden from the public page by a sharing switch in Settings*".
- **Turning off status in TrailsIQ Go keeps your trails listed there.** With *Show trail status in TrailsIQ Go* off and *Show trail status publicly* on, a hiker who opens your organization in TrailsIQ Go still sees your trails and can pick one to report a problem on. Only the condition and grooming are hidden, and the Conditions summary reads "*Trail conditions not published*". This is useful when you take reports through TrailsIQ Go but publish trail conditions somewhere else.
- **Volunteers can post but cannot publish.** They see the composer, but the **Public / Crew only** switch is replaced by a "*Crew only*" label, and every post they make stays crew only. Make the volunteer a field worker, or give them the **Publish day notes publicly** permission on their own, if you want them to publish directly.
- **Changing photos needs a connection.** The wording, network, trail and public setting can all be edited offline and are sent later like everything else. Adding or removing a photo on a post that is already up cannot, and the app tells you so.
- **A post can have 6 photos, each up to 5 MB.** If you pick more than that, or a photo that is too big, the composer tells you which ones it left out and why. The rest of the post is not affected.
- **A post can be dated up to 7 days back and 2 hours ahead.** This only matters for posts the field app saved offline. A post more than 7 days old that comes back online will not upload. New posts always work.
- **The timezone is set for the whole organization, not per person.** If your operation really spans two timezones, pick the one that fits the daily report best, usually where the crew starts its day.

What's next

- Post your first day note today. Even "*Trails opened normal, no incidents*" is enough to see it all working.
- Go through *Settings → Live from the trails* with a colleague who has your website open in a private browser window, so you both see exactly what a hiker sees.

- Read *Public reports setup* for more on the organization-wide switches, and the *Lifts* article to see how every lift status change your crew makes ends up on this page.

Weather on an older report

Today's report shows the weather hour by hour, because you watch a day while it is happening. Rain from four until ten is what a crew needs to see.

A report for yesterday or earlier shows the whole day instead. There is one card per network with the high and low, the rain and snow that fell, and the strongest gust. That is what anybody wants to know about an old report, and it is what TrailsIQ keeps. The hour-by-hour detail is kept for about a week and the daily summary is kept for years, so a report from two seasons ago still tells you what the weather did.

The weekly and monthly reports

Week and **Month** in the header bring the same records together over a longer stretch. The arrows move one week or one month at a time, the date button jumps to any past period, and **Day** takes you back to the daily report on the last day of the period you were reading. The network tab you have open stays open as you move between periods.

Trail, beside the network tabs, narrows the page to one trail: its days, its closures, its open tasks and the weather from its network. The list follows the tab you are on, so a network's tab lists that network's trails, and choosing a network tab goes back to all of its trails. The trail you pick stays picked as you move between weeks and months, and **Open trail page** takes you to it.

Download PDF exports what is on screen. That is one trail when a trail is picked, one network from that network's tab, or every network from **All networks**. On **Trail conditions**, **History** on a network's card opens this month for that network. On a trail's own page, **Condition history** opens this month for that trail. Either one is the quickest way to see how a place has been doing.

Along the top are four numbers. **Days open** counts every day at least one trail was open, and the line under it counts the days that were mostly on caution, partly closed or fully closed. The others are total rainfall, closures, and open maintenance tasks. Under them, a week is laid out day by day and a month as a calendar, with each day's high and low and the rain that fell.

Each day is colored by your trails that day. They are counted one by one, the same way the daily report and the annual report count them. A day is **green** when they were open, **yellow** when more than half were on caution, **orange** when some were closed and **red** when all were. A trail on caution still counts as open. A trail closed for part of a day counts as closed that day. A trail set to follow its area or network takes that status. Under the color, each day says how many trails were closed or on caution, such as *2 of 12 closed*. A network's tab counts only that network's trails. Days still to come in the current period are drawn with a dashed outline.

Below the grid, **Weather** gives the totals for the period. **Maintenance** shows what was opened and resolved, and which trails have the most open work. **Audience** counts your followers, your subscribers and the updates you made public in the period. People who follow only from a browser, and so get no alerts, are counted separately. **What happened** lists every closure, reopening and grooming run, newest first.

If your organization has more than one network, tabs above the numbers switch between all networks together and each network on its own.

DAILY REPORTS

The annual report

One document for any period: volunteer hours, work done, days the trails were open, weather, inspections, events and spending, on a page and as a designed PDF ready to hand to a board.

The **annual report** gathers everything your organization recorded over a period into one document: the hours your volunteers gave, the work done on the ground, how often the trails were open, the weather you worked in, inspections, events and spending. It is built to be handed to a board, a funder or a land manager as it is.

Open it from **Reports → Annual report** in the sidebar. Owners and managers can see it; it names volunteers and their hours, so other roles cannot.

Choosing the period

Across the top are four ready-made periods: **This year** (January 1 to today), **last year** by its number, **Last 12 months** and **This quarter**. **Custom** takes any start and end date, up to two years apart. A period never runs past today, so a report for this year counts only the days that have happened.

The address in your browser carries the dates, so a link you send somebody opens the same period rather than whatever "this year" means on the day they open it.

Download PDF makes the designed document for exactly the period on screen: a cover with your logo, a page of headline numbers, one page each for people, work, trails, weather, and care, community and costs, and a closing thank-you. It uses your organization's primary color throughout, set in **Settings → Organization details**, adjusted where needed so text on it stays readable. Add a logo there too; without one the cover shows your initials.

What each section counts

People and their time is approved hours from the timesheet, with time off left out, plus hours logged on tasks by outside volunteers who are not members, plus the time of everyone who came to your events. People who came to an event and aren't on your team can appear by name under **With thanks**; walk-ins without an email never do. In **Where the hours went**, event walk-ins count under **Outside volunteers**, the same as on the Work report, and people who signed up by name appear as **Named event volunteers**. Hours from anybody marked as **Paid staff** on the Team page are shown separately as crew hours rather than counted as volunteer time. **With thanks** lists the ten people who gave the most time; the **Hide names** link removes the list from the page and from the PDF.

For organizations in the United States, volunteer time is also given a dollar value at the Independent Sector national rate for volunteer time, which is the figure most funders recognize.

Work on the ground counts maintenance tasks filed and tasks completed during the period. A task reopened and finished again counts once, on the day it was last finished. **Typical time to close** is the middle value, so one task that sat open for a year does not drag the number. **Still to do** is what is open today, whatever the period.

The trails counts your trails one by one, the way the daily report does. Each trail takes its own condition, or its area's or network's when it is set to follow them, and a trail on **caution counts as open**, because it can still be ridden. The calendar colors each day **green** when the trails were open, **yellow** when more than half of them were on caution, **orange** when some were closed and **red** when all of them were. A trail closed for part of a day counts as closed that day. **Of trail time open** is the share of all your trails' days that were open, so one trail closed for a month costs a month of one trail rather than a month of the whole calendar. **By network** gives each network the same reading.

The weather we worked in reads the daily weather recorded for your trails: rain, snow, the wettest day and the range of temperatures. A day counts as a rain day at 1 mm (about 0.04 in) or more. If you have several networks, the weather comes from the one with the most days on record, named under the heading.

Care, community and costs covers inspections recorded on structures and trails, checklists finished, events and their sign-ups, daily report updates, trail counter passes and approved expenses. Only approved expenses are totaled; if you spend in more than one currency, the largest is totaled and the others are named rather than converted.

A section with nothing recorded in the period is left out of the PDF rather than printed empty.

Good to know

- Every chart adds up to the number printed above it. Each month's hours, tasks, rain and trail counter passes sum to the period's total.
- Figures come from what is recorded in TrailsIQ. Hours still waiting on approval are not counted until they are approved.
- The numbers follow your own units: miles and inches, or kilometers and millimeters, from your profile.

TEAM

Members, roles and permissions: invite your team

Getting your team into TrailsIQ: the four roles (Owner, Manager, Field worker and Volunteer), every permission, inviting people, the invitation email, permissions for one person, belonging to more than one organization, and removing members.

Every TrailsIQ organization has one owner, one or more managers, and any number of field workers and volunteers. This article covers getting your team in: inviting people, what each role can and cannot do, changing the defaults, making exceptions for one person, and tidying up when someone leaves.

The four roles

Every member has one of four roles:

- **Owner:** one per organization. The owner can do everything, including editing the Manager row in Settings → Roles & permissions. No permission can be turned off for the owner.
- **Manager:** has every permission by default. The owner can turn any of them off, for all managers in Settings → Roles & permissions or for one manager on their own row. A manager cannot edit the Manager row in Settings, cannot remove or change another manager, and cannot make anyone an owner. Everything else is open to them: inviting people, editing trails, running projects, publishing news, building the website and approving hours.
- **Field worker:** the crew role. Field workers count toward your plan's field worker limit. By default they can *Change trail conditions*, *Mark trails groomed*, *Plan grooming*, *Manage inventory*, *Publish day notes publicly*, *View inventory*, *Manage crags and routes*, *See the trail planner*, *See projects*, *See clients* and *See reports awaiting review*. Everything else starts off, and you can turn it on for the role or for one person.
- **Volunteer:** works like a field worker, but **does not count toward your plan's limits**. It is meant for unpaid helpers you want in the field app without going over the number of field workers you pay for. Volunteers start with stricter defaults: every permission is off, so a new volunteer sees the field app in view only.

Role colors on the members list are green for Owner, amber for Manager and gray for Field worker and Volunteer.

Rules for changing roles:

- Nobody can change their own role on the Members page. You see "*You cannot change your own role here.*" To leave, use Profile → Leave organization.
- Only the owner can change a manager's role: "*Only the owner can change a manager's role.*"
- Only the owner can make someone an owner: "*Only the owner can promote a member to owner.*"
- Managers can only change the roles of field workers and volunteers.

The permissions

Owners always have every permission. Managers have every permission below by default, and the owner can turn any of them off. Field workers and volunteers each have their own defaults. You can change every one of them for a whole role or for one person.

Approvals

- **Approve work hours:** open the work hours review queue, approve or reject entries, and see totals for the whole team.
- **Approve expenses:** open the expenses review queue, approve or reject entries, and see totals for the whole team.
- **Triage maintenance reports:** accept or reject reports from the public, reopen resolved tasks, and delete reports.
- **Archive finished tasks:** archive and unarchive completed tasks, and close a past period. Closing a period permanently removes the photos and discussions of the tasks completed in it, and keeps their numbers in every report. This is on for managers by default. See *Archiving finished*

tasks.

Content & data

- **Change trail conditions:** set trails to open, caution or closed, set their grooming, and edit each trail's status note.
- **Mark trails groomed:** set a trail to **Groomed**, **Partial** or **Not groomed**, and finish grooming tasks, without being able to open or close a trail. This is made for a contracted groomer.
- **Plan grooming:** assign grooming runs to a groomer, set each trail's winter role (groomed, open, or closed for winter), and use the winter maps. See *Winter operation and grooming*.
- **Edit trails:** change a trail's name, description, difficulty and main use, edit its route on the map, and recalculate it from a new GPX file.
- **Manage the trail planner:** share public proposals, send trails to other organizations and accept trails from them, publish a planned line as a real trail, and replace or delete other people's recordings. Recording lines, drawing drafts, notes and photos stay open to every member. This permission covers the decisions, not the fieldwork.
- **Manage projects:** create projects, edit their name, color and description, and archive old ones.
- **Manage inventory:** create items and storage locations, edit the catalog, delete items, and manage your own list of categories. Counting stock and checking things in and out stay open to anyone with *View inventory*.
- **Manage crags and routes:** create, edit and delete crags and climbing routes, including pitches and fixed gear. Deleting a crag also deletes the crags under it and every route on them. Without this permission, the climbing pages are view only.
- **Configure types:** edit the types of points of interest and infrastructure, including their categories, custom fields and inspection schedules.
- **Publish day notes publicly:** mark a daily report post *Share publicly*. Without it, the *Share publicly* switch stays off, and TrailsIQ keeps the post crew only however it was sent.

Public-facing surfaces

Some of these depend on your plan, because news, events and parts of the website builder do. If your plan does not include a feature, its permission has no effect.

- **Manage news posts:** create, edit and delete news posts on your organization's website.
- **Manage events:** create, edit and delete events on your organization's website, and approve or decline sign-ups.
- **Manage website:** edit the website's pages, menu, theme, and the home and about content.
- **Use the QR-code builder:** open the QR code builder to design printable signs with your branding. It produces PNG files to download and does not change your public site.

Information access

- **View team-wide totals:** see the summary of who is owed what on the Month views for hours and expenses. This is view only and does not include approving.
- **View inventory:** see the inventory list, item details, stock counts and who has which tool. You need this for any part of inventory. Anyone with it can count stock and check tools in and out.
- **See the trail planner:** open the Trail Planner and the lines in it. Recording and drawing need this too, because both start from that screen. What someone may do with a line once they are there is covered by *Manage the trail planner*.
- **See projects:** open the Projects list and a project's page. Creating and editing projects is covered by *Manage projects*.
- **See clients:** open the Clients list and a client's page, including their contact details and the jobs filed against them.
- **See reports awaiting review:** see maintenance reports from the public before anyone has accepted them, in the *Pending Reviews* list and its count. Accepting or rejecting one is covered by *Triage maintenance reports*.

How TrailsIQ decides. The owner always has the permission. For anyone else, a setting on that person's own row wins. If there is none, your organization's setting for the role applies. If you have not changed that, the built-in default for the role applies.



Inviting your first team member

Owners and managers see **Members** in the sidebar.

The page is headed "*Team*". Near the bottom is **Add a team member**. Everyone you add gets an invitation, which appears under **Pending invitations** with a link you can share.

The fields are:

- **Email:** the prompt reads "*teammate@example.com*".
- **Role:** starts on *Field worker*. Owners see every role including *Owner*. Managers see every role except *Owner*.
- **Name (optional):** how the person shows on the lineup and on Work hours before they have an account. Without a name, their email is shown.
- **Personal message (optional):** up to 1,000 characters. It goes out with the invitation email. For someone added to the lineup, it is kept and goes out when you press **Send invitation**, and **Resend** includes it too.

Press **Send invitation**. The invitation lasts 30 days. You see "*Invitation sent to {email}. Share the accept URL from the Pending invitations list if it doesn't arrive.*" The person gets an email headed "*You're invited to {org} on TrailsIQ*" with a link to accept.

This works the same whether or not the address already has a TrailsIQ account. Someone who already has one joins when they open the link and sign in with that address, so nobody is added to an account they did not agree to join.

If you invite an email that is already on the team, you see "*This user is already a member.*"

Your own email address has to be confirmed before you can send. If it is not, for example just after you changed it under **Profile**, the form says so and a note on the page has a **Send the link again** button. **Add without sending** still works in the meantime. Each account can send up to 50 invitations in 24 hours, and resends count. If you need more than that in a day, ask us.

Add without sending: the lineup

Add without sending sits next to **Send invitation**. It saves the person without emailing anyone. Use it to line people up before a season, or for volunteers you sign up on paper at a work day.

- They appear under **Pending invitations** marked **Not sent yet**, with no link to copy. The invitation does not work until it is sent, so nobody can join from it early.
- Managers can already **log their hours**. On **Work hours**, open **Log hours** and pick them under *Invited, not signed up yet* in **Hours for**. The hours are approved as you save them, and the person's row on the Members page shows how many hours are waiting for them.
- **Send invitation** on their row emails the invitation and starts its 30 days. If the email has a TrailsIQ account by then, they are added to the team straight away instead, the same as with the form.
- When they accept, every hour logged for them **moves to their account**, so their timesheet starts with it.
- **Remove** takes someone off the lineup. It is refused while hours are logged for them, because those hours would then belong to nobody. Delete the entries on Work hours first, or keep the invitation.

Plan limits. Managers count toward your plan's manager limit and field workers toward its field worker limit. Volunteers do not count at all, which is the point of the role. If you are at the limit, you see "*Your {plan} plan is limited to {N} {resource}. Upgrade in Billing to add more.*"

Add a team member form with Email, Role dropdown, and Personal message textarea

The invitation email and accepting it

Subject: "*You're invited to {organisationName} on TrailsIQ*".

Body: a headline reading "*Join {organisationName} on TrailsIQ*", then "*{inviterName} invited you to join **{organisationName}** as a **{role}**.*" If you wrote a personal message, it shows below under "*Note from {inviterName}*" in an amber box.

Field workers then read "*Accept below to create your account. The field app will be waiting for you on the other side.*", followed by a short list about logging maintenance from the trail, working offline and recording GPS location and photos.

Managers and owners get a list about running the organization, such as "*Member management: invite and remove team members from the Members page.*", and the line "*Accept below to create your account and get access to the dashboard.*"

Footer: "*This invitation expires on {date}. If you didn't expect this email you can safely ignore it.*"

Accepting. The **Accept invitation** button in the email opens the invitation. The same link works in every case:

- **Not signed in and no account yet:** they go to the sign-up page with their email already filled in, and their name too if you typed one when you invited them.
- **Not signed in, but they already have an account:** they see "*Sign in as {email} to accept your invitation.*" and go to the sign-in page.
- **Signed in with a different email:** they see "*This invitation is for {email}. Sign out (or open the link in a private window) and try again.*" The invitation still works.
- **Signed in with the right email:** they join the organization. A field worker goes straight to the field app. Everybody else lands on the dashboard with "*You joined the organization.*"

A field worker who creates their account from the invitation also lands in the field app, so the first thing they see is the tool they will use on the trail.

If the invitation has expired or the link is wrong, they see "*This invitation is no longer valid.*" It is deliberately general, so it gives nothing away about the invitation.

Invitation email preview showing "You're invited to {org} on TrailsIQ" with Accept button

Pending invitations and requests to join

The Members page has a **Pending invitations** section. It lists every invitation that has not been accepted, including expired ones, which are marked *expired*. The lineup is listed first, marked **Not sent yet**. A sent invitation shows its link with **Copy link**, **Resend** and **Revoke**. A lineup row shows **Send invitation** and **Remove**.

- **Copy the link** if the invitation email did not reach them, because of a spam filter, a wrong address or a company email block. Send them the link by text or chat.
- **Resend** sends the same invitation again. You see "*Re-sent invitation to {email}.*" On an expired invitation it also gives it a fresh 30 days, and the message gives the new date: "*Re-sent invitation to {email}. It now expires on {date}.*" The link stays the same, so one you already shared works again.
- **Revoke** asks you to confirm and then deletes the invitation. You see "*Invitation revoked.*" Like Remove on the lineup, it is refused while hours are logged for the person.

Requests to join is a separate section on the Members page, marked "*Requests to join*" with an amber dot. It shows anyone who signed up and named your organization. To turn a request into an invitation, pick a role (*Field worker / Volunteer / Manager / Owner*) and press **Send invitation**. It asks "*Send an invitation to {user_email}?*" and then shows "*Invitation sent to {email}.*" The **Dismiss** button asks "*Dismiss {user_email}'s request to join?*" and then shows "*Join request dismissed.*"

Pending invitations section with Email, Role, Expires columns and Resend/Revoke actions

Reading the members table

The table has four columns, and the last one is the most useful. **Last active** says when that person last signed in and used TrailsIQ. It reads **Never signed in** for someone who was invited and accepted but has not been back since. Without it, a member who never started looks exactly like an active one, and this column usually answers "*did they ever actually start?*"

The count above the table says how many members have never signed in, so you can see it without reading down the list.

Changing roles

You can change a role in two places, and both do the same thing:

- **The role dropdown** on the members table. Pick a new role next to any member. Nothing happens if you pick the role they already have.
- **The Edit window.** Press Edit on any member. The window is titled "*Edit member*" with "*Updating {email}*" under it. You can change the role and the person's own permission settings in one save. Name and email belong to the person, not to your organization, so they are shown but cannot be changed here. Each member changes their own on their profile. On your own row you can fix your name here, and the window points you to your profile for your email.

Only the owner sees *Owner* in the role list. Only the owner can change the Role field on a manager's row. Anyone else sees "*Manager overrides can only be edited by the organization owner.*" instead.

When the change is saved, you see "*Member updated.*"

Paid staff

The Edit window also has a **Paid staff** switch. It starts off for everyone, so every member counts as a volunteer until you say otherwise. A member with it on shows a small **Paid** tag beside their name.

When you turn it on or off, the window asks **from when**, with today filled in. Hours are counted by the role the person had **on the day they worked them**, so a long-time volunteer you hire today keeps every volunteer hour they gave before. Pick an earlier day if they started being paid before you changed the switch, or clear the date to count all of their time the new way. While the switch is on, the same field reads **Paid staff since** and you can change it at any time. Everything already logged is counted again to match.

It does not change what the person can do. It changes how their hours are counted. The **Work report** shows paid staff hours separately from volunteer hours. If your organization is hosted by an umbrella account, a paid member's approved hours are reported as crew hours, next to the volunteer hours rather than inside them, and they are not given the dollar value a volunteer hour gets. See Umbrella accounts.

Permissions for one person

Every permission has a default for each role. You can also turn one on for one person who would not otherwise have it, or turn off one their role normally gets.

These settings are in the Edit window for any manager, field worker or volunteer. Owners always have every permission, so their window has none.

The section is headed "*Permission overrides*". When you are not the owner, a manager's row shows a small "*Owner only*" badge. The help text reads "*Per-user grants and revokes that override what this person's role gets by default. Leave on Inherit if the role default is fine.*"

Each permission has a dropdown with three choices:

- **Inherit:** use the role's default, which is shown as on or off. This means no setting for this person.
- **Grant:** turn this permission on for this person, whatever the role's default is.
- **Revoke:** turn this permission off for this person, whatever the role's default is.

Some common uses:

- **One volunteer who can change trail conditions:** set *Change trail conditions* to *Grant* on their row. Every other volunteer stays view only.
- **One field worker who writes the news:** set *Manage news posts* to *Grant*. Nobody else gets it.
- **One manager you do not want publishing to the public:** set *Publish day notes publicly* to *Revoke*. It takes effect straight away, and it stays if their role changes later.

Members with any of these settings show a small amber "*custom*" tag on the members table, with the tooltip "*{n} permission override(s)*".

Area leaders

A long trail run in regions usually has somebody responsible for each one. The **Region** box in the Edit window makes a member an area leader: tick the networks they look after. They still see every trail and every task, everywhere, so they can read a report filed just over their boundary and point it at the right person. They can approve, assign, edit, finish or delete tasks only on trails in their own networks.

Inside their region, an area leader does that work whatever their role. A volunteer or field worker with a region sees *Pending Reviews* for their own networks, gets told when the public reports a problem on one of their trails, and can approve or reject that report, reopen a finished task, change whether it is shown as a public hazard, and delete it. Reports from the public waiting for review elsewhere are left out of their list and its count, because deciding those is somebody else's job. That is all the region adds. Team, settings, work hours, expenses and billing still follow their role, so you do not need to make somebody a manager to give them an area.

A task outside their region opens as normal, with a line at the bottom saying it is outside their region in place of the buttons. In the field app, trying to change one says the same. A task with no trail is open to everybody. Leave every network unticked to give somebody the whole organization again.

Owners are never limited. Only the owner can set a manager's region, and nobody can change their own. Members with a region show an "*Area leader*" tag on the members table, and the **Networks** list names each network's area leaders under its name.

A region is about what somebody may change, not about who walks a trail. To name the volunteer for a section, use the **Looked after by** card on that trail's page. Whoever is on that card also sees the public's reports on that trail while they wait for review, and is told when one arrives, so they can go and check. Approving or rejecting it is up to the Area leader or a manager, unless you let section leaders do it too: for everybody under **Settings → Issue types → Reports from the public**, or for one person under **Team**, in their Edit window, with **Reports on their trails**. One person's setting outranks the default either way. Anyone can leave a comment on the report.

Edit member modal open with Permission overrides section showing tri-state selects

Defaults for a whole role (Settings)

To turn a permission on for *every* field worker in your organization, not just one, use **Settings → Team → Roles & permissions**.

The section reads: "*Default capabilities for each non-owner role. Owners always have full access. The Manager row is editable by the owner only; everyone else sees it read-only. Per-user overrides (one volunteer who can change trail conditions even when the role default is off) happen on the Members page.*"

The table has one row for each permission, grouped as *Approvals / Content & data / Public-facing surfaces / Information access*, and one column for each role except owner. Tick a box and that permission is on for everyone in that role. Untick it and it is off. You can still change it either way for one person on the Members page.

When you are not the owner, the Manager column shows "*Owner only*" under its heading, with the tooltip "*Only the organization owner can change this row.*", and its boxes cannot be changed.

Press **Save role defaults** (it reads *Saving…* while it works). You see "*Saved.*"

Settings → Roles & permissions matrix with checkboxes per role

Belonging to more than one organization

You can belong to more than one organization. If you do, the sidebar shows a **switcher** with each organization's name and a ✓ next to the one you are in. Tap another to switch. You see "*Switched to {name}.*"

My organizations on your Profile page lists every organization you belong to, with your role and status, the date you joined, a *Switch to* link (unless you are already in it) and a *Leave* button. If you belong to none, it reads "*You aren't a member of any organizations yet.*" Owners cannot leave their own organization. The Leave button is grayed out, with the tooltip "*Owners can't leave their own organization. Delete or transfer it instead.*"

What only the owner can do

These are reserved for the owner:

- Editing the Manager column in Settings → Roles & permissions.
- Editing a manager's own permission settings on the Members page.

- Making anyone an owner.
- Changing a manager's role.
- Removing a manager.

Closing the organization or handing it to a new owner cannot be done from the dashboard. Ask us and we will do it with you.

The owner cannot be removed on the Members page: "*The owner cannot be removed from their own organization.*"

The owner cannot leave through Profile → Leave either: "*Owners cannot leave an organization.*"

Removing a member

Press **Remove** on the member's row. It asks you to confirm: "*Remove {email} from the organization?*"

What managers can remove:

- Managers can only remove field workers and volunteers.
- Only the owner can remove a manager: "*Only the owner can remove a manager.*"
- Nobody can remove the owner.

When it works, you see "*Member removed.*"

What happens. The person leaves your organization. Their TrailsIQ account stays, and so do their other memberships, since they may be an owner or manager somewhere else. Everything they created in your organization stays too, including trails, maintenance tasks and day notes. What they lose is access to your organization. From that moment they cannot open your dashboard or your field app.

There is **no way to pause someone**. Removing a member is immediate and complete, and inviting them again is the only way to give them access back.

When TrailsIQ staff act as a member

TrailsIQ staff can act as a member of your organization when they are helping with a support question. Only staff see the **Act as** link on the Members page.

Before they start, they confirm: "*Act as {name}? You'll see and do everything they can — and content you create will be attributed to them. Use Stop in the top banner to switch back.*"

While they are acting as someone:

- An amber banner across the top reads "*Acting as {user name}*", with a **Stop acting** button.
- They see the organization that person would see.
- The organization switcher is locked, with the message "*Stop acting to switch organization.*"
- Anything they create is credited to that member.

Pressing Stop takes them back to their own account, with the message "*Stopped acting as another user.*"

If a member says "*I didn't do that*" about something credited to them, check whether TrailsIQ staff were acting as them at that time before assuming it was them.

Common gotchas

- **Nobody can manage their own row on the Members page.** You cannot change your own role or remove yourself. To leave, use Profile → Leave. Owners cannot leave, so an owner has to hand the organization to someone else first.
- **Volunteers work like field workers but start with less.** They see the same screens and use the same table of defaults. The two differences are that volunteers start with every permission off, and they do not count toward your plan's limits.

- **A manager's permissions can be turned off.** Managers have every permission by default, but the owner can turn any of them off for all managers in Settings → Roles & permissions, or for one manager on their row.
- **Pending invitations do not use up a place on your plan, but accepting one does.** If your places have filled up between sending and accepting, the person is told the team is full and their invitation still works. Free a place or upgrade and the same link works. Volunteers never count.
- **Opening an invitation while signed in as someone else:** the person sees "*This invitation is for {email}. Sign out (or open the link in a private window) and try again.*" The invitation still works.
- **Invitations expire after 30 days.** An expired one stays on the Pending invitations list marked *expired*, so you can see that it lapsed. **Resend** gives it a fresh 30 days with the same link.
- **Revoking deletes the invitation.** TrailsIQ keeps no history of revoked invitations. If you need a record of who was invited and when, keep it in your own notes.
- **The invitation email can take a moment to send.** If it does not arrive, because of spam, a wrong address or a bounce, the message on screen tells you to "*Share the accept URL from the Pending invitations list*". Use the **Copy** button on the row.
- **Some public-facing permissions depend on your plan.** If your plan does not include news, events or a website feature, the permission for it has no effect.
- **Field workers can change trail conditions by default.** If only managers should change conditions in your organization, turn it off in Settings → Roles & permissions.
- **Field workers can publish day notes publicly by default** too. Turn it off in the same place if you want more control over what reaches the **Live from the trails** block on your website.
- **Volunteers see the field app in view only to start with.** Turn on *Change trail conditions*, *View inventory* or any other permission in Settings to open parts of it for them.
- **Volunteers do not see the trail planner, projects, clients or reports awaiting review, and the climbing pages are view only for them.** (A volunteer who is an area leader, or who looks after a trail, does see the reports awaiting review on their own ground: see *Area leaders*.) These are the planning and business side of an organization: what it plans to build, what it is being paid for and by whom. A volunteer who comes to a work party does not need them. An organization run by a volunteer committee can turn any of them on for the role in one place.
- **Closing an organization or handing it to a new owner is not something you can do yourself.** Ask us and we will do it with you.
- **Removing a member does not delete what they created.** Trails, maintenance tasks and day notes they made stay, and they are still named as the author.

When we ask for your password again

A few actions ask you to type your password even though you are already signed in. Inviting someone, changing or removing a member, revoking an invitation, sharing a trail with another organization and taking it back are in this group. So are deleting your own account, changing your email address, and pointing a custom domain at your site.

This protects against someone else using your device. TrailsIQ keeps you signed in for a long time on purpose. The field app has to keep working for days in places with no signal, and being signed out at a trailhead is a problem of its own. The risk is a phone left on a tailgate or a laptop left open in a truck stop. Asking again before the few actions that change who can get in, or that cannot be undone, stops a borrowed screen from becoming a borrowed organization.

Nothing a crew does is affected. Filing maintenance, recording inspections, planning trails, counting stock and posting to the daily report never ask. A question you cannot answer without a connection would only get in the way out on the ground.

One confirmation covers the next half hour, so a run of changes asks once rather than once per row. The ones about your own account, your email and your domain only last fifteen minutes, because those are worth being sure about.

If you have a passkey, you can use it instead. Add your phone or laptop under Profile & preferences, and the same prompt asks for your fingerprint, your face or your screen lock instead of a typed password. It is optional and changes nothing else. See *Passkeys*.

You do not lose your work while you confirm. The prompt opens over the form you were filling in, and what you were saving goes through as soon as you confirm. If you change your mind, nothing is saved and nothing changes.

One exception. You can change your name and your units from **My account** in the field app, but not your email address. That screen has no way to confirm your password, so the app tells you and points you to the dashboard. Everything else on that panel saves from the phone as usual.

Resending an invitation that is already pending never asks for your password.

What's next

- Go through Settings → Roles & permissions before inviting a large team, so the defaults match how you work.
- If you run volunteer days, invite volunteers as *Volunteer*, not *Field worker*, so they do not take up places on your plan.
- Once your team is in, point them to the *TrailsIQ Field App* article. That is where they will spend their day.
- If someone loses access to their email and cannot accept an invitation, revoke it and invite their new address. The old link stops working as soon as you revoke it.

TEAM

Work hours, expenses and time logged on tasks

Record crew time and spending three ways: quick time logs on a maintenance task, timesheet hours on the dashboard, and expenses to claim back. Covers approval, paying people back, mileage, categories, totals, and PDF exports for payroll and accounts.

TrailsIQ keeps track of your crew's time and spending in three related ways. **Quick time logs** record time spent on a particular maintenance task in the field. **Work hours** are timesheet entries for payroll on the dashboard. **Expenses** are costs people claim back. They share the same steps from draft to approval, the same totals and the same permissions, so once you know one, the others will feel familiar.

The three kinds of entry

- **Quick time log** (on a maintenance task): a note of how long you worked on that task, added straight from the task in the field app. It has a duration in hours and minutes, a short note and the date. It adds up on the linked project's *Hours worked* tile and feeds the **Work report** under **Reports** in the menu.
- **Work hours** (your timesheet): hours with a category (regular work, trail maintenance, admin, meeting, training, travel, holiday, vacation, sick and so on), an optional description, and an optional link to a project or task. You submit them for approval, and they can be exported as a PDF timesheet.
- **Expense** (a cost to claim back): an amount, a currency, a category, an optional photo of the receipt, and an optional link to a project or task. It goes through the same approval and export steps as work hours.

Work hours and **Expenses** are organized the same way: Day, Week and Month across the top, a review queue for approvers, the same steps from draft to approval, the same totals and the same permissions. Hours are tracked the same way money is.

The two screens do not look exactly alike yet, and the review queues in particular work differently. Where that matters below, the heading says which screen it is about.

Quick time logs are the odd one out. They live on a maintenance task and do not go through approval themselves. They are saved, they count and they add up straight away. Each one also puts a draft on the timesheet of the person it is for, and that is where the approval happens.

Logging time from the field app (quick time log)

Open a maintenance task in the field app. The task has a **Work log** button next to Edit and Share, with a small number showing any entries already logged. Tap it and the "Work log" screen opens.

When there are entries, the heading reads "*Work log · Xh Ym total*". Under **Add entry** there are three boxes, **hrs**, **min** and **What did you do?**, and a **Log** button.

Any active member can log time. Owners and managers can delete anyone's entry. Field workers and volunteers can only delete their own.

Existing entries are listed under **History**. With none, it reads "*No time logged yet.*" Tap the pencil on any row to change the hours, minutes, note or date, then press **Save** or *Cancel*.

If you open a task and see "*This task isn't in your current organization — it may have been moved, deleted, or you've switched orgs. Refreshing now…*", you have switched organizations since the task was saved on your phone. The app refreshes by itself.

Where the time shows up:

- The project's **Hours worked** tile. Every quick time log on a task linked to a project is added up here.
- The **Work report**, under **Reports → Work report**. It adds up time by person, by trail and by task type, over the last 30 days to start with. Once anyone on your Team page is marked **paid staff**, the totals are split into **Volunteer hours** (members who are not paid staff, plus any

outside volunteers) and **Paid staff hours**, and their rows under *By member* say *paid staff*. Each hour is counted by the role its person had on the day it was worked, so someone hired partway through has their earlier time counted as volunteer time. If trail users send you reports from TrailsIQ Go, a banner at the top counts how many arrived in the period and how many are still waiting for review, with a button that opens them. Rejected reports are counted too, even though rejecting one deletes it. **Export CSV** in the header downloads every entry. Its last column, *role*, says volunteer, paid_staff or outside. **Share** offers a PDF with the hours totaled (split the same way, with a TrailsIQ Go line when there were any), or a link to the report exactly as you see it.

- The task's own history, so anyone who opens the task again sees who logged what.

Volunteers who are not on your team

A trail day often has helpers who will never have an account, such as a school group, a scout troop or neighbors who turned up. Under *Who worked?* in the field app, or **Volunteers not on your team** in the dashboard's log form, enter **how many** of them worked the session. They get one entry between them, such as "*8 outside volunteers*", and each of them is counted for the length of the session. Eight volunteers for three hours is twenty-four hours.

Walk-ins at an event are counted the same way. A sign-up with no email on an event's attendee list is one of your **Outside volunteers**, for the length of the event. Someone on your team who comes to an event gets the time on their own work hours for that day, already approved, and removing them from the list removes the entry. Events explains more.

That time counts everywhere volunteer time is counted: the task's total, the project's **Hours worked**, the **Work report**, and your umbrella account's volunteer hours if you have one. In the Work report it shows as an **Outside volunteers** figure beside the total, with how many people and sessions it came from, as its own row under *By member*, and as a line in the PDF. It never goes on anyone's Work hours, because there is no timesheet to put it on, so it does not wait for approval. Owners, managers and whoever logged it can remove the entry.

Your logged time goes into Work hours

Every quick time log also appears in **Work hours** for the person it is for, on the same date, as a **draft**. It reads "*From task:*" followed by the task's name, so you can tell it apart from a line you typed yourself. Check it with the rest of your week and submit it like any other entry, with nothing to type twice. Unlike a draft you type yourself, it is not private. Whoever approves work hours can see it on your timesheet before you submit, so a crew lead who logged a session for you can check it arrived.

A few rules keep the two in step:

- **The task decides the date and the hours.** Change them on the task's work log and the work hours entry changes to match. On the Work hours screen, those two fields are locked on an entry that came from a task. You can still change the category and description. Entries from tasks start in the *Trail maintenance* category, or *Infrastructure* when the task is on a structure.
- **Once the entry is submitted or approved, the time on the task is locked.** Changing or deleting that log is refused with a message explaining why, because an approver has already looked at the number. If it needs changing, ask whoever approves work hours to send the entry back. It returns to draft, follows the task again, and you submit it again. You can always change the note on a log.
- **Deleting the log removes its draft.** Deleting the entry on Work hours only takes it off your timesheet. The time stays logged on the task.
- **Time you already entered is not doubled.** If you entered hours on Work hours for that task on that day yourself, the log does not add a second entry.
- **This only applies from when it was introduced.** Time logged before then was not copied across, because most crews had already entered those days by hand.

Organizations that have turned Work hours off in their modules get none of this. Quick time logs work just as they did before.

Logging one session for everyone who was there

Most trail work is done by more than one person, and everyone's hours count. Under the three boxes, in the field app and on the dashboard's task panel, is **Who else worked this session?**. It lists every active member of your organization except you. Tick the people who were with you, and each of them gets their own entry with the same date, length and note.

It is the same session, so it is the same time for each person. Two of you on a bridge for ninety minutes is ninety minutes each, not forty-five. If you want different amounts for different people, log them separately.

An entry someone else made for you says so. The row reads "· *logged by Dana Whitfield*" under the name the hours belong to, so a total you did not enter yourself always has an author you can ask about it. Your own entries have no such line. The draft it puts in your Work hours says the same, "*Logged by Dana Whitfield*", so you see the name wherever you see the hours.

The list only has people in your organization. Someone who has been invited but has not accepted yet is not on it, and nor is anyone outside your organization. In the field app, the list is saved with the rest of your offline information, so you can log a whole crew's afternoon with no signal and it uploads when you have some.

Work hours dashboard on Week view with the day nav and Log hours form open

Logging work hours on the dashboard

Open **Work hours** from the sidebar. Across the top are **Day**, **Week** and **Month**. The page works the same on all three. The choice only decides which days you see and how entries are grouped (by day, or by week in a month). Approvers also get **Needs review**, with a red count of entries waiting for them. Everyone gets **Export PDF** and **Log hours**, plus **Drafts** whenever you have entries you have not submitted, with an amber count.

Under the header:

- **The period bar:** arrows to move back and forward, the period you are looking at, and **Today**, **This week** or **This month** to jump back. Approvers also get a member dropdown on the right, which starts on *All members*.
- **Four totals:** the period's hours, how much is waiting for approval, how much is approved, and how much is linked to a project or task.
- **On Week**, a bar for each day, with today in amber. Press a day to open it.
- **The entries**, grouped, each with its hours, what was worked on, its category and link, who it belongs to and its status. **Press a row** to open it. That is where you submit, edit, approve, send back or delete it.
- **On the right**, the period's total by category, the hours **by member**, and **where the time went**: the projects and tasks the hours are linked to.

Press **Log hours** to open the entry form over the page. The fields are:

- **Hours for:** approvers only. Pick yourself, anyone on the team, or someone invited who has not signed up yet (see *Logging hours for someone else* below). It starts on the member the page is showing.
- **Date:** required. It starts on the day you are looking at, or today when today is in the period.
- **Hours:** 0.25 to 24, in quarter hours. Type it, use **−** and **+** to move a quarter hour at a time, or press **4 h**, **6 h** or **8 h** under *Quick fill*.
- **Category:** pick from the categories you have turned on (see below).
- **What you worked on:** optional, up to 2,000 characters.
- **Link to project or task (optional):** pick a project or a single maintenance task, not both.

Press **Save entry**, or *Cancel* to leave without saving. Entries are saved as **drafts**, which only you can see until you open the row and press **Submit for approval**. You can also press **Submit N drafts** above the list to send every draft on screen at once. **Drafts** in the header lists every draft of yours, whatever its date. That includes hours drafted from a task weeks ago and anything sent back. **Submit all** there sends them all.

Logging hours for someone else

Anyone who approves work hours can log hours for another member, such as a volunteer who never opens the app, or a day someone forgot to enter. Pick them under **Hours for**. The **Category** list changes to that person's categories, which are the ones their role is allowed under **Settings → Work hours**.

Hours you log for someone else are **approved as you save them**, with you as the approver, because logging them is the check. They do not go into the member's drafts. Their timesheet shows the entry with **Logged by** and your name, so a total they did not enter always has an author they can ask. To correct one, delete it and log it again.

Someone who has not signed up yet is in the dashboard's list too, under *Invited, not signed up yet*. That is anyone with an invitation on the Members page, including people added with **Add without sending**. Their hours are approved the same way and show under their name with *(invited)* after it. When they accept the invitation, all of those hours move to their new account. The member filter at the top of the list offers them too, so you can see what is waiting for one person.

In the field app it is the same choice in a different shape. Open **Work hours** and press **Log hours**. The form opens on **Hours for**, set to you. Press **Change** to pick a member. The category buttons under it change to that person's categories, and the button at the bottom says who the time is for, such as *Log 2h 15m for Dana · today*. It only lists team members. Hours for someone invited who has not signed up yet are logged from the dashboard.

The field app's form also works a little differently from the dashboard's:

- **Date** is a strip of the last seven days, with today on the right. Press the date above the strip to pick an earlier day.
- **Time** moves a quarter hour at a time with **−** and **+**. You can also press **30m**, **1h**, **2h**, **4h** or **8h**.
- **Category** shows the four categories you use most as buttons. Everything else is under **More**, which has a search box.

There is no hourly rate on a work hours entry. Pay rates are kept outside TrailsIQ.

Expenses dashboard with the Add expense form open and Mileage category selected

Logging an expense

Open **Expenses** from the sidebar. It opens on today, with **Day**, **Week**, **Month** and **Year** across the top, and arrows and a date picker under them for moving around. Approvers also get a green **Review** button showing how many expenses are waiting for them. When nothing is waiting, the button is not shown.

Add expense is in the header of every view, and an expense is always filed against a day. Press it from Week, Month or Year and you go to the day view with the form already open. That is today if today is in the period you were looking at, or the period's last day if not. The date is a field on the form, so you can change it.

Press **Add expense** and the form fills the screen, so nothing behind it gets in the way. The only way out is the **×** in its top corner. **The field app has the same form.** Filing an expense from the phone and from the dashboard uses the same screen, with the same controls in the same order, so there is only one to learn.

- **Category:** a grid of tiles rather than a dropdown. Five of your categories get their own tile, and the sixth is **Other**, which opens a panel with everything that did not fit, such as *Accommodation* and *Transport* when every category is turned on. Anything you can file is in one of those two places. Picking **Mileage** swaps the amount for a distance (see *Mileage*).
- **Date:** buttons for today and the two days before, and a calendar button for any other day. It is required, and it must be today or earlier.
- **Amount:** 0.01 to 99,999.99.
- **Currency:** one of 10 currencies (USD, CAD, EUR, GBP, AUD, NZD, CHF, JPY, MXN and ZAR). It starts on your organization's currency.
- **Receipt (optional):** one picture, up to 5 MB, in JPG, PNG or WebP. **Scan receipt** opens the scanner, which finds the edges of the receipt, straightens it and attaches it. You still type in the amount and the date. **Upload** picks a picture from your device instead.
- **What was it for? (optional):** a note for whoever approves it.
- **Link to project or task (optional):** the same picker as on work hours.

The running **Total** is beside the green **Add expense** button at the bottom of the form, so you can see what you are about to file. Expenses go through the same steps from draft to approval as work hours.

In the field app, the scan button beside Add expense is a shortcut. Tap it from the expenses list, photograph the receipt and press **Done**. A new expense opens with the receipt already attached, ready for the category and the amount. Close the scanner without taking a picture and you are back on the list.

Expense form in Mileage mode showing the distance input + read-only Amount + math helper

Categories and settings

Work hours and expenses both come with a set of categories, and you can trim both down to the ones your organization uses.

Expense categories are *Mileage*, *Fuel*, *Materials*, *Equipment*, *Food*, *Accommodation*, *Transport* and *Other*. The list is fixed. You can turn any of them off, but you cannot add your own. Turning one off removes its tile from the form, and a category that no longer fits in the grid moves behind **Other** rather than disappearing.

Work hour categories come in three groups, and you can add your own:

- Day-to-day work: *Regular work*, *Trail maintenance*, *Infrastructure*, *Points* (points of interest), *Lifts*, *Other*.
- Office: *Admin*, *Meeting*, *Training*, *Travel*.
- Time off: *Holiday*, *Vacation*, *Sick*, *Other leave*. These are kept separate so payroll can tell paid work from leave on the same timesheet.

Settings → Expenses: untick the categories you do not use. A category you turn off stops being offered on the dashboard and in the field app.

Settings → Work hours: a table with a row for each category and a column for each role: *Owner*, *Manager*, *Field worker* and *Volunteer*. Tick what each role should see in the work hours form, on the dashboard and in the field app. Volunteers can have a short list, such as *Trail maintenance* and *Training*, while field workers keep the full list with the time-off types. Every role needs at least one category. Until you change anything, every role sees every category.

Your own work hour categories. Type a name under **Add a category** and press **Add**. It joins the table under *Your own*, ticked for every role, and is saved when you press **Save work-hours settings**. Your own categories count as work, not time off, so they count toward volunteer hours wherever those are added up. Press **Remove** to take one away. Entries already filed under it keep it and still show its name, and it is simply no longer offered. Adding the same name again brings it back.

When a manager edits someone else's entry, they pick from the manager's own list. An entry whose category has since been turned off for its author keeps that category until someone changes it.

The currency amounts are shown in

Set it in *Settings → Organization details → Currency*. It is the currency for expenses, mileage rates, build estimates, proposals and contracts, on the dashboard, in the field app and in every PDF.

Changing it changes the label, not the amounts. A figure saved as 4,000 stays 4,000 and is then shown in the new currency, so set it before you start filing rather than after. A signed contract is the exception. It keeps the currency it was signed in, so opening one next year shows what was agreed, not what Settings says today.

Each expense also keeps the currency it was filed in, so a crew member who buys fuel across a border has it recorded as they paid it, rather than converted at a rate nobody chose.

Expenses do not include tax. The tax rate under Organization details applies to proposals and contracts, which are the documents that go out to other people. Claiming back tax on a receipt is a different job. It needs a rate for each receipt and a note of whether the amount already included tax, and one organization-wide rate on a fuel receipt would give your accountant a number to untangle. Enter the amount you actually paid.

Mileage

Mileage is one of the expense categories, and it has its own form and its own rate.

When you pick **Mileage** on the expense form, the amount is replaced by a distance (0.1 to 99,999, in tenths) with a **From map** button beside it. The line underneath shows the sum, such as "*24.6 mi × $0.73 / mi*", and what it comes to.

The distance is in your organization's units. An organization set to imperial gets **Miles driven** and a rate per mile. One set to metric gets **Kilometers driven** and a rate per kilometer. The two always match, so you never enter one unit against a rate meant for the other.

Your organization sets the rate in *Settings → Expenses → Mileage reimbursement rate*. It can be from 0 to 9.9999. If you have not set it, 0.73 per mile or kilometer is used.

Changing the rate does not change past claims. A mileage expense keeps the amount worked out when it was saved, so changing the rate tomorrow does not change yesterday's mileage. The distance is saved with the amount **and the unit it was entered in**. That way anyone checking can always see how the amount was reached, and switching your organization to metric next year cannot change the price of a claim you already paid.

From map

Beside the distance is a **From map** button. It opens a map where you tap the stops you actually made, or search for an address, and it gives you the real driving distance along roads, not a straight line. Round trip is one tap, so the drive home counts. You can save a route you drive often and use it again on your next claim.

Search finds the places you already have. Trails, points of interest, infrastructure and storage locations are all in it, along with any address. Businesses are too, so you can type a hardware store or a fuel stop by name rather than looking up its address. Tap one and it becomes a stop. Only places with a position on the map are offered, so everything in the list can be tapped.

The order is the drive. Every stop after the first shows how far it is from the one above, so a claim can be checked leg by leg rather than as one total. Drag a stop by the handle on its left to move it up or down. The numbers stay with the position, so stop 1 is always where you set off from. Tap a stop to change it to somewhere else, or tap the × to remove it.

The map's own buttons are at the bottom right. They point the map north, change how the map looks, and center it on where you are. They are the same three on every map in TrailsIQ.

Your trails are on the map. Every trail in your organization is drawn under the roads, with its name once you zoom in, so you can find the trailhead you drove to by its trail rather than by a street name. When you have not added a stop yet and the map does not know where you are, it opens showing your trails. The route you are building is always drawn on top.

So are your trailheads and parking areas. Each one is drawn with the same sign your website uses, a green flag for a trailhead and a blue P for parking, and tapping a sign makes it a stop. They are also listed in the search before you type anything, after your saved places and routes, so the usual end of a drive for trail work is one tap away. They come from your Points of interest page. Anything there with the trailhead or parking type shows here.

Save the stops you keep driving to. The bookmark on any stop lets you name it, such as *Home*, *The yard* or *Bob's depot*. Saved places are at the top of the search the next time you open it, before you type anything. Saving a place under a name you already used moves that place rather than adding a second one with the same name. Tick **Share with team** and everyone in your organization gets it. Leave it unticked and it is yours alone.

Saved places and saved routes are both under **Saved** in the map, where you can remove any you added. A place someone else shared can only be removed by them.

From map is available from **Core** upward. On Starter the button is still there and still opens. It shows what the feature does and which plan includes it, rather than sitting grayed out with no explanation. Typing the distance in yourself works on every plan.

Review queue grouped by member with the inline review panel open

Approval

Work hours and expenses go through the same four stages: **draft**, **submitted**, then **approved** or **sent back**.

- **Draft:** the entry is on your dashboard, but nobody else can see it. A draft does not count toward reimbursement or payroll.
- **Submitted:** you opened the row and pressed **Submit for approval**, or pressed **Submit N drafts** above the list. It is now waiting for approval.
- **Approved:** a manager approved it. It has a green label and counts in every total.
- **Sent back:** a manager returned it instead of approving it. Nothing is deleted. You keep the row, you can read any note they left, and you can fix it and submit it again. Hours that are sent back go straight back to your drafts, marked **Sent back** with the note, so **Edit** and **Submit** work on them as on any draft. Like any draft, only you can see them until you submit again. An expense that is sent back drops out of the month's totals, but hours that are sent back do not (see the gotchas).

Hours without approval

Some teams do not want a manager to sign off every timesheet. An owner or manager can turn approval off for work hours under **Settings → Work hours**, by unticking **Submitted hours need a manager's approval**. With it off, submitting an entry approves it straight away. It goes to **Approved** and counts everywhere approved hours count, with no reviewer named, because nobody reviewed it.

Entries that were already waiting when you turned it off stay in the review queue for someone to decide. Turning it back on only affects entries submitted afterwards. Expenses always need approval. The switch is for hours only.

An approved expense can also be marked paid. That is a separate step and a separate decision. Approving a claim says it is fair, and marking it paid says the money has gone out. A paid expense shows a **Paid** label wherever you would otherwise see Approved, and it still counts as approved spending in every total and in a project's costs, because it was. Work hours have no paid stage, because they go to payroll rather than being paid back.

Submitting several at once. Whenever you have drafts on screen, **Submit N drafts** above the list sends them all. To catch the ones outside the period you are looking at, press **Drafts** in the header. It lists every draft you have, whatever its date, with **Submit all** above them. Press **Drafts** again to go back to the week.

Reviewing expenses

Expenses → Review is for anyone with *Approve expenses*. The queue is grouped by member. Each card shows the person's name, the total waiting, how many expenses, the date of the oldest one and how many came with a receipt.

Each row is meant to be decided without opening it. It shows the receipt as a small picture you can recognize (or a dashed **None** when there is no receipt), the date, the amount, the description, the category and the project or task it was filed against. Next to those are labels pointing out anything worth a second look: no description, no distance on a mileage claim, or more than 90 days old.

There are three ways to work through the queue, fastest first:

- **Approve all** in the header, when you have already read them.
- **Tick the rows you trust**, using the box on each row, or the one on a member's header to take everything of theirs. The banner then offers to approve them together, showing the total you are about to approve, or to send them all back with one note.
- **Open** a row to see the whole record: the receipt at full size, the link, the description and the review history, with Approve and Send back in the same panel.

Sending back needs a note, and approving does not. An approval needs no explanation, but a crew member whose expense comes back with no reason has to guess what to change.

A row you have decided stays where it is, grayed out with your decision on it, rather than disappearing, so you keep your place in the list. Every count and total on the page already leaves it out, and the panel on the right keeps a running total of what you have approved this time.

Worth a look is the panel beside the queue. It collects the rows with a label on them, plus any two claims from the same person for the same amount in the same category, which can mean something was submitted twice. These are hints rather than verdicts, because people really do drive the same round trip twice. Tapping one opens that row.

Export is in this header too, so you can export a reimbursement run from the screen where you approved it. It exports the current month in one press, or any period up to a year under *Custom range…*.

To pay, in the same header, shows how much your organization owes across every approved expense nobody has been paid back for yet, and opens the payment run below.

Paying people back: the payment run

Expenses → Review → To pay is for anyone with *Approve expenses*. Approving a claim is a decision about the claim. This is the list of people you owe money to, and where you record that you have paid them.

It opens on **everything outstanding**: every approved expense that has not been marked paid, whatever month it belongs to, because "what do we owe?" has no natural cut-off. Each person is one card with their total and how long they have been waiting, because one person is one payment,

however many receipts are behind it.

Export gives you the run two ways. The spreadsheet is the one to work from, with a row per person showing the amount to send, then every expense behind it. The PDF is the same run on your letterhead, for your records. Both have a reference such as *PR-20260910-A3F1*. Exporting the same run twice gives the same reference, so you can enter it when you record the payment and find it again on a bank statement months later.

Then pay them, come back, tick what you paid and press **Mark paid**. You can add a check number or transfer reference. It is optional, and it is the only thing that links these rows to a line in your accounts.

Only mark what you actually paid. Anything approved while you were at the bank stays on the run for next time, which is why the button only takes the rows you ticked.

Marked something by mistake? Undo on the row puts it back on the run. The approval stays as it was.

Picking a period filters by the date of APPROVAL, not the date on the receipt. A receipt from March that was only approved last week belongs in last week's run, because that is when you started to owe it. If you narrow the period, anything approved earlier that is still unpaid is shown on its own line, so an old claim cannot fall outside every period you look at.

The person who filed the expense sees the **Paid** label on their own row and gets a notification when it happens, which is the answer they have been waiting for since it was approved.

Reviewing work hours

Work hours → Needs review is for anyone with *Approve work hours*. It is the same page, showing every submitted entry whatever its date, grouped by member. Press a row to open it, add a note if you want, and press **Approve** or **Send back**. **Approve all shown** approves everything in the list, after asking you once. Filter by member first to approve one person's week. The note is optional either way, unlike on expenses, and it is the only explanation the person gets. Press **Needs review** again to go back to the week.

People are not told when their work hours are approved or sent back. Only the submission sends a notification, to approvers. A decision on an expense does reach the person who filed it (see the gotchas). So if you send back someone's hours, tell them.

Month view with Monthly total banner + By category breakdown + Team summary rows

Totals: Day, Week, Month and Year

Every view has totals at the top:

- **Work hours:** Day, Week and Month all have the same four figures (the period's hours, waiting for approval, approved, and linked to work) and the same panel on the right: the total by category, hours by member and where the time went. Approvers see everyone's hours. Everyone else sees their own.
- **Expenses, Day:** "*Total: X.XX*".
- **Expenses, Week:** grouped by day, with a weekly total for each person.
- **Expenses, Month:** every expense in the month, grouped by week, with three panels on the right:
  - **The month's total:** on the dark green card, with a bar showing how much is paid, approved, still waiting for review, or in drafts.
  - **By category:** rows of "*{category} · Nx · total*", so whoever handles the money can see where it went.
  - **Team:** one row per crew member with how many are waiting and their total. Only approvers see it.
- **Expenses, Year:** the year at a glance rather than a list of receipts. Each month is a row with a bar sized against the year's biggest month, how many expenses it has, how many are still waiting for review, and its total. Press a month to open it. On the right are the same three panels as for a month, covering the whole year. Months still to come are left blank, and a past month with nothing filed shows a dash.

An expense that is sent back leaves the month's and the year's totals, but hours that are sent back do not. An expense nobody is paying back is no longer money spent, so it drops out of "money spent this month". Time someone worked is still time worked, even when payroll will not take it, so it stays in the hours total.

Each project's total. Every project's page has an **Hours worked** tile, such as "*12.5 h — Across N linked items, summed from the work log.*" It only counts **quick time logs**, not timesheet hours. So a project whose crew entered plenty of work hours but no quick time logs shows 0 on the tile, even though the work clearly happened. If you need the two to agree, tell us. For now, the tile answers one of the two questions and says which.

The Work report, under **Reports → Work report**, adds up every quick time log by person, by trail and by task type. It opens on the last 30 days.

What it shows. Across the top are the total time logged, split into volunteer and paid staff hours once anyone on your Team page is marked paid staff, the tasks worked on, and how many days in the period had any work. Each figure shows what it was over the period before, so a quiet fortnight shows as a quiet fortnight rather than a number you have to remember. Under them is a row per person with their hours, tasks filed and tasks resolved. Press a column heading to sort by it. Then comes a breakdown by task type, with the average time each kind of job takes, the same by trail, and the individual entries all those numbers come from, grouped by day.

Daily rhythm is a calendar of the period, one square per day, starting on Monday. The darker the color, the more time was logged that day. Point at a square to see the day's hours and entries. Days outside the period are drawn as empty outlines so the weeks line up. Underneath are your busiest day, the average over days with any work, and how much of the time was on a weekend. Over a long period the calendar turns on its side, with one column per week.

Changing the period. 7 days, **30 days** and **Season** are one press each. Season runs from January 1 to today and is compared with the same dates last year, so a spring that started late reads as late rather than as a collapse compared with winter. For anything else, the date button opens a calendar with the usual shortcuts down the side. Click the first day and then the last, and nothing reloads until you press **Apply**.

Narrowing it down. The row of filters under the header narrows the whole page to one **member**, one **trail**, one **task type**, or volunteer or paid **hours**. Pressing a row under *By trail* does the same for that trail. The filters are part of the page's address, so you can bookmark a filtered report or share it with **Copy link**. **Clear filters** puts everything back. The hours filter only narrows time. A task is not volunteer or paid, so tasks filed and resolved stay the same. The downloads use whatever period and filters are on screen, so the number you see is the number you get.

Approvers get a dashboard tile showing "*Expenses to review*", which opens the queue.

Settings → Expenses page with category checkboxes + Mileage reimbursement rate input

Editing and deleting

The same rules apply to work hours and expenses:

- **Drafts:** the author can edit or delete them freely.
- **Submitted or approved:** locked, and so is an expense that was sent back. (Hours that are sent back are drafts again.) Trying to edit shows "*Only draft entries can be edited.*" or "*Only draft expenses can be edited.*"
- **Deleting:** authors can delete their own drafts. Managers can delete any entry, whatever its stage. On work hours, so can anyone you have given *Approve work hours*.
- **Expenses have one exception:** the author can also delete their own **approved** expenses, for the rare case where they realize afterwards that a claim was a mistake.

Deleting asks "*Delete this entry?*" or "*Delete this expense?*" first.

Quick time logs on maintenance tasks: field workers can edit and delete their own, and managers can edit and delete anyone's. They have no draft stage of their own. The log is saved and counts, and its draft on Work hours is what gets approved. Once that draft is submitted or approved, the log's date and hours are locked for everyone until it is sent back.

When TrailsIQ staff act as a member, anything they file is credited to that member, not to the staff member.

Photos and receipts

Only expenses have a receipt picture. Each expense can have one receipt, up to 5 MB, in JPG, PNG or WebP. It counts toward your organization's storage. Tap the small picture on a row to see it full screen.

When you edit an expense, you can take the receipt off and add a different one in the same save.

Receipts count toward your plan's storage. If your organization's storage is full, the upload is refused with a message about your plan limit. Free up space by deleting old pictures, or upgrade in Billing.

Work hours and quick time logs cannot have photos. If you need pictures of the work, add them to the maintenance task instead.

Exporting for payroll or accounts

Work hours export as a PDF:

- **Week:** the week on screen, for the member you are looking at or everyone. On the Day view the button reads **Export week PDF** and exports the week that day is in.
- **Month:** the month on screen.

Approved entries carry the reviewer's signature, from their Profile → Signature setting. Both downloads are one click from the page header.

Expenses export as a PDF with more choice of dates:

- **Export** is in the header of every expenses screen. The first option is the period you are looking at (this day, this week, this month, this year, or the current month on the review queue), and it downloads in one press.
- **Custom range…**, the second option, opens a calendar for any period up to 366 days. Use it for a pay period that does not line up with a week or a month. For more than a year, export it in two parts.
- Expenses that were sent back are left out, because the export is what you hand to whoever does the accounts, so it has to match the totals on screen exactly.
- Receipt pictures are included in the PDF itself.
- Your organization's logo is at the top.

The Work report downloads every quick time log in your organization for the period you chose, one row each, with the date, the minutes, who logged them, and the task, trail and note if there were any. It is useful for reporting hours to a funder or a land manager.

If a PDF download ever says "*PDF export is being provisioned — try again after the next deploy.*", ask us.

Permissions

Two permissions control the approval queues:

- **Approve work hours:** "*Open the work-hours review queue, approve or reject submissions, see team-wide totals.*" On by default for owners and managers, off for field workers and volunteers.
- **Approve expenses:** works the same way. On by default for owners and managers.

You can give either one to a particular field worker, on their row (*Members → Edit → Permission overrides*) or for the whole role in *Settings → Roles & permissions*, if you want them to help a manager keep the queue clear.

View team-wide totals reads "*See who-owes-what summaries on the Month views for hours + expenses. Read-only — does not include approval rights.*" It is off by default for everyone. Give it to someone who needs to see the totals for reporting, such as a bookkeeper, without letting them approve anything.

Any active member can create their own entries. Logging and submitting need no permission. On a task, **Who else worked this session?** lets you record time for other people too, giving each person you tick their own entry, marked with who logged it.

Common gotchas

- **Drafts are hidden until you submit them**, even from managers filtering by member. If a crew member enters something but forgets to submit it, nothing gets approved or paid. The field app's expenses list warns "*You have N draft expense(s) waiting for approval — drafts aren't*

reimbursed." with a **Submit all** button.

- **An expense that is sent back is kept, but leaves the totals.** The author still sees the red label and the note, and the row stays there to be fixed and submitted again. It is left out of weekly and monthly totals, the category breakdown, the team summary and every PDF. Work hours that are sent back DO stay in the totals.
- **Link to a project or a task, not both.** The picker offers one or the other.
- **Changing the mileage rate does not change past claims.** Earlier claims keep the amount worked out when they were saved. Change the rate tomorrow and only new mileage claims use it.
- **Each expense has its own currency.** The form starts on your organization's currency, and a crew member who is traveling can file an expense in another one. Whoever does your accounts sorts it out from the export.
- **A quick time log becomes a Work hours draft, not an approved entry.** The project's "Hours worked" tile and the Work report count the time as soon as it is logged. Work hours counts it as a draft until someone submits and approves it. So the two can show different totals for the same week while drafts are waiting.
- **The person who filed an expense is told the decision.** Approved or sent back, they get a notification with the reviewer's note. If someone would rather not get it, it is under *Expense decision emails* in Settings.
- **New quick time logs, expenses and work hours can be added in the field app with no signal.** They are saved on the phone and upload when you have signal again. Changing an entry that already exists needs a connection, so editing yesterday's expense out on the trail will not work without signal.
- **Expense reminders** are something each person turns on for themselves, under Profile → "*Expense reminders*" (weekly or monthly, by email or notification). Suggest them to crew members who forget to submit.
- **Receipts count toward your storage.** If you are near your plan's limit, remove old receipts by editing the expense.

What's next

- Trim your expense and work hour categories in *Settings → Expenses* and *Settings → Work hours* before your crew starts logging. A shorter list is quicker to pick from and reads better on the PDF.
- Set your **Mileage reimbursement rate** now if you will pay crew back for driving. Once claims start coming in at the default rate, changing it will not fix the earlier ones.
- If you want someone who is not a manager to review the queues, such as a bookkeeper, give them **Approve work hours** or **Approve expenses** under *Members → Edit → Permission overrides*.
- Read *Members, roles and permissions* for more on giving one person a permission.
- Read *Projects and work planning* to see how a project's *Hours worked* tile is filled from quick time logs.

TEAM

Inventory: stock, equipment, checkouts and reservations

Keep track of your organization's tools, lumber and gear. Covers stock counted at each location, equipment that people take out and bring back, low-stock alerts, reserving stock for maintenance in progress, and inventory in the field app.

Inventory is your organization's shared list of physical things: tools, lumber, hardware, signs, safety gear and machinery. It keeps a count for each place you store materials, and records who takes equipment out and brings it back. Anyone on the crew can answer "how much 2×4 do we have at the East Trailhead?" or "who has the chainsaw right now?" from the dashboard or the field app.

How inventory works

Each item in inventory is one **kind of thing**, such as "2×10 pressure-treated lumber", "Stihl MS 261 chainsaw" or "trail-closed signs". When you create an item, you pick one of two **tracking modes**:

- **Stock count:** materials that get used up. Use it for anything you count in units, feet, gallons or bags, such as lumber, screws, gravel, paint and flagging.
- **Tools & equipment:** things that go out and come back, such as shovels, saws and machines. Several of the same can share one item: set *How many do you own?* to 5 for five identical shovels, and each one can be checked out and returned on its own.

The question to ask is whether the thing gets used up or comes back, not whether you have one or many.

The two work very differently. Stock gets counted, moved and used up. Equipment gets taken out and brought back, and each trip is recorded.

You can change an item's tracking mode later from its Edit page on the dashboard. Switching an item to stock clears its machine details, because they only apply to equipment.

Inventory Index page with the filter bar and mixed asset/stock rows

Setting up storage locations

Locations are where your inventory lives: the shop, a shed at the trailhead, a job trailer, a gravel cache. Manage them under **Settings → Storage locations**.

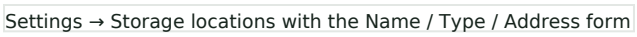
The page says "*Shops, trailers, caches, trailheads — where inventory lives.*" Under the form to add one, it says "*Physical spots where your crew stores tools, lumber, signs, and other gear. Inventory items link to these locations so you can answer 'how much 2×4 do we have at the East Trailhead?' at a glance.*"

The fields are:

- **Name:** required, and each location needs a different name. The prompt reads "*Name (e.g. Main Shop)*".
- **Type:** one of *Shop / Warehouse / Shed / Container / Yard / Cache / Trailer / Trailhead / Office / Other*.
- **Address:** optional.
- **Map position:** optional. Fill it in if you want the location to show on the map.
- **Notes:** optional.
- **Archived:** hides the location from the usual list without deleting it.

You cannot delete a location that still has stock in it. You see "*This location still has inventory. Move or remove the stock rows first.*" Empty the location, or move its stock somewhere else, before you delete it.

Set up your real locations before you create items. The *Initial stock* field on the item form needs at least one location to be useful.



Categories

Every organization starts with these categories:

Tools · Lumber · Hardware & Fasteners · Trail Materials · Signage · Consumables · Safety & PPE · Equipment & Machinery · Other

These are always there. To add your own, such as "*Wire rope*", "*Fasteners (galvanized)*" or "*Prescribed-fire kit*", press **Manage categories** on the inventory page. A panel opens titled "*Inventory categories*", which says "*The defaults are always available. Add your own to fit your workflow — they'll show up in the picker both here and in the field app.*"

Categories fill the picker on the item form and the category filter on the inventory page. Two categories add extra fields. **Lumber** adds lumber measurements, so the bridge materials calculator can match your stock against a bridge (see *Every field on the form*). **Equipment & Machinery** opens the machine details.

Creating an inventory item

Creating items needs the *Manage inventory* permission. Managers have it, and so do field workers by default. Volunteers do not, so they see the list in view only unless you give it to them.

Press **+ Add item** on the inventory page. The same form is used to create and to edit. When you save, the item's page opens.



Every field on the form

- **How is it tracked?** Two tiles: *Stock count* ("*Materials that get used up*") and *Tools & equipment* ("*Things that go out and come back*"). Pick this first, because the rest of the form changes with it.
- **Name:** required, up to 120 characters, and different from your other items. Lumber is the exception: a name only has to be different within its lumber type, so a rough-cut 2x4x8 and a dimensional 2x4x8 can sit side by side, told apart by the type shown under each. The phone checks the name against the list before saving, so a clash shows on the form rather than after the item has gone into your queue.
- **Category:** pick from your list, including any categories you added. The list puts the categories that suit the tracking mode first: materials such as Lumber and Hardware & Fasteners for stock, and Tools and Equipment & Machinery for tools and equipment. Everything else, including your own categories, is listed under *Other categories*. On a new item, switching the tracking mode also switches the category if the one picked belongs to the other mode.
- **Unit: stock only**, up to 20 characters. The prompt reads "*pcs, ft, gal…*" and it starts as *pcs*. This is what shows next to the quantity everywhere, as in "6.5 gal" or "24 pcs".
- **Home location: equipment only**. This is where the thing goes back to when it is not out. A stock item has no home location, because where it is *is* its count at each location, which you set on the **Stock** tab. The first choice is "*No home location set*".
- **How many do you own? Equipment only**, a whole number from 1 to 9999. The help text reads "*Use 1 for a single tool; bump it up for several of the same (e.g. five identical shovels).*"
- **Low-stock threshold: stock only**, optional. The prompt reads "*Leave blank to skip alert*". When the amount on hand drops below this number, managers get a notification (see *Low-stock alerts*).
- **Cost per unit** (or **Cost each** for equipment): optional, in your organization's currency. Enter what one unit costs to buy. With a cost set, the item's page shows what its stock is worth, the inventory list adds it to a total, and a project shows what the materials linked to it are worth. Leave it blank if you don't track cost. An item with no cost is never counted as free: totals say how many items they left out.
- **Machine details:** make and model, serial number, fuel, **Hour meter**, **Service due at** and **Check before it goes out**. These show for equipment in the **Equipment & Machinery** category and stay folded away otherwise. They also stay open for any item that already has one of those filled in, whatever its category. That way you never lose sight of a number you saved, and filing a machine under your own category name never loses its hour meter.

- **Lumber dimensions: only when the category is Lumber**. The help text reads "*Fill these in so the bridge calculator can spot this stock when it computes what you need.*" It has:
  - **Lumber type:** pick from the built-in list, or add your own.
  - **Nominal label:** the size as you would say it, such as "2×10". The help text reads "*Just a display tag — the actual mm values below are what the calculator matches against.*"
  - **Length**, **Thickness** and **Board width**, each in your own units, imperial or metric.
- **Description:** up to 2,000 characters. Use it for where the item sits on the shelf and anything odd about it.
- **Photo:** one picture, up to 5 MB, in JPG, PNG or WebP. It is optional when you create the item. On an existing item, **Upload photo**, **Replace photo** and **Remove** work straight away. Remove asks "*Remove this photo?*" first.
- **Initial stock:** when creating a stock item only. Pick a location and a quantity, so you do not have to open the item afterwards to enter a starting count. If you have no locations yet, you see "*Add a storage location first if you want to log a starting quantity now.*"
- **Archive (hide from default list):** when editing only. The item leaves the inventory page unless the Archived filter is on.

Save changes and **Cancel** stay at the bottom of the screen as you scroll, so a one-word change to a name does not mean scrolling past every field. **Delete this item** is at the end of the form, for managers only. It asks you to confirm by name, with `Delete "{name}"? Stock rows will be removed too.` The item's counts and history are deleted with it. Deleting needs a connection, but everything else on the form saves offline.

Stock: materials counted at each location

A stock item keeps a separate count for each storage location. So *2×10 lumber* might be *84 pcs at the Main Shop*, *12 pcs at the East Trailhead cache* and *0 pcs at the Job Trailer*. The item's page has a **Stock by location** card with a row for each location. Each row has a box for the current amount, a **Move** button, and when it was last counted and by whom.

With no stock yet, it reads "*No stock recorded yet. Add a location below.*"

Anyone who can see inventory can change the counts. You do not need *Manage inventory*. Typing in a new value is recorded as a count, so you can read the whole history of counts. That helps when you want to know "when did we last actually go out to the cache and count?"

You can set a count or change it. You can set it to exactly what you counted, or change it by an amount. The field app's − and + buttons change it by an amount. Typing into the box, on the phone or the dashboard, sets it.

Every change to the number goes into the item's history, with who made it and when. So a count that takes 84 down to 60 reads as "used 24", rather than just replacing one number with another.


Item Show page for a stock item showing Stock by location card

Equipment: who has what

Equipment does not have a count at each location. Instead it has a number **at home** and a number **out**. Each time it goes out and comes back is one trip, which stays open until it is returned.

The item's page has a card titled **Take it out**, which says "*Record who's taking the {item name}, where, and what for. Anyone in the org can see it's gone (and where it went).*"

The fields are:

- **How many are you taking?** This only shows when you own more than one. Use − and + to choose, up to the number at home, with "*The rest stay at {home location}.*" underneath.
- **Who is taking it:** a list that starts with *Me ({your name})*, followed by every active member. Pick someone else if you are recording it for them.
- **Where is it going:** a search box. As you type, it searches your **outstanding maintenance tasks** and your **trails** together. Type a trail name and you get the trail itself as well as the work on it, so one box covers "up Granite Ridge" and "the washout on Granite Ridge". Picking a task

links the trip to it, which puts the tool on that job rather than just somewhere.

You do not have to pick anything. Type *North trailhead, Section 4* and carry on, and those words are recorded as the place. If nothing matches, the box says so.

Out of signal, it searches **what is on the phone** rather than everything, and tells you so, so a short list is not mistaken for a complete one.

- **Note:** optional. Anything the next person should know.
- **Bring back by:** optional. A day the crew agreed on. While the item is out, its card turns red once that day has passed.

The button reads **Record it**, and *Recording…* while it saves.

Two people cannot take the last one. If two people tap at the same moment, one gets it and the other sees "*None available — all are already checked out.*" or "*Only N available right now.*" TrailsIQ sorts it out, and it cannot check out something that is not there.

Bringing it back. Each open trip has a card with a **Bring it back** button. It opens a short sheet asking how it came back. That is optional, and it is the place to write "*chain needs sharpening, ran fine otherwise*" so the next person sees it before they take it. An item you own several of can be out on several trips at once, so each card closes its own trip.

A trip linked to a task reads as one. While the item is out, its card says *Out on a task* over the task's title, with the trail under it. It shows the title as it reads **now**, not as it read when the trip started. Both are kept: the link, so the name stays current, and the text that was typed, so a deleted task still leaves a readable record of where the thing went.

The **Trips** section on the item's page, "*Past and present check-outs. Newest first.*", shows the last 50 trips.

Machinery: hours and the check before it goes out

A piece of equipment becomes **machinery** as soon as someone puts a number in **Hour meter** on its edit form. There is no machinery switch to find. The reading is what says the thing has an hour meter, and leaving the field blank keeps a pair of loppers a pair of loppers.

Two things change once it is filled in.

Take it out asks for the reading. The field starts on the last number recorded, and it is highlighted, because it is the one thing you cannot answer from the shed door. It has to be read off the machine. Whatever you type is saved with that trip, so the history shows what the meter said each time someone took it out. The item's own figure only ever goes **up**. A reading lower than the one on file is a typo, not a machine that ran backwards, and accepting it would make every later number wrong with no way to tell why.

Hours logged then appears on the Details tab, next to make and model, serial number and fuel.

Service due at is the second hours field. It is in hours rather than a date on purpose, because a machine wears with use. One that sat in the shed all winter is not due, and one that ran every day in May is. Enter the figure from the service sticker. The app does not work it out from an interval, because that would need a last-service reading nobody has written down, and it would be wrong for every machine you bought used.

Service every keeps that number up to date for you. Fill in an interval, such as *every 50 h*, and closing a service task moves the due-at forward by itself. It is measured from the reading **at the service**, not from the old due-at. So a machine serviced thirty hours late does not come due again thirty hours early and pass that error on to every service after it. With no interval, the due-at is a one-off that you move yourself.

Details then shows a **Service** line that counts down in hours: "*29 h left · due at 175 h*" while there is time left, and "*Due now · 6 h past 140 h*" in red once the meter is past it. It needs both numbers and shows nothing without them, because a due-at with no reading beside it is not something anyone can act on.

Servicing a machine is ordinary maintenance

An item with **Machine details** has three rows on its page, and a service box above them once it has an hour meter and a due-at.

Give it a **Service checklist** on the same edit form, and a fourth row appears at the top: **Start service**. It opens that checklist as this machine's service. Ticking off the last task logs the service at the hour reading taken when it started, and moves the due-at forward, the same as closing a

service task. While a service is under way, the row reads **Continue service**. The *Checklists* article explains how to write the list.

Log service or repair and **Report a problem** both open the usual task wizard with the type set to **Service / Repair** and the machine already attached. **Report a problem** files it as high priority, which is the real difference between "it is due an oil change" and "it will not start". Both go on the same task list as every other piece of work, with the same notifications and the same history. Servicing a machine is work someone has to go and do, and a separate system for it would be one more place to look.

Two things are different from an ordinary task:

- **The wizard skips what it already knows.** A machine lives at its home location, so the task uses that position and the *Where is it?* step is skipped. The row you tapped already sets the urgency, so *How urgent is it?* is skipped too. Give the machine a home location with a map pin and the whole thing is three steps: the photo, the details, and done. Without a pinned home location, the wizard asks where, because a task with no position never shows on the map or in an offline download. If you pick *Service / Repair* from the type list yourself, it still asks where, because nothing has told it. It does not ask how urgent, because those questions are about something blocking a trail and make no sense for a machine in a shed. A task filed that way starts at Medium, and you can change the priority on the task afterwards. It can be placed anywhere, because that type never needs a trail.
- **Closing the task is the service record.** Closing it saves the machine's hour reading onto the task and moves the due-at forward. The **Last serviced** line on the item's page is read straight from that task. There is no separate service log to keep up to date, which is the point.

Manual and safety sheet is the third row. Add a PDF or a photo of a page, up to 25 MB, and give it a name. If you leave the name blank, the file's own name is used. Mark it as a **Safety sheet** rather than a manual and it goes to the top of the list, because that is the one someone wants at a trailhead with cold hands. Anyone on the crew can read them, and managers can add and remove them. Adding one needs a connection.

Check before it goes out is a list you write for each machine, on the same edit form. It can have up to eight lines, in your crew's own words. A chainsaw and a towed compactor do not have the same walk-around, which is why there is no fixed list. Whatever you write appears as tick boxes when someone takes it out, and what was ticked is saved with the trip. A machine with no list asks nothing.



Moving stock between locations

The **Move** button on any stock row opens a sheet titled **Move stock**, headed "*Move from {source} (on hand: X unit)*". Pick where it is going and how much to move.

If two people move stock from the same place at the same moment, TrailsIQ handles one after the other, so you can never move more than is there. The move shows in the item's history as one amount taken from the first location and the same amount added at the second.

If the first location does not have enough, you see "*Source location does not have enough stock to move.*"

Low-stock alerts

Set a **Low-stock threshold** on any stock item. When a count drops from at or above that number to below it, every manager and owner gets a low-stock notification.

The notification is titled "*Inventory low*" and reads "*{Item name} is at {qty} {unit} (threshold {threshold})*".

It is only sent when the count crosses the threshold, not on every count below it. Counting the shovels three times in a row does not send three notifications. Once you restock above the threshold and a later count drops below it again, you get another one.

Going back above the threshold sends nothing. The amber *Low* label on the inventory page shows the current state, and a "we're fine now" message would only be noise.

Linking inventory to a project or maintenance task

The **Used in** card on an item's page lets managers link the item to projects or maintenance tasks, with the amount they plan to use. With no links, it reads "*Not linked to any projects or maintenance tasks yet.*"

The form, for managers only, has:

- **Type:** Project or Maintenance.
- **Target:** pick a project ("Pick a project" / "No projects yet") or an open task ("Pick a task" / "No open tasks").
- **Planned qty:** a whole number.
- **Notes:** optional.

Press **Add link** (*Linking...* while it saves). Removing a link asks `Unlink "{target}" from this item?`.

A link reserves stock when it is to a maintenance task that is in progress:

- The planned amount, less whatever has already been used, is taken off the amount shown as available.
- The item's page shows a blue **Reserved by** card listing each reservation with an "*In progress*" label and "*X of Y already drawn*".
- On the inventory page, the *On hand* column shows the available number first, with a blue **Available** label and "*X reserved · Y on hand*" under it.

So a shovel item with 5 on hand, linked to a bridge-building task that is in progress and plans to use 2, reads **3 available (2 reserved · 5 on hand)** on the inventory page. As the crew takes the shovels for the job and records it on the link, the reservation shrinks.

Recording what a job used. Each link has a **Used so far** box for managers. Type the amount the job has taken and it saves when you leave the box. The reservation shrinks by that amount, and a project's job costing shows it as drawn. Recording use does not change the count on the shelf: count the shelf as usual on the **Stock** tab.

When the item has a cost, each link also shows what its planned amount is worth.

Links to projects never reserve stock. Only a link to a maintenance task in progress does. A project link is there for planning and reporting, such as "how much lumber is planned for the Spring Rehab project?", without holding any stock back.

The inventory page

The page is headed **Inventory**. The buttons on the right are:

- **Categories:** managers only.
- **Locations:** managers only. It opens Settings → Storage locations.
- **Export PDF:** anyone who can see inventory. The PDF follows the filters you have set.
- **Add item:** managers only.

At the top are four figures: **Items tracked**, **Need reordering**, **Out with crews** and **Locations**.

Under them is a row of filters:

- Search ("*Search items, sizes, SKUs*").
- Category (starts on **"All categories"**).
- Lumber type, which only shows when the category is Lumber and there are matching items (starts on **"All lumber types"**).
- Location (starts on **"All locations"**). It shows the items with stock at that location, and equipment whose home is there.
- **Needs reordering**, to show only items below their reorder level.
- **Group by category**, on by default. Each category heading says how many of its items need reordering.
- **Show archived**, to include archived items.

On a computer the list is a table with **Item** (with a small photo), **Category**, **On hand**, **Location** and **Status**. Click a row to open the item. On a phone it is a list of cards.

The status shows:

- Equipment: green **At home**, or **Out** ("*2 out*" when you own several).
- Stock: **In stock**, amber **Low stock** below the reorder level, or red **Out of stock** at zero.

- Stock reserved by work in progress shows the available amount first, with the reserved amount next to it.

What your stock is worth. Under the list, next to the number of items shown, the page adds up the items that have a cost: "*Worth $4,210.00 at cost*". The total follows the filters, so picking a location answers what is in that shed, counting only the stock on its shelves. Items with no cost are left out and named: "*not counting 3 items with no cost set*".

With no items yet, the page says so and managers get an **Add your first item** button.

Items are edited one at a time. There is no way to select several and edit or move them together.

Inventory in the field app

The field app has everything inventory does. The home screen has an **Inventory** tile, which opens a panel with three views:

1. **List:** grouped by category, with the same search, category and location filters as the dashboard. The lumber type filter appears when Lumber is selected.
2. **Item:** the same information as the dashboard's item page, laid out for a phone. See *Reading an item* below.
3. **New item / Edit item:** managers only, with the same form as the dashboard.

Reading an item

An item's page answers three questions, each on its own tab, so the one you came for is a tap away rather than a scroll. **Edit** is next to the close button at the top.

A **stock item** opens on **Stock**: the total, then a row for each place it is kept. Each row shows the place, what kind of place it is, when it was last counted, and large `?` and `+` buttons with the count between them. Tap either button, or type straight into the number. **Stock at another location** and **Move between locations** are here too.

Equipment opens differently, because a machine has no count at each location. It is either on the shelf or out with someone, and the page says which first. A card at the top shows its picture, where it is, and one button: **Take it out**. That opens a sheet over the page rather than a form further down, so the questions are on one screen and **Record it** is the only button that saves anything. While it is out, a card names the person, the place and the job, with its own **Bring it back** button. Equipment has two tabs rather than three.

Details is what the thing is: its category, unit and low-stock number, and for lumber a block of measurements with the volume of one piece worked out for you. Any notes saved on the item are at the bottom, with the photo.

A machine has three more details: **make and model**, **serial** and **fuel**. They are all on the same Edit form as everything else, and all optional. Fuel is a plain text box rather than a list, because what is worth writing down is as often a mix ratio as a fuel type: *Gas · mixed 50:1* is one fact. A field you leave blank does not appear on the page at all, so an item you have not filled in still reads like an item and not like an empty form. These are for equipment only. They are not offered on a stock item.

Activity is everything that has happened: every count and move for a stock item, and every trip for a machine. A run of taps in one visit shows as one line that says how many changes it stands for.

Reading the list

The line under the title says whose inventory it is, how many items it has and how many places they are kept, so you know how long the list is before you scroll.

Categories are a row of buttons rather than a dropdown, each showing how many items it has. A category you set up but never used is left off the row, because tapping it would only show an empty list. The counts take your other filters into account, so each button tells you what tapping it will show.

Sort by name or by quantity. The control on the right of the filter row shows the current order. Tap it to switch. Quantity puts the biggest pile at the top of each category, which is the order you want when you are deciding what to take.

Anything with none left is counted in an amber label in the filter row, such as *3 out of stock*. Tap it to see just those. Those rows also look different: the number turns gray and says **out** instead of the unit, and the row is tinted.

Each row starts with its amount. The quantity comes first, in the unit you set. It turns amber and reads **low** when it is below that item's threshold. An item kept in more than one place lists each place with its own count rather than saying "2 locations", because that is what someone loading a truck wants to know. Equipment shows differently: a picture or an icon, where it lives, and whether it is **Ready** or **Out**.

A long category shows the first few and offers the rest. A lumber rack can have dozens of lines, so the section shows enough to get a sense of it, with **Show N more** underneath. The next heading is never a whole screen away.

Manage locations is at the bottom of the list and names the places you keep things. It is the quickest way to check whether you already made one for the trailer.

Anyone with *Manage inventory* gets an **Add item** button in the bottom corner of the panel, above the dock.

Share PDF. In the TrailsIQ apps for iPhone and Android, the panel has a **Share** button that opens the share sheet with the inventory PDF attached. It is a quick way to send a stock list to a partner or a funder from the trail.

Empty lists. With no items and no filters, it reads "*No inventory yet. Tap **Add item** to create the first one.*" An item with no stock reads "*No stock recorded yet. Tap a location below to add some.*" Offline with nothing saved on the phone yet, it reads "*You're offline. Inventory will refresh once you're back online.*"

The list is kept on the phone. Every time Inventory loads, the phone keeps a copy. Open it with no signal, or with one bar that cannot finish loading, and you see the list from the last time it loaded straight away, with an amber line saying so. Changes you make from it are saved to send later like anything else, and the next time it loads from the server it is replaced.

Working offline. Almost everything in Inventory saves without a connection. Counts, the − and + buttons, moving stock between locations, editing an item, adding or removing an item's photo, and editing a location are all saved to send later, and upload by themselves once you have signal. A green line confirms it on the screen you made the change from, the new number shows straight away, and the **pending** badge in the header counts it. Tap the badge to see everything waiting, item by item.

Two things need a connection, and the app tells you so when you try. **Adding a new storage location** needs one, because stock cannot go into a location TrailsIQ does not have yet. **Deleting a location** needs one, because TrailsIQ first has to check that no stock is still in it.

The phone groups a run of taps. Taking a stack of lumber out of the shed is a row of presses on `?`, and the phone shows that as one line: the total taken, the count left, and how many changes it stands for. A different location, a different person, a change in the other direction or a long pause starts a new line. The full list of individual changes is still on the item's page on the dashboard, which is where you can remove one.

Adding an item offline. Add item still works offline. The item is saved on the phone and sent the next time you have signal. It shows in the list with a blue *Pending* label, and you cannot open it until it has uploaded. A photo added with it waits too and uploads once the item exists. The starting amount goes up together with the item, so the item and its first count always arrive together.

Photos

Each item has one photo, up to 5 MB, in JPG, PNG or WebP. It shows as a small picture on the inventory list and at full size on the item's page.

Permissions

There are two inventory permissions:

- **View inventory:** "*See the inventory list, item details, stock counts and asset-checkout status. Required to use any of the inventory surfaces. Counting stock and checking assets in/out are allowed for anyone with this right.*"
- **Manage inventory:** "*Create new items + storage locations, edit catalog rows (name, category, photo), delete items, manage the org's custom-category list. Counts and check-outs/-ins stay open to anyone who can see the inventory.*"

By default, **owners, managers and field workers** have both. **Volunteers** have neither.

Counting stock and taking equipment out and back only need View inventory, not Manage inventory. That is deliberate. The person at the shelf can update the count, and the person with the chainsaw can record that they took it, without having to find a manager.

If you want volunteers to help with counts, give them *View inventory* on their row, or turn it on in Settings → Roles & permissions for all volunteers.

Only people with View inventory see Inventory in the sidebar. The same goes for Settings → Storage locations.

Common gotchas

- **Changing the tracking mode clears the machine details.** You can switch an item between stock and equipment on its Edit page. Switching to stock removes its make, serial, fuel and hour meter, because those only apply to equipment.
- **You cannot delete a storage location while it still has stock.** Move the stock or set it to zero first.
- **Deleting an item deletes its stock and its history too.** The confirmation says "*Stock rows will be removed too.*" If you might want the history later, archive the item instead.
- **You cannot lower the number owned below the number that are out.** You see "*Can't reduce total below N — that many are currently checked out.*" Wait for the trips to close, or record the returns, first.
- **Removing a line from the history does not undo the change.** The confirmation says "*Remove this activity entry? This only forgets the log line — the stock change itself stays as it is.*" Change the count separately if you also want to undo the number.
- **Lumber measurements only belong to the Lumber category.** Move an item to another category and they are removed when you save. The edit page warns you before you save.
- **Low-stock alerts are only sent when the count crosses the threshold.** More counts below it send nothing, and neither does going back above it. The amber *Low* label on the inventory page shows the current state.
- **Links to projects never reserve stock.** Only a link to a maintenance task in progress does. Link an item to a project for planning, and to a particular maintenance task when you want stock held for it.
- **Field workers can count stock and take equipment out by default.** Only creating, editing or deleting an item needs Manage inventory. That is on purpose, so the person at the shelf does not need a manager to update a count.

What's next

- Set up your real storage locations before creating items. Sorting out locations later is more work than getting them right at the start.
- If you will use the bridge calculator, fill in the lumber measurements on your Lumber items. The calculator matches them exactly against what it needs.
- Give volunteers *View inventory* if you want them to help with counts on volunteer days. They can change counts without being able to edit the items themselves.
- Read *Members, roles and permissions* to see how to give or take away *Manage inventory* for one person.
- Read *Projects and work planning* to see how reserved inventory shows on a project's page.

TEAM

Job costing: estimated against actual

Every project page compares its build estimate against the hours and expenses booked to it. Only approved work counts, anything unreviewed is called out separately, and hours are compared as hours because TrailsIQ does not know what anybody is paid.

If nobody checks an estimate against what the job really cost, the next estimate is no better. **Estimated vs actual** sits on every project page and answers one question: is this job costing what we said it would?

It only uses what you already record. Work hours and expenses can be linked to a project (see Work hours and expenses), and this panel adds them up and puts them next to the build estimate.

What counts as actual

Only approved work counts. A draft expense is only a plan, and a submitted one is only a request. Neither counts as a cost until a manager approves it. Rejected entries never count.

Anything waiting for review is listed right under the totals, for example "*2 entries are waiting on approval*", with the hours and money involved. This matters more than it sounds. A job can look comfortably under budget while three thousand dollars sits unreviewed in the queue, and somebody may make a decision based on that number.

To get work onto a job in the first place, pick the project when you log the hours or submit the expense. Both forms have a link field for it.

Everything is in your organization's currency. An expense filed in a different currency is not added to the total, because adding it would need an exchange rate. The panel lists those expenses under the total instead, so they are not lost.

Reading the numbers

The main figure is the **percentage of the estimate used**.

We chose that on purpose. Comparing one total against another only means something once the job is finished. Three weeks into a build, "96% under budget" is true, but it really means the work has barely started. The percentage used makes sense at every stage of a job, and once it goes past 100 it shows you the overrun.

Below it, the panel shows how much of the estimate is left. Once you go over, it shows **over by** in red instead.

The breakdown lists labor on one line and then each expense category, biggest first, so whatever used most of the budget is at the top.



The estimated vs actual panel showing percentage of the estimate used, crew hours and the pending-approval notice

Crew hours give the fairest comparison

TrailsIQ does not know what anybody is paid. So when the panel turns your logged hours into money, it uses **the same hourly rate the estimate used**. That is the rate in **Settings → Trail build rates**, or the built-in default if you have not set your own.

Using the same rate on both sides is what makes the comparison fair. It tells you whether the work took the hours you priced it at. It does not tell you what your wages came to, so do not give it to your accountant as a payroll figure.

That makes the **Crew hours** block the most reliable part of this panel. The estimate counts labor in hours, your crew logs hours, and so the two numbers measure the same thing. If you only look at one row, look at that one.

Materials from inventory are shown at cost, beside the total

Inventory items linked to a project appear under **Materials from inventory**, with the quantity planned for the job and, once stock has been drawn, the quantity drawn. If an item has a cost per unit, the row shows what that quantity is worth, and the block shows a subtotal.

That subtotal is not added to the actual total above it. Stock was paid for when it was bought, often through an expense that is already counted on this panel. Adding it again would count the same money twice. If you know the stock was bought for another job, or came out of general supplies, you can add the subtotal to the total yourself.

An item with no cost set is listed with its quantity and counted as "no cost set", rather than treated as free. To add a cost, open the item in Inventory and choose **Edit**.

What this is not

This panel tracks the cost of a job. It is not accounting software. It does not know about overheads, insurance, depreciation on your machine, the time somebody spent quoting, tax, or anything that never became a work-hour entry or an expense claim.

Use it to answer *are we on track against what we quoted, and where is the money going?* Keep your books wherever you keep them now.

Common gotchas

- **An expense is missing.** It has no project on it, or it has not been approved. Check the review queue first.
- **The panel is not on the project at all.** Nothing has been recorded and there is no estimate yet, so there is nothing to compare. It appears as soon as either exists.
- **Actual is high but the job feels fine.** Look at Crew hours rather than the money. If the hours are on track, the money line is telling you about materials, not labor.
- **The rate is wrong.** It comes from Settings → Trail build rates. If you have never set them, the panel says so and is using the default.
- **Hours logged against a maintenance task do not show.** They belong to the task, not the project. Link the hours to the project if they are part of the job.
- **The percentage is small on a nearly-finished job.** That means the estimate was high, which is worth knowing before you quote the next one the same way.

TEAM

Recording volunteer hours

Every way to record volunteer time: team members on a task or a timesheet, a whole crew at once, outside groups, event signups and walk-ins, and TrailsIQ Go check-in. Also how they add up to one count, and the Volunteers page that lists everybody who has helped.

Volunteers reach you in several ways, so there are several ways to record their time. Some are on your team, some sign up for a workday on your website, some check in with TrailsIQ Go, and some simply turn up. However an hour is recorded, it ends up in the same count: the **Work report**, the **annual report**, and your umbrella account's figures if you have one.

This article puts every option side by side, so you can pick the right one for each kind of volunteer. The articles it links to have the step-by-step detail.

Which option fits which volunteer

The volunteer	How their time is recorded	Counted as
A member of your team	Logged on a task, or entered on **Work hours**	Their own hours, by name
A member who worked alongside somebody else	Ticked under **Who else worked this session?** on the task	Their own hours, by name
A group that is not on your team	**Volunteers not on your team** on the task's work log	**Outside volunteers**
Somebody who signed up for a workday	**Came** on the event's attendee list	By name
Somebody who checked in with TrailsIQ Go	Scanned the QR code or checked in by location	By name
Somebody who turned up at a workday	**Add walk-in** on the attendee list, a name is enough	By name with an email, otherwise **Outside volunteers**

Volunteers on your team

Volunteers who have a TrailsIQ login are members of your organization, usually with the **Volunteer** role. Invite them from **Team** like anybody else, and every hour they give is counted under their name. Members, roles and permissions covers invitations and roles.

They have two ways to record time.

On the task, from the field

Open a maintenance task in the field app or on the dashboard and press **Work log**. Enter the hours and minutes, say what you did, and press **Log**. It works with no signal and uploads once you are back in range.

That time counts straight away on the task, on its project and in the Work report. It also appears on the person's **Work hours** as a draft reading "*From task:*" and the task's name, so nobody has to type it twice. It is submitted with the rest of their week.

On the timesheet

Work hours in the sidebar is the timesheet. Press **Log hours**, pick the date and the hours, and choose a category, such as *Trail maintenance*, *Infrastructure*, *Training*, *Meeting* or *Travel*. You can also link the entry to a project or a task. Use it for time that was not spent on one task: a planning meeting, a training day, a drive to the trailhead.

Entries start as drafts, private to the person who made them, and count once they are submitted and approved. **Drafts** in the header lists everything not yet submitted, whatever its date. If your team does not want a manager signing off every timesheet, an owner or manager can untick **Submitted hours need a manager's approval** under **Settings → Work hours**, and submitted hours then count at once.

Time off (*Holiday*, *Vacation*, *Sick* and *Other leave*) is kept on the timesheet for payroll and is never counted as volunteer time.

Work hours and expenses has every control on both screens.

Logging a session for everybody who was there

Most trail work is done by a crew, and one person can record it for all of them. Under the hours on a task's work log, **Who else worked this session?** lists every active member of your organization. Tick the people who were with you and each gets their own entry for the same date, the same hours and the same note.

It is the same session, so it is the same time for each person: three of you for two hours is two hours each, six in total. Each entry says who logged it, so a total somebody did not enter themselves always has an author to ask. The draft on their Work hours carries the same line.

Groups who are not on your team

A school group, a scout troop, a corporate volunteer day, neighbors who came to help: people who will never have a login. On the task's work log, set **Volunteers not on your team** to how many of them worked the session.

They get one entry between them, reading "*8 outside volunteers*", and each is credited for the full session. Eight volunteers for three hours is twenty-four hours. That time counts as volunteer time everywhere: on the task and its project, as the **Outside volunteers** figure in the Work report, in the annual report and in your umbrella account's figures. It never waits for approval, because there is nobody's timesheet to put it on.

Volunteer days and other events

For a planned workday, the event does the counting. Create it under **Events** with a start and an end time, and take signups on your website. Each volunteer is credited with the length of the event. Events explains creating one, signups, waivers and the waitlist.

On the event's day its attendee list turns into a **Came** list. Once the event is over, every row ticked as came counts for the length of the event, times its party size. Signing up alone never adds hours. On the list you can:

- **Untick Came** for somebody who signed up and did not show.
- **Change the hours** on a row for somebody who left early or stayed late.
- **Add walk-in** for somebody who turned up without signing up. Only a name is needed. Start typing it and TrailsIQ suggests matching people from your Volunteers list and your team. Pick one and their email and phone fill in. Anything you add that was missing is kept on their Volunteers row. The field app has the same button and the same suggestions, even with no signal, and a walk-in added offline uploads later.

Who the hours belong to depends on who the person is:

- **Somebody on your team**, matched by the email they signed up with, gets the hours on their own Work hours for that day, already approved. Untick them and the entry goes again.
- **Somebody with an email who is not on your team** is counted by name in your reports. They are not added to your team and get no invitation.
- **A walk-in with no email** counts under **Outside volunteers**, the same figure as a group logged on a task.

If you log time on a task for the same day a linked workday already counts somebody, the work log warns you first, so the same afternoon is not counted twice.

Volunteers with TrailsIQ Go

TrailsIQ Go is free for anybody to install. Trail users sign in to it with an email address and a six-digit code. They need no password and take no seat on your team. A volunteer with the app can:

- **Sign up for your events** from your organization's page in the app. The signup lands on the event's attendee list like any other, marked as coming from the app, and the app can remind them the day before.
- **Check themselves in on the day.** Show the event's QR code at the sign-in table, either by opening **Check-in** on the event or by printing its sign. Volunteers scan it from the app's menu or with their phone's camera. If you set a check-in spot at the meeting point, anybody within 300 meters can check in from the event's page with no scanning.

A check-in finds the person's signup and marks them as came. If they never signed up, it adds them. Either way they are counted by name, with a **checked in** badge on the list, and never under Outside volunteers. A team member who checks in gets the hours on their own Work hours, the same as when you tick them.

Check-in opens an hour before the event starts and closes two hours after it ends, in your organization's time zone. You can still untick **Came** or change the hours for anybody who checked in.

Volunteers and paid staff

Every member counts as a volunteer until you say otherwise. On **Team**, open a member's **Edit** window and switch on **Paid staff**, with the date it started. From that day on their hours are shown as paid staff hours, apart from volunteer hours, in the Work report, the annual report and an umbrella account's figures. Their earlier hours stay volunteer hours, because that is what they were.

Where the hours show up

- **The task and its project.** Every session logged on a task, outside volunteers included.
- **Reports → Work report.** Volunteer hours, paid staff hours and outside volunteers over any window, by member, by trail and by task type, with a CSV and a PDF. Event hours appear here once the event is over.
- **Reports → Annual report.** Approved timesheet hours, outside volunteers and everyone who came to your events, for any period, with the ten people who gave the most time under **With thanks**. For organizations in the United States the hours are also given a dollar value at the Independent Sector national rate for volunteer time. See The annual report.
- **Your umbrella account**, if you are hosted by one, sees your approved hours and their value beside your other chapters.

Approved hours are what a report calls volunteer time. Timesheet entries still in draft or waiting on approval are not in the annual report or an umbrella's figures until somebody approves them, so if a total looks low, check **Work hours → Needs review** first.

When your volunteers do not log hours

Plenty of volunteer groups never log hours, and still need to say who looked after which section. **Reports → Team activity** answers that from what people already do in the app. For each person on your team, volunteers and paid staff alike, it counts the tasks they reported, the tasks they worked on, the tasks they finished, and the structures and trails they inspected, with the last day they were active. Pick this month, this quarter, this year, last year or any dates, and narrow it to one network. **Export CSV** gives you the same table as a spreadsheet.

Everybody on your team has a row, including people with nothing recorded in the period, so you can see who has not been out as well as who has. Somebody who has left the team appears only if they did something in the period. A task counts as worked on when somebody changes its status, finishes it, adds photos to it, logs time on it or writes in its discussion. It counts once per person, however many of those they did. Reporting a task counts under tasks reported instead. Team activity is for owners and managers, because it names people.

Everyone who has helped, in one list

Organization → Volunteers lists every person who has helped you: everybody who signed up for one of your events, was added as a walk-in, checked in with TrailsIQ Go, came from an imported volunteer log, filed a trail report while signed in to TrailsIQ Go, or was added on this page, and

the volunteers on your team. Owners and managers can open it.

Members of your team appear with a **Member** badge when they have the Volunteer role or have given volunteer time. Their hours are their approved **Work hours**, which already include the events they came to and the work they logged on tasks, so nothing is counted twice. A member's hours are added and changed on **Work hours**, and their details on **Team**. Paid staff hours are not shown here.

Each person appears once, however many ways they reached you. People are matched by email address. A walk-in added with a name but no email joins the person with that name and an email, if there is exactly one. Each person's hours are their own time at finished events and in logged work. People who came along with them, such as a friend on their signup, still count on the Work report, but as **Unnamed helpers** rather than on that person's row, so the list shows who gives the most time themselves.

The boxes at the top show how many volunteers you have, their hours, how many came back for more than one event, and the **Unnamed helpers** : walk-ins added with no name, people who came along with somebody, and helpers counted as a number on a task's work log, who cannot be listed by name.

Finding people

- The tabs above the list (**All**, **Event signup**, **Walk-in** and so on) narrow it to the people you first met that way. The number on each tab says how many.
- **Came back** shows people who attended more than one event. **No contact details** shows the people you have no email or phone number for.
- **Search** finds anybody by name or email.
- Press the **Activity**, **Hours** or **Last seen** column heading to sort the list, most first. Press again for least first. On a phone the same choices are under **Sort**.
- Press the activity on a row, for example **3 events**, to see each event and piece of work with its date, trail, how they signed in and their hours.

Adding and editing people

+ Add volunteer opens a panel for somebody who has helped and is not on the list yet. Only a first name is needed. If the email is already on the list, the panel says so before you save. Under **Credit past work** you can also add them to an event that has already happened, with their hours, so those count straight away.

Import CSV adds a whole list at once, for example the contact list of a volunteer system such as Better Impact, so nobody has to be typed in twice. Export the list from that system as a CSV file with a heading row, then choose the file. TrailsIQ finds the name, email and phone columns by their headings, such as *First Name*, *Last Name*, *Email* and *Mobile Phone*, and shows you what it will do before anything is added: how many people are new, who is already on the list, who is already on your team and which rows it will skip and why. Press **Add** to add them. Somebody already on the list is not added twice, and a phone number missing from their row is filled in. Importing the same file again adds nobody new. To bring the people you imported onto your team, tick their rows and press **Invite**.

The ••• menu on each row has the rest:

- **Add hours** credits time they gave. Each entry is either **At an event**, which adds them to a finished event with their hours, or **On their own**, for work they did by themselves. For that, pick the day, the hours and what they did, and the trail if it was on one. Work on their own is saved as finished work with their hours on its work log, on the trail when you picked one, and counts on the Work report and the annual report like any other volunteer time. **Came with** on either kind is for people who came along with them and need no name, like a friend or family. Each one gets the same hours. They count on your reports and with the **Unnamed helpers**, not on this person's row. **+ Add another** adds more entries, and the total at the bottom shows what you are about to add.
- **Edit details** corrects their name, email or phone number and adds a note only your team sees. **+ Add email** adds a second address they use, so their signups under that address join this row. It changes this list and its export. The event's own attendee list keeps what was entered there, and their hours do not change.
- **Merge with…** is for two rows that are really one person, for example somebody who signed up under two different emails. Their events, reports and hours join together. Nothing underneath changes, so you can separate them again from **Edit details**.
- **Remove** takes them off this list. **Their hours stay where they are**: on the Work report, the annual report and each event's attendee list. **Show removed** lists the people you took off, and **Put back** returns them.

Inviting people to your team

Invite on a row sends that person an invitation to join your team as a volunteer, after asking you to confirm. Tick the boxes on several rows to invite them all at once. You can also tick **Send a team invite on save** when adding or editing somebody with an email. Somebody who joins your team stays on this list with a **Member** badge. Everything they gave before joining moves onto their own approved Work hours: the events they came to, under any email or name this list knew them by, and the work you added for them on their own. Anybody who came along with them stays with the **Unnamed helpers**. Your totals do not change. Their time is simply credited to them, under their name, in every report.

Export CSV downloads the whole list with names, emails, phone numbers and totals.

MAPS

The TrailsIQ map

A base map we build ourselves, drawn for trail work instead of driving. Paths stand out, it comes offline with a download, and there is no usage limit. Covers how to switch your organization onto it, why coverage follows your trails and what it does not do.

The **TrailsIQ map** is a base map we build ourselves, made for trail work. It draws the roads, buildings, water and paths around your trails. Because we make it ourselves, it comes offline with a download, and there is no monthly limit on how often your team opens a map.

Every new organization uses it. Organizations that were set up before it existed kept whatever map they already used, and can be moved over on request. Each organization has its own setting, and you can change it back at any time.

Why we draw it ourselves

Almost every base map you have used was drawn for somebody in a car. Roads stand out, junctions get the detail, and the paths, which are what your whole job is about, are a thin dotted line under the tree cover. You can change the colors of someone else's map, but you can't make it care about singletrack.

This one is drawn the other way round. Paths and tracks are the heaviest lines on it, in brown, so a trail reads as ground instead of as a footnote to a road.

Because we make the map ourselves, you also get two more things:

- **It comes with you.** Base-map tiles are part of an offline download on this map. Roads, paths, water and place names are on your phone, down in the valley. See *It comes offline* below.
- **There is no usage limit.** Your team can open a map as often as it likes, so a busy week in the field can't end with the map switching itself off.

Which map your organization is on

New organizations already have this one. Every organization created since August 2026 uses it, so if yours is recent there is nothing to arrange.

Organizations that existed before then kept whatever they already used. There are three possibilities, and the only difference is what the background under your trails is drawn from:

- **TrailsIQ map:** this one. It is drawn for trail work, comes offline with a download, and has no usage limit.
- **Mapbox:** Mapbox's own maps, for organizations that prefer Mapbox's styles. You no longer need it for satellite photos outside the United States: see *Satellite* below.
- **A map provider:** a style from another company, shared across TrailsIQ.

You can't switch in Settings. **Contact us** and we will move you, usually the same day. Nothing else about your organization changes. Trails, overlays, offline downloads, the field app and every marker work exactly as before. Only the background under them is different, so it is easy to try and easy to undo.

What a brand-new organization sees

Before an organization has any trails, it has no map tiles of its own either, because there is nothing to collect them around yet. So its first map is the plain background with **hillshading** on top, switched on for you. You see the shape of the ground, ridges and valleys, but no roads or place names.

Zoomed right out, you will see a real map, because the widest tiles cover whole continents and are shared by every organization.

Once the first trail or planned line is saved, the map is collected around it, and the roads, water and place names appear within a minute or so. From then on, maps open on the organization's own ground. Until there is anything on a map, they open on the area your **Country** and **Timezone** in Settings point to. Only when neither is set do they open on a view of the world.

You don't need a trail to get a map. Opening the trail planner over ground that has no map yet downloads the area around it, about 10 km across. Every line you draw, have suggested or walk in the planner downloads the ground along it too. While an area is still missing, a note at the top of the map says so: *This area isn't downloaded yet.*

Coverage follows your trails

This is the trade-off this map makes, and it is the one thing worth understanding before you switch.

We don't hold a map of the whole world. We collect the tiles in a strip **around your trail lines and planned lines** and store those. Ground with nothing of yours near it has no tiles, so it shows the plain background instead.

In practice the strip is wider than it sounds. The tiles are large at the zoom levels involved, so the covered strip runs roughly **1.5 to 2 km either side** of a trail. You won't hit the plain background while looking at a trailhead, a parking lot or the road in. If you pan a long way from your network, you will.

The covered area changes as you zoom, and that is not a fault

This is the one thing about this map that looks like a bug but isn't, so it helps to know about it before it surprises you.

Coverage starts at the closest zoom and grows outwards. Each step out, one tile covers **four times** the ground of a tile at the step before. So the area with a map on it grows enormously as you zoom out, and narrows back toward your trails as you zoom in. For a small network it is roughly:

Zoomed to	Ground with a map on it
Region	about 110 × 110 km
County	about 28 × 28 km
Valley	about 14 × 14 km
Trailhead	about 9 × 7 km

That leads to the two things people ask about.

Zoomed out, you will see towns nowhere near your trails. That is just one large tile doing its job. It is not coverage you can rely on. Zoom into one of those towns and it won't be there.

Zoomed in past the edge of your network, the map fades to the background. It doesn't happen straight away. For the first few steps in, the wider view you already had is stretched over the gap, so the ground goes blurry before it goes plain. Keep zooming and it goes plain. Both are correct. There is genuinely no map collected there, because nothing of yours is there.

Every map in TrailsIQ zooms in further than it used to. The last few steps enlarge the picture instead of adding new detail, on covered ground and off it. That is on purpose. Zooming isn't only for seeing a thing, it is also for aiming at it: a point on a line you are editing, the exact side of a switchback, one end of a bridge. Stopping at the last sharp level kept the picture crisp but made it harder to aim. If it looks soft at the closest steps, the map is honestly telling you that you have gone past what it knows.

If a place you *do* care about goes plain, that is about coverage, not display. It means no trail runs close enough for its map to have been collected. Adding or extending a trail through it fixes it the next time you save.

The map is collected **automatically** when a trail is created, when an existing trail's route changes, and when a line is saved in the trail planner, whether you drew it, had it suggested or walked it. It happens in the background and is usually quick.

When an area isn't downloaded yet

A map over ground with nothing downloaded shows a note at the top: **This area isn't downloaded yet.** It is a note, not an error. The map is working. There is simply nothing stored for that spot yet.

- **Download this area** in the note fetches the ground around the middle of the map, about 10 km across. The note then says it is downloading, and the map fills in within a few minutes.
- **In the trail planner** this happens by itself when you open it, so the ground you are planning on is fetched without you asking.
- **Each plan includes an amount of map area.** Your map area is the ground around your trails, the lines you plan and the places you open the map, measured in square kilometers. A network packed into one valley uses far less of it than the same length of trail spread across a whole region, because nearby trails share the same ground. The smallest plan covers a modest trail network and the area around where you plan, and larger plans include more. Ground counts toward your area even if another organization in the same valley downloaded it first. Once your area is used up, the note says so, and new lines and trails on new ground do not bring in more map until you move to a larger plan. Everything already on your map keeps working. **See plans**, or **ask us** if you need more.

Trails that already existed when your organization moved onto this map have their map collected once as part of the move, so you don't need to save them again. If a stretch of older trail still looks bare a day later, tell us and we will run it again.

Two things follow from this:

- **A brand-new trail's surroundings appear shortly after you save it**, not instantly.
- **Map tiles are shared between organizations.** They are public geography, not anybody's data. If two organizations look after trails in the same valley, the second one is covered as soon as it arrives, because the tiles are already there.

What it draws

It is an outdoor style, made for the job:

- **Paths and tracks** are drawn heavily, in brown, so they read as ground and not as pavement. Most outdoor map styles draw exactly the lines a trail crew cares about too faintly. This one doesn't.
- **Roads** have a light outline so junctions stay easy to read.
- **Buildings** appear as soft outlines from zoom 15 in.
- **Water and waterways** are blue.
- **Woodland, parks and land cover** are green.
- **Town and village names** appear from zoom 6 in.
- **Road, water and place names** are labeled, with route shields where a road has a number.
- **Railways** are dashed lines.

Where there are no tiles, the background shows through. It is a muted version of whichever style you are using, so it reads as open country instead of a hole in the map.

Three looks, same tiles

Your device does the drawing, so all three looks use the same tiles. Switching between them downloads nothing, stores nothing extra and works offline. That is what makes a choice of style worth having:

- **TrailsIQ:** bright and outdoorsy. Rich greens for woodland and cream for open ground, close to the Mapbox Outdoors look TrailsIQ used before. **This is the default**, so an organization that moves over sees something familiar.
- **Outdoor:** soft and outdoorsy. Sage ground and quieter greens, easier on the eyes over a long day.
- **Minimal:** light and plain. Almost all gray, so your own trail colors stand out. Use it for reading condition and difficulty, not for finding your way.

Pick one in the **Base map** section of the layers panel. Your choice is remembered on that device and applies to both the dashboard and the Field App. The terrain overlays are toned to match. See Terrain analysis.

The Field App's map-layer sheet adds two rows just for this map, both **off** by default: **Reserve boundaries** (nature reserves and national parks) and **Town / county lines**. Most days on the trail don't need either, and both draw lines across the whole map. So they are there when you want them and out of the way when you don't.

Hide basemap trails, in the same sheet, is **on** by default. The paths this map draws come from OpenStreetMap, and where they disagree with your trail lines, yours are the ones to trust. See Terrain analysis.

Terrain overlays still work

All of them work exactly as before: hillshading, contours, slope and aspect. See Terrain analysis.

They are worth switching on here more than anywhere else. Hillshading and contours over the TrailsIQ map add relief and height to the roads and buildings. Together they read as a proper topographic map instead of a base map with things missing.

Hillshading and contours are still switched on by default for organizations that use a plain background.

What it does not have

Here are the limits, plainly, because they are the reason some organizations stay on Mapbox:

- **Satellite photos outside the United States need your own Mapbox account.** Inside the US the photos come with the map. Elsewhere you add your own Mapbox key, and those photos need a connection. See *Satellite* below.
- **Labels use the Latin alphabet only.** The map's font covers Latin-1. A place name outside that range gets no label instead of the wrong one.
- **It only covers what has been collected.** Coverage follows your trails and planned lines, and a network saved a few minutes ago may have no tiles yet. Apart from satellite, this is the one limit worth planning around. See *Coverage follows your trails* above.

It comes offline

Base-map tiles are part of an offline download on this map, and only on this map. Other providers' terms don't allow their tiles to be packed up and taken away, but ours do. Roads, paths, water and place names come with you.

They are stored **once per phone, not once per download**. A map tile is public geography and is the same for everyone. So two downloads over neighboring ground share the zoomed-out tiles, the second one adds very little, and removing either one never takes a tile the other still needs.

Only tiles we have already collected are included. A download can't fetch what has not been collected yet, so the sheet only counts what is really stored and says *Nothing harvested for this area yet* instead of promising ground that would arrive empty.

The styles come too. All three are downloaded with the tiles, not just the one you happened to be using, so the Base map picker works in the field exactly as it does with a signal. They share the same tiles, which is why there can be three, so this only adds three small files, not three maps.

With no signal, the picker only offers the styles actually on the phone. If a download is older than this and has the tiles but not the styles, you will see fewer buttons than usual until you download again. That is better than a button that blanks the map when you press it.

See Offline downloads.

Switching back

Ask us to move you back. It takes effect the next time the page loads, and nothing is lost. The tiles collected for your trails stay where they are, so switching over again later is instant.

None of your organization's data depends on which map you use. The choice is only about what is drawn underneath.

Attribution

The map data comes from **OpenStreetMap**, used under the Open Database License, which requires credit. "© OpenStreetMap contributors" appears in the map's attribution, in the bottom corner.

That credit is a condition of the license, not decoration. Don't remove it.

Satellite

Satellite is a fourth base map. It replaces the drawn ground with **aerial photos**, and still draws your trails, the roads and the place names on top. It is the one style that is more than a different set of colors over the same tiles, and it is on **Core and up**.

The photos come from the US Department of Agriculture's National Agriculture Imagery Program. They show about two feet per pixel and are taken state by state every two or three years. So they are up to date for the shape of the ground and the tree line, but they won't show a cut you made last month.

These photos cover the United States only. If your organization is in the US and Satellite is missing, check that your country is set under **Settings → Organization details**. That setting is what decides it.

Satellite with your own Mapbox account

Outside the United States, or if you want newer photos than the government ones, you can use satellite photos from your own Mapbox account instead:

1. Create a free account at mapbox.com, open **Tokens**, and copy your default public key. It starts with `pk.`
2. In TrailsIQ, go to **Settings → Satellite maps**, paste the key and press **Save**.
3. Reload your map. Satellite now appears in the map style picker, in any country.

The Satellite style then shows Mapbox's photos, with your trails, roads and place names drawn on top as before. In the United States they replace the government photos. Mapbox bills your account for the photos your team views, and its free allowance covers light use. To turn it off, clear the box and save.

You can set a monthly limit. Go to **Settings → Mapbox usage**, tick *Stop using my Mapbox account when I reach a monthly limit*, and save. The page shows how many satellite tiles your team has viewed this month. When you reach the limit, Satellite stops using your Mapbox account until the 1st of the next month. In the United States it goes back to the government photos, and elsewhere it leaves the style picker. Leave the number empty to use the default, or set it a little under the free allowance shown on your Mapbox account page. A map that is already open keeps its photos until it is reloaded.

Mapbox's photos need a connection. They are not saved with offline downloads. In the field app without signal, choosing Satellite keeps your normal map on screen and tells you why, and everything else in an offline download keeps working.

Two things work differently while Satellite is showing:

- **Hillshading switches itself off**, and its row leaves the layers sheet. A photo already has the ground's own light and shadow, and gray shading on top of it looks like a dirty screen instead of relief. Your setting comes back when you leave Satellite.
- **3-D terrain stays on.** Photos on raised ground actually look better, so that row stays.

Coverage still has edges. Zoom past what the photos hold and they go soft instead of disappearing. That is simply a photo being enlarged, which looks the same everywhere else.

MAPS

Map overlays: streams, wetlands, public land and property lines

The overlays that come from public agencies instead of your own data: what each one shows, why property lines appear in some places and not others, and why a parcel boundary is not a survey.

This article covers streams, wetlands, public land, weather radar and property lines: what each one is for, where it comes from and where it stops.

Turning them on

Field app → Layers → Compliance overlays.

On the dashboard, they are in the layers button on the map itself. It is the same button that switches the base map. Streams, wetlands, radar and public lands are under *Environment*, and parcels are under *Property lines*. Every dashboard map has this button, so the overlays are there wherever you are working: the trail you are reading, the route you are drawing or the project you are pricing.

These overlays are on the Core plan and above.

The sources you see depend on where the map is. Each state runs its own parcel service, and Vermont's knows nothing about Idaho. So a source is only offered over the ground it covers, and moving the map across a state line changes the list. Everywhere in the lower 48 also gets the survey grid, which does not show ownership. If you expect a state's parcels and do not see them, check where the center of the map is first.

Each overlay is drawn over the base map and under your own trails, structures and tasks, so your work always stays on top.

The Layers sheet in the field app with the compliance overlays and property lines sections

What each layer answers

The first four come from United States federal mapping services, so they are only offered to organizations in the US. Elsewhere they would show nothing, which would look like a broken map. The map checks the country you set in *Settings → Organization details*.

Streams (USGS NHD) shows every mapped stream, including seasonal ones that are dry when you walk them but still count as a crossing on paper.

Wetlands (USFWS NWI) shows federally mapped wetlands. Tread, a bridge or a culvert inside one of these areas may need a Clean Water Act permit before you build. It is better to find that out when you flag the route than at inspection.

Public lands (BLM) shows federal, state and tribal land: BLM, Forest Service, Park Service, Fish and Wildlife, Defense, state and tribal. This is the layer that tells you which agency to talk to.

NEXRAD radar shows the last hour of rain and snow as an animation. It also turns on when you open the rain tab in the weather panel, and dragging along the chart moves the radar with it.

Business names shows the names of shops, gas stations, places to eat and other named places once you zoom in to level 13. It is off at first, because on a trail map those names usually get in the way. Turn it on when you need the nearest gas station, hardware store or somewhere to eat before the drive home. It also labels a few places that are not businesses, such as a town hall, a library or a church. That is because it labels every named place that no other layer has labeled already, so new kinds of shop appear without us having to add them.

These names come from the same map data as the base map, so **they work in a download with no signal** and take up no extra space. They appear on the TrailsIQ map. If your organization uses a commercial base map, the switch is not offered, because that map draws its own business

labels and the switch could not turn them off.

Property lines

Two layers, and they answer different questions.

Property lines are parcel boundaries with the owner of record, in states that publish them. Today those are **Vermont, Massachusetts, New York, Wisconsin and Florida**. Each comes from that state's own agency: VCGI, MassGIS, NYS ITS, the Wisconsin Land Information Program and Florida's GIO. Zoom in and each parcel shows its owner's name.

Some parcels have no name, because the tax record is missing or the property is not taxed. That is about one in twenty in Vermont and closer to one in a hundred in Massachusetts and New York. Their lines are still drawn. For an unnamed parcel, ask the town or county assessor.

Florida's parcels look different, and that is expected. Florida keeps one record for every tax roll entry. A condominium building is a stack of parcels on one footprint, and a downtown block can show several hundred overlapping lines.

Section lines are the Public Land Survey System grid of townships, ranges and sections. They do not show ownership, but deeds across most of the country are written against them, and they are available everywhere.

Property lines are not a survey, and that matters. They come from tax maps, which are drawn to collect taxes and not to settle boundaries, so being off by several meters is normal. The error is usually worst where old deeds meet, which is exactly where you most need to know. Read the layer as "*the line is somewhere near here, so go and ask*", and check with the town or a surveyor before building close to one.

Why the toggle is sometimes not there

Parcels are county records. Nobody keeps a national parcel map, free or paid. About three thousand counties each keep their own, and only some states combine them.

So the property lines switch appears **only where we have a source for the ground you are looking at**. It follows the map, not your organization, so it can appear or disappear as you move across a state line. That is the coverage changing, not a fault.

You see one state at a time. Each state's coverage is a rectangle around it, and the rectangles overlap. The one around New York contains the whole of Vermont, for example. Only the closest match is offered, so you never get a second row that could only say *no parcels mapped here*. Along a border that follows a river, the map can still offer the wrong state's layer for a few miles. It draws nothing there and tells you so.

We would rather show no switch than one that draws nothing. If your state publishes parcels and you do not see the switch, ask us. Adding a state is a small change for us.

Two things to expect

Property lines load when you zoom in to about level 14, when a few blocks fill the screen. Further out there are tens of thousands of parcels in view and the state's service will not send them, so the layer stays empty instead of half loading.

These layers need a connection. They come straight from the agency that publishes them and are not part of an offline download. On a phone with no signal, their switches are hidden. Downloaded trails, tasks, photos and the base map all still work offline as usual.

MAPS

Terrain analysis: slope, aspect and contours

Three overlays made from open elevation data around your trails: slope shading for steepness, aspect for which way the ground faces, and labeled contour lines. Where to turn them on, how to read them, why they stop at the edge of your network, and what to check when one shows nothing.

Terrain analysis adds three layers to your maps: slope shading, aspect shading and contour lines. All three are made from open US elevation data (USGS 3DEP) around your own trails. That is why they work offline, and why they stop at the edge of your network.

Turning the overlays on

Every dashboard map has a **layers button** in the top right corner, with a stacked tiles icon. Tap it to open the layers panel.

The panel has these sections:

- **Base map:** the background style. Mapbox maps offer Outdoor, Satellite and Streets. The TrailsIQ map offers TrailsIQ, Outdoor and Minimal. The style you pick is remembered on that device for your next visit.
- **Overlays:** Hillshading and Contours, with the other map layers. They are free on every plan.
- **Terrain analysis:** Slope and Aspect. They appear whichever map you use.

Tap a row to turn it on or off. A tick means it is on, and a spinner means the layer is still loading. Your choices apply to the map in front of you and stay with you as you move between dashboard pages, because the dashboard uses one map throughout.

The terrain overlays are drawn **under** the base map's roads, buildings and labels, and over its ground colors. Otherwise a contour crossing a road would look as if the road ran under the hill, and slope shading would cover the road completely.

They are also **toned to match the base style you are using**. Hillshading is strongest on the colorful TrailsIQ style, and lighter on Outdoor and Minimal, where the same shading would be the loudest thing on the screen. On Minimal the contours are gray instead of brown for the same reason. That style is there so your own trail colors stand out, and brown lines would draw the eye away from them. There is nothing to set, because switching the base style adjusts the overlays too.

The **field app's** map layers sheet has the same two sections plus a few rows the dashboard does not have: 3-D terrain and the base map detail switches below.

Hide basemap trails

This is in the field app's map layers sheet, and it is **on at first**.

Every base map draws its own version of the paths in your area, taken from OpenStreetMap. It is often out of date or wrongly routed, or shows a right of way your organization does not look after. Drawn in the same brown and at the same weight as your own trails, it is hard to tell which line to trust.

Your organization's trails are the ones to trust. So the base map's paths and their names are hidden, and what you see is what you maintain.

Turn it off when you want to see the wider network again, for example to check a connection to a neighboring system or a right of way that leaves yours. The setting is remembered on each device.

Hillshading sits with these layers in both places, and works differently from the three above.

Slope and aspect depend on your plan. They are made as image tiles for each trail and are included in offline downloads.

Contours and hillshading are on every plan, including Free. Contours are drawn on your device from elevation data that is already there for every organization, so they work wherever your trails are. Hillshading loads live instead, which is why it needs a connection and cannot be downloaded. That is the one way it is weaker than the others.

That is also why it turns itself off when you lose signal, and its row disappears from the sheet until the connection comes back. It does not turn itself back on. When the row returns, tap it. The field app's **3-D terrain** works the same way, for the same reason.

On a plain background

If your organization's map shows a plain green background, either because you have gone over your monthly map loads or because you chose it, hillshading and contours are turned **on for you the first time**, on the dashboard and in the field app.

With no base map underneath, those two layers become the map. Hillshading shows the shape of the ground and contours show its height, so together they read as a topographic map instead of a base map that failed to load. They are only turned on once, so if you turn either one off, it stays off.

On the TrailsIQ map

All four overlays work there too, and that is the best combination. Relief and height on top of roads, buildings and paths make a proper topographic map. See The TrailsIQ map.

The TrailsIQ map draws a real base map around your trails, and the plain background only beyond them. So on one screen you may see the base map under the overlays in some places and the plain background in others. That is expected.

Slope shading

Slope shading colors the ground by how steep it is, so you can see where a route will be a problem before you walk it.

Color	Grade
Green	15% and under
Amber	15–25%
Red	25–35%
Magenta	Over 35%

The bands match the ones TrailsIQ uses for sustainable grade checks everywhere else, so a stretch that is red here is the same stretch the planner flags.

It is most useful for **laying out new trail**, when you are reading a hillside for a workable route. It also helps you explain to somebody why you did not build the direct route.

Aspect shading

Aspect shading colors the ground by which way the slope faces:

Color	Facing
Blue	North
Yellow	East
Red	South
Purple	West

Aspect tells you where the ground dries and freezes. In the northern hemisphere, a north-facing slope holds snow and stays wet for weeks longer than the south-facing slope on the other side of the same ridge. If you are planning the order of spring openings, working out where mud season hits first, or wondering why one trail is always the problem, aspect answers it faster than walking the ground.

Contour lines

These are standard elevation contours, drawn in brown, or in gray on the Minimal base style, where brown would stand out too much. Every fifth line is an **index contour**, drawn thicker and labeled with its elevation.

The lines get closer together as you zoom in, so a wide view stays readable instead of filling with brown lines:

Zoom	Metric	Imperial
17+	2 m	5 ft
16	5 m	10 ft
15	10 m	20 ft
14	20 m	40 ft

The imperial intervals match USGS 7.5-minute quad maps, so a printout reads like a paper topo map.

When contours are on, the layers panel shows the current interval, such as "*Contours every 20 ft*", so you never have to work it out from the labels.

Contour units

Contour labels use **your own** unit setting, not your organization's.

This works the same way everywhere in TrailsIQ:

1. If **Profile → Distance units** is set to *Metric* or *Imperial*, that is what you see.
2. If it is set to **Auto**, which is where it starts, it follows your organization's **country** in Settings → Organization details. The United States, Liberia and Myanmar use imperial, and everywhere else uses metric.

So if your map shows feet in an organization you think of as metric, your own profile is usually set to Imperial, and your profile always comes first. The layers panel tells you which setting is being used: "*unit from your profile's distance units*" or "*unit from your organization's country*". Change the one it names.

Where the overlays appear

Terrain tiles are made in a strip along either side of your trails, **not** across your whole region.

That means:

- **Ground with no trail near it has no overlay.** Blank areas between networks are expected, not broken. When an overlay is on and you are close enough, the layers panel says so: "*Baked around your trails — blank ground has none yet.*"
- **A brand new trail has no terrain until it has been made.** It is made automatically in the background when a trail is created or its route changes. It is usually quick, but not instant.
- **Planning on bare ground makes terrain for that ground too.** Drawing or suggesting a route in the planner where there are no overlays starts making them for that area, just as saving a trail there does. The overlays appear on their own a few minutes later. The map picks them up without reloading, so there is nothing to press and no need to keep switching the layer off and on.

The overlays start at **zoom level 14** and get more detailed as you zoom in. Further out, nothing is drawn, because a wide view would need far too many tiles. The layers panel tells you when that is the reason: "*Zoom in to level 14 or closer to see these — you are at 11.3.*"

Offline

You can download contours and slope shading. They are one of the choices in the offline download sheet. See Offline downloads.

This matters more than it first seems. On a map from an outside provider, the base map cannot be downloaded, so an offline map shows a plain background. Contours and slope shading turn that plain background back into terrain you can read and find your way by.

On the TrailsIQ map, the base map downloads with them, so an offline map there also has roads, paths, water and place names under the terrain.

Downloaded terrain is used even when you are online, so it never has to wait for a weak signal.

Plans

- **Free:** hillshading and contour lines.
- **Core, Pro and Enterprise:** those two, plus slope and aspect shading.

Hillshading and contours are not part of terrain analysis, and every plan has them. The organizations that most need shape and height on their map are the ones with the least else on it.

Elevation data is collected for **every** organization on every plan, including Free. That way it is already there when you need it. If you upgrade, the overlays appear straight away. There is nothing to wait for and nothing to ask for.

On a plan without terrain analysis, the slope and aspect rows are still shown, grayed out, with the plan that includes them. You cannot turn them on, and tapping one does nothing. Their descriptions and color keys stay readable, because they explain what the overlays do better than a price list can. Contours sit with hillshading among the ordinary map overlays instead, since everybody has both. If your plan includes terrain analysis and the slope and aspect rows are missing completely, the cause is your organization's setting rather than your plan. See **Settings › Terrain**.

I turned one on and nothing happened

These are the most likely reasons, most likely first:

1. **You are zoomed out further than level 14.** The panel says so and shows your current zoom. Zoom in.
2. **It is still loading.** The row shows a spinner until the tiles arrive. On a slow connection this can take a few seconds.
3. **There is no trail near where you are looking.** The overlays follow your trails, so move the map to a trail.
4. **The trail is new.** Terrain is made in the background after a trail is created or edited, so give it a few minutes.
5. **You are on the Free plan.** Hillshading and contours work. Slope and aspect are grayed out with the plan that includes them, and cannot be turned on until you move to it.

If the shading is only missing when you are offline, use **Check downloaded terrain** in the download sheet before reporting it. It can tell apart several problems that look the same on the map.

SETTINGS

Workspace modules: show only the sections your team uses

TrailsIQ is for teams who run trail networks and teams who build them. Choose which you are when you sign up and the menu matches. Turn sections on and off later in Settings. Turning one off hides it, never deletes anything, and does not change anybody's permissions.

TrailsIQ is used by two quite different kinds of team. Some **run and maintain** a trail network: a club, a land manager, a park or a land trust. Others **build** trail: contractors and crews who design, quote and build, then hand the finished work over and move on. Plenty of teams do some of both. Pick the one that is your main work, then turn on what you need from the other.

These teams need different parts of TrailsIQ, so your account only shows the sections you use. You choose them in **Settings → Workspace modules**.

Choosing what your team does

You are asked when you sign up, and again whenever you create another organization:

- **Trail organization:** runs and maintains trails. This turns everything on, and it is the default.
- **Trail builder:** builds and maintains trails. This turns on what you need to design and deliver work: the trail planner, projects, clients, infrastructure, the money sections, and a website and news to help you win work. It leaves off conditions, lifts, counters, events and the daily report.

Your answer is **a starting point, and it does not lock you in.** It decides which switches are on the first time you sign in. After that, the switches are yours. The only other thing it decides is which work your dashboard and setup guide show first, as described below. It never hides anything. What you see is always decided by the switches.

You can have as many organizations as you need with one sign-in, and each is completely separate, with its own trails, team, settings and billing. Somebody who volunteers for a club and also runs a trail-building business needs two, and switches between them from the sidebar. **Settings → Advanced → New organization** creates one.

The signup question asking whether the team runs trails, builds trails, or both

What each choice turns on

Section	Trail organization	Trail builder
Trail conditions	on	off
Projects	on	on
Clients & job pipeline	off	on
Maintenance	on	on
Infrastructure	on	on
Points of interest	on	on
Lifts	on	off
Trail counters	on	off

Section	Trail organization	Trail builder
Daily report	on	off
Expenses	on	on
Work hours	on	on
Inventory	on	on
Build cost estimates	on	on
Contracts	off	on
News	on	on
Events	on	off
Website builder	on	on
QR builder	on	on
Website API	on	on
Volunteers	on	off

The builder column follows a simple idea. Conditions, lifts, counters and the daily report all describe a trail system somebody is *running*, and a builder hands theirs over at the end of the job. Events are a trail organization's public calendar. **The website and News are on for both**, because a building company needs a public face too. A builder's website starts as a **Business** site with your services. On the Pro plan and above, it also has a projects page built from your News posts, and a quote request form that adds each request to your job pipeline as a lead. See Website templates, donations and forms. A builder account created before this keeps the switches it had.

Clients & job pipeline and Contracts work the other way round. They are the only two sections a builder gets that a trail organization does not. A trail organization has no clients, because it is the client, and so has nobody to sign an agreement with. A club that takes on the occasional paid build for a neighbor can turn both on. See Clients and the job pipeline and Contracts for won jobs.

Contracts is separate from Build cost estimates. An organization pricing its own work still wants the estimate, but it has nobody to send a contract to. Turning Contracts on adds the Contract button to a won job, the contract section in the field app, and the legal name, registered address and terms fields under Organization details. Those three fields only appear when Contracts is on, because nobody who never sends a contract needs them.

Turning Contracts **off** hides all of that and stops new contracts being prepared. It does **not** hide contracts that already exist. A job with a contract keeps its button, and the file and its fingerprint can still be reached. You may need a signed agreement years later. Turning off a setting is not a decision to give it up. Withdrawing a contract is, and that is a different button.

Volunteers is off for builders. It lists the people who help without being on your team, such as event sign-ups, walk-ins, check-ins and people who sign in to report. A building company's crew is on the payroll, not on a sign-up sheet. Most of that list comes through Events, which a builder account also starts without. Turn it on if you run volunteer build days. Nothing recorded is lost while it is off.

Clients adds your jobs to the dashboard, and your answer decides what comes first. With Clients on, the dashboard also shows the job pipeline by stage, the jobs you have won or are building with what has been spent against the estimate, and your latest planned trails.

What comes first depends on your answer to **What does your team do?**. If you answered **Trail builder**, the dashboard opens on your jobs. Open jobs, contracts waiting for a signature and this week's hours are across the top, with the pipeline first. A **Get started** checklist begins with a client and a job instead of a trail import, and ticks each step off as you do it. If you answered **Trail organization** and turned Clients on, your trail work still comes first. The trail tiles, trail health and the usual Get started card stay where they were, and the job cards come after them. The setup guide works the same way, adding the job steps after the trail steps. Trail health, network status and the closed trails count follow the Trail conditions switch, so an account with it off does not see them.

Maintenance stays on for builders on purpose. It already works well as a punch list for a build, the things to put right before handover. Without it, there would be nowhere to record them.

Build cost estimates is on for both, and is the section most often turned off by hand. It controls the trail planner's priced breakdown: what a proposed route would cost to build, as line items with a contingency and a total. Plenty of organizations would rather not have it on the screen. The figure is a model, not a quote, and when a board member or volunteer sees it over somebody's shoulder, they tend to repeat it as if it were a quote. Turning it off hides the estimate on the planner page, on projects, in the field app, in the comparison table and on the proposal a client sees. Everything else in the planner stays, including the route, the grades, the sustainability score and the drainage analysis. See The trail planner.

Turning sections on and off

Every row on the Workspace modules screen has its own switch, whichever choice you started from. A building company that also runs a demo loop can turn Trail conditions back on, and a club with no lift can turn Lifts off. **The switches always win over your starting choice.**

Two things are worth knowing about this screen:

- **Changing the "What does your team do?" answer does not move any switch.** It changes the label, what *Reset to defaults* will do, and which work your dashboard and setup guide show first. We did this on purpose. If changing the answer undid a dozen switches you had set by hand, you might not notice until a section you rely on had gone.
- **Reset to defaults for this workspace type** does move every switch back to the table above. It asks first, because it overwrites everything you have changed.

Only owners and managers can open Settings, so a volunteer cannot change this by accident.

Workspace modules in Settings — the preset dropdown and the per-section switches

Nothing is deleted

Turning a section off **hides it from the menu and from Settings.** It does not delete anything, and everything that already exists stays.

Settings is worth explaining, because people usually notice it second. Turn off Infrastructure and *Infrastructure types* disappears from the settings list too. Turn off the public daily report and its settings page goes as well. A section you have turned off should not leave settings behind for something you do not use. **Settings → Workspace modules is never hidden**, so whatever you turned off, you can always turn it back on from the same place.

Turn Events off and your events are still there, with their calendar entries, sign-ups and history. Turn it back on and everything is as you left it. The same is true for every section on the list.

This also means a switch here is **not a permission**. Somebody who bookmarked a page in a hidden section can still open the bookmark, and anybody you gave the matching permission still has it. If you want to stop a person reaching something, use **Settings → Roles & permissions**. Use Workspace modules to keep the menu matched to what your team actually uses.

Sections we turn on for you

Three things are not on this list, because turning them on changes more than the sidebar:

- **Trails**
- **The trail planner**
- **Climbing** (crags and routes)

A builder account gets the trail planner turned on automatically, since that is why builders use TrailsIQ. If you need one of these three changed on an existing account, ask us.

Common gotchas

- **A section disappeared from my menu.** Somebody turned it off in Settings → Workspace modules. Your data is untouched, so turn it back on.
- **A settings page I used has gone.** It is the same cause, because settings follow their section. Turn the section back on and the settings page returns with everything as you left it.
- **An article mentions a screen I do not have.** It is the same cause. The documentation describes all of TrailsIQ, and your menu shows the sections you have turned on.
- **Changing my answer to "What does your team do?" did nothing.** That is expected. It sets the label, the defaults and the order of your dashboard, not the switches. Use *Reset to defaults* if you meant to move them.
- **Reset to defaults overwrote my switches.** That is what it does, and it asked first. It cannot be undone, so set the ones you want again.
- **I picked the wrong option when I signed up.** No harm done. Change the switches, or change your answer and reset. The only other thing your answer affects is the order of your dashboard and setup guide.
- **I need a second, separate organization.** Use Settings → Advanced → New organization. It creates a completely separate organization, and you choose its type the same way.
- **Hiding a section did not take away anybody's access.** It is not meant to. Use Roles & permissions for that.

SETTINGS

Plans and limits

Plans mostly limit how much you can have going at once, not which features you get. Everything your crew does is on every plan, including the free one, and only a short list of planning overlays depends on your plan. Archiving a finished project or client frees up its place straight away, and branches off a planned trail never count.

Every account is on a plan, and a plan mostly sets limits rather than turning features on or off. **Settings → Billing** shows how close you are to each limit, and what the other plans allow.

In short, almost nothing is locked. The trail planner, projects, clients, the field app and the public site are on every plan, including the free one. What changes with the plan is *how much* you can have going at once, plus a short list of planning overlays covered at the end of this page.

What is measured

There are two kinds of limit.

Things that build up over time: trails, networks, managers, field workers and storage. These grow as your network grows, and they are why a trail organization moves up a plan.

Things you have going at once: active projects, planned trails and active clients. These go up and down as work starts and finishes, and they are why a trail-building business moves up a plan.

Each limit is separate, and you only hit whichever one you reach first. A club with three hundred trails and one project under way is nowhere near the project limit. A builder with four jobs running and no trail network of their own is nowhere near the trail limit.

Only active work counts

Archiving a project or a client frees up its place. It is worth knowing this before you need it.

Nothing is deleted or hidden from your records, and every number on it stays the same. An archived project keeps its trails, maintenance tasks, hours and costs. It just stops counting toward what you have going at once, which is what the limit measures.

Archive from the project or client page. Use **Show archived** on either list to find them again. You can bring one back at any time, as long as you have a place free, because restoring it makes it active work again.

Finishing a job and archiving it is the normal way to work. If you are thinking of deleting something to make room, archive it instead.

A project page with the Archive action, and the Show archived toggle on the projects list

Planning trails

The planner counts **planned trails**, and only the main lines.

Branches do not count. A spur, an alternate, a reroute or a connector coming off a planned trail does not count toward the limit, however many you draw. Comparing three possible routes is exactly what the planner is for, and we do not want to charge you for weighing up options.

Trails inside an **archived** project do not count either. Archiving a finished job frees up the project and every trail planned inside it in one step.

A planned trail that belongs to no project does count. If you have been drawing lines to try ideas out and the number is higher than you expected, that is usually why. Open **Trail planner** and look for lines with no project.

When you reach a limit

You are told when you try to create something, not afterwards, and the message says what is full and what the limit is.

The Projects list also shows a running count, such as "*3 of 5 active*", so you can see the limit before you start writing up a job. **Settings → Billing** shows the same figures for every limit, each with its own bar.

You then have two options, and both are perfectly normal:

- **Archive something that is finished.** It is free, instant and can be undone.
- **Move up a plan.** Settings → Billing shows what each plan allows, and the change takes effect straight away. You can pay for each paid plan **monthly or yearly**. The card shows both prices, with the yearly saving on the button, so you can see the difference before you choose.

The Billing page usage bars, showing active projects and planned trails against the plan limits

The few features that depend on your plan

A short list of map features is on the Core plan and above: **slope and aspect**, **3-D terrain**, **land boundaries**, **satellite imagery**, and the **compliance overlays** for streams, wetlands, public land and radar.

They are on paid plans because they do a different job from the rest of TrailsIQ. Everything else is about looking after the ground you already have, and all of that is on the free plan for as many people as your plan allows. These five are for deciding where new trail should go: reading a hillside before you walk it, checking whose land a route crosses, and seeing the ground under the trees. That is design work, and it is usually the part somebody is paid to do.

Two things are worth saying plainly, because this list is the exception:

Your crew is not affected. Everything a field worker does is on the free plan, including the app, offline downloads, maintenance, inspections, sweeps and photos. So are **contour lines** and **hillshading**, which are what most people mean when they ask about terrain.

We keep this list short on purpose. It has five things on it, and we would rather it had fewer. If you are on the free plan and one of these is the only thing stopping you getting your work done, tell us. We would really like to know which one.

Common gotchas

The count on the Projects list always shows active projects. That is what the limit measures. Turning on **Show archived** adds rows to the list but does not change the number.

Restoring an archived project needs a free place. It becomes active work again, so it counts again. If you are at the limit, archive something else first.

A branch only stays uncounted while it is a branch. If you detach a branch from its parent, it becomes a planned trail of its own and starts counting.

Every member counts, whether or not they sign in. The manager and field worker limits count the people who have those roles, not the people who have signed in. Remove somebody from **Team** to free a place. Owners never count toward the manager limit.

Storage is used by photos, not by records. If your storage is full, the photos on maintenance tasks and planner notes are almost always the reason.

A plan we set up for you ends on its end date. If you arranged your plan with us instead of buying it on the Billing page, Settings → Billing shows the date it runs to. Your owners get an email two weeks before. On that date your account moves to the free plan unless the plan has been renewed. Your trails and records are kept, and anything over a free limit stays where it is. After thirty days on the free plan, your photos are kept as smaller copies. Seasonal accounts and the off-season explains what changes and how to download the full-size photos first.

If a payment keeps failing, the plan ends after a grace period. When a renewal cannot be charged, your owners get an email straight away with the date the plan will end. If you update the card and pay before then, nothing changes. After that date, your account moves to the free plan until a payment goes through.

Your invoices are on the Billing page. A plan paid by card on the Billing page lists its invoices under **Invoices**: the date, the period each one paid for, the amount, and whether it is paid. Each links to its receipt and to a PDF you can file, and one still due links straight to the page where it can be paid. Beside it, **Payment & contact** shows the card your plan is charged to and the email the invoices go to, with a button to change

either.

If anything does not add up, ask us. We can see the same numbers you can, and it is usually quick to explain.

SETTINGS

How to enable weather automation

Turn on weather automation, pick a mode, and see where recommendations show up on the dashboard and in the field app. Covers what each trail needs, how wetness is scored, where the weather comes from, which trails a network recommendation is about, how a recent inspection outranks the forecast, and when the check runs.

Weather automation keeps your trail conditions current without someone checking every trail by hand. Twice a day it pulls a forecast for each of your networks and scores each trail against its surface, drainage and main use. Depending on the mode you pick, it then recommends a condition, closes trails on wet days, or opens and closes them for you.

If the field app's home screen says **"No weather data"** and the recommendations panel on your trails is empty, this article takes you from off to on.

What weather automation does

Twice a day, TrailsIQ gets the weather for each of your networks. It reads three things: **the rain over the last 24 hours**, **the rain forecast for the next 24 and 72 hours**, and a **wetness score** for each trail built from them.

Every trail has a profile made of its **surface** (clay, loam, gravel, hardpack, rock, asphalt or mixed), its **drainage** (poor, moderate or good) and its **main use** (mountain biking, hiking, nordic skiing and so on). Each profile has a threshold. When the wetness score crosses it, TrailsIQ recommends a condition: **open**, **caution** or **closed**.

What happens next depends on the mode you pick:

- **Off:** nothing is scored and nothing is recommended.
- **Recommend only:** TrailsIQ scores your trails and shows its recommendation, but never changes a trail's condition. You see the suggestion and you decide.
- **Auto-close only:** TrailsIQ can move a trail from Open to Caution or Closed, but never reopens it. Reopening is up to you.
- **Auto-open & close:** TrailsIQ handles the whole open, caution and closed cycle. A trail that has dried out is reopened without a manager touching it.

Before you start: what each trail needs

TrailsIQ can only score a trail well if it knows what the trail is like. Every trail needs:

- **Main use:** mountain biking, hiking, nordic skiing, alpine and so on. This sets the difficulty icons and picks which thresholds apply.
- **Surface:** clay, loam, gravel, hardpack, rock, asphalt or mixed. This feeds straight into the wet-day threshold.
- **Drainage:** poor, moderate or good. A loam trail with poor drainage closes after much less rain than a rock trail that drains well.

If a trail has none of these set, TrailsIQ treats it as loam with poor drainage and mixed use. That is the most cautious guess. The trail is still scored, but the recommendation may not match what you see on the ground.

Set them on each trail from **Trails → [trail name] → Edit**. The *How to create a trail* article walks through every field. If you have a lot of trails to update, select them on the **Trails** page and press **Bulk update**. It can set the use, surface and drainage on all of them at once.

Turn it on in Settings → Weather automation

Only an owner or manager can do this. Open **Settings** from the sidebar and pick **Weather automation** from the list of sections, under **Field tools**. The check runs twice a day, at 07:00 and 19:00 in your organization's timezone. It gets a forecast for each network, scores every trail against the threshold for its surface, drainage and use, and, depending on the mode, updates the trail's condition for you.

There are three things to set:

1. **Weather data.** This is the switch at the top, **Get weather for this organization**. It turns on the forecast itself and everything that shows it.
2. **Mode.** These are the four choices described above: Off, Recommend only, Auto-close only and Auto-open & close. They only affect trail status recommendations, and they need weather data on. They appear when your account has the **Trail conditions** module switched on. Without it, the section shows only the weather data switch, because the forecast is used across the product either way.
3. **Threshold overrides.** Press **Show threshold table** to see a table with one cell for each combination of surface, drainage and use. Each cell shows the default. Type a number to change it for that one combination, or leave it blank to keep the default.

Press **Save weather settings** at the bottom. The first check runs at the next 07:00 or 19:00. The *Timing* section below explains how to get a fresh forecast sooner.

Weather data and recommendations are separate switches. You can have the forecast without the recommendations. Leave the mode on **Off** with weather data on, and the weather still shows on your daily report, on the field app's home screen and hourly forecast, on your website, in *Live from the trails*, in TrailsIQ Go and in your reports. Each trail's **wetness** score still shows too, on Trail conditions, on the trail's own page, in the field app and on your website. Wetness is a reading of the weather, not a recommendation. With the mode on Off, nothing recommends or changes a trail's status.

No forecast is fetched until weather data is on and you have a trail. If weather data is off, or no trail has been drawn on the map yet, TrailsIQ fetches no weather for your organization. No forecast is shown anywhere, including one fetched before you switched it off. Reports and past daily reports keep the weather of the days they recorded. Turning weather data off also sets the mode to **Off**, because recommendations are scored from the forecast. Turn it on and upload or draw a trail, and the forecast starts within a couple of hours.

Your website's **Trail conditions** page follows the same rule, with one difference. While weather data is off *and* none of your trails is public, visitors get a "page not found" there, and the links to it in your menu, footer and buttons are hidden. You can still open it yourself while signed in. As soon as you have a public trail the page comes back, because it still shows whether each trail is open even without a forecast.



Which mode to pick

- **New to weather automation?** Start on **Recommend only** for a week or two. The recommendations appear in the field app's trail status screen and on the dashboard's Trail Conditions page, and you can compare them with what you would have done yourself. Nothing changes on its own, so a threshold that is set wrong cannot close a dry network.
- **You trust it on wet days but not on dry ones?** Move to **Auto-close only**. TrailsIQ moves trails to Caution or Closed on wet days, and you decide when the network is ready to reopen. This suits teams that have been burned before by a system calling a trail dry when it was not.
- **You want it to handle everything?** Pick **Auto-open & close**. TrailsIQ runs the whole open, caution and closed cycle. A manager can still change any trail by hand, and that change stays until a later check recommends something *different*. This suits teams with well-tuned thresholds and a lot of trails to keep track of.
- **Not ready yet?** Leave it on **Off**. The Trails chip on the field app's home screen still opens the trail status screen, where you can change conditions by hand. The recommendations panel just stays empty. With weather data on, the forecast and each trail's wetness still show everywhere else.

How it decides a trail is too wet

It uses one measurement, called **trail wetness**. Trail wetness is a reading of the ground, not a count of the rain.

TrailsIQ keeps a running picture of how much water the ground is holding. It updates it every day from that day's rain, snow and temperature, and carries it forward through the season. Rain that falls on ground with room for it soaks in. Rain that falls on ground that is already full stays on the surface, and surface water is what wrecks a trail. So the same 40 mm of rain reads very differently depending on the week before it. That is how trail crews have always thought about it, and it is how the score works.

Two things come out of that picture, and both feed the score: **how full the ground is**, and **how much water had nowhere to go**. The rain forecast for the next three days is added on top with less weight. Water already in the ground counts for more than rain that is only predicted.

A network you have just added has no season behind it yet. For its first days it is scored on the rain of the last five days instead. It moves to the fuller picture once enough weather has come in to show whether the ground has filled or dried out. A wetness reading from a trail inspection counts straight away, however new the network is.

Snow and spring melt

Snow is tracked separately, and it matters most in spring.

A snowpack stores water for months and then releases it on a warm day, even with no rain in the forecast. TrailsIQ follows the snowpack through the winter, including how much fell and how much has melted. It counts the meltwater as water arriving on the trail, because that is what it is. It also knows that ground under snow does not dry out, and that frozen ground takes no water in. A January cold snap reads as quiet, and the first warm week of March reads as wet as it feels.

Rain falling on a snowpack is the worst case, and it reads highest of all.

The score is compared with a threshold for the trail's surface, drainage and main use. A clay trail with poor drainage that carries horses closes far sooner than a rock trail used by hikers. Above the threshold the trail is **closed**. Above 65% of it, the trail is **caution**. Below that, it is **open**.

A recent inspection outranks all of this for the trail that was walked. The score is an estimate of how wet the ground is. Somebody standing on the trail has actually looked. When a trail has a recent wetness reading, TrailsIQ starts from what was seen and then applies the real rain and drying since. So a network the forecast says to close can still recommend leaving one walked trail open, and the recommendation names the inspection. Inspecting trails explains this, including why a reading that says the trail is WETTER is trusted for longer than one that says it is drier.

Three rules sit on top of the score and apply whatever it says:

- **A downpour closes the trail ahead of time.** If more than 25 mm of rain is forecast in the next 24 hours, the trail closes before the rain arrives.
- **Heavy rain moves it one step.** If more than 20 mm is forecast, an open trail goes to caution and a caution trail goes to closed.
- **Freeze and thaw is its own case.** Frozen ground under a warm daytime high gets caution whatever the rain says. That is when tread is damaged most, and rain figures cannot show it. Ground that stays fully frozen behaves like hardpack, and the score is read against hardpack instead.

If you had earlier picked a different way of scoring wetness in these settings, that option has been removed and your organization now uses trail wetness.

Where the weather comes from

There is nothing to choose. TrailsIQ picks the weather source from your organization's country, and the Weather automation settings name the one in use.

- **NWS:** the US National Weather Service's own forecast. It covers the US only, at about 2.5 km resolution, and gives the sharpest picture available inside the country. US organizations get this one.
- **NOAA GFS:** the National Weather Service's global model. It covers the whole world at about 13 km resolution. Organizations outside the US get this one.

Both are public US government data, and neither needs an account or a key. The thresholds work the same with either source.

TrailsIQ makes this choice for you so that every number on a screen comes from the same source. Two sources measuring the same week disagree about how much rain fell, and mixing them could give you a recommendation that contradicts the rainfall printed under it.

Rain that has already fallen is measured

A forecast is the right answer for tomorrow and the wrong one for last Tuesday. The wetness score needs both, because it remembers five days of rain and those days have already happened.

For US organizations, the rain on those past days comes from the National Weather Service's own measurements. These are the gauge-corrected estimates its River Forecast Centers publish for what actually fell. Only the days still ahead come from the forecast.

Two things to know about it:

- **It is US only, and coverage varies even inside the US.** When there is no measurement for a day, that day keeps its forecast figure and the score works as before.
- **Your recommendations may shift a little** the first time this applies to your networks. A day the forecast called a little wet or a little dry now reads as what actually fell, so a trail close to its threshold can move one step either way. Your thresholds and settings have not changed.

Where recommendations show up

Once a network has a recommendation, you will see it in two places:

- **Field app:** the **Trails** chip on the weather bar opens the trail status screen. When there are recommendations, a **Recs** button appears in its header, with a count of the networks where the recommendation and your current status disagree. Each of those networks also shows a line on its own card, such as *Recs suggest Caution · 58% wet*, with an **Apply** button. Tap **Recs** to open the recommendations panel. It has a card for each network with the recommendation and a one-line reason. You can open a breakdown that shows trail wetness, the rain over the last 24 hours, today and the next three days, the affected trails by name, and a short forecast. A **Set** button appears where the recommendation differs from the network's current status. **Apply** and **Set** both open the usual status sheet with the recommendation already picked. Nothing changes until you press Save, and you can still add a note or save quietly.
- **Dashboard:** the **Trail Conditions** page shows the same recommendations next to each network's header, with the recommendation in a colored pill and a "Why:" line under it.

Which trails a recommendation is about

A network marked **Caution** often means two trails out of forty, not all of them. The reason line says how many, for example "*Affects 2 of 39 trails*", and the panel lists those trails by name, wettest first, with each one's reading beside it. A network marked **Open** has no list, because every trail agrees with it.

That lets you close the two trails that need it instead of the whole network.

A few closed trails do not close the network. TrailsIQ only recommends closing a whole network when a third or more of its trails are over their closure threshold. Below that, it recommends **Caution** and names the trails to close instead, for example "*2 of 13 trails are over the closure threshold — close Cedar Loop and Ridge Spur rather than the whole network.*" A network with half its trails closed still reads as closed. Two wet trails out of thirteen do not close the other eleven.

A network also never reads better than the trails in it. If its trails are all on caution, the network is on caution, whatever the closures do. The one-third rule exists to stop one trail closing the rest, not to average the weather away.

Seeing how a recommendation was worked out

On **Trail Conditions**, each network with a recommendation has a **How this is worked out** section under it. Open it when a recommendation does not match the ground. It shows the same arithmetic the recommendation used, in three steps:

1. **How wet the ground is.** This is the network's wetness reading, broken into its parts: how full the ground is, any water standing on top of it, and the rain forecast for the next day and the two after. Each part shows the reading it came from and how many points it added, and the points add up to the network's percentage.
2. **From the network to each trail.** This shows each trail's starting reading, how much the way it faces and its grade added or took away, the wetness at which it goes to caution and to closed, and the result. The trails closest to their closure point are listed first. If a wetness reading

from a recent inspection, or a rule such as heavy forecast rain, decided a trail instead of its score, the row says so.

3. **From the trails to the network.** This shows how many trails are over their closure point, measured against the one-third rule above.

Under the three steps, **When this does not match the ground** lists what you can change, starting with what usually helps most:

- **Fill in each trail's surface, drainage and use.** A trail with none of these set is scored as the softest, worst-draining kind, so it closes early. The section names the trails that are missing them.
- **Record a wetness reading when you inspect a trail** in the field app. What the crew sees on the ground outranks the forecast for several days, and longer for a wetter reading than a drier one. After that it fades back to the forecast.
- **Raise the closure point** for the kinds of trail that are driving the recommendation, in **Settings → Weather automation**. The section names those kinds.
- **Describe your ground** under **Settings → Weather automation → Your ground**. You can set how much water it holds before the rest stands on the surface, how much drains away each day, how much more dries for each degree of warmth, and how fast snow melts. If recommendations stay wet for days after your trails have dried, raise how fast it drains or dries. If they read wet after rain your trails handle easily, raise how much it holds. Leave a box blank to keep the default.

What a closure point means

Each kind of trail has a default closure point. It is the wetness of ground that is **already full, with water standing on it**. That ranges from about 12 mm of standing water for a clay trail with poor drainage that carries horses, to about 100 mm for an asphalt one. So ground that is simply full after a wet week means caution on the softer kinds of trail and is fine on the harder ones. It takes water with nowhere to go to close a trail. A new network whose weather history is still too short to say how full its ground is gets scored on rainfall alone, against lower closure points, until it has enough history.

If the mode is **Off**, or no check has run for your organization yet, the Recs button does not appear in the field app and the recommendations panel is empty. The trail status screen still works and you can change conditions by hand. You just do not get the recommendations on top.

Timing: when the check runs

The weather check runs twice a day, at **07:00** and **19:00** in your organization's timezone. You set the timezone in **Settings → Organization details**.

- The **07:00 check** is the main one. It picks up the overnight rain and gives the day's recommendation before crews head out.
- The **19:00 check** scores again against the day's actual rain and any evening change to the forecast.

If you turn automation on between those times, you will not see recommendations until the next check.

How old the forecast is, and how to get a new one

Trail conditions shows when the forecast on screen was fetched, for example "*Fetched 3 hours ago*", beside the forecast strip. This is worth checking, because the weather is fetched a couple of times a day and kept between fetches. Numbers that look wrong are usually numbers that are old.

Press **Refresh**, next to it, to fetch a new forecast now. It updates what the page shows, including rainfall, wetness and the day-by-day outlook. It **does not change any trail's status**. Only the 07:00 and 19:00 checks set statuses, because a button that quietly re-graded your trails would be a worse surprise than an old number.

Two things follow from that:

- **A threshold change shows straight away.** Recommendations are worked out when you open the page, using your current settings. You do not need to refresh anything to see the effect of a change to a trail's surface, drainage or threshold. Refresh is for the *weather*, not for your settings.
- **One press is enough.** The refresh takes a moment, and there is a short wait before you can press it again. If you press it again too soon, the page tells you so.

Anyone who can change trail conditions can use Refresh.

The time of the **Last check** is shown at the top right of the Weather automation settings, for example "Last check: 2 hours ago". It tells you whether the check ran at all.

Common gotchas

- **"No weather data" on the field app's home screen has three possible causes.** Weather data is switched off, there is no trail on the map yet, or a new account has not had its first forecast yet. Turn weather data on, make sure you have a trail, and give it a couple of hours.
- **A network needs trails before it gets a recommendation.** An empty network has nothing to score, so it is skipped. Add at least one trail and fill in its use, surface and drainage on the trail's own page.
- **A trail with no surface or drainage is treated as loam with poor drainage.** It is still scored, but the recommendation may be more cautious than it should be. Fill these in on your busiest trails first.
- **In the automatic modes, a change you make by hand lasts until a check recommends the opposite.** Say TrailsIQ closed a trail and a manager opened it again by hand. If the next check also wants it closed, the manager's decision stands. If the next check wants it open, the trail follows the recommendation from then on. Your decision holds while nothing has changed, and the recommendation takes over once the conditions catch up with you.
- **Each threshold override covers one combination of surface, drainage and use.** A blank cell uses the default. A number in a cell changes that one combination and leaves the others alone.
- **The forecast is per network, and the score is per trail.** All the trails in a network share its forecast. They differ because each one's own surface, drainage and use are scored against that forecast.

What's next

- If your trails are missing their surface, drainage or main use, read *How to create a trail*. The fields are on each trail's Edit page.
- Once recommendations are coming in, *How to use the field app* shows where they appear in the field.
- Managers can turn on the **Weather-driven condition changes** email to hear when TrailsIQ changes a trail's condition. The *Email preferences* article explains how.

SETTINGS

Email preferences

Everybody chooses their own notifications: the email alerts on the dashboard, the team updates in the field app, and expense reminders. Alerts start out on, and turning one off stops it straight away.

Everybody in your TrailsIQ organization chooses their own notifications, and nobody else can change them for you. At first you get every alert except reminders, so you see the important ones from day one. Once you know which ones matter for your role, you can turn the rest off.

Where to set your preferences

There are three places:

- **Managers and owners** open **Settings → Email notifications** on the dashboard for the email alerts. The page says "*Choose which emails you receive. These are personal preferences — each team member controls their own.*"
- **Everybody** can open **Settings → Notifications** in the field app. It covers the notifications about your team's work, such as new tasks, trail status changes and discussions.
- **Field workers and volunteers** cannot open the dashboard's Settings. They set **Expense reminders** on their own **Profile** page. Saving there leaves their other choices as they were, so a manager who becomes a field worker keeps their settings.

All three change the same stored settings, so a change in one place shows in the others straight away.

Settings sidebar with the Email notifications entry highlighted

Every notification you can turn off

The labels below are exactly as they appear in the app.

Email alerts on the dashboard

Settings → Email notifications has these switches:

- **New public trail reports:** "*Receive an email when someone submits a report via the public trail page.*" This covers reports sent in by the public through TrailsIQ Go. Tasks your team files from the field app or the dashboard do not send this email. They appear in the queue instead.
- **Weather-driven condition changes:** "*Receive an email when the weather automation updates a trail condition.*" You get it when weather scoring moves a trail from Open to Caution, or back again.
- **Plan & billing alerts:** "*Receive emails when you're approaching plan limits or a subscription changes.*" These are for owners: a plan ending, a limit coming close, or a subscription renewing.
- **New team members:** "*Receive an email when someone joins your organization.*" You get it when somebody accepts an invitation or has a request to join approved.
- **Website messages:** "*Receive an email when someone uses your website's contact or volunteer form, unless your organization sends those to one address instead.*"

Expense submission reminders

This section, headed **Expense submission reminders**, has a frequency and two ways to be reminded.

- **Frequency:** *Off*, *Weekly* or *Monthly*. It starts at *Off*, and it decides whether you get reminders at all.
- **Email me:** send the reminder by email.
- **Push notification on my phone:** send it as a notification in the TrailsIQ app. The note under it says "*Push delivers to any phone where you've installed and signed in to the TrailsIQ mobile app.*"

When the frequency is Off, you get no reminders at all, whichever boxes are ticked.

Press **Save preferences** to save. The page says **Saved.** when it is done.

Notifications in the field app

Settings → Notifications in the field app lists the updates about your team's work. Turning one off stops the notification bell and the phone notification for that kind, and the email too for the kinds that send one. Changes save as soon as you flip a switch.

- **Items posted:** *Maintenance issues*, *Infrastructure items* and *Points of interest*, when a teammate adds one.
- **Status + activity:** *Daily reports*, *Trail status changes*, *Tasks handed to you*, *Area status changes*, *Network status changes*, *Lift status changes*, *Maintenance status changes*, *Shared trails*, *Contracts signed*, *Discussions* and *Expense decisions*. In winter there are also *Trail grooming changes* and *Grooming forecast*.
- **Admin**, for owners and managers only: *Join requests*, *Website messages* and *Checklists due*.
- **From TrailsIQ:** *TrailsIQ news*, our newsletter about what is new in TrailsIQ.

To quiet one busy discussion without turning off the rest, mute it from inside the discussion.

Email notifications page showing the four one-off toggles + the expense reminder block

Default behavior

Every alert is **on** until you turn it off. If you have never saved your preferences, you get every email alert and every field app notification, as if each switch were on.

Expense reminders are the one exception. They start at *Off*, so nobody is reminded about a feature they may not use.

Turn a switch off and that notification stops. Turn it back on and it starts again.

What managers and field workers can change

The five email alerts on the dashboard (public reports, weather, plan, new members and website messages) are meant for managers. They only appear on **Settings → Email notifications**, which field workers and volunteers cannot open.

Field workers can still receive those emails, because every alert starts out on. To stop one, they use the unsubscribe link at the bottom of that email, described below. In practice this rarely comes up, because none of those emails are frequent.

Everybody can use **Settings → Notifications** in the field app. Its **Admin** group only shows for owners and managers.

Expense reminders are on the Profile page, and everybody can set them. Field workers who submit expenses choose how often they are reminded.

Profile page for a field worker showing only the Expense reminder block

Unsubscribing from a single email

The quickest way is the link at the bottom of the email. Every notification email has one. It turns off that kind of email for you, it works without signing in, and it never expires, so even a message that has been in your inbox for a year still works. Some mail apps also show their own *Unsubscribe* button at the top of the message, which does the same thing.

Emails you need to get into your own account, such as password resets, invitations and support replies, have no unsubscribe link.

The TrailsIQ newsletter has its own switch. Its link reads *Unsubscribe from TrailsIQ news* and stops only the newsletter. Every alert from your team keeps arriving. In the field app it is the **TrailsIQ news** switch under **From TrailsIQ** in Settings, which is also how you turn it back on. Replying to a newsletter reaches the TrailsIQ team.

To change several at once, or to turn one back on:

1. Sign in to TrailsIQ.
2. Open **Settings → Email notifications** on the dashboard (owners and managers), **Settings → Notifications** in the field app (everybody), or **Profile** (expense reminders).
3. Turn the switches on or off.
4. On the dashboard, press **Save preferences**. The field app saves on its own.

Each person sets their own preferences. Nobody, owners included, can change them for somebody else.

Common gotchas

- **Every alert starts out on.** New team members get every alert until they turn some off. If somebody says they get too much email, show them where their settings are.
- **A frequency of Off stops expense reminders even if Email and Push are ticked.** The frequency decides whether any reminder is sent.
- **Phone notifications need the app installed and signed in on that phone.** Without it, no notification arrives, whatever the setting says.
- **Every notification email has an unsubscribe link.** It turns off that kind of email for the person who clicks it, works without signing in, and never expires. Emails you need to get into your own account, such as password resets, invitations and support replies, have no link.
- **Field workers cannot open the dashboard's email settings.** They can still receive those emails, and they can stop any of them with the link at the bottom.
- **Saving on the Profile page keeps your other choices.** It only changes the expense reminder settings.

What's next

- If your team gets too many *New public trail reports* emails, first check whether public reports are turned on for your organization. The *Public reports setup* article shows where.
- Field workers who do not submit expenses can leave the reminder frequency at Off.

SETTINGS

Public reports setup

Turn TrailsIQ Go on or off for your organization, see what trail users go through, approve or reject reports waiting for review, and choose the alerts your managers get when a report arrives.

Public reports let a trail user, such as a hiker, mountain biker or cross-country skier, report a maintenance problem without an account. They follow a few steps on their phone, either standing at the problem or later from a photo they took there, and their report arrives in your queue as *pending review*. A manager approves it, which moves it to Open, or rejects it, which deletes it. Once approved, it is handled like any other task your crew files.

For most organizations, public reports are the biggest source of first-hand information about problems on the ground. Hikers cover hundreds of miles a week, and one report a weekend is far more than a small crew could find by checking the trails themselves.

What are public reports?

A public report is a maintenance task filed by a trail user through TrailsIQ Go at `/report`, without an account. It has the same parts as anything your crew files: a title, a description, a location, an issue type and photos. The difference is that it arrives with its own status, **pending review**. Pending review tasks do not appear on the public map, on any trail's page or in the usual Maintenance list. They wait in a queue until a manager deals with them.

Each organization chooses whether to receive them. If you do not want them, turn off one setting and your organization disappears from TrailsIQ Go completely. Trail users on your trails will not be offered your organization to report to.

Turning public reports on or off

Public reports are **on at first**, with one exception. An account set up as a **trail builder** starts with them off. A hiker uses TrailsIQ Go to reach whoever *maintains* the trail they are standing on, and for a building company that is usually the client, not you. An organization that does both starts with them on, like any trail organization.

Either way it is one checkbox. Open **Settings → Public visibility** and find the setting labeled:

> **Exclude from TrailsIQ Go**

Its description says: "*Hides this organization from TrailsIQ Go — hikers won't see it in the report wizard, won't find it via 'near me' discovery, can't save it as a favorite, and get no notifications from it. Your website is a separate setting below. Your crew + the field app keep working normally.*" That separate setting is **Hide public website**, just below it.

This has its own section, separate from *Live from the trails*, on purpose. Builder accounts usually turn the daily report off, so a setting inside it would be hidden from exactly the accounts that start with reports off.

Turning **Exclude from TrailsIQ Go** on does four things:

1. Your organization no longer appears in the list of organizations to report to, so nobody can send you a report.
2. A report aimed at your organization anyway is refused with a plain "*Trail not found.*" Nothing tells the sender that you exist and have reports turned off.
3. Trail users stop getting notifications from you and can no longer save you as a favorite.
4. Your organization no longer appears when people search for organizations near them.

Your public website is **not** affected. It stays up, so a builder can still send clients to it. Everything else, including the field app, the dashboard, your members and your trails, keeps working too. This setting only affects what the public sees.

Hiding your public website

Your public website has its own setting, just below the first one:

> **Hide public website**

It is the same setting as **Hide** in the website builder, so turning on either one turns on the other. Your website and your public daily report page show "not found", and search engines are no longer told about your pages. Your pages and settings are kept for when you turn it back on. The Website API and the trail status widget you can add to other sites keep working, so a website of your own still shows your trails. It is separate from the TrailsIQ Go setting, so you can hide either one, both or neither. Every account starts with its website live, including trail builders.



What the trail user sees

TrailsIQ Go is at `app.trailsiq.com/report`. Every organization uses this same address. A report always carries a real location, which comes either from the phone's GPS or from the photo itself.

The app opens by asking **Where are you right now?** with two choices:

- **I am at the spot** is for somebody standing at the problem. The app uses the phone's location, so GPS has to be allowed. If the browser cannot get a location, it tells the user to allow location access and try again.
- **I took a photo earlier** is for somebody who is already home or back at the car. Tapping it opens their photo album straight away. The photo they pick is both the location and the picture your crew sees, so it has to have its location saved in it. If it does not, the app says so on the same screen, and they can pick another photo or switch to **I am at the spot**.

After that come these steps:

1. **The photo.** Somebody at the spot takes it now. The camera opens before anything else is asked, because working out which trail they are standing on takes a few seconds and the app does it while they take the picture. They can add up to 3 photos of up to 5 MB each.
2. **Where.** This step only appears when there is something to ask. If more than one organization has a trail nearby, the user picks which one gets the report. If more than one trail is close, they pick the trail. If they are not within about 30 meters of a known trail, the app asks them to move onto the trail first.
3. **Already reported here?** If a problem has already been reported within about 50 meters, the app shows it. The user can confirm that one instead of sending a second report, or tap **No — mine is something different** to carry on. When nothing has been reported nearby, this step is skipped.
4. **What's going on?** A box to describe the problem, and their name if they want to give it. Without a name, the report is from *Anonymous*. A reporter who isn't signed in can also leave an email or phone number if they would like a reply. **Submit report** sends it.

Nobody is asked what kind of problem it is, or asked to confirm a pin on a map. The location is the one the app recorded at the spot, or the one saved in the photo. The title is made from the trail and the first issue type the app recognizes in their description. So "big blowdown across the corridor" on Owl's Ridge is filed as *Owl's Ridge — Blowdown*. The words it recognizes come from your *Settings → Issue types* page.

When the report is sent, the user sees **Report submitted!** and "*Thanks for keeping the trails safe. Your report has been sent to the {your-org-name} crew.*"

If they have weak signal, the report is saved on their phone and a "*Saved — no connection right now*" screen tells them it will send by itself once they have signal.

If they confirmed a problem your crew already knows about, they see "*Thanks for confirming! The {your-org-name} crew already knows about this one. Thanks for stopping to check — that's a real help.*"

Under the confirmation, a reporter who is not signed in is offered **Follow this report**. They can make a free account with just their email, with no password, and then see when your crew accepts the report and when it is fixed. They can also tap **Not now**. A reporter who is already signed in is not asked, because the report is already in their own list.

In the installed TrailsIQ Go app, the same screen also asks "*Follow {your-org-name}?*" That lets the person get a notification from your organization when trail conditions change, which is a good way to turn a one-time reporter into a regular one.

Protection against spam

A form anybody can send without an account attracts automated spam, so TrailsIQ Go has several layers of protection:

- **A limit per connection:** 3 reports every 10 minutes from the same internet address. Beyond that, the sender sees "*Too many reports from this address. Please try again later.*"
- **A hidden trap:** the form contains a field that people never see but spam programs fill in. Anything that fills it in is told the report worked, so it does not try again.
- **Only the app can send reports:** reports sent from anywhere other than TrailsIQ Go are refused.
- **Photo limits:** at most 3 photos of up to 5 MB each.
- **Length limits:** every text field has a maximum length.

There is no "I am not a robot" check, because these layers have been enough. If spam ever becomes a problem, ask us and we can look into where it is coming from.

Approving or rejecting a report

Every public report arrives as **pending review**. The number waiting shows as an amber badge on Maintenance in the sidebar. That badge means somebody needs to look.

Open **Maintenance → Pending Reviews** in the sidebar, which shows the same amber count. It is the Maintenance list filtered to pending review. Select a report to open it, with two buttons at the top:

- **Approve** changes the status to **Open** and adds the task to your main list. It asks "*Approve this report and move it to Open?*" and then shows "*Approved and moved to open.*" Any bell notification about the report is cleared so it does not linger.
- **Reject deletes the report permanently**. It asks "*Reject and delete this report? This cannot be undone.*" and has a box for an optional reason. Cancel takes you back. The report and its photos are deleted, and every notification about it is removed. Use it for spam, duplicates and reports that are clearly not real.

Your reason is for the reporter, and only reaches people with an account. A trail user who signed in to TrailsIQ Go and sent the report under their name sees *Not added* next to it in their list, with your reason if you gave one. Anonymous reporters never see it. Keep it short and kind, for example "*Already on our list*" or "*That trail is on private land*".

A report sent from an account shows the reporter's email under *Reporter*, next to their name, as a link. Use it if you need to ask a follow-up question. A reporter without an account may have left an email or phone number instead, and it shows in the same place. When they left neither, there is no way to reach them.

Once approved, the report is a normal maintenance task. You can set its priority, link it to a project, send a crew and close it when the work is done. Rejecting cannot be undone, because the report is not kept, so be fairly sure before you press it. A rejected report still counts toward the reports received on the **Work report**, marked as rejected.

The quick *In progress* and *Resolved* buttons you use on other tasks do not work on pending review reports. They show "*Use approve or reject for pending-review items.*" This is on purpose, so every public report gets a decision.

Notifications to your team

When a public report arrives, TrailsIQ makes sure somebody sees it.

- **Bell notification:** every active owner and manager gets one. The bell on the dashboard shows a red dot straight away.
- **Phone notification:** sent to every owner and manager who has the TrailsIQ app installed. The title is "*Trail report needs review*" and the text is "*{report title} · {trail name}*".

- **Email:** with the subject "*New trail report: {title}*". It only goes to people who have **New public trail reports** turned on in their email preferences. It is on at first. See the *Email preferences* article for details.

If your inbox gets too busy, turn off the email. You will still get the bell and phone notifications.

Common gotchas

- **Public reports start on for every trail organization.** You have to turn them off, not on. If you set up an account for a private landowner who does not want to be public, remember to change the setting.
- **There is no separate address for each organization.** Everybody uses `app.trailsiq.com/report`, and the trail user picks the organization from a list of those near them. Turning reports off removes your organization from that list.
- **Rejecting a report deletes it for good.** It is not hidden or archived, and nothing of it is kept. Only the count remains, on the Work report. If in doubt, approve it. You can always mark it resolved without doing anything later.
- **A public report always arrives as pending review.** Even if an owner tests TrailsIQ Go while signed in, the report is still pending review. Every public report goes through approval, whoever sent it.
- **Every report has a real location.** It comes from the phone's GPS at the spot, or from the location saved in a photo taken there. Nobody can type in a place or drop a pin by hand. This is on purpose. It stops people reporting from home about trails they have never visited.
- **Emails follow each person's preferences.** Bell and phone notifications always arrive, but each person can turn the email off.

What's next

- To get fewer alerts, turn off *New public trail reports* in your **Email preferences**. You will still see everything through the bell and phone notifications. See the *Email preferences* article.
- You cannot approve or reject several reports at once yet. Each report needs its own decision.
- Group approved reports into a project, such as "Storm cleanup 2026", so your dashboard shows the whole cleanup together. See *Projects and work planning*.

SETTINGS

Custom domain: your public pages on your own address

Serve your public pages from your own domain instead of a TrailsIQ address: a subdomain beside your existing site or your root domain as your real website, the DNS records to add, what pending means, and how to switch to a different domain without your pages going offline.

At first, your public pages have a TrailsIQ address made from your organization's short name. A **custom domain** puts them on your own address instead, such as `trails.yourclub.org` or `yourclub.org` itself. Nothing else about how you use TrailsIQ changes.

What you get

Your website appears at your own address: every page you built with the website builder, including its trail pages, news, events, forms and donations.

A custom domain is only for your website. Your organization's public trail page, with its conditions, hazards and crew updates, stays at its TrailsIQ address. It is the same page your followers see in TrailsIQ Go. Until your website is turned on, anybody who visits your domain is sent to that page.

The dashboard, the field app and your sign-in page stay where they are. A custom domain only changes the pages you send the public to.

Custom domains are a **Pro** feature.

Choosing a hostname

There are two good choices. The right one depends on what is already at your domain.

A subdomain, such as `trails.yourclub.org`, `map.yourpark.gov` or `conditions.yourtrust.org.uk`, sits beside whatever you already have. Your current website keeps working and your trails site appears next to it. Choose this if your organization has a main website it is keeping. It works with every DNS provider.

Your root domain, which is `yourclub.org` with nothing in front, makes TrailsIQ your organization's main website. Choose this if you built your site with the website builder and want it at the address people already know. Know two things first:

- **It replaces whatever is there now.** Your new site takes over from your current website the moment it goes live. Make sure the new site is ready and that you have moved anything you need from the old one.
- **Your DNS provider has to support it.** A root domain cannot use an ordinary CNAME record, so providers offer a substitute under one of three names: **ALIAS**, **ANAME** or a **flattened** CNAME. Most modern providers have one. If yours has none of them, use a subdomain instead.

A root domain includes www. When you add `yourclub.org`, `www.yourclub.org` is set up with it. Anybody who types the www lands on the same site at the root address, so you have one site with one address.

Pick something short and easy to guess, because it will go on signs.

Setting it up

Settings → Custom domain.

1. **Enter your address**, for example `trails.example.com` or `example.com`, and save.
2. **TrailsIQ shows you the DNS records to add.** A subdomain needs one CNAME. A root domain needs two: an ALIAS (or ANAME, or flattened CNAME) for the root, and an ordinary CNAME for www. Each comes with the exact name and target to use.

3. **Add those records with your DNS provider.** That is wherever your domain is managed: your registrar, your hosting company or your IT team's control panel. This is the only step you do outside TrailsIQ.
4. **Wait for it to be checked.** TrailsIQ checks every few minutes on its own, and **Re-check status** checks straight away. Each address shows its own status.

When the status says live, your site is up at that address. TrailsIQ sets up the security certificate for you, so there is nothing to buy, install or renew.

What "pending" means

A domain is **pending** from the moment you add it until your DNS record can be seen and the certificate is ready.

A pending domain shows nothing. We do that on purpose. A domain that is only half set up would show visitors a broken or insecure page with your name on it, which is worse than one that is simply not ready. Until it goes live, your TrailsIQ address keeps working as before, so your site is never down while you wait.

With a root domain, the root and www are checked separately. The root can be live while www is still pending. As soon as www is live too, it sends visitors to the root.

Most of the wait is for your DNS change to spread across the internet, which nobody can speed up. It usually takes minutes and sometimes hours, depending on your provider and the old record's settings. If it is still pending the next day, the record is almost always slightly wrong. Check for a dot at the end, a domain typed twice (`trails.example.com.example.com` is the usual one), or an old record for the same name that is still there and taking priority.

Changing to a different domain

Once a domain is live, **Change domain** on the same screen adds a new one beside it. Your pages stay up the whole time:

1. **Your current domain keeps working** while the new one is checked. Add the new domain's DNS records the same way you did the first time.
2. **They swap on their own** as soon as the new domain is live. Nobody has to come back and press anything.
3. **For 90 days, the old domain sends visitors to the new one**, to the same page they asked for. Links on signs, posters and bookmarks keep working while you replace them.

After 90 days the old domain stops working, so remove its DNS records then.

If you change your mind before the swap, **Cancel the switch** drops the new domain and leaves the current one as it was. Update your signs once the new domain is live, and not before.

Removing it

Remove the domain on the same settings screen. Your public pages go back to the TrailsIQ address straight away, and for a root domain the www address is removed too. If you are moving to another domain, use **Change domain** instead, so your site stays up in between.

Remove the DNS records as well, or they will keep pointing at a site that is no longer there. If it was your root domain, put your previous website's records back at the same time, or the address will show nothing.

Common gotchas

- **A root domain replaces your current website.** Use a subdomain if you are keeping the site you have.
- **A root domain needs an ALIAS, ANAME or flattened CNAME.** Most providers refuse an ordinary CNAME on the root, and where they accept it, it can stop your email arriving.
- **You make the DNS change.** We can tell you the exact records, but only whoever controls the domain can add them.
- **An old record for the same name will win over the new one.** If the name already had an A or CNAME record, delete it instead of adding a second one. With a root domain, check www as well as the root.

- **Nothing shows until the domain is live.** Do not print the new address on anything until the status says live.
- **Use Change domain instead of removing and adding again.** Removing takes your pages off that address at once. Changing keeps them up and sends the old address to the new one.
- **Only the public pages move.** Your team still signs in at the usual TrailsIQ address. There is no `trails.yourclub.org/login`.
- **It is a Pro feature.** On a lower plan, this section explains that instead of letting you set up something that will not work.

SETTINGS

Bring your own Mapbox token

Use your own Mapbox token to lift the map-load limit on Mapbox maps, or to turn on satellite photos on the TrailsIQ map. Mapbox bills your own account, and an optional monthly limit keeps you inside its free allowance.

TrailsIQ can draw your maps two ways. The TrailsIQ map is the one new organizations start on. Mapbox maps are the other. Your own Mapbox token does a different job on each.

- **On the TrailsIQ map** there is no map-load limit, so you never need a token for that. A token here turns on satellite photos from your Mapbox account, in any country. That is covered in The TrailsIQ map under *Satellite with your own Mapbox account*.
- **On Mapbox maps**, every plan includes a monthly allowance of map loads. A map load is counted each time a map opens in a browser or in the field app for your organization. If you go over it, your maps show a plain green background with your trails drawn on top, until your count for the last 30 days drops back under the allowance. Your own token removes that limit, and this article explains how.

Not sure which one you are on? On the TrailsIQ map, the map style picker offers *TrailsIQ*, *Outdoor* and *Minimal*. Mapbox maps carry the Mapbox logo in the bottom corner.

If you are on Mapbox maps and open a lot of them, you can also move to the TrailsIQ map, which has no usage limit and comes offline with a download. Its coverage follows your trails, so read that article first to see whether it suits your ground. Ask us to move you, usually the same day.

Why bring your own token

- **No TrailsIQ map-load limit.** Once your organization has its own Mapbox token, the plan limit no longer applies. Every map your team, your visitors and your website open is billed to your Mapbox account.
- **Mapbox's free allowance is generous.** As of 2026, Mapbox includes 50,000 free map loads a month before it charges anything. That is more than the TrailsIQ Core limit.
- **It costs less beyond that.** Above 50,000, Mapbox charges roughly $0.50 per 1,000 map loads (check their current pricing). If you are going over the TrailsIQ Pro limit, this usually costs less than upgrading your plan.
- **The maps look the same.** Your maps keep the same Mapbox style they had before, so your users will not see any difference.
- **You can stay inside the free allowance.** Turn on a monthly limit and TrailsIQ stops using your account before Mapbox would charge you. See *Stay inside the free allowance* below.

What you need from Mapbox

1. A Mapbox account (free to create).
2. A **public access token** with the default scopes. Every Mapbox account gets one automatically. It is labeled "*Default public token*" and starts with `pk.`. If you would rather make a separate token, press **Create a token** on your account page and leave every public scope ticked (styles:read, fonts:read, datasets:read and vision:read, which are the defaults).

Do not use a secret token (one that starts with `sk.`). A secret token can create and delete things in your Mapbox account. TrailsIQ sends your token to the browser so the map can load, so it must be a public `pk.` token.

Adding the token to TrailsIQ

1. Sign in to TrailsIQ as an owner or manager.
2. Open **Settings → Organization details**.
3. Scroll down to the **Mapbox access token (optional)** field, near the bottom of the page.
4. Paste your `pk.` token.

5. Press **Save settings**.

The note under the field changes to a green "*Using your own Mapbox account.*" That tells you the token is saved and in use.

On the TrailsIQ map you can paste the same token in **Settings → Satellite maps** instead. It is the same setting, saved in one place.

What changes after you save

- **Straight away,** your Mapbox maps load on your token. Pages that are already open keep their old settings until they are refreshed.
- **Saving a token does not switch which map you are on.** An organization on the TrailsIQ map stays on it and gets satellite photos from the token. To move to or from Mapbox maps, ask us.
- **On the billing panel,** the *Map loads (30d)* bar still fills up so you can see how busy your maps are. The plan limit no longer applies, so you will not see the plain green map, and you will not get the email that warns you at 80% of your map loads.
- **Weather, trail conditions and everything else** stay the same. The token only affects maps, and every other feature keeps the limits of your plan.
- **To remove the token,** clear the field and press Save. Your Mapbox maps go back to the TrailsIQ-provided token and the plan limit applies again straight away.

Stay inside the free allowance

If you would rather never pay Mapbox anything, turn on a monthly limit:

1. Open **Settings → Mapbox usage**. It appears once your own token is saved.
2. Tick **Stop using my Mapbox account when I reach a monthly limit**.
3. Leave **Map loads a month** empty for the default of 45,000, a little under Mapbox's free 50,000, or type your own number.
4. Press **Save**.

The page shows your map loads so far this month. When you reach the limit, your maps switch to the TrailsIQ map for the rest of the month, with your trails drawn on top as usual, and go back to Mapbox on the 1st. The count starts again on the 1st of each month, the same as Mapbox's.

Two things to know. A page that is already open keeps its Mapbox map until it is reloaded. And Mapbox's own count is the one it bills by, so it can differ slightly from ours, which is why the default sits a little under the free allowance.

Common gotchas

- **Use a public token.** A `pk.` token is public and is the right one. Do not paste an `sk.` secret token, because it can make changes to your Mapbox account.
- **Limiting the token to certain addresses.** Mapbox lets you limit a token to specific web addresses. If you do, add every address that shows a map: `app.trailsiq.com`, `go.trailsiq.com`, and your own domain if your website has one. A token limited to your own domain alone will not work on `app.trailsiq.com`, and the map will be blank.
- **The limit lives in TrailsIQ.** The monthly limit in **Settings → Mapbox usage** is what stops TrailsIQ using your account. Check your usage on your Mapbox account page too, because that is the count Mapbox bills by.
- **The field app picks up the token on its own.** It reads your settings each time it opens, so there is nothing to install or update.
- **Deleting the token in Mapbox** leaves your Mapbox maps blank. If you replace it, paste the new token into TrailsIQ before you delete the old one.

What's next

- If you would rather not run a Mapbox account at all, read The TrailsIQ map. It has no usage limit.
- If you are on Mapbox maps and not sure a token is worth it, open **Billing** and check your *Map loads (30d)*. If you use under 20,000 a month, your plan limit is fine. If you regularly go over 40,000, your own Mapbox token will almost certainly cost less than an upgrade.

- If your website gets a lot of visitors, turn on the monthly limit in **Settings → Mapbox usage** so a popular link cannot produce a surprise bill.

SETTINGS

Passkeys: confirm with your device instead of a password

Add your phone, laptop or security key to your TrailsIQ account so the handful of actions that ask you to confirm take a fingerprint rather than a typed password. It is optional, you can remove it at any time, and your password keeps working either way.

A passkey lets your phone or laptop confirm it is you with a fingerprint, your face or the screen lock you already use, instead of a typed password. Adding one to your TrailsIQ account is optional and takes about ten seconds. You can remove it again whenever you like.

Adding one

Open **Profile & preferences** from the account menu and scroll to **Passkeys**.

1. Give the device a name you will recognize later, such as *Work iPhone*, *Kitchen laptop* or *Yubikey on the truck keys*. Six months from now, the name is the only way to tell which one to remove.
2. Press **Add a passkey**.
3. Confirm with your password. We ask here because adding a new way into your account is something we want to be sure about.
4. Your device takes over with Face ID, Touch ID, Windows Hello, an Android screen lock or a security key you plug in. Follow whatever it shows you.

The new device appears in the list with the date you added it, and you are done.

What it changes

A handful of actions in TrailsIQ ask you to confirm even though you are already signed in: inviting or removing a member, sharing a trail with another organization, changing your email address, pointing a custom domain at your site, deleting your account. *Members, roles & permissions* has the full list and the reasoning.

Once you have a passkey, that prompt asks for your device instead of your password. The same actions ask at the same moment, and you answer with one press instead of typing. Everything a crew does in the field, such as filing maintenance, recording inspections, planning trails and counting stock, still asks for nothing.

What it does not change

You still sign in with your email address and password. A passkey is a faster way to confirm the actions above. You cannot sign in with it yet. Nothing about your password changes, and removing every passkey puts you back exactly where you started.

Register more than one

A passkey lives on one device. If your phone ends up in a river, its passkey goes with it, and no other device can stand in for it.

Adding a second one, such as your laptop as well as your phone, or a security key kept somewhere safe, takes another ten seconds. Then losing a device is an inconvenience rather than a problem. Repeat the steps above on the other device. Each one gets its own row and its own name.

Removing one

Press **Remove** on the row. The device is forgotten immediately and the prompt goes back to asking for your password if that was your last one.

Do this when you sell a phone, hand back a laptop, or cannot remember which device a row belongs to. If you cannot tell what a passkey is for, remove it.

Things worth knowing

- **Your device decides what it asks for.** Some phones want a fingerprint every time, and some laptops accept the screen lock you entered a few minutes ago. That is a setting on your device, not in TrailsIQ.
- **A passkey belongs to one browser on one device.** A passkey added in one browser is not offered by another browser on the same laptop. Add one in each browser you use, or stick to one browser for TrailsIQ.
- **A very old browser cannot use passkeys.** The Passkeys section tells you so instead of showing a button that will not work. Your password keeps working as it always has.
- **You can add up to ten.** That is more than anybody needs, and it keeps the list readable.

If you get stuck, for example with a device that will not register or a row you cannot remove, ask us and we will sort it out.

SETTINGS

Photos

Every picture your organization has uploaded in one gallery, filterable by what it is attached to, and reusable on your website, news and events.

Photos brings together every picture your organization has uploaded: the photos on tasks and infrastructure, inspection photos, points of interest, daily reports, discussions, checklists, planned trails, lifts, crags, events, news posts, your website and your logo. Open it from **Settings → Photos**, under *Organization*.

Owners and managers can open it, and so can anybody allowed to edit the website, news, events or crags. Expense receipts appear only for people who can approve expenses.

Finding a picture

Search by the name of what a picture is attached to, its trail or its area. The buttons under the search box show only one kind of picture, such as **Tasks** or **Inspections**, and you can pick several at once.

Narrow it further with:

- **Area** and **Trail**, which find a picture through whatever it is attached to. A photo from a bridge inspection is found under the trail the bridge is on.
- **Infrastructure**, for every picture of one bridge, sign or structure, including its inspections.
- **Date**, a range of days.
- **Only pictures with a map location**, for the ones taken somewhere on the map.

Each filter counts what it would show, and only offers choices that have pictures. On a phone, the filters fold behind the **Filters** button.

Looking at a picture

Tap a picture to see it large. The panel beside it says what the picture is attached to, with a link that opens that task, structure or page, and its trail and area. When it was taken somewhere on the map, **Show on a map** opens that spot.

The arrows and the arrow keys move to the next and previous pictures. **Open full size** shows the original, and **Copy link** copies a link to it.

Reusing a picture on your website, news and events

Every image field in the website builder, and the picture fields on news posts, events and crags, has a **Gallery** button beside **Upload**. When the field is empty it reads **Choose from your photos**. It opens your Photos in a window: find the picture and press **Use**.

The picture is added to that field as a copy. The original stays where it was, so deleting the task or post it came from never takes the picture off your website, and replacing the website picture never changes the task.

SETTINGS

Your brand color

Choose one color for every page your visitors see: your public site, the daily report, shared trail pages, proposals and QR codes. The dashboard and the field app keep the same colors for every account.

Settings → Organization details → Primary color sets one color, and TrailsIQ uses it on the pages your visitors see: your public site, a trail page you have shared, a proposal and a QR code. You choose it once, and it appears everywhere the public meets your organization.

Settings → Organization details with the Primary color picker

Where it appears

- **Your public site.** Headers, buttons and accents on every page a visitor lands on. The website builder has its own **Accent color** if you want the site to look different. If you leave that blank, the site uses this color. See How to use the website builder.
- **Public trail and network pages**, and anything you have shared by link.
- **Proposals and contracts** you send to a client.
- **QR codes** you generate, which start on this color.

Your logo, your trail colors and your map style are all separate choices. This is the one color that runs through the pages you hand to somebody else.

Where it does not appear

In the app itself. The dashboard and the field app use the same colors for every organization, and your brand color does not change them.

We chose this on purpose. The app is a tool your crew works in, so a menu, a button and a status label look the same in every account. That makes the app easier to learn, easier to screenshot and easier to ask us about. It also means every screen in this documentation looks like the one in front of you.

Your organization's name, your logo and your public site preview still appear inside the app as they always have.

Picking one

Pick the color you already use on your signs or jerseys. There is nothing else to set, and nothing else has to match it.

Two things worth knowing before you choose:

- A color that looks good on a sign is not always easy to read as **text on a white page**. A mid yellow or a pale green can look right in print and fade away on a screen. If your color looks faint on your public site, try a slightly darker shade of it.
- The color is used **exactly as you set it**. TrailsIQ does not adjust it, so what you see in the picker is what a visitor sees.

You can change it whenever you like. Your public pages update straight away, and there is nothing to republish.

WEBSITE

Website builder: pages, blocks and templates

Build your organization's public website from blocks: the home page, your own pages, the shared header and footer, and the templates every news post and event is shown in. Also covers the theme, publishing and using your own domain.

The **Website builder** is where you put together your organization's public website from ready-made blocks. You use it for your home page, your trail conditions and About pages, and the layout every news post and event is shown in. On the Pro plan and above you can add pages of your own too. Your site is live at a TrailsIQ address from the start, and you can connect your own domain when you want it to be your real website.

What the website builder is

Every organization gets a public website built from blocks, on every plan. Every plan can edit the home page, Trail conditions, About and the built-in trail pages. Adding pages of your own, and the Get involved starter page, comes with the Pro plan and above.

The site has two kinds of settings:

- **Settings for the whole site:** whether the site is published, the shared header and footer, and the accent color.
- **Each page's own settings:** its title, its address, whether it is published, where it sits in the list, and the blocks that make up the page in order. Two special pages are kept here as well: the **Post template**, which every news post is shown in, and the **Event template**, which every event is shown in.

The addresses work like this:

- Home: `go.trailsiq.com/{your-org-slug}`, or `/` on your own domain.
- A page: `go.trailsiq.com/{slug}/{page}`, or `/{page}` on your own domain.
- A news post: `go.trailsiq.com/{slug}/news/{post}`, or `/news/{post}` on your own domain.
- An event: `go.trailsiq.com/{slug}/events/{event}`, or `/events/{event}` on your own domain.
- A trail: `go.trailsiq.com/{slug}/trails/{trail}`, or `/trails/{trail}` on your own domain. Every public trail has one, and there is nothing to set up.
- The built-in lists of news and events are at `/news` and `/events`. To give either list your own layout, create a page with the address `news` or `events`.
- Calendar feeds are at `/events.ics` for the whole calendar and `/events/{event}.ics` for one event.

The Report a trail issue link. Wherever a block asks for a link, the chain button next to the box lists your pages, plus News, Events and **Report a trail issue**. Choose that last one for a button that lets visitors report a problem. On a phone with the TrailsIQ Report app, it opens the app ready to report to your organization. On a computer, or on a phone without the app, it opens the page where they can download it. You still write the button's text yourself, and you can type any other address instead. Press × on the link to clear it.

Your site starts with a set of starter pages, each with blocks already in place: Home, Trail conditions and About, plus Get involved on the Pro plan and above. About starts as a draft until you have written your own story. The shared header and footer are set up too. On Pro and above, where News and Events are included, there is also a Post template and an Event template. Every link on the starter pages goes to a page that exists, so the site works as it is while you make it your own. If you delete a starter page later, **Add starter pages** in the right panel puts back the ones that are missing. Every site also has a **Trails page**, a **Trail page template** and a **Network page template** from the start. All three are described below.

Opening the editor

Open **Website builder** from the sidebar, under *Public site authoring*. It appears when your role has the *Manage website* permission. The editor fills the whole screen, because the page you are building needs the room. It is the only part of TrailsIQ that does this.

The top bar has these controls, from left to right:

- **×** closes the editor. Next to it is your organization's initial.
- **Page picker:** the button under your organization's name. It shows the page you are editing, with *Page*, *Shared* or *Template* in front of it. Click it to switch pages. Pages are grouped under *Pages*, *Shared header and footer* and *Templates*, and a draft page has "*(draft)*" after its title.
- **New page** (the + icon) opens the *New page* window.
- **Draft** appears next to the page picker while the page you are editing is a draft.
- **Page settings** (the gear icon) holds the current page's title, address, publish switch and delete button.
- **Desktop / Tablet / Mobile** sets the width the page is shown at. Tablet and Mobile show the page exactly as it looks on a visitor's tablet or phone, and you can still click and edit every block. When your window is too narrow to show a tablet at full size, the page is drawn smaller to fit and the label above it says by how much, for example *Tablet · 820 · 84%*. Desktop works the same way on a laptop: when the editor's panels leave less room than a desktop screen, the page is laid out at desktop width and drawn smaller, for example *Desktop · 1024 · 67%*, so the menu and every block look the way a visitor on a computer sees them.
- **Site Published / Site Hidden** shows whether visitors can see the site.
- **All changes saved / Unsaved changes** shows whether there is anything left to save.
- **Undo / Redo** (Cmd/Ctrl-Z and Cmd/Ctrl-Shift-Z).
- **Save** (Cmd/Ctrl-S) saves the current page.
- **View live** opens the page you are editing in a new tab. It opens the public address, or your preview while the page is a draft or the site is hidden.
- **Publish / Hide** turns the whole site on or off. **Hide** takes your public website offline, and its pages and your public daily report then answer "not found". It is the same switch as *Hide public website* under *Settings → Public visibility*, so changing one changes the other. Your pages and settings are kept for when you publish again. The Website API and the embeddable trail-status widget keep working while the site is hidden, so a club that uses its own website can hide this one.

On a phone the bar takes two rows. The page picker is on the first, and the status and buttons are on the second. The width buttons are left out, because a phone already shows the phone layout.

Short messages appear at the top right and go away after about three seconds. If you try to leave with unsaved changes, your browser asks you to confirm.

The three panels of the editor

On a computer the editor has three columns. On a phone it has one column, with *Blocks*, *Preview* and *Details* tabs along the bottom.

- **Left panel: Layers and Add block.** There are two tabs at the top. **Layers** lists every block on the page in order, each with its icon and a line of what it says. Drag the `?` handle to reorder them, and point at a row to see Move, Duplicate and Delete. The shared **Site header** and **Site footer** sit above and below the list, and **Edit** on either one opens it. **Add block** shows the block library, grouped by what each block is for, with a search box at the top. A new block goes below the one you have selected, or at the end of the page when nothing is selected, and the panel tells you which before you pick. Point at a block in the library to see a preview of it drawn with your own site's design and data. The preview closes when you move away. The eye button keeps it open until you close it.
- **Center: the page.** The page is drawn in a browser window, with the shared header above it and the shared footer below. Click either one to edit it. Pointing at a block outlines it, shows its name and shows a small bar with *move up*, *move down*, *move to another page*, *duplicate* and *delete*. Click a block to select it. The **+** under a block opens the library to add a new block right below it. An empty page shows "*This page is empty*" with an **Add your first block** button. The editor draws every block, even empty ones, with a prompt or an empty frame wherever something is still missing. Visitors never see those. On your site, a block with nothing in it is left off the page, heading included. An unfilled card or photo inside a block is left out, and the starter words a new block comes with, such as *Your headline goes here.* or *Page title*, stay hidden until you write your own. Three blocks keep a line on purpose, because an empty list is news in itself. An automatic **Events** list says when nothing is coming up, a **News** list of your published posts says *No posts yet*, and **Live from the trails** says when nothing has been posted yet. **Hazards** disappears completely while nothing is active.

- **Right panel: settings.** With no block selected, it shows the **Theme**: your accent color, the template, corner style, who the site is for (*Organization* or *Business*), starter pages, donations, and links to your form inbox and payments. With a block selected, it shows that block's settings in three tabs, and the × at the top goes back to the Theme. A block type without its own settings screen shows its raw settings in a text box instead.

The three tabs for a block are:

- **Content:** what the block says and shows.
- **Style:** the block's colors, one row each. A row set to *Default* follows your theme and accent color. Click the color box or type a color code to set your own, and click × to go back to the default. The number next to *Style* is how many colors the block has.
- **Advanced:** the **Block ID**, which links can jump to with `#the-id`, and **Dividers**, which add a shape along the top or bottom edge of the block.

A block inside a **Columns** block keeps its colors, Block ID and dividers at the bottom of its own settings, inside the column.

Moving a block to another page

The arrow icon on a block (*Move or copy to another page*) sends it somewhere else: another page, a template, or the shared header or footer. Everything in the block goes with it, so its text, pictures, links and colors arrive unchanged. Pick the page, choose whether it goes at the top or the bottom, and choose whether to **Remove it** from this page or **Keep a copy** here too.

Moving a block saves the page you are on, because the block is no longer there. Any other unsaved changes on that page are saved at the same time, and the window tells you so before you press the button. A copy only changes the page it lands on. When it is done, **Open it** takes you to where the block went.

Pages a block cannot go to are listed but grayed out. A menu or footer block only belongs in the shared header and footer. A template part, such as the post body or the trail map, only works in its own template, where there is a post or a trail for it to show.

Blocks

The **Add block** library groups blocks by what they are for. The search box at the top narrows the list as you type, so try *donate* or *map*. The same groups appear when you add a block inside a column.

Page tops

- **Hero:** a large cover photo across the full width, with a headline and buttons. Under the photo, tap the part that must always show (*Keep in view*), and use *Darken the photo* until the headline is easy to read on it.
- **Page header:** a title band for the top of an inner page, with an optional button. Give the button a label and a link, or leave the label blank to hide it.
- **Alert bar:** a slim notice across the top of a page. Write your own message, or let it show your first closed trail automatically and hide itself while nothing is closed.

Text and layout

- **Text / embed:** headings, paragraphs and embedded content stacked in one block. A paragraph has a formatting bar above it with bold, italic, strikethrough, two sizes of subheading, bulleted and numbered lists, a quote, text color and links. To add a link, select the words, tap the link button, and enter a web address or a page on your site such as */about*. A link opens in the same tab unless you tick *Open in a new tab*. *Clear format* removes the styling from the selected words. To show a video, a map or a form from another site, add an **Embed** item and paste the code that site gives you.
- **Columns:** two to four columns side by side, each holding any of your other blocks. Pick a layout from the row at the top of its settings: *50 / 50*, *33 / 67*, *67 / 33*, *33 / 33 / 33*, *25 / 50 / 25* or *25 × 4*. If you switch to a layout with fewer columns, the blocks from the columns that go away move into the last one, so nothing is lost. On a phone the columns stack on top of each other, and the blocks inside them take a smaller, card-like shape.
- **Buttons:** a row of buttons you design yourself. A button can be an icon on its own in a square or a circle, an icon with a title and an optional second line, or a box with an icon on top, a title and a few lines of text. Choose any icon from the icon library, then a shape, a size, a link, and

the background, text, icon and border colors. A background left on default uses your site's accent color. *Icon size* makes the icon bigger or smaller than the button's size would give it, and an icon-only button grows to fit. On a button or a box, *Align across* puts the icon and words on the left, in the center or on the right. *Align up and down* sets where the icon sits next to two lines of words, or where a box's contents sit when the box is taller than they are. An icon-only button reads its title aloud to screen readers and shows it when you point at it, so give it a title. Any button can also have a *Background photo*. Tap the part of the photo that must stay in view, and use *Darken the photo* until the words on the button are easy to read. The background color shows while the photo loads.

- **Timeline:** milestones along a line, each with a date, a title, a sentence or two and an optional photo. On a wide screen the photo sits next to the words. In a narrow column or on a phone it goes above them. A timeline with no milestones yet only shows in the editor, the same as a gallery with no photos. Visitors see nothing, heading included, until you add some.
- **Questions:** questions and answers that open one at a time.
- **Files to download:** documents and images visitors can open or download, such as a trail map as a PDF, a waiver, meeting minutes or a spreadsheet. **Choose or upload files** opens your files library, where you can pick files you already uploaded or upload new ones. Each file can have its own name and a line about it. See Files and uploads.
- **Call to action:** a centered headline and subtitle with buttons. Add a photo and the block splits in two, with the photo on one side and the words on the other, like a *Join us* section.
- **How it works:** a row of numbered steps joined by a line.

Trail info

- **Trail conditions:** how many trails are open, shown as a sentence and a colored bar, above a row for each trail or network with its status. A trail's row also shows how wet it is, your crew's condition note, and its length when it is known. Wetness only shows while weather is turned on for your organization. Tick *Show forecast* to add the weather to the same block, above or below the conditions. It has the same choices as the Forecast block: which network, hourly or daily, how many days, and a heading and subtitle. On the Trailhead, Groundwork, Ridgeline, Backyard and Hub designs you also choose its background: white, inside the conditions panel, or see-through so the block's own background shows. Each trail or network in the block opens its own page on your site. Tick *Auto-scroll when overflowing* to show them in one line that scrolls by itself when they do not fit. It stops while a visitor points at it. If your organization does not show trail status publicly, this block does not appear on your site at all. No other block shows a trail's status either: the Trails list, the trail pages, the map and the hero's open count all leave it out.
- **Stats bar:** numbers that fill themselves in. They include trails, distance, networks and bridges, plus this year's volunteer hours, volunteers, trail tasks completed, events, event attendees, trail visits counted, and the share of days your trails were open. The numbers for this year count from January 1 and match your annual report. Any slot can also hold a number you type yourself. Tick **Count up to each number** and the numbers count up from zero when a visitor scrolls to the bar. A value without a number, such as YEAR-ROUND, stays as it is.
- **Trails list:** your full trail list, grouped by network. A visitor taps a network's name to fold its trails away and taps it again to show them. The name, trail count and status stay visible. Tick *Start with networks folded* to show only the network names at first, which keeps a long list short on a phone. A search always opens the networks where it finds trails. Each trail shows its length, difficulty and main use, and opens the trail's own page on your site.

  That page shows a map of the trail with its start, finish and any hazards, over contour lines of the ground around it. The contours are in feet or meters to match your organization's country. Below the map is an elevation chart a visitor can trace along the route, followed by the distance, climb and descent, the steepest and average grade, and which way the trail faces. Then come the difficulty, the direction the trail is ridden, whether bikes and e-bikes are allowed, the surface, the access, the main use and the other uses allowed, all taken from the trail's own settings. Anything you have not filled in is left out. After that are your description and the current conditions. Next to them are the trail's network, the hazards on the trail, a **Trails nearby** list of up to four of your other public trails with the closest first, and a link that opens TrailsIQ Go at that trail. A nearby trail that meets this one says *Connects*.

  While weather is turned on for your organization, a **Trail weather** box under the current conditions shows how wet the trail is now and whether it is drying or getting wetter. It has a chart of the last five days and the next two with the rain on each day, and it shows the soil temperature, today's high and the rain over the last 24 and 72 hours. The days around today are worked out the same way as today's reading, from rain that fell or is forecast. The chart and the bar above it always mark where caution starts and where the trail should close. If your organization shows trail status publicly, the box also gives a verdict: good, caution or too wet. If it does not, the box shows the readings without a verdict. When your crew has recently logged a wetness reading on the trail, the days after it start from that reading, the same way today's reading does.

- **Find your trail:** a dark section with cards that link to your trails.
- **Trail map:** a map of one of your networks, drawn right in the page in your site's own fonts and colors. Color the trails by status (open, caution, closed) or by each trail's own color, pick a map style (*Trails*, *Outdoor* or *Minimal*), and choose whether the trails are listed under the map. A visitor taps a trail, on the map or in the list, to see its status, your crew's note and its length, with a link to the trail's own page. On the TrailsIQ map it is a live map visitors can zoom and pan. One finger scrolls the page past it and two fingers move the map. With any other map setup, the block draws the trails as an outline instead.
- **Hazards:** active hazards, either listed by hand or filled in for you. The automatic list starts with maintenance tasks your team marked **Warn the public**, at their own level (Danger, Warning, Caution or Notice). After those come your closed and caution trails that have a note. A visitor taps a hazard to open its trail's page. A hazard you list by hand links to a trail when the trail you name is one of your public trails. While nothing is active, visitors do not see the block at all, heading included. The builder still shows it so you can find it. See Warning the public about a hazard.
- **Live from the trails:** today's updates from the trails, on your own site, newest first. It shows today's public day notes with their photos, the weather, and the trail and lift changes you have chosen to show. Settings → Live from the trails decides what appears beside your crew's posts: *Show weather*, and the events under *Also show*. An event you hide from the Daily report page is hidden here too, and turning off public trail status removes the trail rows. The block starts again at midnight in your organization's time zone. Choose how many updates show before **Show more**, leave the weather out if the page already has a forecast, and write the line visitors see while nothing has been posted yet. If you clear that line, the block stays off the page until something is posted. A public post appears on the site as soon as it is posted. A status change or new weather can take a few minutes to follow.
- **Grooming report:** when each trail was last groomed.
- **Hourly forecast:** the weather now and for the next couple of hours, or a few days ahead with each day's high and low. Pick which network's weather it shows, or leave it on *Automatic*, which uses the network with the most weather readings. A network with no forecast yet shows nothing, rather than another network's weather. On the Trailhead, Groundwork, Ridgeline, Backyard and Hub designs you choose its background: a white panel, or see-through so the block's own background shows.

Get involved

- **Get involved:** a row of tiles that link somewhere, each with an icon, a title and a line of text. It starts with Join, Donate, Volunteer, News and Events, and you can change, reorder or add to them. An optional **Subscribe** tile at the end takes an email address.
- **Donation form:** preset amounts, one-time or monthly gifts, and a progress bar toward a goal. Gifts go straight to your own PayPal, Stripe or other giving page.
- **Shop:** sell t-shirts, hats, stickers and other gear. Each product has a photo, a name, a price, a line about it, and the sizes or colors it comes in.

  If your Stripe account is connected, under **Settings → Card payments (Stripe)** or **Donations** in the Theme panel, a product priced as a plain number such as 25 needs nothing else. It gets an **Add to cart** button, with your sizes or colors to choose from next to it. Visitors can put several products in one cart, in different sizes and amounts, and a **Cart** button in the corner of the page opens it. **Check out** pays for the whole cart in one card payment on Stripe's page. That page asks where to send the order, unless you untick **Ask card buyers for a shipping address**. To charge for postage, enter an amount under **Shipping fee per order**. It is added once to every card order that asks for an address, however many products are in it. It shows under your products and in the cart before checkout, and appears on Stripe's page as **Shipping**. If a cart holds products from two Shop blocks with different fees, the higher fee is charged once. The cart stays in the visitor's browser while they look around your site. Each order is listed under **Settings → Payments** with who bought it, each product with its size and quantity, the shipping fee, the address and when it was paid. If a product in somebody's cart has been removed, has sold out, or no longer comes in the size they picked, checkout stops and tells them which one, and nothing is charged.

  A product can instead link to a checkout of your own, such as a Stripe Payment Link, a PayPal button, a Square checkout link or any other https:// page that takes payment. Its **Buy** button then opens that page in a new tab. That page collects the card, the address and the size, and the order is only recorded there. A product with its own link is bought on its own and does not go in the cart. Either way, the money goes straight to your account. Tick **Sold out** to keep a product on the page without a button. Without Stripe connected, a product with no checkout link shows without a button.

- **Volunteer signup:** name, email and the kinds of help somebody is interested in.
- **Newsletter signup:** a single email field.
- **Follow button:** a heading, a line under it and a **Follow** button, so visitors can get your trail alerts. Pressing it asks for an email address and sends a six-digit code. Typing the code in, plus a name the first time, creates a free TrailsIQ Go account with no password and follows your organization in one step. The alerts arrive in the TrailsIQ Go app on the visitor's phone. Once they sign in there with the same email, your organization is already followed. A visitor who already follows you sees **Following** on the button, and pressing it again lets them unfollow. On your own domain, the button opens the same page at go.trailsiq.com, where the sign-in happens. You can change the heading, the line and the button's label.
- **Contact:** your contact details next to a message form.
- **Quote request:** a form for somebody who wants work done. They pick the kind of project from options you write, then give their name, email and a message. You can also switch on any of organization, land type, location, size, timeline and budget. Land type, timeline and budget can each be a list of choices you write or a free-text box. A *What happens next* list sits next to the form. A visitor can send a request with the details alone and no message. Each request is emailed to your team and filed as a lead in **Projects**. See *Website templates, donations and forms*.
- **Sponsors:** sponsor logos or names, with optional links. Tick **Show in random order** and each visitor sees them in a different order, so no sponsor always gets the first spot. The editor keeps your own order while you work.
- **Local guide:** a guide to the places around town a visitor needs before and after the trail, such as coffee, the bike shop, food, a brewery or somewhere to stay. Each place gets a card with its kind, its name, a line in your own words about why to go, an optional **Trail perk** such as a member discount, and its address, hours, phone and website. Places of the same kind share a filter button, so a visitor can tap *Coffee* and see only the coffee. **Directions** opens the address in Google Maps. Fill in **Town** and it is added to any address that does not already name it, so *12 Main St* finds your Main Street and not somebody else's. Tick **Supports our trails** on a place and its card gets a ♥, with a line under the guide explaining what the heart means. It is a way to thank sponsors with something visitors actually use, and it tells visitors plainly which businesses help pay for the trails. You can list places that are not sponsors too, and the guide is better for it. Tick **Show in random order** so no business always gets the top spot.

Every email field on your site checks the address as it is typed. A common misspelling such as gmial.com gets a *Did you mean gmail.com?* line. The form also refuses an address whose domain cannot receive email, so everybody in your inbox is somebody you can write back to.

News and events

- **News grid:** a grid of article cards, each with a picture, a title and a short summary. It fills itself with up to 12 of your published news posts, or you can pick the posts by hand.
- **Events list:** upcoming events with their date, details and tag. Like the News grid, it can fill itself or you can pick the events.
- **Social posts:** posts you pick from Instagram, Facebook, TikTok, YouTube or X. Paste the link from a post's Share or Copy link button, up to 12 of them, and each shows as that platform's own post card or player. The editor tells you when a link is a profile or a page rather than a single post. You can also switch it to **Latest YouTube videos**, enter your channel link or @handle, and your newest videos appear on their own in your site's style, usually within half an hour of going up.

Photos and features

- **Photo gallery:** a grid of photos with captions.
- **Card slider:** a row of feature cards that slides, with the middle card larger. Each card can have a photo. Once it has one, tap the part of the photo that must stay in view (*Keep in view*), and every screen size crops around that spot.
- **Features grid:** cards in three columns, each with an icon, a title and a description.
- **Feature showcase:** two columns, with text and a bulleted list on one side and a picture on the other.
- **Project specs:** a spec sheet for one project. It has a heading, a few lines about the project, and rows of labels and values such as *Length — 4.2 mi* or *Machine — Mini excavator*, in two or three columns with an optional photo. Until it has a row it only shows in the editor, so an empty one never appears on your site.

App showcase

- **Marketing hero:** a dark top section with a badge, a headline, buttons and an optional picture of a phone.
- **Smartphone mockup:** a phone frame on its own, which you can place inside columns.

Menu and footer

- **Top menu:** the menu fixed across the top of the site. It belongs on the shared header page, not on a regular page.
- **Footer:** the footer of the site. It belongs on the shared footer page, not on a regular page.

Trails page

- **Trail directory:** every public trail, grouped by network, with a search box and filters for network and difficulty. Next to each network are its location and description from the network's own settings, and its trail count, length and how many trails are open. The network's name opens its own page, and a long description is shortened with a **Read more** link to that page. Each trail shows its difficulty, uses, length and status, and opens the trail's own page. You choose which filters show, whether network descriptions show, and how many trails each network lists before a *Show all* button: 3, 6, 10 or all of them.
- **Types of trail:** a card for each type of trail you have, such as singletrack, flow trail or multi-use path, with the networks where it is found. Each network button opens that network's page. The types come from each trail's own settings. A trail can have a main type and other types it also fits, and it is listed under each one. A type that no public trail has is left out.
- **Difficulty ratings:** each difficulty rating your public trails use, in your own difficulty colors, with how many trails have it and a couple of them to try.
- **Features by network:** a table of features such as rock gardens, roots, creek crossings and viewpoints, network by network. *Lots* means at least half of a network's trails have the feature, and *Some* means at least one does. It reads the features ticked on each trail, and *Horse access* comes from the trails open to horses.

All four start on the Trails page, and you can add any of them to another page as well. Each one has its own title and subtitle. In the last three you can rewrite the description of each type, rating or feature in your own words, or leave one blank to keep ours. In the builder, a block with nothing to show yet tells you what it needs.

The **Post template**, **Event template** and **Trail page template** groups only appear while you are editing those templates.

Every block lets you set its own colors, so you can change a hero's small heading, a card's background or a button separately from the site's accent color. The fonts come from the template you pick. See *Website templates, donations and forms*.

Creating and editing pages

+ New opens the "*New page*" window:

- **Title:** the name shown in the page picker, for example "*Conditions*".
- **URL slug:** the page's address, after a `/`. It fills itself in from the title until you change it. It can use lowercase letters, numbers and hyphens, must start and end with a letter or number, and must be different from your other pages' addresses.
- **Start as a draft:** ticked at first, so you can build the page and check it before visitors can see it. Untick it to publish the page as soon as it is created.

If the address breaks those rules, you see "*Slug can only contain lowercase letters, digits, and hyphens.*" or "*A page with that slug already exists.*" When the page is created, it appears in your page picker and opens empty, ready for blocks.

⚙ **Page settings** in the top bar opens a window for the current page. It shows the preview address, the title, the address, the *Page published* checkbox and a **Delete page** button. Untick *Page published* to turn a page back into a draft. The home page's address cannot be changed, and the home page cannot be deleted.

When you change a page's address, the old address keeps working. Anybody who arrives there from a bookmark, a link on another site or a search result is sent on to the new one. The same goes for a news post or an event whose address changes. If a new page takes over an old address, it gets the old page's visitors.

The Trails page. Every site has a Trails page at `/trails`, listed with your pages in the picker. It starts with a page header that counts your networks, trails and miles. You can use that same line on any page by choosing *Trail totals* as the header's small heading. Below the header are a Trail directory, Types of trail, Difficulty ratings and Features by network. You can move, rename, remove or add blocks as on any page. Its address cannot change, because every trail's own page sits under it, and it cannot be deleted. Like the home page it is always published. To keep it out of the menu, untick **Show in the menu** in its page settings, and the page stays at `/trails`. No other page can use the `trails` address. The Trails page only appears while trails are turned on for your organization, and visitors only see it once you have at least one public trail. Until then it is left off the site, along with every link to it in your menu and footer. The builder still shows the page and those links so you can set them up.

If you switch pages with unsaved changes, you are asked "*You have unsaved changes. Switch pages anyway?*"

The shared header and footer

The menu and footer are not set per page. They are on their own page in the page picker, under *Shared header and footer*. Each is a block with its own settings.

Menu settings. *Wordmark* is the name at the left of the menu, and it starts as your organization's name. *Menu links* is a list of links, each with a label and an address, which you can add to and reorder. The *Call-to-action button* is a filled button on the right of the menu, with a label and an address. Leave the label blank to hide it. Your organization's logo from Settings appears next to the wordmark on its own.

The Trails link. The starter menu lists Trails after Conditions, and you can move or rename it in *Menu links* like any other link. If your menu has no Trails link, your Trails page is added after Home, or first if there is no Home link, named after the page's title. To place it somewhere else or call it something else, add your own link to `/trails` in *Menu links*, and yours is used instead. A link already named *Trails* that only jumps to a spot on the home page, like the one in the starter menu, is pointed at the Trails page instead. The link is left out when *Show in the menu* is off, and while you have no public trails.

Footer settings.

- *Tagline.*
- *Social links* for Facebook, Instagram, X/Twitter, YouTube, LinkedIn, TikTok and Strava. Each shows the platform's icon, and a row with no link is left out. You can add a line above the icons, such as *Follow us on*, which only shows while there is at least one icon.
- A *TrailsIQ Go* switch, on for every site. The TrailsIQ Go icon in your footer opens your organization's page in the app, or offers the download to somebody who does not have it yet. There is no link to enter. The icon is hidden while your organization is hidden from the app.
- *Link columns*, each with a heading and a list of links.
- A *Copyright line*, which starts as "*© {year} {org name}*".

Both appear on every public page. In the editor they are locked, with a purple *Shared header — click to edit* or *Shared footer — click to edit* label. Clicking one takes you to its settings.

Post, event, trail and network templates

Every news post and every event is shown through a template, one for posts and one for events. You set the layout once and every post or event uses it.

Post template. Find it in the page picker under *Templates* → *Post template*. It is built from blocks that only exist in this template: **Post hero**, **Post title**, **Post meta** (the date it was published and a "*By {author}*" line), **Post excerpt** and **Post body**. Put them in whatever order you like, place them in Columns, or add a call to action underneath. If you empty the template, posts are shown with a simple default of the hero, the summary and the body.

Event template. This works the same way. Its blocks are **Event hero**, **Event title**, **Event date/time**, **Event location**, **Event excerpt**, **Event body**, **Event trail work** and **Event signup form**. Event trail work is headed "*What we'll be working on*" and lists the open maintenance tasks linked to the event. Event signup form is where people sign up. Rearrange them, place them in Columns or add any other block, such as a features grid underneath.

Trail page template. Every trail's own page is built from this template. That is the page a visitor reaches from the Trail directory, the Trails list or a map. Find it under *Templates* → *Trail page template*. Its blocks are the parts of a trail's page:

- *Trail header*: the name, difficulty, status and photo.
- *Trail map and profile*.
- *Trail details*: length, climb, grade and type, then a *Points of interest* box listing the trail's public points.
- *About the trail*: the description and current conditions.
- *Trail weather*.
- *Trail hazards*.
- *Network and nearby*: a *Trail features* box, then the network, uses, trails close by and a report link.

It starts with the header, map and details across the page. Below them is a Columns block with the description and weather on the left and the hazards and nearby trails on the right. You can reorder the parts, remove one, change a heading, or add any other block between them, such as a Call to action or a Donation form. The builder shows the template filled in with one of your public trails so you can see the result, and every trail fills it with its own information.

Network page template. Every public network has its own page too, at `/networks/` followed by the network's name. Visitors reach it from the network names and **Read more** links on the Trails page, the network buttons under *Types of trail*, and the *Other networks* list on another network's page. Find it under *Templates* → *Network page template*. Its blocks are:

- *Network header*: the name, location and how many trails are open.
- *Network map*: the trails in their difficulty colors, with trailheads and hazards, over contour lines. Pointing at a trail shows its name and clicking it opens the trail. The map also shows the trail count, total length, open count and the lowest and highest points.
- *Network details*: season, parking, fees, uses, dogs, access and who manages the network, plus the mix of difficulties.
- *About this network*.
- *Trails in this network*.
- *Network weather*.
- *Trailheads*: trailhead and parking points, with directions.
- *Network hazards*.
- *Other networks*.

It starts with the header, map and details across the page. Below them is a Columns block with the description, trails and weather on the left and the trailheads, hazards and other networks on the right. Season, fees and dogs come from the network's **Visitor details**.

Trailheads lists the network's points of interest marked *Trailhead* or *Parking* in one *Trailheads & parking* box, with a row for each location. Each row opens to show the address and parking, the trails that start there with a link to each, what is on site, the other types the point also is, and the types of any infrastructure linked to it, such as a kiosk that is also a trail map. Each row also has a **Get directions** button, and the first location starts open. A trail starts at a trailhead when one of its ends is within 75 m (about 250 ft) of it, or when the trailhead is filed against that trail. An uphill-only trail starts at its bottom and a downhill-only trail at its top. Only public trails are listed. The block's settings let you change the box's heading and the *Trails from here* label. A hidden network has no page. With public trail status turned off, the page shows no conditions and no open counts.

Template blocks are hidden from the library on regular pages, so you cannot put a **Post body** on your home page by mistake and end up with a blank space.

Theme and block colors

Template decides the whole design: the fonts, the spacing and how each block is laid out. Every template has every block, so switching templates keeps all your pages and words. Pick one in the right panel when no block is selected. *Website templates, donations and forms* explains the choices.

Accent color is the other setting that applies to the whole site, in the same panel. If you have not set one for the website, the site uses the primary color from your organization's Settings, and if that is blank too, it uses a default. The accent color is used for buttons, highlighted words in

headlines, and what happens when a visitor points at something, across every block.

Each block's **Style** tab lets you replace the accent color for that block alone, for example on a hero's small heading, a card's background, a section's background or a button. A color set on one block never changes the blocks around it.

Logo comes from Settings → Organization logo. Change it there once and the menu, the browser tab icon and every share preview update.

Uploaded images. Every image block uses the same uploader. It takes JPG, PNG or WebP files up to 5 MB, and they count toward your plan's storage. If your storage is full, the upload stops and says so. A picture larger than any screen can show is made smaller as it uploads, to 2560 pixels on its longest side, so your pages open quickly on a phone. Nothing is cropped, and a transparent PNG stays transparent. Pictures for news posts and events are handled the same way.

Publishing and previewing

Your website is live from the start. Every organization gets one as soon as it is created. The home page, Trail conditions and Trails pages are ready to read without you writing a word, and an About page waits as a draft for your own story. You can change anything you like, but you do not have to.

The **Publish / Hide** button in the top bar shows or hides the whole website.

Links to your trails open them on your website. While your website is published, a link to a trail or a network at its TrailsIQ address, such as a link somebody shared or a printed QR code, opens that trail's or network's page on your website. While your website is hidden, the same link shows the older TrailsIQ page, so it keeps working either way. The **Open** link on a trail's page in the dashboard works the same way.

The home page and the Trails page are always published. Every organization's site has them, so their Page settings have no draft switch.

Draft pages. A page can be a draft while the rest of the site is live, so you can build it, check it and publish it when it is ready. New pages start as drafts. While you edit one, a bar above the page says so, with a **Publish page** button next to it, and **View live** opens your preview of it. A draft:

- shows "page not found" to visitors;
- is left out of your menu and footer, and buttons that point to it are hidden, so nobody clicks through to a missing page;
- is left out of the list of pages that search engines read.

To turn a published page back into a draft, untick *Page published* in its Page settings.

Links to a draft are left out everywhere a visitor would see them, including the menu, the footer and buttons such as the home page's *About*. They are still there in the editor, and visitors see them again as soon as the page is published.

Preview. Owners and managers can always see every page, published or not, with a yellow banner across the top:

- "*Preview — this site is currently hidden from visitors.*" when the site is hidden.
- "*This page is a draft. Only owners and managers can see it; visitors get a "page not found".*" on a draft page.

View live opens the page you are editing. On a live site it opens the public address. On a draft page, or while the site is hidden, it opens your preview, which only your organization's owners and managers can open.

Working on a new version of your site

A draft page covers one page. To change the whole site at once, such as a new template, a different menu or several pages reworked together, start a **development version**. It is a full copy of your website that you can change as much as you like, while visitors keep seeing the live site exactly as it is.

- **Start one** with **Development** in the top bar, or **Start a development version** in the Versions card on the Theme panel. The builder opens the copy, with a green bar above the page to remind you.
- **Everything you change goes into the copy.** That includes pages you add, rename or delete, blocks, the menu and footer, the template, colors and corners. Switch between **Live** and **Development** in the top bar at any time.

- **Preview** opens the development version at your site's own address, with a green bar across the top. Only your organization's owners and managers can open it. Search engines never see it, and your own visits are not counted in your analytics.
- **Publish to live site** makes the development version your website. Pages you renamed keep their old addresses working, and search engines are told what changed. Publishing only changes the design. A hidden website stays hidden until you press **Publish** in the top bar.
- **Restore it** in the Versions card brings back the website as it was before your last publish. The version it replaces becomes the one you can restore, so pressing it again undoes the restore.
- **Discard** throws the development version away and leaves the live site as it is.

A few things belong to your organization rather than to a version, so they are the same in both and any change shows straight away. These are whether the site is published or hidden, your site description, share picture and icon, and donations and payments. Forms in the development preview send their answers to the same place the live forms do.

You can still fix things on the live site as normal. A typo, new opening hours or a changed photo can go straight onto the live site while a development version is open. Whatever you save there is copied into the development version too, so publishing it does not bring back the old text. A new page you add to the live site appears in the development version, and a page you delete from the live site is removed from it.

The one exception is something you changed in both places, such as the same block or the same page name. The development version keeps its own change, and the green bar lists each one. When you publish, they are listed again before the live site is replaced, so you can copy the live change across first if you want to keep it.

Using your own domain

At first your site lives at `go.trailsiq.com/{your-org-slug}`. Older `app.trailsiq.com/site/…` links still work and send visitors there. While you are signed in as an owner or manager, those links open your preview instead, so you can check drafts before anyone else sees them. Connect a **custom domain** to make it your real website. That can be a subdomain such as `trails.example.com`, or your main domain `example.com`. If you use the main domain, `www.example.com` is set up too and sends visitors to the same site. Custom domain explains which to choose and the DNS records each one needs.

You set it up in Settings → Custom domain. It comes with the Pro plan and above. The steps:

1. Enter your domain. If it is not usable, you see one of these messages: "*Enter a valid hostname like trails.example.com (no http://, no path).*", "*That domain is already attached to another organization.*" or "*That hostname is reserved.*"
2. Once it is accepted, you see "*Custom domain registered. Add the DNS record at your registrar, then click* "*Re-check status*"."
3. At the company you bought the domain from, point the domain at the record shown on the page. If your main domain cannot use that kind of record, use the IP address shown instead.
4. Click **Re-check status** until the label changes to "*Live*".

Once the domain is Live, your site is served at that address. Forms, event signups and the donation page work there exactly as they do on your TrailsIQ address, with spam protection built in.

If your website is turned off, anybody who visits your domain is sent to your organization's public trail page at its TrailsIQ address, so they can still find you. Links to individual pages on your domain stop working until the website is turned back on.

Plans and permissions

What each plan includes. The website builder is on every plan. On the Starter and Core plans you can edit the pages every site has: Home, Trail conditions, About, the Trails page, and the trail and network templates. The **New page** button stays in the top bar and tells you which plan adds pages of your own, with a link to upgrade. News and Events come with Pro and above. On a plan without them, the starter menu and footer do not link to them, and the Post and Event templates are not in the page picker.

Blocks per page. On the Starter and Core plans each page holds up to 5 blocks, counting blocks inside Columns. The count above the list shows how many are in use. Once a page is full, the block library says so, and you cannot add another until you remove one. The default home page uses all 5. The shared header and footer, the templates and the Trails page do not count. A page that already holds more, for example after a change of

plan, keeps every block and can still be edited and trimmed. Pro and above have no limit.

Links to other websites. On the Starter and Core plans, a link in a block can go to your own pages, to TrailsIQ, to your own domain, to an email address or to a phone number. Links to other websites come with the Pro plan. A link field shows a note when it points somewhere else, and the page will not save with a new link like that. The social icons in your footer can link to your profiles on every plan, as long as each one goes to its own platform. For example, an Instagram icon has to open instagram.com and a Facebook icon facebook.com. A link that is already on a page stays.

The shared header and footer. On the Starter and Core plans, the shared header holds only the top menu and the shared footer holds only the footer, and the block library only offers that block there. Extra blocks in the header and footer come with the Pro plan. Any that are already there after a change of plan stay.

Blocks on Pro and above. These blocks come with the Pro plan: the Contact, Quote request and Volunteer signup forms, Get involved, the News grid, the Events list, Files to download, the Smartphone mockup, Text / embed, Buttons and Columns. On a plan without them they stay in the block library, grayed out and marked with the plan's name, and you cannot add them. A block like this that is already on one of your pages stays and keeps working. The Newsletter signup, the Follow button and the Donation form are on every plan.

Who can edit the website. The "*Manage website*" permission lets someone edit the website pages, menu, theme, and the home and About content. It is on for owners and managers and off for field workers and volunteers. You can change it for each role in Settings → Roles & permissions. The Website builder link in the sidebar only shows for people who have it.

Custom domains need the same plan and have a permission of their own. If your plan does not include them, adding a domain says "*Custom domains are available on the Pro plan and above.*"

Common gotchas

- **The home page's address is fixed.** It cannot be changed or deleted. Every link to your home page depends on it, and your site needs a front page.
- **Hiding the site hides every page from visitors**, along with your public daily report. Owners and managers still see every page, with the yellow preview banner. While the site is live, you can unpublish single pages.
- **The menu and footer belong on the shared header and footer page.** You cannot add them to a regular page, because the library hides them there.
- **Post and event body blocks only work in their templates.** They show the post or event being viewed, so a **Post body** block on your home page would show nothing.
- **Automatic news and event blocks only show published items.** A news post has to be published and its publish date reached. An event has to be published and still upcoming.
- **Automatic blocks show up to 12 items.** *Max posts to show* lets you pick any number up to 12.
- **Uploaded images count toward your plan's storage.** If you are out of space, the upload is refused and tells you why.
- **Forms on your own domain still show their thank-you message** after somebody signs up.
- **Links to your own pages work on both addresses.** A link to `/about` in a block becomes `go.trailsiq.com/{slug}/about` on your TrailsIQ address and stays `/about` on your own domain. You write the link once and it works on both.
- **Search titles and descriptions are written for you.** Every page gets its own title: the page name and your organization's name, or just your name on the home page. Its description is taken from its opening text, which is the line under its heading or its first paragraph. A news post or an event uses its summary, and a trail or network uses its description, or a sentence saying how long the trail is, how hard and where it is. The home page uses your site description from Settings → Website if you have written one. Page settings shows what a search result for that page will say. To write it yourself, press *Write your own* there, and clear the boxes to go back to automatic. Search results cut a title off after about 60 characters and a description after about 160, and Page settings shows the count.
- **Search engines are told what each page is about.** Events carry their date, time and place, posts their date and author, and trails and networks their location. Every page sits under Home in a trail of links, so a search result can show more than a plain link. Every published page, post, upcoming event, network and trail is listed in a sitemap that search engines read on their own. With your own domain, the sitemap and

every page's address use that domain, and the TrailsIQ copy of your site points search engines there. A page you are previewing before it is published is marked so search engines leave it out.

- **Your news has a feed.** Once you have published a news post, your website has an RSS feed at its address followed by feed.xml, and every page points feed readers to it. People can follow your news in a feed reader, and most newsletter tools can send it out on their own.
- **You can see which searches find you.** Settings → Search and analytics takes the code Google Search Console gives you. That lets you prove the website is yours and see the searches that bring people to it. It also takes a Google Analytics measurement ID to count visits. Your own previews from the builder are not counted. Tick **Show a cookie banner** there and visitors are asked first. Analytics only loads after they press Accept, a visitor who declines is not counted, and their choice is remembered. A link to `#cookie-settings` anywhere on your site, such as in the footer, brings the banner back so a visitor can change their mind. The banner only appears while a measurement ID is set, because nothing else on your website uses cookies.
- **People can find you without anybody linking to you.** Once your website is live, it is listed in the TrailsIQ club directory at go.trailsiq.com, a page that links every live club website and helps search engines find yours. Bing, and the search engines that share its results, are told within minutes whenever you publish, change or take down a page, news post or event. Google reads your sitemap instead. Hiding your public website also takes it out of the directory.
- **You can take your website with you.** Settings → Download your website gives you one zip file with every page, news post and event, drafts included, and every picture they use. The pages hold your words and pictures and open in any browser without internet. A data file in the zip holds every block and setting, for whatever you move to next.
- **Every page arrives complete.** Your site's pages are built before they are sent, so a search engine can read your headings, trail list, news and events straight away. Visitors see the same page either way. Each page also downloads only the design your site uses, so it opens faster on a phone, and search engines take that into account too.

What to do next

- Read the *News* article to see how the News grid fills itself with your published posts.
- Read the *Events* article to see how the Events list, the `/events` page and the **Event signup form** on each event fit together.
- Connect your own domain in Settings → Custom domain and launch your site. You can keep improving the words, photos and menu links while the site is live.

WEBSITE

News: write, publish and show articles on your site

Write and publish news posts that appear at /news/{slug} on your public site and in the News grid block. A post is built from the same blocks as the website builder, so adding a rich section is one drag away.

News posts are your organization's public articles: trail updates, ride reports, announcements, opening day recaps and anything else your community wants to hear about. Each post has its own page at `/news/{slug}` on your public site and appears in the News grid block on any page you add it to. Every post uses the **Post template** you design in the website builder, so all your articles look consistent.

What a news post contains

A news post is kept simple on purpose. It has:

- **Title:** up to 200 characters.
- **Web address:** the end of the post's address, made of lowercase letters, numbers and hyphens. No two posts can share one.
- **Excerpt (optional):** a short summary shown on cards and under the title. Up to 500 characters.
- **Hero image (optional):** one picture, shown at the top of the article and on News grid cards.
- **Body:** a set of website builder blocks, the same ones you use in the website builder, arranged by drag and drop.
- **Draft or Published:** a post is one or the other. You cannot schedule a post for later.
- **Published date:** set the first time you publish. It is cleared if you unpublish, and kept when you publish again, so the order of your latest news does not change.
- **Author:** the person who first saved the post.

Deleting a post is permanent. There is no trash and no undo.

Opening News

News is in the sidebar under *Public site authoring*. The row appears when your plan includes News and your role has the *Manage news posts* permission. On a plan without News, the row is not in the menu. The News page itself still opens and explains which plan includes it, so a bookmark or a link from an article like this one still takes you somewhere useful.

The News page shows:

- The title "*News*" and "*Posts that appear on your website's Latest news block and at /news/{slug}.*"
- A green **+ New post** button at the top right.
- In a new account, a dashed card saying "*No posts yet.*" with a **Write your first post** button.
- A table with **Title** (with the post's address underneath), **Status** (a green *Published* label or a gray *Draft* label), **Published** date, **Updated** date, and **Edit** and **Delete**.

Every post, published or draft, is on this page. There is no search, filter or paging. On a phone, the table becomes a list of cards.

News Index page with the New post button, empty-state card, and the Posts table

Writing your first post

Click **+ New post** to open the full screen editor. It is the website builder's editor, with **Layers** and **Add block** on the left, the post in the middle, and **Post details** on the right. On a phone, these become tabs at the bottom: *Details*, *Blocks* and *Preview*.

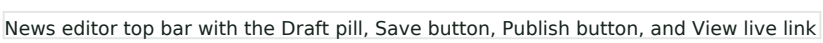
The bar at the top shows:

- the post's title
- **Desktop**, **Tablet** and **Mobile**, to see the post at those widths
- a *Draft* or *Published* label
- *All changes saved* or *Unsaved changes*
- **Save**
- **View live**, which opens the article in a new tab (a draft shows a yellow "*Preview — this site is currently hidden from visitors.*" banner)
- **Publish** or **Unpublish**, which also saves, so you cannot publish without saving

On a phone, the bar takes two rows.

Short messages confirm what happened and disappear after about three seconds: "*Post created.*", "*Post saved.*" and "*Post deleted.*"

If you try to leave with unsaved changes, your browser warns you first.



Every field on the form

The **Post details** section on the right has:

- **Title:** for example "*Post title*". Up to 200 characters.
- **Web address:** shown after `/news/`, for example "*my-post*". It fills in from the title until you edit it yourself. The help text says "*Lowercase letters, digits, hyphens. Auto-fills from the title until you edit it.*" If something is wrong, you see "*Slug can only contain lowercase letters, digits, and hyphens.*" or "*A post with that slug already exists.*"
- **Excerpt:** a short summary, for example "*Short summary used in the Latest news block + post-meta slot.*" Up to 500 characters.
- **Hero image:** press "*+ Upload image*" or drop a picture there. JPG, PNG or WebP, up to 5 MB. If you skip it, News grid cards show a placeholder instead.

At the bottom of the panel, a note says: "*Hero, title, meta and body are laid out by the Post template page in the website builder. Edit it there to restyle every post at once.*" You cannot style one post differently from the others. Layout changes are made on the Post template in the website builder and apply to every article.

Click a block in the body and the panel shows that block's settings instead, in **Content**, **Style** and **Advanced** tabs. The × at the top takes you back to *Post details*.



The body works like the website builder

The post body is not a word processor. It uses **exactly the same blocks** as the website builder. **Layers** lists your blocks ("*No blocks in the post body yet.*" when there are none), **Add block** opens the block library, the middle shows them as they will look, and the panel on the right edits the one you have selected.

The block library has *Default blocks* (Text / embed and Columns) and *Prebuilt blocks* (Hero, Stats bar, Trail conditions, Hourly forecast, Card slider, News grid, Find your trail, Events list, Sponsors, Features grid, How it works, Call to action, Marketing hero, Smartphone mockup, Feature showcase and Trails list), the same ones as in the website builder. The Post template blocks (**Post hero**, **Post body** and the rest) are not offered here, because they belong on the Post template page and not inside a single post.

An empty post says "*The post body is empty*" and has an **Add your first block** button.

If you are new to blocks, read the *Website builder* article first. They work exactly the same way.

Publishing

A post is either a **Draft** or **Published**. You cannot schedule one. When you press Publish, the post is public straight away.

Publish saves and publishes in one step. The first time you publish, the published date is set to now. Unpublishing clears the date. Publishing a post again keeps its original date, so the order of your latest news stays the same.

Managers can preview a draft with **View live ↗**, which shows the yellow "*Preview — this site is currently hidden from visitors.*" banner. Anybody else who opens a draft's address gets a page not found.

Hero image and pictures in the body

- **Hero image:** one per post, added with + *Upload image*. It appears at the top of the article (through the **Post hero** block on your Post template) and as the picture on News grid cards. JPG, PNG or WebP, up to 5 MB. If you skip it, the card shows a placeholder.
- **Pictures in the body:** add them with any block that takes an image. The Hero, Card slider, Feature showcase, Features grid, News grid, Sponsors and Find your trail blocks all use the same uploader, with the same 5 MB limit and the same file types.

Every picture you upload counts toward your plan's storage. If an upload is refused because your storage is full, free up some space or upgrade your plan, then try again.

Where news appears on your site

News appears in three places, all built with the website builder:

1. **Each article** has its own page at `go.trailsiq.com/{orgSlug}/news/{postSlug}`, or `/news/{postSlug}` on your custom domain. It shows your site's header, your Post template and your site's footer. If you have not customized the Post template, a standard layout is used, with the hero, excerpt and body. The template shows a *By {author}* line at first. You can remove it, restyle it or replace it in *Website builder → Post template*.
2. **The News page** is at `go.trailsiq.com/{orgSlug}/news`, or `/news` on your custom domain. Its heading says "*Latest*", "*News*" and "*Trail updates, ride reports, and announcements.*" Posts are grouped by month ("*June 2026*" and so on) as cards with the hero image, date, title and excerpt. With no posts, it says "*No posts yet. Check back soon.*" If you create a website builder page with the address `news`, your page is used instead of this one.
3. **The News grid block** can go on any website builder page. Its **Article source** setting has two choices. "*Latest from News dashboard (recommended)*" shows your latest published posts automatically, up to the number in *Max posts to show* (1 to 12, starting at 6). "*Manual list (typed in here)*" lets you choose the articles yourself. The automatic choice adds a "*View all news →*" link. With no published posts it says "*No published posts yet — publish a post in the News dashboard.*"

Visitors only see published posts. Your own team can see drafts, always with the preview banner.

Editing, unpublishing and deleting

- **Edit:** click *Edit* on the News page, or open the article from its title. It opens the same editor. You can change the web address. Once you have edited it, or once the post has been saved, it no longer fills in from the title.
- **Unpublish:** click *Unpublish* in the top bar. The post goes back to being a draft and its published date is cleared. It disappears from your public site straight away, and the News page shows it as *Draft*.
- **Delete:** only from the News page. Your browser asks `Delete "{title}"? This can't be undone.` The post and its uploaded pictures are deleted for good, and you see "*Post deleted.*"
- Publishing, unpublishing or deleting a post sends no email or notification. The post simply appears or disappears.

Who can use News

Plans. News is on Pro and above. On other plans, the sidebar row is hidden. If somebody opens the page from a link, it shows a "*Pro plan required*" card ("*News posts are part of the Pro plan, alongside the website builder.*") with an "*Upgrade to Pro*" link, and the + *New post* button is hidden. Creating, editing or deleting a post is refused with "*News posts require Pro or Enterprise.*"

Roles. The "*Manage news posts*" permission says "*Create, edit and delete news posts that show on the org's website. Requires the org to be on Pro or Enterprise — the toggle has no effect on Free orgs.*" Owners and managers have it at first, and field workers and volunteers do not. Owners can give it to other roles in Settings → Roles & permissions. TrailsIQ staff can always use News.

The sidebar row only appears for people with the permission.

Common gotchas

- **You cannot schedule a post.** Publishing is immediate. If you want a post to go out tomorrow, save it as a draft and publish it yourself then.
- **To link posts together,** add a *Call to action* or *Text / embed* block in the body with a link to the other post.
- **The hero image is the only cover picture.** The News grid card and the article's hero use the same picture.
- **The body is made of blocks, not typed like a document.** If your team is new to TrailsIQ, have them read the *Website builder* article first.
- **Post template blocks are not offered inside a post.** They belong on *Website builder* → *Post template*, where they apply to every article. Make style changes there, not in a single post.
- **A custom domain gives you a short `/news/{slug}` address.** Without one, articles are at `go.trailsiq.com/{orgSlug}/news/{slug}`. Both addresses stay the same over time.
- **Deleting is permanent.** There is no trash and no way to restore a post. If you are not sure, unpublish it instead.
- **Pictures count toward your storage.** If you get a "storage full" error, free up some space or upgrade your plan.
- **The News grid shows up to 12 posts automatically.** Its *Max posts to show* setting accepts any number up to 12, and the field says so.
- **Web addresses have strict rules.** Use only lowercase letters, numbers and hyphens, starting and ending with a letter or number. Accented letters, spaces, capital letters and hyphens at either end are refused.

What's next

- Style your Post template once in the website builder so every future article matches your brand: hero size, where the author line goes, body width and a call to action.
- Add a **News grid** block to your home page and set its source to *Latest from News dashboard (recommended)*, so new posts appear there automatically.
- Read the *Website builder* article if any of the blocks are unfamiliar.

WEBSITE

Events: sign-ups, waivers, waitlists and reminders

Create events with their own public page, sign-up form, waiver, waitlist, tickets, calendar feed and reminders. Covers repeating events, walk-ins, check-in, volunteer hours, and linking maintenance tasks to volunteer workdays.

Events are your organization's calendar of workdays, rides, races, get-togethers and anything else you want to invite people to. Each event has its own public page and sign-up form, a waitlist for when it fills up, a calendar feed, reminders the day before through TrailsIQ Go, and a list of attendees you can work from as the day gets closer.

What an event is

An event is one entry with its own list of sign-ups. Each one has:

- **Title and content:** a title, a web address, a short summary, a main image and a page body, built from the same blocks as the website builder.
- **When:** a date (required, in your organization's timezone), optional start and end times, and an *All day* option. An event counts as upcoming until its day is over in your timezone. That applies on your website, in TrailsIQ Go and in reminders, wherever the reader is.
- **Where:** the location in words, such as "Trailhead, town, address...".
- **What kind:** a *Type* ("Volunteer day", "Meeting", "Group ride") and an *Audience* ("All ages", "Members").
- **Publishing:** draft or published, the date it was first published, and a *Notify followers when published* option.
- **Repeats:** optional. Daily, weekly or monthly, every so many days, weeks or months, with an optional end date. A repeating event is one entry that covers every date.
- **Sign-ups:** whether sign-ups are on, how many places (or no limit), a deadline, which form fields to show, and wording for the sign-up form on this event.
- **Tickets:** optional. Ticket types with prices, paid by card through your own Stripe account.
- **Waiver:** whether a waiver is required, and the waiver itself, typed in or uploaded as a PDF or a picture. Each person ticks to agree, and the time and their IP address are saved with their sign-up as a record.
- **Trail work:** the open maintenance tasks this event will work on, so people know what they are signing up for.

Creating an event

Events is in the sidebar under *Public site authoring*. It appears when two things are true: your plan includes events, and your role has the *Manage events* permission. On a plan without events, it is not in the menu. The Events page still opens if you go to it, and names the plan that includes them.

The Events page lists your events in three groups: **Happening now**, **Upcoming** and **Past**. An event is under *Happening now* from its start time until its end time on the day, by your organization's clock, and an all-day event for the whole day. Each one is marked *Published* (green) or *Draft* (gray). An event that is on is marked *Happening now* and a past one *Finished*, either way. The **Attendees** column counts everyone going, walk-ins included, so an event with sign-ups turned off still shows how many came once you add walk-ins at check-in. Press the number to see who. Press **+ New event** to open the editor. It is the same editor as the website builder and News, but a new event starts with only the *Event details* form, in the middle of the page. Press **Custom page builder** in the top bar when you want a full page for the event. That opens **Layers** and **Add block** on the left, the event page in the middle and the details on the right. Clicking a block shows its settings in **Content / Style / Advanced** tabs, and the × at the top of them takes you back to the details.

The top bar has the title "*New event*", the **Custom page builder / Hide builder** button, **Desktop / Tablet / Mobile** while the builder is open, a *Draft* or *Published* label, *All changes saved* or *Unsaved changes*, **Save** (*Saving...* while it works), **View live** once saved, and **Publish / Unpublish**. On a phone, the bar takes two rows and the editor has *Details / Blocks / Preview* tabs at the bottom instead of the builder button.

You see "*Event created.*", "*Event saved.*" or "*Event deleted.*" when those happen.



Events Index page with the New event button, a mix of Draft / Published / Finished rows

Every field on the form

The **Event details** section on the right, from top to bottom:

- **Title:** the prompt reads "*Event title*".
- **URL slug:** the end of the event's web address, after `/events/`. The prompt reads "*my-event*". It fills itself in from the title until you change it. The rules are the same as for News.
- **Date:** required.
- **All day:** a checkbox. When ticked, Start and End are hidden.
- **Start** and **End:** times, side by side.
- **Repeat:** *Doesn't repeat / Daily / Weekly / Monthly*.
- **Every N days/weeks/months:** a number from 1 to 52.
- **Ends on (optional):** a date. The help text changes between "*Repeats {freq} until {date}.*" and "*Repeats {freq} indefinitely.*"
- **Signups:** the whole sign-up section (see the next section).
- **Location:** the prompt reads "*Trailhead, town, address...*".
- **Type:** picked from your event types, or *No type*. **Edit types** beside it opens the list.
- **Audience:** the prompt reads "*All, Members...*".
- **Excerpt:** a short summary of up to 500 characters. The prompt reads "*Short summary used in the Events block + event-meta slot.*"
- **Hero image:** the main picture, a JPG, PNG or WebP up to 5 MB.
- **Notify followers when published:** a checkbox that reads "*Sends a 'New event' push + bell-inbox row to people who favorited your org with the New events notification on. Uncheck to publish quietly.*"
- **Trail work:** a list of open and in-progress maintenance tasks to tick.

At the bottom it says "*Hero, when, location, body — the layout these data points render through lives in your website builder → Event template page.*" In other words, how these details look on your website is set once, on the Event template page in the website builder.

Event types

Every event can have a type, which says what kind of event it is. You start with *Volunteer day*, *Meeting*, *Group ride*, *Race*, *Fundraiser*, *Social* and *Training*, plus any label your events already had before types existed.

Event types, at the top of the Events page and also under Settings, is where you change the list:

- **Add a type** for anything the defaults do not cover, with a color.
- **Edit** renames a type or changes its color. A new name changes on every event of that type, and on your website, straight away.
- ↑ ↓ set the order types are listed in.
- **Remove** takes a type off the list. You cannot remove a type that events still use. Give those events another type first, or rename the type instead. A default type you remove does not come back.

The type shows next to the event on the Events page, on the event in the field app, and on your website's events list, where visitors can filter by it.



Event editor Details form open with Title, Slug, Date, Repeat, Location

Sign-ups: turning them on and setting up the form

The **Signups** switch controls everything under it. With it off, there is no public form, no attendee list and no reminders. With it on, the event's public page shows the sign-up form, and the attendee list opens from *View attendees* →.

The help text under the switch reads "*When enabled, the event's public page shows a form for visitors to RSVP. Manage attendees from View attendees.*"

When sign-ups are on, these fields appear:

- **Capacity (optional):** the number of places. The prompt reads "*unlimited*". Once it is full, new sign-ups go on the waitlist instead of being turned away.
- **Deadline (optional):** a date and time. After it, the form takes no new sign-ups.
- A **View attendees →** link.
- **Form copy (overrides template):** four boxes (Eyebrow, Heading, Subtitle, Button label), each reading "*(use template default)*". Leave them blank to use the wording from the *Event signup form* block on your Event template in the website builder. Fill them in to change the wording for this event only.
- **Form fields:** a table with Field, Show and Required columns. The rows are **Name** (always shown, you can only choose whether it is required), **Email**, **Phone**, **Party size** (show or hide only) and **Notes**. The help text reads "*Hide fields you don't need. Make the form as simple as a 'yep, count me in' button — or collect everything.*" If you hide Email, an amber warning appears: "*Without email, attendees won't receive the confirmation + cancel email — you'll only see them in this dashboard.*"
- **Require liability waiver**, a checkbox (see the next section).

Selling tickets

To charge for places, add a ticket under **Tickets** in the Signups section. Each ticket type has a name and a price, such as Adult at 25 and Child at 10, and an event can have up to eight. Tick **Members only** on a type, such as a member's price, and enter a **Member code** that you share with your members. The form then asks for that code before anyone can buy a members-only ticket. Upper and lower case do not matter. Leave the code blank to sell member tickets on trust. The code itself never appears on your website.

Tickets are paid by card through your connected Stripe account, and the money goes straight to you. Connect it under **Settings → Card payments (Stripe)**, and the event editor links there. Until Stripe is connected, the editor says so and the event page says tickets are not on sale online.

Each ticket is one place, so **Capacity** counts tickets. Nobody can buy more tickets than there are places left. A sold-out event shows *Sold out.* and has no waitlist. An event with tickets has no free sign-up, so everyone signs up by buying a ticket.

The public form has spam protection built in everywhere your site appears, and repeated attempts from one visitor are slowed down. There is nothing to set up.

Public event page showing hero, When, Location, and the signup form

Waivers

Require liability waiver adds a waiver to the public form that people tick to agree to. When it is on, choose how to add the waiver:

- **Type it:** paste the full text into the box, up to 20,000 characters. If you pick a plain text (.txt) file under *Upload a file*, its text goes into this box instead, so you can still correct it.
- **Upload a file: Choose a file** opens your files. Pick the waiver as a **PDF** or a **picture** (JPG, PNG or WebP), up to 25 MB, and it uploads straight away. The editor then shows the file exactly as attendees will see it, with **Replace** and **Remove** beside its name. A Word document cannot be shown on the sign-up form, so save it as a PDF first and upload that.

The file also goes into your organization's uploads library. Deleting it there takes it off the event, and the library warns you first.

On the public form:

- The form shows a "*Liability waiver*" heading with the waiver, and a required "*I have read and agree to this waiver.*" checkbox.
- An uploaded waiver sits in a window of fixed height that scrolls by itself. It can be read on the form without downloading it, and it does not push the form off the screen. Every page of a PDF is shown. An **Open in a new tab** link under the window opens the full file for anyone who prefers that.
- A sign-up without the checkbox ticked is refused with "*You must agree to the waiver to sign up.*"

- Each sign-up saves the exact time and IP address where the waiver was agreed to. Managers see a "*✓ waiver*" label on the attendee list, with the time it was signed when they point at it.

The same waiver, typed or uploaded, appears on the event in TrailsIQ Go.

Repeating events

Set **Repeat** to *Daily*, *Weekly* or *Monthly*, and set how often and an optional end date. The event is one entry that covers every date it falls on.

- The public event page lists every upcoming date in a *Which date* dropdown on the sign-up form.
- The events list shows the next 12 months of dates, so a repeating event appears several times.
- The attendee list on the dashboard is grouped by date, so a weekly volunteer day has a separate list for each Wednesday.
- To end a repeating event, set an *Ends on* date. Leave it blank for it to repeat with no end. Setting **Repeat** back to *Doesn't repeat* clears the interval and end date when you save.

A deadline applies to each date separately. Sign-ups for a date that has passed are always refused, even when the series carries on.

Linking trail work

The **Trail work** picker links the event to open and in-progress maintenance tasks. Search by title and tick the ones the event will work on.

The help text reads "*Pin open maintenance items this event will tackle. The public event page lists them so attendees know what they're signing up for.*" With no open tasks, it reads "*No open maintenance items. Add some from Maintenance in the sidebar.*"

Linked tasks appear on the public event page in the **Event trail work** block, headed "*What we'll be working on*" by default. People can click through to see what is broken, where it is and how bad it is. This is useful for volunteer workdays where you want people to see the real job. The same tasks are listed under **The work** on the event's page in TrailsIQ Go.

An event can link to many tasks, and a task can be linked to many events. Linking does not change the task itself. It does show on the task's **Work log**, on the dashboard and in the field app: each linked workday with its date, how many people came and the hours it has already counted (or, before it happens, how many signed up). If you log time on that task for the workday's date, for yourself or for a teammate the workday already counts, the log form warns you first so the same afternoon is not counted twice. Only log time spent outside the workday there.

Signing up (what the public sees)

The public event page is built from your organization's **Event template**. It uses the **Event hero**, **Event title**, **Event date/time**, **Event location**, **Event excerpt**, **Event body**, **Event trail work** and **Event signup form** blocks, which you can arrange to suit you in *Website builder → Event template*.

When sign-ups are on, the form sits on the event page as the **Event signup form** block. On the Trailhead, Backyard and Hub designs, when it comes straight after the event's details, a wide screen shows it in a column beside them, so the details and the form are read together. On a phone it shows underneath. Each field shows, hides or is required according to the *Form fields* table you set up:

- *Which date* (repeating events only), a list of upcoming dates.
- *Your name* or *Your name (optional)*.
- *Email* or *Email (optional)*.
- *Phone* or *Phone (optional)*.
- *Party size*, a number from 1 to 50.
- *Anything we should know?*, a box for notes.
- The waiver, if it is on.

The button reads whatever you set in *Form copy*, or the template's wording ("*Count me in*" to start with). When the event is full, the button changes to "*Join the waitlist*" and the line above the form reads "*Event is full · N on waitlist*".

What people see after they send the form:

- Success: "*You're signed up. We'll see you at {title}.*" or "*You're on the waitlist for {title}. We'll be in touch if a spot opens up.*"
- Already signed up with that email: "*You're already signed up for {title} — see you there!*" or the waitlist version.
- A misspelled email: as someone types, a line under the field asks "*Did you mean jane@gmail.com?*", and tapping the address fixes it. The form will not take a common misspelling of a big email provider (gmial.com, yaho.com, hotmail.con) or an address that cannot receive email, so the confirmation actually reaches them.
- Waiver not ticked: "*You must agree to the waiver to sign up.*"
- A repeating event with no date picked: "*Please pick a date for the event.*"
- Too many tries: "*Too many attempts. Try again in {s}s.*"

An event with tickets shows each ticket type with its price and **−** and **+** buttons instead of *Party size*, then the total and a button reading *Continue to payment* with the amount. The visitor pays by card on Stripe's page and comes back to the event page, which reads "*Payment received. Your tickets for {title} are on their way to your email, with a QR code to show at the door.*" Leaving Stripe's page without paying charges nothing.

They are added to the attendee list once Stripe confirms the payment. They get an email titled "*Your tickets for {title}*" with a QR code, the ticket code under it, what they bought, what they paid and a calendar file. **Show my ticket** in the email opens the ticket on its own page, which works at the door as well as the email does, and so does a screenshot of either. Buying more with the same email for the same date adds to the same ticket, and the email lists everything they hold. A paid ticket has no cancel link. To cancel, they contact you and you refund it.

Confirmation email. Unless you have hidden the Email field, everyone who signs up gets an email straight away. The subject is "*You're signed up for {title}*" or "*You're on the waitlist for {title}*". It includes when, where and the party size, an **Add to calendar** button with a calendar file for that date (also attached to the email), and a **Cancel my signup** button that works for 14 days. The cancel page reads "*Signup canceled — Thanks for letting us know, {name}. Your spot for {title} has been freed up. You can close this tab.*" An expired link shows "*This cancel link has expired. Get in touch with the organization directly.*"

Attendee roster page with Going table, Waitlist table, Share menu and Add walk-in button

Managing sign-ups (on the dashboard)

Press **View attendees →** in the event's Signups section. The page is headed "*Attendees: {title}*", with the total number of attendees in large type and "*attendees across N signup(s)*". When the event has a limit, it adds "*of {capacity}*", and "*+ N on waitlist*" when anyone is waiting.

Both downloads are under **Share** above the list:

- **PDF check-in sheet:** for the day itself. It has your letterhead at the top, then everyone going and on the waitlist with their contact details, party size, date and whether they signed the waiver. Places taken and the waitlist count are totaled at the top.
- **CSV spreadsheet:** the same people as rows (Name, Email, Phone, Party size, Status, Source, Occurrence date, Notes, Signed up, Waiver signed at). It opens correctly in Excel.

+ Add walk-in opens a form for someone signing up in person, with Name, Email, Phone, Party size, Hours each, the date for a repeating event, Status (*Going* or *Waitlist*) and Notes. Only the name is needed. Leave Email blank for someone who turned up on the day and did not want to give one. As you type the name, people from your Volunteers list and your team are suggested, and picking one fills in what you already have for them. Walk-ins are added even when the event is full, and they do not get a confirmation email.

For a repeating event, the list is grouped by date. Each group has a *Going* table and a *Waitlist* table. Each row has **Promote**, which moves someone from the waitlist to going and sends "*You're in: {title}*" to people who signed up through the app, and **Remove**, which asks "*Remove {name}'s signup?*" first. Removing someone who was going sends "*Signup canceled: {title}*" if they signed up through the app.

Rows can show these labels: **walk-in** (no email on the sign-up), **team** (the email belongs to someone on your team), ◫ **app** (signed up through TrailsIQ Go, so they can get notifications), ✓ **waiver** (with the time it was signed when you point at it), **paid** (with the amount and the tickets they bought, and the ticket code when you point at it), and **checked in** once their ticket has been scanned at the door.

Paid tickets. Each ticket order is also listed under **Settings → Payments**, under *Tickets*. To refund one, refund the payment in your Stripe dashboard. A full refund takes those tickets off the person's sign-up, and once they have none left the ticket is canceled and no longer gets anyone in. A partial refund cannot say which tickets it was for, so the tickets stay as they are and the person is flagged on the attendee list with how much was refunded. Either remove the tickets it was for there, one at a time, or press **Done, tickets are right** if it was a discount rather than tickets. Until you do, their ticket still lets the whole party in. A card dispute you lose counts the same as a full refund. Removing a paid sign-up from the list does not refund the money, so refund it in Stripe.

At the top of each group, **Copy emails** copies everyone's email addresses, separated by commas, and tells you "*Copied N emails to clipboard.*" To email everyone, paste them into your usual email program.

If sign-ups are off but some sign-ups already exist, an amber banner reads "*Signups are currently disabled for this event. Existing signups are shown for reference; the public form won't accept new ones until you re-enable signups in the event editor.*"

With no sign-ups, it reads "*No signups yet.*"

Volunteer hours from an event

Everyone who comes to an event counts toward your volunteer hours: in the Work report, in the annual report, and in the figures an umbrella account sees. Once the event's day arrives, the *Going* table is headed **Came**, so you can tick off who is there. Every row on it counts for the length of the event, from its start and end times, multiplied by the party size. It only counts **once the event is over**, which means after its end time in your organization's timezone, or the next day for an event with no end time. Signing up alone never adds hours. The total shows under the attendee count at the top of the page.

- **Untick Came** for anyone who signed up and did not show. Their row stays on the list and stops counting.
- **Change the hours** on a row for someone who left early or stayed late. Clear the box to go back to the event's length.
- **An event with no end time**, or an all-day event, has no length to go by, so nobody counts until you enter their hours.

Where each person's time shows up depends on who they are:

- **Someone on your team** (their sign-up email matches a member's) gets the hours on their own work hours for that day, already approved. Paid staff count as paid hours there, not volunteer hours. Untick them or remove the sign-up and the entry is removed too.
- **Someone with an email who is not on the team** is listed by name in the Work report and counts as a volunteer. They do not get an account or an invitation.
- **A walk-in with no email** counts under **Outside volunteers**, the same row as helpers logged on a task as a number.

In the Work report, event time appears under the task type **Events**, with the event's title where a task would be. Picking a trail in the report's filters leaves events out, because an event is not on a trail.

Check-in from TrailsIQ Go

Volunteers who have TrailsIQ Go and are signed in can check themselves in on the day, so you do not have to write their names down. It is free on every plan.

Check-in on each row of the Events page opens the event's check-in page, and so does **Check-in code** on the attendee list. It is made to be opened on your phone at the meeting point, or printed:

- **The QR code** fills the top of the page. Volunteers scan it with the app (menu → *Check in at a workday*) or with their phone's own camera, which opens the app. **Print a sign** prints one page for the sign-in table, with the event, when and where, a large code and a line on how to use it. **Download PNG** saves the code on its own. **Make a new code** replaces it, and the old one stops working, including printed copies.
- **Style in the QR builder** (**Change the look** once you have one) opens the QR code builder on the event's code, so you can give it your colors, dot shape and logo. **Save as the check-in look** uses that look for every event's check-in code, on screen, on the printed sign and in the field app. Each event still gets its own code. **Back to the plain look** undoes it. If the logo in the middle cannot be loaded, the code is shown without it so it still works. Styling needs permission to use the QR code builder.
- **Check in by location** is optional. Stand at the meeting point and tap **Use my location here**. From then on, anyone within 300 meters can check in from the event's page in the app without scanning. An event's location is written in words, so without this spot the QR code is the only

way to check in. The spot is also where **Open in maps** on your website's event page drops its pin. Without one, the link points to the trailhead, network or trail your location names. A street address is looked up as written, and any other place name points to the middle of your trails. To send people somewhere exact, set the check-in spot. **Turn off** removes it.

- **Checked in** lists everyone who has checked in, with the time and how they did it. It updates by itself while the page is open.

Check-in only works on the event's day, from an hour before the start time until two hours after the end time, in your organization's timezone. An all-day event, or one with no end time, is open all day.

No signal at the meeting point is fine. A volunteer who scans the code with no connection sees that their check-in is saved on their phone, and it uploads by itself once they are back in range. It only uploads for the person who scanned it. If someone else signs in on that phone first, it waits until the volunteer signs in again. It counts as long as they scanned while check-in was open, even if it uploads that evening. A check-in saved more than a week ago is not accepted, so add them on the attendee list instead.

One code for all your events

Check-in code at the top of the Events page opens your main check-in code. It is one code for every event, so one printed sign can stay at the trailhead or the shed all season. A volunteer who scans it is checked in to whichever of your events is open for check-in at that moment. When two or more are open at once, the app lists them and they pick the one they are at. When none is open, the app says so and checks nobody in.

It only offers your own organization's published events. A draft does not show up on it, although a draft's own code still works.

The page lists what is open for check-in right now, so you can see what a scan would offer. It has the same **Print a sign**, **Download PNG**, **Change the look** and **Make a new code** as an event's page. Each event's own code keeps working alongside it, so use whichever suits the day. Checking in by location still happens from the event's own page in the app.

What a check-in does:

- **It finds their sign-up**, if they signed up with the same email, and marks them as came. If they did not sign up, it adds them. A full event or a passed deadline does not stop someone who is standing there.
- **They are a named volunteer.** They show on the list by name with a **checked in** label, and count by name in the Work report, never under *Outside volunteers*. They are not added to your team.
- **A team member who checks in** gets the hours on their own work hours, the same as any member who comes to an event.

You can still untick *Came* or change the hours for anyone who checked in.

Deleting an event asks first (*Delete "{title}"? This can't be undone.*) and deletes its attendee list and its links to trail work too.



Running an event from the field app

Everything you need on the day is on the phone. Tap **Events** on the field app's home screen. If you have arranged your home screen before, the tile is added at the end. It opens on **Upcoming**, with **Past** beside it for the last year.

- **New event:** title, date, start and end times (or *All day*), where, a short description, whether to take sign-ups on the website and how many places, and whether it is published. New events start as drafts. The event's length is what each volunteer is credited with, so set an end time.
- **Edit event:** the same form. It only changes what is on it. The event's page, waiver, repeat rule and sign-up form stay as you set them on the dashboard.
- **Type:** picks from the same event types as the dashboard.
- **Who's coming:** open an event to see everyone signed up, grouped by date for a repeating event, with the waitlist underneath. Once the list is longer than a screen, a search box finds someone by name or email.
- **Add a walk-in:** a name is enough. As you type it, people you already know from your Volunteers list and your team are suggested. Pick one to fill in their email and phone. Add their email if they would like to be named in your reports, their party size, and their hours if they did not stay for the whole event.

- **Check-in code:** the event's check-in page on the phone. It has the QR code to hold up, **Use my location here** to set the check-in spot where you are standing, and who has checked in so far, updating by itself. It needs a connection. Anyone who checked in has a **Checked in** label on the list.
- **Scan tickets:** on an event that sells tickets. Point the phone at the QR code on someone's ticket email or ticket page. A green *Admit 3*, with their name and tickets, means they are in, and they are checked in on the list. It keeps scanning for the next person. It also tells you when a ticket has already been scanned (and at what time), when it is for another date of a repeating event (with *Let them in anyway*), when it is on the waitlist, when it was refunded, and when it is not for this event. You can type the code printed under the QR code instead.
- **After the day:** every row has a **Came** box, ticked to start with, and an hours box. Untick anyone who did not show and enter hours for anyone who left early. The *Came* and *Volunteer hours* totals at the top update to match. **Move up** takes someone off the waitlist, and **×** removes a sign-up.

The walk-in email field shows the same *Did you mean* line as the public form. On the dashboard a misspelled address cannot be saved. In the field app it can, so a walk-in added with no signal is never lost because of an address.

Walk-ins, ticking who came and scanning tickets all work with no signal. Each is kept on the phone, a walk-in under *Waiting to upload*, and sent when you are back in range, like anything else saved offline. The scanner checks tickets against the list the phone already has, so a ticket bought after you last opened the event with signal is not on it yet. Open the event again with signal to bring the list up to date. Creating, editing and deleting events and removing people need a connection, and the app tells you so. The list and each event you have opened are kept on the phone, so you can still see who is coming offline.

The field app shows Events to anyone whose role includes *Manage events*, on a plan that includes events.

Publishing an event

An event is either a **Draft** or **Published**. You cannot schedule it to publish later. The Publish / Unpublish button in the top bar changes it and saves in one click. On an existing event, the "*unsaved*" dot clears straight away.

The first time you publish, the publish date is saved. Unless you untick **Notify followers when published**, everyone who has made your organization a favorite and left the *New events* notification on gets a "*New event: {title}*" notification, in the app and in their inbox there.

Saving an event that is already published never sends it again. The notification is only sent the first time the event goes from draft to published.

On the Events page, past events are marked *Finished* and events that are on right now *Happening now*, whether they were drafts or published, so you can tell at a glance which side of the calendar they are on. A repeating event stays under *Upcoming* until its last date and shows the next date it falls on.

Where the public sees your events

Events appear in five places:

1. **The event's own page:** `go.trailsiq.com/{slug}/events/{event}`, or `/events/{event}` on your own domain. It is built from your Event template, with the blocks you set up.
2. **The events list:** `go.trailsiq.com/{slug}/events`, or `/events` on your own domain. It has the small heading "*WHAT'S ON*", the heading "*Events*" and the line "*Upcoming workdays, rides, races, and gatherings.*" Each row shows the day, time, title, location, type, audience, a ↻ *Recurring* marker for repeating events, and *N/C going* if there is a limit. Visitors can filter by type: *All*, plus every type your upcoming events use. With nothing to show, it reads "*No upcoming events. Check back soon.*" or "*No upcoming events tagged '{tag}'. Clear filter*". Past events are not shown to the public. You can still see them all on the dashboard.
3. **The Events list block:** add it to any page in the website builder. Like the News grid block, it can pick events by itself or show the ones you choose. Set to pick by itself, it shows up to 12 upcoming published events.
4. **Calendar feeds:** `/events.ics` for your whole calendar, and `/events/{event}.ics` for one event. Add `?date=` to the end for one date of a repeating event. People can subscribe to these in their own calendar app. They update every 5 minutes.

5. **TrailsIQ Go:** every event, sign-up form and cancel link works in the app too. Sign-ups made in the app can get reminders and other notifications.

   A sign-up from TrailsIQ Go can bring a party of up to 20. One phone can sign up once per date, and one internet connection can take up to 40 places on one date, so one person cannot fill an event alone. A bigger group can contact you, and you can add them with **+ Add walk-in**, which has no such limit. For a repeating event, the app only takes dates the event actually falls on. The confirmation email goes to the address someone typed at most three times a day, and their sign-up stands either way.

Notifications and reminders

- **When you publish (once):** a notification reading "*New event: {title}*" and "*{Mmm d} · {location}*", in the app and in its inbox, to every follower who left the *New events* notification on. Untick *Notify followers when published* to skip it.
- **Reminder (the day before or the same day):** each date of an event gets its own reminder. For events starting at noon or later, it is sent at 09:00 local time on the day. For events before noon, and all-day events, it is sent at 17:00 local time the day before. It is titled "*Reminder: {title}*" and reads "*today at HH:MM · {location}*" or "*tomorrow at HH:MM · {location}*". Each person gets it once. Only people who signed up through TrailsIQ Go and left *Event reminder* on receive it.
- **Confirmation email:** sent straight away on sign-up, unless the email field is hidden or a manager added them as a walk-in.
- **Moved off the waitlist:** when a manager promotes someone who signed up through the app, they get "*You're in: {title}*" and "*A spot opened up — your signup is now confirmed.*"
- **Removed by a manager:** when a manager removes someone who was going and signed up through the app, they get "*Signup canceled: {title}*" and "*Your signup was removed by the organization. Reach out if you have questions.*"

Reminders are sent through TrailsIQ Go only, not by email or text message.

Editing, canceling and deleting

- **Edit:** click the event to open the same editor again. You can change the web address, and it stops filling itself in from the title once you do.
- **Unpublish:** switch it back to Draft. The public event page disappears straight away, and the sign-ups stay on the attendee list. No emails or notifications are sent.
- **Delete:** from the Events page or the editor. It asks `Delete "{title}"? This can't be undone.` The event is deleted completely, along with every sign-up and its links to trail work.
- **People canceling themselves:** the link in the confirmation email works for 14 days and marks the sign-up as *canceled*. You can still see the row, and promote them again if there was a mix-up.
- **Canceling an event:** there is no separate button. Either delete the event, or switch it to Draft, which hides it from the public and keeps the attendee list.

Permissions and plans

Your plan. Events depend on your plan. On a plan without them, the Events row is hidden from the sidebar. The Events page still opens, with the list in view only and an amber card at the top naming the plan that includes events, with a link to upgrade. Creating, editing and deleting events is refused.

Your role. The "*Manage events*" permission is on by default for owners and managers, and off for field workers and volunteers. You can change it for each role in Settings → Roles & permissions. Only people with it see Events in the sidebar.

Anyone can sign up from the public form without an account. Spam protection is built in.

Common gotchas

- **New events start with *All day* unticked.** Tick it yourself if you want an all-day event.

- **Web addresses only have to be different within your organization.** Two organizations can both have `/events/summer-workday`.
- **Deleting an event deletes all its sign-ups.** There is no trash. If you want to take it down without losing anything, unpublish it instead.
- **The follower notification is only sent the first time an event is published.** Saving an event that is already published never sends it again, even if you change the checkbox.
- **Hiding the email field** means no confirmation email, no calendar file and no cancel link. The editor warns you about this. Those people only appear on your attendee list.
- **Nobody moves off the waitlist by themselves.** When someone who was going cancels, nobody on the waitlist is moved up automatically. Keep an eye on the list and press *Promote* yourself.
- **The sign-up form's heading and button** use the wording from your Event template's block (*Sign up*, *Count me in*) unless you change it. To change it for one event, use "*Form copy (overrides template)*" in that event's Signups section.
- **Setting *Repeat* to *Doesn't repeat* clears the interval and end date** when you save. If you turn repeating off meaning to turn it back on later, you will have to enter them again.
- **The public events list hides past events.** Managers can see the full history on the dashboard (marked *Finished*). The public only sees upcoming events.
- **Reminders only go to people who signed up through TrailsIQ Go.** People who signed up on your website with an email address do not get reminder notifications. Encourage people to use TrailsIQ Go if they want reminders.
- **Paid tickets are refunded in Stripe, not here.** Removing a paid sign-up from the attendee list does not refund the money.

What's next

- Set up your **Event template** once in the website builder, so every event gets your look: the main image, how the date and location are laid out, where the sign-up form sits, and related trails.
- Add an **Events list** block to your home page and set it to pick events by itself, so new events appear without any extra work.
- If your event needs a waiver, write it in a document first, paste it into the waiver box, and test signing up with your own email. The record you keep is only as good as the waiver you wrote.
- Read the *News* article, which works in a very similar way, and the *Website builder* article for how blocks work on your Event template and event pages.

WEBSITE

QR code builder: branded codes for signs and print

Make styled QR codes for trailhead signs, junction posts, report forms and printed maps. Choose the dots, corners, colors and a center logo, and set the error correction that keeps a code with a logo working once it is printed and out in the weather.

The **QR builder** makes branded QR codes for anything you want people to reach from a sign, a poster or a printed map, such as a trail page, current conditions, a report form or an event.

Making a code

Open **QR builder**, enter the address you want, style the code and download it.

Codes are made fresh each time and TrailsIQ does not keep a copy, so treat the download as the original. You will almost always need a sign's code again, so keep the file with the sign artwork rather than in your downloads folder.

Styling it

You can style each part of the code separately:

- **Dot style:** Square, Rounded, Dots, Classy, Classy rounded or Extra rounded.
- **Corner square style:** Square, Extra rounded or Dot. These are the three large markers in the corners.
- **Corner dot style:** Square or Dot, for the centers of those markers.
- **Colors** for the code and its background.
- **A center image**, if you want your logo in the middle.
- **Frame shape:** Rectangle, Rounded, Circle or Triangle.

A phone uses the corner markers to find the code and turn it the right way up. Any of these styles is safe, but if a code will not scan, set the corners back to plain squares first.

QR builder with dot, corner and colour styling controls

Error correction and logos

QR codes carry redundant data so they still scan when damaged, dirty or partly covered. You choose how much:

Level	Recovers	Use when
Low	~7%	Smallest possible code, no center image
Medium	~15%	The default. Robust to small smudges
Quartile	~25%	Harsher conditions
High	~30%	Recommended whenever you add a logo

The important rule: **a logo in the middle counts as damage.** It covers part of the code, and only error correction lets the code work despite it. A logo at Low often scans on your screen and then fails on the sign.

Higher correction makes a denser code, so print a High code slightly larger. Outdoors, that is nearly always worth it.

Error correction options with a centre logo applied

Printing QR codes that actually scan

A trailhead sign is a hard place for a QR code to work. These are the things that decide whether it scans:

- **Size.** As a rough guide, make the code about a tenth of the distance it will be scanned from. A code read at arm's length can be small, but one on a kiosk that people stand back from cannot. When in doubt, go bigger.
- **Clear space.** Leave a blank margin around the code. Artwork or a border right up against the edge stops phones finding it.
- **Contrast.** Print a dark code on a light background. Light codes on dark backgrounds and low-contrast colors are unreliable, and weather makes them worse.
- **A matte finish.** Sun glare off a glossy, laminated sign stops a camera reading the code at all.
- **Test the printed sign.** Do not rely on your screen. Print the code at its final size and scan it with an ordinary phone, from the distance and angle people will actually use.

One more that is easy to forget: **there is often no signal at a trailhead.** A code that opens a page nobody can load is only decoration. Use codes for pages people need before they leave the parking lot, and remember that your crew's phones may have no signal either.

Where QR codes are worth putting

- **Trailhead signs:** current conditions and closures for that network.
- **Junction posts:** the page for that trail, so people can see where they are in a way a paper map cannot show.
- **Report signs:** your public report form, so people can report a hazard while they are standing next to it.
- **Event material:** sign-up pages on posters and flyers.
- **Bridges and structures:** the record for that structure, for your crews.
- **Printed maps and newsletters:** the live conditions page, so the paper map stays useful after the day it is printed.

A shared **planner proposal** has its own QR download in the sharing panel. See Trail Planner, and use that one rather than rebuilding the link by hand.

Common gotchas

- **A logo without high error correction fails outdoors.** Set High whenever there is a center image.
- **Test the printed code, not the one on your screen.** Paper, distance and daylight all change how it scans.
- **Codes are not stored.** Keep the downloaded file with your sign artwork.
- **If the address changes, every printed code stops working.** Point codes at pages that will stay put, and remember that changing your custom domain changes those addresses too. See Custom domain.
- **No signal means no page.** Check the phone coverage where the sign will go before you design the sign around a code.

WEBSITE

Files and uploads

Upload documents and images once, reuse them across your website as downloads, and manage them from one library under Settings.

Your organization has one library of uploaded files: trail maps, waivers, meeting minutes, budgets, photos. Upload a file once and reuse it on as many website pages as you like. Visitors to your website can then open or download it.

Find the library under **Settings → Files and uploads**. The website builder's **Files to download** block opens the same library.

Uploading files

Press **Upload files** and choose one or more files, or drag them onto the box. Each file can be up to 25 MB.

These kinds of file are accepted:

- **Documents:** PDF, Word (.doc, .docx), Excel (.xls, .xlsx), PowerPoint (.ppt, .pptx), OpenDocument (.odt, .ods, .odp), rich text (.rtf), plain text (.txt) and CSV.
- **Images:** JPEG, PNG, GIF, WebP and HEIC.

Every file is checked when it is uploaded, and anything that could run on a visitor's computer is turned away with a sentence saying why:

- Office files containing macros, and the macro-enabled formats (.docm, .xlsm, .pptm). Save the file without macros, as an ordinary .docx, .xlsx or .pptx, and upload that.
- PDFs containing scripts, actions that open other programs, or attached files. Printing the document to a new PDF usually removes these.
- A file whose contents do not match its name, such as a web page renamed to end in .pdf.
- SVG images, web pages and programs, which are never accepted.

If you upload several files at once and one is turned away, the others are still saved.

Finding and managing files

The library lists every file with its type, size, the date it was uploaded and who uploaded it. Search by name, or show only documents or only images.

- **Open** shows the file the way a visitor gets it.
- **Copy link** copies its download link, to paste into an email or anywhere else.
- **Rename** changes the name the library shows and the name the file is saved under when somebody downloads it.
- **Delete** removes it. If a website page, news post or event still lists the file, you are told which ones first, and the links on them stop working once you delete it.

Uploaded files count toward your organization's storage, which you can see under **Plan**. Deleting a file gives that space back.

Putting files on your website

In the website builder, add a **Files to download** block (under *Text and layout*). Press **Choose or upload files**: the library opens, so you can tick files you have already uploaded or upload new ones, which are ticked for you. Press **Add** and they appear in the block.

Each file in the block can have its own name and a short line about it, and the arrows put them in order. Removing a file from the block leaves it in your library.

Visitors see each file as a row with its type and size. PDFs and images open in the browser; other documents download.

Anybody who has a file's link can download it, whether or not it is on a page. Keep anything private out of the library.

WEBSITE

Website templates, donations and forms

Switch your website between templates without losing a word, choose whether it speaks for an organization or a business, and add starter pages. Also covers taking donations through your own PayPal or Stripe, seeing who gave, and reading what visitors send through your forms.

Your website has a **template**, which is the design every page is drawn in. You can pick a different one at any time, and every page, block and word comes with you, redrawn in the new design. This article covers choosing a template, the starter pages, taking donations, and the inbox your website's forms send to.

Choosing a template

Open the website editor with no block selected, or press the × at the top of a block's settings, to see **Theme**. Under **Template** there are six. Each shows a small picture of your own site in that design: your header and the top of the page you have open, in your accent color and corners, including changes you haven't saved yet.

- **Hub:** the look of your organization's public page on TrailsIQ, grown into a whole site: a header band in your color, white cards on a pale background, and trail status first. A new site starts in Hub.
- **Classic:** bold condensed headlines, dark bands and a menu fixed to the top of the screen.
- **Trailhead:** light paper, wide headlines and status-first trail cards, with a menu that folds into a button on a phone.
- **Backyard:** chunky hand-drawn headlines, cards that lean a little this way and that, and bands of color with wavy edges between them.
- **Groundwork:** condensed headlines, spec-sheet labels and thin ink rules on warm paper. Made with trail-building businesses in mind, and it suits any site.
- **Ridgeline:** full-width photo bands, tall condensed headlines and your accent color bright against a dark ground.

Hub is on every plan. Classic, Trailhead, Backyard, Groundwork and Ridgeline come with the Pro plan. On lower plans they are listed with the plan's badge and can't be chosen, but **Preview site** still shows your pages in them. A site that was already drawn in one of them keeps it until you switch to Hub.

Click one and the canvas redraws straight away. Nothing is saved until you press **Save**, and **Undo** takes a template change back like any other edit.

Every template has every block and every block setting. Where a template's own design had no place for a setting, it has been added in that template's style, so nothing you write disappears when you switch. Colors you set on a block are kept too. Trailhead and Backyard offer fewer per-block colors because most of their detail comes from your accent color, and colors you set under Classic are still there if you switch back.

Corners appears under Trailhead, Backyard, Groundwork and Ridgeline: *Sharp*, *Soft* or *Round*, for buttons, cards and photos across the whole site.

Hub

Hub takes its colors from your accent color, which starts as your organization's brand color. The header band, buttons, links and highlighted dates are all shades of it, each picked so the text on it stays readable, so a light color gets dark text and a dark one white. Trail status, hazard levels and difficulty symbols keep their own colors, so they read the same as on your trail signs and in the app. Hub has its own rounded shapes, so Corners does not appear under it.

Backyard

Backyard draws its waves for you. Wherever a colored band, such as the stats bar, a call to action or the footer, meets a plain block, the edge between them is wavy. Reorder your blocks and the waves follow. There is nothing to set.

Two settings appear only under Backyard:

- **Sticker**, on the Hero block: a few words in a round sticker in the hero's corner, such as *Go big or go home*. Leave it empty for no sticker.
- **Motto**, on the footer: your motto set in giant letters across the bottom of every page. Leave it empty to leave it out.

Both are kept if you switch to another template. That template simply doesn't show them, and they come back when you switch back to Backyard.

Backyard looks its best with a light, bright accent such as a lime or a sky blue, which it sets buttons and badges in. A dark accent works too: Backyard puts white text on it, and uses a pale lime instead wherever the accent would be text on a dark band.

Groundwork

Groundwork reads like a spec sheet: small uppercase labels, numbers set large, and thin rules between sections. It shares Trailhead's blocks, so everything you have built comes along.

One setting appears only under Groundwork: **Fact card**, on the Hero block. It pins a small card to the hero's photo with up to four short facts, such as *Est. 2009* or *140 mi built*, under a title of your choosing. Leave the facts empty for no card. Like Backyard's sticker, the facts are kept if you switch to another template and come back when you switch back.

Ridgeline

Ridgeline is built around photographs. The hero, and the newsletter, volunteer form, features grid and call to action blocks, are drawn as full-width bands, with a shade laid over each photo so the words on it stay readable. It shares Trailhead's blocks, so everything you have built comes along.

One setting appears only under Ridgeline: **Background photo**, on the Page header, Newsletter, Volunteer form and Features grid blocks. It fills that block's band. Leave it empty and the band is drawn on a dark ground with faint contour lines instead, which looks finished on its own. The photo is kept if you switch to another template and comes back when you switch back.

On a computer the photos stay still while the page scrolls past them. On phones and tablets, and for visitors who have asked their device to reduce motion, each photo simply covers its band and scrolls with the page.

Ridgeline puts your accent color on a near-black ground, so a bright accent such as a lime or a sky blue suits it best. A dark accent works too: Ridgeline lightens it wherever it is text on a dark band, and darkens it wherever it is text on a light one.

Theme panel with the Classic and Trailhead template cards and the Corners choice

The same home page drawn in Classic and in Trailhead

Who the site is for

Site for, in the Theme panel, above the templates, sets who your website speaks for: **Organization**, for a club or trail association, or **Business**, for a company that designs and builds trails. It changes the starter pages and the wording new blocks start with. It never changes your design, so any template works with either. Until you pick one, it follows **What does your team do?** in Settings: **Business** for a trail builder and **Organization** for a trail organization. Changing that answer also changes the starter pages you haven't edited. Once you pick one here, it stays.

A new account set up as a trail-building business starts with **Business** chosen, and with Website and News switched on under Workspace modules. Every other site starts with **Organization**.

A Business site starts small: one page with your business's name, *Trail builder* and the country you are in, with your name in the menu. It shows no email address until you choose one. Fill in **Public email** in Settings under Organization details, and the page gets an **Email us** button and the footer shows the same address. Your **Contact email** is never shown on your website. Nothing on it is written for you, so it reads like a listing until you add more. Once you have a public trail, the menu links to your Trails page by itself. When you want services, projects and a quote form, press **Add starter pages** (below).

Switching it and pressing **Save** swaps the starter pages you have **not** changed for the other side's starting site, and puts the other set's menu and footer in place if you never edited yours. Any page you have edited stays exactly as it is, and so does anything you built yourself. The editor tells you what it swapped after you save.

Blocks you add after switching start with the new wording. On a Business site, a call to action asks for a project, the features grid lists your services, and the volunteer signup becomes a **Careers** form asking which role somebody wants. Blocks already on your pages keep what you wrote.

Pages to start from

Add starter pages, in the same panel, adds pages with blocks already filled in. For an **Organization** site:

- **Home:** a *Welcome to* hero with your organization's name and how many trails are open, the stats bar, trail conditions, *Live from the trails* and a newsletter signup, between the shared menu and footer.
- **Trail conditions:** hazards, every trail with a filter and search, the forecast, a map, and a grooming report if your organization grooms.
- **Get involved:** a volunteer signup, a donation form and common questions. Pro plan and above, with the other pages of your own.
- **About:** your story, and a contact form on the Pro plan and above.

For a **Business** site, the pages below. Your home page, menu and footer become the Business ones too, as long as you have not changed them:

- **Home:** a hero for your business with a **Request a quote** button, what you have built in numbers, who you build for, your services, how a project runs, and a closing call to action.
- **Services:** each service with a photo and what it covers, the rest of what you do, common questions and a call to action.
- **About:** your story, your numbers, your crew, how the business has grown, and a contact form on the Pro plan and above.
- **Projects:** your project write-ups, a spec sheet and a gallery. Pro plan and above. The project write-ups are your News posts: write one per project in News and it appears here.
- **Request a quote:** a quote request form and common questions. Pro plan and above.

On a plan without the Request a quote page, the **Request a quote** buttons open an email to your **Public email** instead (set in Settings under Organization details), or go to the Services page when you have not set one, so they always lead somewhere. On a plan with a limit on blocks per page, these pages come within that limit, with the closing call to action kept.

A new Organization website starts with these already in place, and the menu and footer link only to pages your site has, with Trails in the menu from the start. Pages you already have are left alone, so it is safe to press on a site you have been working on, or to bring back a starter page you deleted. The shared header and footer are only replaced if you have never changed them. Every word on the starter pages is yours to rewrite.

Taking donations

The **Donation form** block sends a gift straight to your own account. TrailsIQ never holds the money and takes no cut. The donor picks an amount, one-time or monthly, and presses **Give**. They then land on your provider's page with the amount filled in.

Set it up under **Donations** in the Theme panel. Turn on any of the three:

- **PayPal**: the email address or merchant ID of your PayPal account. One-time gifts open PayPal's donation page and monthly gifts open a monthly PayPal subscription, both for the amount the donor picked. Nothing else to install.
- **Card (Stripe)**: press **Connect Stripe**. Stripe opens its own page. There you sign in to your organization's Stripe account, or create one with your organization's details and a bank account for payouts, and allow TrailsIQ to take payments on it. You come back to the editor connected, with nothing to copy or paste. The same **Connect Stripe** button is in **Settings → Card payments (Stripe)**, under *Public site*, and on the Payments page, so you can connect without opening the website editor. It brings you back to wherever you pressed it. Donors then pay by card on Stripe's page with the amount already filled in, one-time or monthly, and every payment is listed under **Settings → Payments**. The money is paid out to your bank by Stripe, and Stripe's usual card fees come out of your payouts. Refunds and disputes are handled in your own Stripe dashboard. **Disconnect**, under the same heading or in Settings → Card payments, removes TrailsIQ from your Stripe account. Payments already listed stay listed. Disconnecting doesn't cancel monthly gifts. Stripe keeps charging them on your account, so if any donor gave monthly in the last month, you are told before you disconnect. Cancel them in your Stripe dashboard if they should stop. One Stripe account can be connected to more than one of your organizations, and disconnecting one leaves it connected in the others.

- **Another giving page**: any page that takes donations, such as Venmo, Givebutter or Zeffy, with a label for its button. The amount is chosen there.

If you already use Stripe Payment Links, **Use Stripe Payment Links instead** under Card (Stripe) still takes them. Use one link set to *Customers choose what to pay*, and a second, recurring one for monthly gifts. Donors confirm the amount on Stripe's page, and these payments are not listed under Payments. Connecting Stripe replaces the links.

Press **Save donation settings** after turning PayPal, Card or another page on or off. If more than one is on, donors choose between them on the form. Monthly is only offered through methods that can take it. With none turned on, the block shows a short note in place of the button, so a donate button never goes nowhere.

On the block itself you set the preset amounts and what each one pays for, whether monthly is offered and which is picked first, whether donors can type their own amount, and an optional goal. Set a goal and the block shows a progress bar toward it.

With Stripe connected, the bar counts card gifts by itself and moves with every one. A refund, or a dispute you lose, comes back off it (a partial refund by the amount refunded), and each month of a monthly gift counts toward it. If the block says what the gift is for, it counts only gifts made for that, so two campaigns on one site each fill their own bar. **Count card gifts automatically** on the block turns this off. The block's **Raised other ways** and **Donors other ways** are for money that arrived some other way, such as PayPal, checks or an event, and are added to the card total. Without Stripe connected, the raised total and donor count are numbers you type in and update yourself.

After a card payment, the donor goes back to the page they gave on, where the form thanks them. Stripe emails them a receipt if receipts are turned on in your Stripe account.

Seeing who paid

Settings → Payments, under *Public site* and also linked at the bottom of the Theme panel, lists every gift, shop order and event ticket order paid by card through your connected Stripe account: who paid, their email, what for, the amount, and when the money was received. A monthly gift appears once for each month it is paid, and a shop order from the cart appears once, with each product, its size and how many, and any shipping fee listed when you open it. The amount includes the shipping fee. A ticket order lists each ticket type and how many; see the *Events* article for selling tickets. A bank payment that is still clearing shows as **Waiting on the bank** until it lands, and a payment you refund in Stripe, or a card dispute you lose, shows as **Refunded**. A partial refund leaves the payment listed as received, with the amount refunded under it. Totals for the last 30 days are at the top, minus anything refunded, and **Download CSV** exports the list, with a *Refunded* column for partial refunds.

PayPal, Stripe Payment Links and other giving pages do not tell TrailsIQ about a payment, so those gifts are only in your account with them.

Your account details are never shown on your website. The donate button asks TrailsIQ where to go, and only then is the donor sent to your provider.

Donation form block on the Get involved page

Donations settings with PayPal and Stripe turned on

The website inbox

Messages from the **Contact** block, requests from the **Quote request** block and signups from the **Volunteer signup** block are emailed to your team. Open **Settings → Website inbox**, under *Public site*, to choose who gets them and to see what the spam filter held back. It is also at the bottom of the Theme panel.

- **One email for the whole team.** It goes to the owners and anyone whose role is allowed to manage the website, all on the same email. Use **Reply all**, so the visitor gets your answer and the rest of the team can see it has been handled. Each person has a switch beside their name in **Who gets these by email**. Switch someone off and they stop getting these emails for your organization, but they can still open the inbox. Anyone can also turn the emails off for themselves in their notification settings, as *Website messages*.
- **Send them to one address instead** takes an address such as info@yourclub.org. While it is set, only that address gets the emails and nobody on your team does. It is never shown on your website. Clear the box and save to go back to emailing your team.
- **The email is the only copy.** A message that is emailed is not kept in TrailsIQ, so file or forward it from your email as you would any other.

- **A quote request also becomes a lead.** Each one that is emailed is filed in **Projects** as a job at the *Lead* stage, with everything the visitor sent in its description, and a client for them in **Clients**. A second request from the same email address is added to the client already on file rather than making another. The email links to the new lead. Nothing is filed while Projects is switched off for your organization, and no client is added while Clients is switched off. The email says so when that happens, and also when you reach your plan's limit on active projects or clients.
- **On a Business site, the volunteer signup is a job application.** Its email and its row in the inbox say *Job application* and the roles somebody picked.

Spam

Every message, quote request and volunteer signup is checked for spam before it is emailed. Anything the filter catches is **not** emailed. It waits in the website inbox instead, with the reasons it was held:

- **Likely spam** is deleted automatically after 30 days.
- **Possible spam** looked mostly real but tripped something. It is deleted automatically after 60 days, so check it now and then.

Open a row to read it, along with why the filter held it and how many days it has left before it is deleted. **Not spam, send it on** emails it to your team as usual and takes it out of the inbox, and you answer it from that email. A quote request the filter held is filed as a lead only once you send it on, never while it waits. **Delete** removes one, and **Delete all spam** at the foot of the list empties the inbox. The visitor always sees the usual thank-you, whatever the filter decided.

If nobody is set up to receive these emails, a message that passes the filter is kept in the inbox as **Not emailed** so it is not lost. **Email it** sends it once somebody is.

Newsletter signups are never emailed. They are on their own page:

Newsletter subscribers

Settings → Newsletter subscribers, under *Public site*, is your whole newsletter list on one page: everybody who signed up on your website, and anybody you added yourself.

- **Search** by address or name, and narrow to **Website** signups or people **Added by hand**.
- **+ Add subscribers** takes one address or many at once. Paste them one per line, or choose a CSV file with an EMAIL column. An address already on the list is not added twice, and the page tells you which ones were added, which were already there and which were not email addresses.
- **Export CSV** downloads exactly what the table is showing, with EMAIL, FIRSTNAME and LASTNAME columns that Mailchimp and Brevo recognize without any setup. Tick rows to export or remove just those.
- **Remove** takes somebody off the list.

Only add people who asked to hear from you.

Forms are protected against spam with a hidden field and a limit on how often one visitor can send. While your site is hidden, the forms and donate button only work for owners and managers trying them out.

Website inbox with the Messages, Volunteers and Newsletter tabs

Common questions

- **Do I lose anything switching templates?** No. Pages, blocks, words, photos and links all stay. Switch back and everything is where it was.
- **Can I see my site in another template before switching?** Yes. **Preview site** on each template card opens your saved pages in that design. Visitors keep seeing the template you saved.
- **Can a donor give monthly by card?** Yes, once Stripe is connected. With Payment Links, once you have pasted a monthly one.
- **Where do I see who donated?** Card gifts through your connected Stripe account are under **Settings → Payments**. PayPal gifts and gifts through another giving page are only in your account with them.

- **Do I need a Stripe account to connect?** You can create one during **Connect Stripe**. Stripe asks for your organization's details and a bank account for payouts.
- **Why does the alert bar not show?** Set to automatic, it only appears while one of your trails is closed. In the editor it says so in place of the bar.

PUBLIC REPORTS

TrailsIQ Go

What TrailsIQ Go is, how trail users send reports, check trail status and follow your organization, and every setting that shapes what they see.

TrailsIQ Go is the part of TrailsIQ for trail users. It is a free app for iOS and Android, from the App Store or Google Play. It was called *TrailsIQ Report* until version 1.7, and a phone that hasn't updated yet still shows that name under its icon. Opening `app.trailsiq.com/report` in a phone's browser offers the download. Nobody needs an account. A hiker, mountain biker or Nordic skier opens it on the trail, taps "*Report an issue*", and their report reaches your review list within seconds. An account is optional, for reporters who want their name on what they send and want to follow what happens to it. See Optional accounts below.

This article covers the app itself. For your side of it, such as reviewing incoming reports, notifying your crew and spam settings, see the *Public reports setup* article. It is the same feature, seen from the other end.

What TrailsIQ Go does

It does four things, starting with the one most trail users do:

1. **Report a problem on a specific trail.** A short wizard asks whether they are standing at the spot or working from a photo they took earlier. It works out which organization and trail the report belongs to, and asks for a short note. Reports arrive in your review list as *pending review*.
2. **Check trail status for an organization they follow.** They tap an organization on the home screen or in a push notification and see a list of trails for each network, with each trail's condition (open, caution or closed), grooming and recent day notes. They can search the organization's trails.
3. **Follow organizations to get push notifications.** Once they follow you, they get a notification on their phone whenever a trail or network changes condition, whenever you post a new daily report, and (if they choose) for events. They are fully in control. The settings for each organization they follow let them turn each kind of notification on or off.
4. **See upcoming events for organizations they follow.** Volunteer days, group rides and races. The events tab on your organization's page lists the next 30 days, with a sign-up button where you have turned sign-ups on.

The app is built to be used with cold hands, straight out of a pocket. Every button is a big target, it waits patiently for a GPS fix (up to 60 seconds), it opens the camera first instead of a slow file picker, and the report form works fully offline using trail data stored on the phone. So a patchy signal in the forest doesn't stop anyone reporting.

The report flow

There are four steps, and the third often doesn't appear at all.

1. **How are you reporting?** Two cards. *I am at the spot* is the usual walk-up and goes to the camera. *I took a photo earlier* opens the phone's photo library and reads the location from the photo. That is for somebody who is back at the truck, or at their kitchen table with this morning's photo of a washout. Either way, the app starts finding the phone's location as soon as this screen appears, so the seconds spent choosing aren't wasted.
2. **The photo.** On the *I am at the spot* path this is the camera, and a report can't be sent without a photo, because it is what your crew works from. The button says *Take a photo first* until there is one, then *Use this photo*. A reporter who chose *I took a photo earlier* never sees this screen. The photo they picked is the report's photo, so there is no need to ask again.
3. **Where.** This screen only appears when there is something to ask. If more than one organization has a trail nearby, the reporter picks which one gets the report. If more than one trail is close, they pick the trail. If your crew already has an item filed within about 50 meters, the app shows

it, and they can confirm that one instead of filing a second. If the location is still coming in, the screen says so and shows the accuracy improving, with an option to use the location as it is. When there is one organization, one trail and nothing already filed nearby, this step is skipped and the reporter goes straight to the last one.

4. **What's going on?** One description box and, if they like, their name and an email or phone number for a reply. The photo and the location are already attached, and the screen says so.

The type and the location are worked out, not asked for. The location is the one the app already found, or the one saved in the photo. A map asking the reporter to agree with a pin under their own feet would only cost them time. The title is the trail name plus the first issue type the app recognizes in the description. So "*big blowdown across the corridor*" on Owl's Ridge arrives as **Owl's Ridge — Blowdown**, and a description with no recognizable word arrives under the trail's name alone. The words that count are exactly the list on your *Settings → Issue types* page.

If a reporter leaves partway through and opens the app again, they don't have to start from scratch.

Your organization's page in the app

When a hiker taps your organization on the home screen, or in a push notification, they land on your organization's page in the app. It has three tabs:

- **Conditions:** the default tab. A banner at the top sums up the whole organization, such as "All trails are open", "Most trails are on caution", "17 of 20 trails open" or "All trails are closed", with a line under it like "17 of 20 open · 2 on caution · 3 closed". Caution counts as open, and the banner only turns amber when most trails are on caution or some are closed, the same as in the daily report. Below that come any hazards you have published, today's weather while *Show weather block* is on, and your lifts with their status and wait time. Then there is a list of trails for each network, with a condition and grooming label beside each trail. Visitors can search within your organization.
- **Daily:** today's note, if your crew has written one, then your public day notes from the last 14 days. Each post is a card with the author, the time, the text and any photos. Today's public posts also appear in the **Live from the trails** block on your website.
- **Events:** your public events for the next 30 days. Each one opens the event's details, with a sign-up button when sign-ups are open.

Two of your settings control the Conditions tab. See Settings that shape the app below.

Following and push notifications

A hiker who reports to your organization can tap the heart on the confirmation screen to follow you. Following does two things:

- It adds your organization to their home screen, so they don't have to search for it next time.
- It turns on push notifications for your organization. They choose which kinds they get, separately for each organization, with the settings gear: *Trail conditions*, *Daily reports* and *Events*.

Notifications are set up when the user allows them on their phone. Someone who follows four organizations can turn each one's notifications on or off separately. Tapping a notification opens the app on the right screen. A trail condition change opens your organization's page at that trail, and a daily report notification opens the Daily tab.

If notifications stop arriving for everyone at once, not just one person, the problem is on our side. Ask us and we will check.

Optional accounts

Everything above works with no account, and always will. A trail user who wants more can sign in from the person icon in the app's bottom bar, or from the menu. To sign in, they enter their email address and a six-digit code we email them. There is no password. It is free, and it doesn't depend on your plan. A new account needs an email address they will keep, so the app turns away temporary inbox services.

The code is for trail-user accounts only. An email address that belongs to a TrailsIQ team account (anyone on an organization's team, an organization's owner, or a member of an umbrella account) can't sign in to TrailsIQ Go with a code. The app says so and offers **Sign in with password**, which opens the usual TrailsIQ sign-in page and brings them back to the app signed in. This works in the TrailsIQ Go app and in a phone's browser.

What changes for the reporter:

- **Reports go out under their name.** On the last step, the app says *Sending as* and their name, with a *Send without my name* box for any report they would rather send anonymously.
- **My reports.** The account screen lists every report they sent under their name, with where it stands: *Sent* (waiting for your review), *Accepted*, *In progress*, *Fixed* or *Not added*. They can tap a report's photo to see it full size.
- **Notifications about their own reports.** If notifications are allowed, the app tells them when your crew accepts a report, starts work on it, marks it fixed or turns it down.
- **Workdays.** Events they sign up for with their account's email show on the account screen, along with any they checked in at. Past workdays show the hours your organization credits them. That follows the same rule as your volunteer hours: they signed up as going, you haven't unmarked them as came, and the event is over. If you change someone's time on the attendee list, their account screen shows the new figure.
- **Checking in at a workday.** On the day of the event, *Check in at a workday* in the menu opens a scanner for the QR code the organizer shows. If the organizer set a check-in spot, the event's page in the app also offers **Check in** to anybody close enough, with no scanning. While an event's check-in is open, the home screen shows it as a card with its own **Check in** button. That happens for every organization the person follows, and for any event they signed up for, whether they follow the organization or not. A scan with no signal is saved on the phone and uploads once it is back in range, for the person who scanned it. If somebody else signs in on that phone in the meantime, the saved check-in waits until the person who scanned it signs in again. If your organization uses one main check-in code for all its events and two are open at once, the app asks which one. See *Check-in from TrailsIQ Go* in the events article for the organizer's side.
- **Earlier reports come with them.** The first time somebody signs in on a phone, the reports that phone already sent are added to their list. You are not told those were theirs. They arrived anonymously and stay that way on your side.
- **Following from a browser.** Your public page has a **Follow** button. Somebody without the app can press it, enter their email, type the six-digit code it sends, and add their name the first time. That creates the same account the app uses, and they follow your organization as soon as they confirm. A browser can't show alerts, so the page tells them to sign in to TrailsIQ Go with the same email. The first time they do, the app follows every organization they followed on the web, with alerts on. From then on, the phone and the page follow the same organizations. Unfollowing in either place stops the alerts on every phone signed in to that account, and following in either place starts them. Signing out of the app leaves the phone following what it followed, without the account.
- **Counting followers.** Your daily report page and your period overview count **Followers**. That is the phones following you in TrailsIQ Go, plus the people who only follow from a browser. The two are shown separately, because browser-only followers get no alerts until they sign in to the app. Someone who signs in to the app with the same email stops counting as browser-only.
- **They are asked once a report is sent.** Somebody who sends a report without an account sees *Follow this report* on the confirmation screen, with *Create an account* and *Not now*. If they create one there, the report they just sent goes into their list. That includes a report still saved on the phone waiting for signal, which goes into the list when it uploads. As with earlier reports, it reaches you exactly as it was sent, with no name or email added.

What changes for your crew:

- **You see the reporter's name and email** on a report sent from an account, under *Reporter* on the task, on the dashboard and in the field app. The email is a link, so asking them about a report is one tap away. Reports sent without a name look exactly as before.
- **Rejecting a report asks for a reason, which is optional.** When you reject a report, the dashboard and the field app ask why. Leave it blank to reject without a reason. If the reporter sent it from an account, they see your reason next to *Not added*, and nobody else does. Cancel backs out of the rejection.
- **An account is not a team membership.** A reporter with an account doesn't appear on your Team page, doesn't take a seat and can't see anything in your account. If you want one of your regular reporters on your crew, invite them from Team like anybody else, using the email address on their reports.

Signing out needs a signal. With no connection, the phone stays signed in. Sign out again once it is back in range.

A reporter can delete their account from the account screen at any time. Their earlier reports stay in your maintenance list, with the name and email removed. Event sign-ups and check-ins stay on your attendee lists as they are, just like a name on a paper sign-in sheet.

Sending with no signal

TrailsIQ Go is built to work in the woods, where the signal comes and goes. If a hiker sends a report with no signal, it waits on the phone as *pending*. The app confirms the report was saved, not that it was sent. When the phone has signal again, whether that is back in cell range, on trailhead Wi-Fi or at home, the saved reports send themselves.

When reports are waiting, the top of the home screen shows a "*{N} pending*" badge. Tapping it opens a list where the user can see each waiting report and try sending it again.

A report somebody started but didn't send is kept on the phone too. The next time they open the wizard, the app offers it back with **Continue** and **Discard**, so closing the app halfway through doesn't lose it.

If a waiting report no longer matches a trail when it uploads, for example because the trail was made private or the organization left TrailsIQ Go, it stays on the pending list with **Retry** and **Discard**. It isn't thrown away. The reporter decides what happens to it.

A report saved while one account was signed in goes out under that account. If a different account is signed in on the phone by the time it uploads, the report still reaches you, but without the link to anybody's account.

Reports more than 7 days old when they try to send are not sent. A report about a trail hazard from a week ago usually can't be acted on any more. The user sees a message in the list and can send a fresh report instead.

Settings you control that shape the app

Every switch that changes what trail users see of your organization is in **Settings**. These are the ones that matter:

- **Exclude from TrailsIQ Go** (*Public visibility* section). This removes your organization from the app completely. Hikers won't see it nearby or in search, nobody can follow it and no notifications go out. Your website stays up. It has its own switch, **Hide public website**, right below. Your crew, the field app and the dashboard keep working as normal.
- **Show trail status publicly** (*Public visibility* section). This is the main switch for the Conditions tab in TrailsIQ Go *and* for trail status on your website. When it is off, neither shows any trail conditions, and no notifications go out when a trail's status changes.
- **Show trail status in TrailsIQ Go** (*Public visibility* section, just below the main switch). This turns off trail status in the app only. When it is off and the main switch is on, trails are still listed in TrailsIQ Go so a hiker can pick one to report on, but the condition and grooming labels disappear. Use it if TrailsIQ Go is only for collecting reports and you post trail conditions somewhere else, such as a Facebook page or another website.
- **Show weather** (*Live from the trails* section). This shows today's weather on your organization's page in TrailsIQ Go, and the weather in your website's live feed.
- **Public trails** (set on each trail, under its details). A trail set to *private* never appears in TrailsIQ Go's trail list. That is useful for test loops or trails temporarily closed to public reporting.
- **Issue types** (*Settings → Issue types*). Trail users don't pick a type, but TrailsIQ Go still uses this list. It is the set of words the app looks for in a description to title the report. Every type has a *Use for TrailsIQ Go reports* switch. Turn it off on a type you keep for internal use and it will never be picked out of a hiker's words. A custom type you have added is used unless you turn it off. The switch only affects TrailsIQ Go, so your team can still file tasks under the type. A type you **Hide** on the same screen is not used by TrailsIQ Go either.

Common gotchas

- **Reports aren't shown on your website.** A hiker who sends a report shouldn't expect to see their photo on your website. It shows what your crew publishes (day notes, weather and trail status), not what hikers send in. Public reports arrive as *pending review* tasks in your review list. Even after a manager approves one, its photo and description are never shown on your website. A short line such as "New maintenance issue opened on Owl's Ridge" *can* appear in your website's **Live from the trails** block, if you have ticked *Maintenance items, new and resolved* under *Also show* in Settings → Live from the trails. It is unticked by default, so nothing appears. Hikers never see other hikers' reports. They only see the trail's status (open, caution or closed) once your crew has acted on the problem.

- **A second report of the same thing can still arrive.** The app shows reporters any item already filed nearby, but someone can still send a second, almost identical report, for example because they didn't see their first one appear while it waited for review. Both will be in your list. Merge them when you review them, or reject the duplicate.
- **Exclude from TrailsIQ Go turns off a lot inside the app.** It also stops people following you and stops every notification a trail user could get. It leaves your public website alone. To take that down too, also turn on *Hide public website*. If you only want to hide the Conditions tab, use *Show trail status in TrailsIQ Go* instead.
- **Push notifications need the app.** The web version at `/report` can't send notifications, because phone browsers handle notification permission very differently. A hiker who wants notifications needs to install TrailsIQ Go from the App Store or Google Play.
- **There is a limit of 5 reports an hour from one internet connection.** On a trailhead Wi-Fi hotspot with 20 hikers, a group sending several reports could reach it. Extra reports get a "*try again in a few minutes*" message, and the app sends them again automatically.

What's next

- If you are setting up public reports for the first time, follow the *Public reports setup* article. It covers the review list, notifications and every setting, from the point of view of getting your first report.
- To choose which updates appear in your website's **Live from the trails** block (day notes, weather or trail status changes), see *How to use the daily report*.
- To reach everyone who follows your organization, for example to announce an event or a seasonal opening or closing, post a public day note. It sends the *Daily reports* notification to everyone who follows you and has those turned on.

Umbrella accounts

When a larger organization pays for your plan: how to see who is hosting you, exactly what they can and cannot see about your trails, who may accept or decline, and how to leave.

Some organizations belong to a larger one, such as a state association, a regional alliance or a parent club. TrailsIQ calls that larger organization an **umbrella account**. It can pay for the chapters it looks after, so each of them is on a paid plan without paying separately.

If an umbrella hosts you, two things are true. Your plan comes from them, and they can see some things about your trails. This article covers both, and shows you how to check either one at any time.

Finding out where you stand

Open **Settings → Umbrella account**. It tells you one of three things:

- **Nobody is hosting this organization.** Nothing about your trails is visible outside your own team, and your plan is your own.
- **An umbrella has asked to host you.** You can read exactly what they would be able to see, then accept or decline.
- **An umbrella is hosting you.** The page names them, the plan you are on because of them, and what they can see.

The page is always there, whether or not anybody is hosting you. That is on purpose. You should be able to answer "*can anyone outside our team see our numbers?*" without already knowing the answer.

What an umbrella can see

They can see:

- Totals for your organization — how many miles of trail you look after, how many bridges, gates and signs, and what condition they are in — and the lines of your trails, drawn on one map beside the other chapters' without their names.
- How much maintenance you are getting done over a period you choose, and how much is still open.
- The names of anything in poor or failed condition, which trail it is on and when it was last rated — so they can ask you about it.
- Your team list — who is a member of this organization, what their role is, and whether you have marked them as paid staff, so their hours are counted as crew time rather than volunteer time.
- Approved work hours — who worked, on which day, for how long, and under which category. This is what lets an umbrella account cover insurance for volunteers across its chapters.
- Time your crew logs against a maintenance task — who, which day and how long. It is shown beside the approved hours and counted separately, because a task log has not been through anybody's approval. When a session includes volunteers from outside your team, they see the number of them — never names — and that time counts in your volunteer hours.
- Time given at your events — how many people came and for how long, counted in your volunteer hours. They see the totals, never who came. A member of your team who comes gets the time on their approved work hours, like any other day they work.
- How things stand today — your networks' condition if you publish it on your public pages, how many people your trail counters recorded, how many structures are past their next inspection date, how long your oldest open task has been open, and how many public reports are waiting for you to review.
- Your plan, and whether this organization has been active recently.

They cannot see:

- Your inspection records, including the answers and the photographs.
- Your maintenance items themselves — the descriptions, the notes and the photographs your crew takes.
- What anybody wrote on a work-hours entry or a task log. They see the hours and the category, never the description of the work.

- Time off. Holiday, vacation and sick days are left out of everything an umbrella sees, the entries and the totals alike.
- Work-hours entries nobody has approved. A draft, a submitted entry waiting on review and a rejected one are all invisible to them. (Task time has no approval step of its own, which is why it is counted under its own heading rather than added to the approved total.)
- WHICH task somebody's time went on. They see that a person worked three hours on a Tuesday; they do not see the item, the trail or anything written on it. The same line the maintenance items themselves are on, said again here because a log of hours against work is the one place it would be easy to assume otherwise.
- Which structures are overdue for inspection, or your counter readings by counter, day or hour. They see a count and a total for the organization.
- Your expenses.
- Any ability to change something. They cannot edit, close or delete anything in your organization.

In short, they see **totals, names and approved hours**. They never see the work itself. They can tell that three of your bridges are in poor condition, which three they are, which trail each one is on and when each was last rated. They cannot open the inspections, read what the inspector wrote, or look at the photos.

Everything they see is view only. There is no control anywhere in TrailsIQ that lets an umbrella change, close or delete anything in your organization.

Your team and your hours

This part changed on 24 September 2026. If you joined before then, it changed after you accepted, and you were sent a notification about it.

An umbrella account can see **your team list**. That means who is a member, what role they hold, and whether you have marked them as **paid staff** on your Team page. It can also see **every work-hours entry you have approved**: who worked, on which day, for how long and under which category. Finally, it sees **time your crew logs against a maintenance task**, meaning who, which day and how long. That time is shown in its own column beside the approved hours.

The reason is insurance. An umbrella that insures volunteers across its chapters cannot buy that policy without knowing who is covered and when they were working. The people insured are your volunteers, so sharing these figures benefits your organization.

A few limits are worth knowing:

- **Only approved work hours.** Drafts, entries waiting for review and entries you rejected are all hidden from them. They only see hours you have signed off.
- **Paid staff count as crew, not volunteers.** Mark a member as paid staff in their Edit window on your Team page. From that day on, their hours are reported to the umbrella as crew hours. They are listed beside the volunteer hours, without the dollar value a volunteer hour carries. Hours they gave before that day stay volunteer hours. Everybody starts as a volunteer.
- **Time off is never shared.** Holiday, vacation and sick days are left out of everything the umbrella sees, both the entries and the totals.
- **Outside volunteers count as volunteer hours.** When a work session includes helpers who are not on your team, the umbrella sees how many there were but never who they were. Their time is added to your volunteer hours.
- **So do the people who come to your events.** Everyone on an event's attendee list counts toward your volunteer hours once the day has passed. The umbrella sees the hours and how many people gave them, but never who came. When a member of your team comes, the time goes on their approved work hours, like any other day they work.
- **Task time is counted separately until it is approved.** Hours logged against a maintenance task land on the person's Work hours as a draft. Until somebody at your organization approves that draft, the time is shown under its own heading instead of in the approved total. Once it is approved, it moves into the approved hours and leaves the task column, so the same afternoon is never counted twice. Both are shown because an umbrella that insures your volunteers needs to know how long somebody was out there, whichever list the time is on.
- **They never see the description.** They see the hours and the category. Whatever somebody wrote about the work, such as what broke, where and who else was there, stays with you. That applies to work-hours entries and task logs alike.
- **Expenses stay with you.** Nothing about money leaves your organization.

If you don't want to share this, the answer is to stop being hosted. Go to **Settings → Umbrella account → Leave**. You can do this yourself, and the umbrella is not asked to approve it.

Accepting an invitation

When an umbrella invites your organization, every owner gets an email about it. The email links to **Settings → Umbrella account**, where the invitation is waiting. If you belong to more than one organization, switch to the one that was invited first.

Only an **owner** can accept. Joining shares your organization's totals with another account. That is a bigger decision than changing a trail's condition, so a manager or volunteer cannot make it for you.

The invitation shows the full list above before the buttons, not behind a link. Read it, then press **Accept** or **Decline**. Declining is final for that invitation. The umbrella can ask again later, and you will then see a new one.

If the invitation came by email

An umbrella can invite an organization that is not on TrailsIQ yet. So the first you hear about any of this may be an email instead of a page in the app. The email names the account inviting you. Before the button, it shows the same two lists of what they can and cannot see.

Following the link sets up your organization and joins the umbrella in one step:

- **If you don't have an account**, the link takes you to the sign-up form. It asks for your organization's name, the same as for anybody starting out. The organization you create there is the one that joins the umbrella. Nothing else about setting up changes.
- **If you already have an account**, sign in. The link then shows a short screen asking which of your organizations is joining, or offering to set up a new one. It never picks for you. Joining an umbrella is a decision about one particular organization, not about whichever one you happened to have open.

The invitation is addressed to one email address, and only that address can answer it. If you are signed in as somebody else, the screen tells you so. It does not quietly use the account you are signed in to.

The link works for three weeks. After that it stops working, and the umbrella can send a new one.

From then on, everything is the same as an invitation answered inside the app. Your organization stays yours, your plan becomes the higher of the two, and you can leave whenever you like.

Your plan while you are hosted

Your plan becomes **whichever is higher**, your own or the umbrella's. Almost always that means you move up to theirs at no cost to you.

If you were already paying for a higher plan than the umbrella bought, you keep yours. Joining an umbrella never takes a feature away from you.

Three things change your plan back to your own, and you can see all of them on the same Settings page:

- you leave;
- the umbrella stops paying, or their account is suspended;
- they stop hosting you.

In each case you drop to the plan your organization pays for itself. For most chapters that is the free plan. Nothing is deleted when that happens. Trails, maintenance, photos and history all stay exactly as they are. Only the features available to you change.

While an umbrella is hosting you, **Settings → Billing** shows the umbrella's deal instead of the standard plans, because that is the plan it agreed for you. If you leave, or its account stops being active, the standard plans come back.

Cover can start on a later day. An umbrella can pay ahead for cover that starts on a date it picks. Until that day, **Settings → Billing** names the umbrella and the date its cover starts. In the meantime you can stay on the free plan, or take a plan of your own until then. If your umbrella pays part of your plan, you can also subscribe for your share before that day. Your card is saved now, nothing is charged until the start day, and you are on the plan from the morning it starts.

A plan of your own stops renewing once your umbrella pays for all of it. Say you are paying for a plan yourself when your umbrella starts covering all of it. We set your subscription to stop at the end of the period you have already paid for, and we email your organization's owners to tell them. Nothing is refunded and nothing more is charged. If we cannot stop it ourselves, the email tells you how to cancel it. If the umbrella's cover ends before your paid period does, your subscription is set to renew again. This only happens when your umbrella's plan is at least as high as the plan you pay for. If yours is higher, it is left alone.

When the umbrella pays part of it

Some umbrellas pay a share of each chapter's plan instead of all of it, for example half. Some pay a different share for different chapters. If yours does, the plan is not switched on for you automatically. **Settings → Billing** shows what share they pay and offers their plan with that amount taken off. You pay by card, monthly or yearly, or whichever of the two your umbrella agreed. Once you subscribe, the discount is on every invoice and your umbrella is billed for its share.

The discount follows the umbrella. If they change your share, your next invoice uses the new one.

You are never moved to the full price without choosing it. If you leave, the umbrella stops hosting you, or its agreement ends, the discount comes off. Your subscription is then set to stop at the end of the period you have already paid for. We email your organization's owners when that happens. To carry on at the full price instead, press **Keep my plan** on **Settings → Billing**. If the umbrella renews before your period ends, the discount comes back and your plan renews as normal.

When an umbrella's agreement is about to end and has not been renewed, your organization's owners get an email two weeks ahead explaining what will change.

If you already pay for a plan yourself, the Billing page says so instead of selling you a second one. Ask us and we will move you onto the discounted price.

Leaving

Go to **Settings → Umbrella account → Leave**. You can do this yourself. You don't need the umbrella's permission, and they are not asked to approve it.

Before you press it, the screen tells you what changes. If the plan you are on comes from the umbrella, it names the plan you go back to. If you were already paying for that plan yourself, it says so, and leaving costs you nothing except their access. Either way, leaving takes effect straight away, and the umbrella stops seeing anything about your organization at the same moment.

Common gotchas

- **Trust the page, not people's memory.** To know who can see your numbers today, open Settings → Umbrella account. What somebody remembers agreeing two seasons ago may not match.
- **Only an owner can accept, decline or leave.** If you don't see the buttons, you are signed in as a manager or below.
- **Being invited is not the same as being hosted.** Nothing is visible to them, and your plan does not change, until somebody at your organization accepts.
- **An emailed invitation has to be answered from the address it was sent to.** Forwarding it to a colleague does not work. Ask the umbrella to send one to them instead.
- **Setting up through an invitation link still gives you your own organization.** It is not a shared or limited account. You get everything a chapter gets, and leaving later takes nothing away from you.
- **When an umbrella stops paying, your cover ends that day.** The Settings page shows their account as not active, and your plan is your own again.
- **A partly paid plan has to be bought.** If your umbrella pays less than the whole plan, nothing changes until somebody at your organization subscribes on the Billing page.
- **You can belong to more than one umbrella.** A club in two associations can be hosted by both, and you get the higher of the two plans.

UMBRELLA ACCOUNTS

Running an umbrella account

For the organization holding the account: inviting chapters, reading the overview and reports, hours across every chapter, who else can sign in, places and billing, and what an umbrella can never see.

An **umbrella account** is for an organization that looks after other organizations, such as a state association, a regional alliance or a parent club with chapters. It pays for the plans its chapters are on, and it gets one place to see what all of them are doing.

You sign in to it separately from an ordinary account. Everything below is under **HQ**, which is where you land when you sign in to an umbrella account. HQ is not the same as your own organization's dashboard. If you have both, the switcher at the top of the sidebar moves between them.

Setting one up

We create the account and set how many chapters it can host. That part is a conversation rather than a form. Ask us and tell us the name and roughly how many chapters you expect.

Everything after that is yours: inviting the chapters, adding the rest of your staff and changing the account's own details.

Overview

The first screen is the one to show a funder or a board. It shows what your chapters add up to over a period you pick: **30 days**, **90 days** or **12 months**. It opens on 12 months, because a grant application usually asks for a year's figures.

It opens on **Chapters on board**. This is how many of your chapters are fully active, meaning they have accepted and their plan is paid for. That can be because you pay all of it, or because they have their own subscription for the part you do not pay. A prepaid place only pays your share, so a chapter you pay part of counts as fully active once it has subscribed for the rest.

A bar shows every place on your plan, colored by who is in it: fully active, **waiting on payment** (accepted, but their share has not started yet), invited, or free. Beside it, the chapters you still need to chase are listed first, each with the reason, along with links to manage your chapters and to Billing. If your cover starts on a later day, the headline counts your chapters as waiting for cover to start until then, and the chapters that will be fully active say which day they start. Until your own plan is paid for, it covers nobody. Every chapter that has accepted shows as waiting on payment, and the block explains why before anything else.

Under that is the activity across all your chapters, led by four figures:

- **Registered volunteers:** everyone your chapters count as volunteers today. That means the people on their teams and everyone on their Volunteers lists, such as event sign-ups and walk-ins. Anyone a chapter marks as paid staff on its Team page is left out, and their hours show as crew.
- **Trail cared for:** the length of trail your chapters look after today, how many trails that is, and how many structures are on them.
- **Volunteer hours:** approved hours across every chapter over the period from members who are not paid staff, and how many volunteers gave them. Each chapter marks its own paid staff on its Team page, with the day that started. Their hours from that day on show underneath as **paid crew** hours, and are never added in or given a value. Holiday, vacation and sick days are left out entirely, because time off is not time given. Volunteers from outside a chapter's team, logged on a task as a number, are counted for the length of the session. So is everyone who came to a chapter's events, for the length of the event unless the chapter entered their own hours, and they are in the count of volunteers too. You see these as totals, never as names. Time logged against tasks that nobody has approved yet is never added in.
- **Value of that time:** those hours at the national value of an hour of volunteer time, published each year by Independent Sector. Funders and grant forms usually ask for this figure. The rate has an asterisk, and the line under the figures names the source and links to it, so anyone reading your numbers can check it.

Volunteer hours also show how they changed from the period before: the 30 days before the last 30, or the 12 months before the last 12.

Under them:

- **The period against the one before:** a chart of volunteer hours, paid crew hours or tasks completed (maintenance your chapters marked done). You switch between them at the top of the chart. Each week or month has a pair of bars: the period you picked in amber, and the same stretch of the period before in gray behind it. Point at a pair to read both numbers.
- **Chapters:** every chapter, ranked by trail length, volunteer hours, crew hours, tasks completed or **hours per mile** (**hours per km** in metric). You choose in **Ranked by** above the list. Hours per mile is volunteer hours for every mile or kilometer of trail a chapter looks after, which is a fairer comparison between a small chapter with a busy crew and a large one. Press a chapter to see its trail, structures, hours (and how many of its people gave them) and tasks under the list, with a link to its own page. The map beside the list zooms to its trails. Press it again to go back to every chapter. Pointing at a chapter lifts its trails above the rest. The map zooms with your mouse wheel or trackpad like any other map.

Impact summary turns the page into a one-page PDF, sized for US Letter. It has the headline figures, this calendar year against last year month by month, and the chapters side by side. If you have added a logo under Settings, it goes at the top.

Trail length is what your chapters have **today**. Hours, their value and tasks are totals **over the period**. The page says which is which under the figures.

Miles or kilometers

Every trail length under HQ, on screen, in the PDF and in the spreadsheet export, follows the **Units** setting on your own profile. Left on **Auto**, it follows the country set for the umbrella account: miles in the United States and kilometers almost everywhere else. Pick **Metric** or **Imperial** on your profile to choose for yourself. Everyone else on the account keeps their own choice.

HQ overview with the four headline figures, the period against the one before, and the chapters beside the map

Chapters

HQ → Chapters lists who you host, who you have asked, and how many places you have left.

Inviting a chapter

Invitations are sent from **HQ → Members & chapters**. **Invite a chapter** on the Chapters page takes you there with the invitation already open.

The box takes either of two things:

- **An organization already on TrailsIQ.** Type its name, or paste the web address of its public page. They get an invitation and decide whether to accept.
- **An email address.** Use this for an organization that is not on TrailsIQ at all. The link sets up their account and joins them to you in one step, so they do not have to sign up first and then wait for you to find them.

For an organization already on TrailsIQ, a green check appears with its name once what you typed matches one exactly, so you know the invitation is going to the right place. Part of a name never matches. The box looks up one organization and is not a directory. If you already host the organization, the box says so and **Send invitation** stays off.

An emailed invitation can include a short note. The note is what makes an invitation read as a person asking rather than a system sending.

An invitation holds a place until it is answered. If you host eight of ten and invite two more, you have no places free until someone answers. That stops an account promising more places than it paid for. Withdrawing an invitation gives the place straight back.

Accepting is up to them

You cannot add a chapter, only ask one. Someone with the owner role at that organization has to accept. Until they do, you can see nothing about them.

An emailed invitation lasts three weeks. After that the link stops working, but the place stays held until you withdraw it. The list marks it expired, so a place never frees up without you seeing why. An invitation to an organization already on TrailsIQ does not expire.

Which chapter needs a call

Under the list are two panels that help you decide which chapter to call. Both cover the last 30 days:

- **Chapter health:** one line per chapter. It shows how long its oldest open task has been open, how many public reports are waiting for review, how many structures are past their inspection date, its trail use and hours, and when anyone last recorded anything. Chapters with something waiting come first, and the figure that puts them there is marked. It always shows a count or a date, never which task, report or structure.
- **Right now:** each network's condition today, for chapters that show it on their own public pages. A chapter that keeps its trail status private is named at the bottom instead, and you see no more of it here than the public would.

Stopping

Stop hosting takes a chapter off the account. It asks you to type the chapter's name first, because the chapter did not choose this. Their plan goes back to whatever they pay for themselves, the same day.

A chapter can also leave by itself without asking you. That is deliberate. An organization that cannot get out of an arrangement has not really agreed to it.

HQ Chapters with the places bar, the hosted chapters, chapter health and each network right now

A chapter's own page

Clicking a chapter opens the same figures for that one organization, over a period you pick. Like the overview, it opens on 12 months:

- **Trail, trail status, infrastructure and open work** as of today. Trail status counts how many of the chapter's trails are open, on caution or closed. A trail on caution still counts as open. If a chapter keeps its trail status private, the page says so instead of showing the counts.
- **Volunteers**: registered volunteers (the team and the Volunteers list, without paid staff), how many of them logged approved hours, those hours, and what that time is worth.
- **Maintenance**: tasks opened, closed and still open, bar by bar across the period.
- **Infrastructure condition** and **Team and hours**, with everyone on the chapter's team and the hours they worked.

This page is for reading. You cannot open their account from it, edit anything in it, or close a maintenance task for them.

A chapter page with trail status, volunteers, maintenance and the team

People and hours

HQ → People & hours lists every volunteer and staff member across every chapter, with the hours they worked in the period.

It opens on the last twelve months rather than thirty days, because people usually open this screen for a yearly question, such as an insurance return, a grant report or a board pack. You can pick any range with the date picker, and a range you choose takes over from the tabs.

It shows:

- **Hours by role**, so you can see how the work is split.
- **A month-by-month strip** of hours across the whole account.
- **Every person**, with their chapter, their hours, and how many separate days they turned out.
- **Every chapter**, with its people, its hours and its days worked.

Approved hours and task time are counted separately, on purpose. An approved work hours entry has been reviewed by someone at the chapter. Time logged against a maintenance task has not been reviewed yet. It is what a crew recorded while doing the job, and it goes to the chapter's review as a draft work hours entry. Adding the two together would report hours as reviewed when nobody has reviewed them, so they sit side by side under their own headings. When the chapter approves a session's draft, it moves out of task time and into approved hours, so it is only counted once.

HQ People and hours over a twelve-month window

Reports

HQ → Reports shows your chapters' figures for a different job. It is what you build a board pack or a grant return from.

It does three things the overview does not:

- **Any date range**, not just the three set periods.
- **The period before, of the same length**, next to the current one. A quarter's numbers mean little without the quarter before, and working that out by hand meant running the report twice and subtracting.
- **Export**, which gives you a spreadsheet with a row per chapter. The table by chapter is in the file rather than on the screen, because a table you can take away is the useful one.

The comparison covers work **opened and closed** and nothing else. Comparing trail length or structure counts between two periods compares two readings taken on different days. That means little if a chapter joined in between, so the page does not offer a number it cannot stand behind.

A chapter that left during the range is still in the figures, and the page says how many did. Its work still happened during the period you asked about. A total that dropped it would change every time a chapter left.

HQ Reports with the previous period beside the current one and the export button

Members and chapters

HQ → Members & chapters has two tabs, and they are about different things.

- **HQ team** is who can sign in to the umbrella account: your board and staff. A **Reader** reads the reports. An **Owner** can also invite chapters, add people and change the account. Someone who already has a TrailsIQ account is added straight away and gets an email with a link to this account. Anyone else gets an email invitation and joins once they accept it. This is not your chapters' own teams. Each chapter manages its own team inside its own account, and nobody on the HQ team can open it.
- **Chapters** lists the organizations you host, with each chapter's owner and the date it joined, and every invitation still waiting for an answer. Each chapter is marked **Active** once it has accepted and is paid for, or **Waiting to pay** while it still has its own part of the plan to pay. The bar above them shows the places on your plan in the same colors: green for a fully active chapter, amber for one still to pay, pale for a place held by an invitation, and gray for a free place. The places bar on **Chapters** works the same way.

Your HQ team

There are two roles:

- **Owner** can see everything, invite chapters, stop hosting them, add and remove members, and change the account's own settings.
- **Reader** can read the reports and change nothing.

Everyone on the account can see the list. Anyone on the account should be able to see who can read your chapters' figures without having to ask.

Someone you add does not need a TrailsIQ account. If they do not have one, they get an invitation, and its link sets up an account with no organization attached. It is only for reading these reports. They are not on the account until they follow the link, so the list marks them **Waiting** until then, with **Copy link** on the row in case the email did not arrive.

The only owner cannot be removed or made a reader. An account with no owner cannot invite a chapter, change its settings or make anyone an owner again, because all of that needs the owner role. Make someone else an owner first.

Your chapters

Invite a chapter opens the invitation described under *Inviting a chapter* above. It reads **No free places** when every place is filled or held. Withdraw an invitation, or use **Add places** to see your plan.

An emailed invitation has **Copy link** beside it, for the same reason as above. If the email went astray, you can send the link yourself. An invitation to an organization already on TrailsIQ has no link, because they answer it from their own Settings.

Open goes to the chapter's own page. **Stop hosting** works the same as on the Chapters page.

HQ Members & chapters with each chapter marked Active or Waiting to pay

The invite box with a green check on an organization already on TrailsIQ

Billing

HQ → Billing shows the plan your chapters are on, the date the account is paid through, and how many places are used, held by an invitation, and free.

It also lists what a hosted chapter gets on that plan, in the same words their own Settings page uses.

When the account is not paid up, hosting stops covering anyone. Your chapters go back to their own plans that day, and this page says so. It tells apart three cases: never paid, expired and suspended. A bare "not active" would not tell you what to do about it.

Paying part of each chapter's plan

An account can pay all of each chapter's plan, or a share of it. The share can be one figure for every chapter or set chapter by chapter. If you pay all of it, every chapter you host is on your plan as soon as it accepts. If you pay less, each chapter subscribes to your plan on its own Billing page with your share taken off, and you are invoiced your share for the chapters that have subscribed.

When you pay part of any chapter's plan, **HQ → Billing** lists those chapters with the share you pay, whether each one has subscribed and on which cycle, and what your share comes to per month and per year. That total is what your invoice is built from.

A change to a share applies from that chapter's next invoice. A chapter that leaves stops costing you from its next invoice.

How you pay your share

Your share is billed once a month. Every chapter payment since the last invoice goes on one bill, plus sales tax where it applies. In a month with nothing owed, no bill is sent and nothing is charged. An owner chooses how it is paid under **How you pay** on **HQ → Billing**, with **Set up payment**:

- **Card on file.** The invoice is charged to the card automatically. You add the card on Stripe's secure page, and the Billing page names the card it will charge.
- **Emailed invoice.** The invoice is emailed to the address you give, with a link to pay by card or bank transfer. It is due in 30 days.

Both ask for a billing address, because tax depends on it. **Change** switches between the two or updates the details at any time, and the next invoice goes out the new way. The page also shows what the next invoice adds up to so far and the date it goes out.

Until an owner sets this up, **How you pay** reads **Not set up** and asks you to pick one.

Some accounts have agreed how they pay with us instead. If yours is set to a card, the button reads **Add a card** and that is the only choice. If it is set to an emailed invoice, we set it up for you and the page shows where the invoice goes. Ask us to change either one.

Some accounts have to choose this first. If your account was set up that way, every HQ page reminds you until an owner has picked a card or emailed invoices, and you cannot invite a chapter or buy places until then. **Set up payment** takes you straight there.

We may set it up for you. We can set up emailed invoices for your account, and whether an owner can change how you pay is one of the settings agreed with us. If yours cannot, the Billing page says we set it up. Ask us to change it.

Some accounts pay us by check or bank transfer instead. For those, **How you pay** says that we invoice you and there is nothing to set up. We mark each invoice paid when your payment arrives. If you would like to switch either way, ask us.

Prepaying for chapters

Instead of paying your share chapter by chapter each month, you can pay for a number of chapters a year at a time. If your account can do this, owners see **Prepaid chapter places** on **HQ → Billing**. Choose how many places, see the price and buy them. **How prepaid places work** under the box shows the rules below.

- **A place costs your share of a year of your plan.** If you pay 40% of a plan, a place costs 40% of its yearly price. If you cover chapters in full, it costs the whole yearly price. Places bought while you cover chapters in full keep those chapters covered in full until the places end, even if you lower your share in the meantime. A lower share applies to places bought after the change.
- **Buying more places at once can cost less.** Your account may have volume discounts, such as a percentage off from ten places up. They show as cards in the box, and choosing one fills in that number of places. A discount for more places than you can host at once is dimmed until that number is raised. The line under the price says how many more places you need for the next discount. You get the best discount your number reaches, and the price shown is what you pay, plus any sales tax.
- **Places run for a year from the day they are paid.** They start when the payment arrives, not when you ask for them. If your account's end date is earlier than the last day paid for, it moves out to match. Places we set up for you, such as free places while you get started, can run between dates agreed with us instead. They can also cover their chapters in full even when you pay part of each plan. **HQ → Billing** shows the day they end, and the chapters go back to your usual share after that. Places we give you free are listed as **Free**, with what they would have cost. While they cover chapters in full, the page shows those chapters at 100%.
- **Your first places can start on a day you pick.** When no paid places are running or waiting to start, **Starts** offers **When paid**, which is the default, or **On a date**, up to a year ahead. That lets you buy places now for a season that starts later. You pay now and the year runs from the date you chose. If your account is not covering anyone yet, its cover starts on that date too, so your chapters move onto your plan that day and stay on their own plans until then. **HQ → Billing** says when your cover starts. If the payment arrives after that date, the places start on the day it is paid instead. Added places and renewals always start as described below.
- **Adding places or renewing.** While places are running, **HQ → Billing** offers two choices. **Add places now** starts the new places the day they are paid and ends them with the ones you already have, priced for the time left. Together they count toward the volume discount. **Renew for a year** costs nothing extra for paying early, and the new places start the day after your current ones end.
- **Your plan and share are fixed while places are running.** Places are priced on the plan and share of the day you buy them. So an account that can normally change those on **HQ → Billing** cannot while paid places are running. Ask us if they need to change sooner.
- **Your longest-hosted chapters fill the places first.** A chapter you have set to pay nothing toward never takes one. Chapters in places get the same cover as any other chapter, and their share is not billed monthly or when they pay. Chapters beyond your places are billed your share as before. When a chapter in a place leaves, the next one in line takes its place.
- **If you cover chapters in full, chapters beyond your places are billed monthly.** While your places are running, each chapter past them is billed your plan's monthly price on your monthly invoice. That starts on the 1st after it joins and lasts until a place is free for it or you buy more. The month your agreement ends is only billed for the days it still covers. **HQ → Billing** says how many chapters this applies to.
- **You pay for places the same way you pay your share.** With a card on file, the card is charged straight away. With emailed invoices, **Pay now** takes you to Stripe's payment page to pay by card or bank transfer, and a copy of the invoice is emailed too, for your records or for someone else to pay. A purchase still waiting for payment has its own **Pay now** button. If you have not chosen how you pay yet, the buy button reads **Set up how you pay** and opens that choice first. Once it is saved, you can pay for the places straight away. If we bill your account by hand, we send you an invoice, and the places start when we mark it paid.

You can have one purchase waiting for payment at a time. Once it is paid, you can buy more. To change your mind about one that is still waiting, press **Cancel** beside it. Nothing has been charged, and its invoice is canceled so the emailed copy can no longer be paid. Places that are already paid cannot be canceled here. Ask us about a refund.

When the agreement is ending

Thirty days before the agreement's end date, the account's owners get an email saying it is ending and what that means for each chapter. Your chapters are not told at that point, so if you renew in time they never hear about it.

If the end date has not moved two weeks before it arrives, each chapter's owners are told what will happen to their plan. A chapter you cover in full goes back to its own plan the day after. A chapter paying the rest by card is not charged full price. Its subscription is set to stop at the end of the period it has paid for, unless it chooses to keep the plan at full price. If you renew later, the share comes back for any chapter still on the plan.

Changing your own settings

Some accounts can change their own terms on **HQ → Billing**. Under **Who pays for each chapter**, that is the share you pay, for every chapter and for each chapter on its own. Under **The plan chapters get**, it is the plan, which billing cycles a chapter can pay on, and the most chapters you can

host at once. Prepaying for chapters and choosing how you pay are also among these settings. Which ones your account can change is agreed with us, and only owners can edit them. The rest are shown as plain text, so you can see them but not change them. A chapter that has already subscribed keeps its cycle. The most chapters you can host can never go below the number you already host, or below prepaid places you have paid for. **No limit** beside it lets you host any number of chapters. Places are then counted but not capped, and every volume discount is within reach.

Each chapter under **Who pays for each chapter** says whether it is fully active or still has its own part to pay. The **Chapter places** bar shows the same thing: green for fully active, amber for a chapter still to pay, and pale for one that has not answered its invitation. The places bars on **Members & chapters** and **Chapters** use the same colors.

Changes are not saved one at a time. A bar at the bottom of the page counts what you have changed. **Save changes** saves all of it at once, and **Discard** puts it all back. Chapters see the changes on their next bill.

For anything your account cannot change itself, ask us.

HQ Billing with cover dates, chapter places and who pays for each chapter

Settings

HQ → Settings holds the account's own details: name, legal name, country, timezone, logo, color, contact email and website.

The account's web address is shown here but cannot be changed. It is in every link anyone has bookmarked and in every invitation already sent, so changing it would quietly break all of them. If you need it changed, ask us.

What you cannot see

This is the same list every chapter reads before accepting, and it is worth reading from your side too. If you ask a chapter for something on this list, they cannot give it to you from inside TrailsIQ.

- Your inspection records, including the answers and the photographs.
- Your maintenance items themselves — the descriptions, the notes and the photographs your crew takes.
- What anybody wrote on a work-hours entry or a task log. They see the hours and the category, never the description of the work.
- Time off. Holiday, vacation and sick days are left out of everything an umbrella sees, the entries and the totals alike.
- Work-hours entries nobody has approved. A draft, a submitted entry waiting on review and a rejected one are all invisible to them. (Task time has no approval step of its own, which is why it is counted under its own heading rather than added to the approved total.)
- WHICH task somebody's time went on. They see that a person worked three hours on a Tuesday; they do not see the item, the trail or anything written on it. The same line the maintenance items themselves are on, said again here because a log of hours against work is the one place it would be easy to assume otherwise.
- Which structures are overdue for inspection, or your counter readings by counter, day or hour. They see a count and a total for the organization.
- Your expenses.
- Any ability to change something. They cannot edit, close or delete anything in your organization.

In short, you see **totals, names, conditions and hours**. You do not see the work itself: the descriptions, the notes, the photos, or which task anyone's time went on. You also cannot change anything in a chapter's account, including closing one of their maintenance tasks.

Common gotchas

- **HQ is separate from your own organization's account.** If your organization also uses TrailsIQ, the switcher at the top of the sidebar moves between them. A change in one does not change the other.
- **Inviting a chapter is not the same as hosting it.** You can see nothing about a chapter, and its plan does not change, until someone with the owner role there accepts.

- **A chapter you pay part of is not on your plan until it subscribes.** If one is missing features, check whether HQ → Billing shows it as subscribed.
- **An unanswered invitation uses a place.** If Billing says no places are free but you host fewer than your number, check the pending list.
- **A chapter can leave without telling you.** It does not need your permission, and you stop seeing its trail figures at the same moment.
- **The screens open on different periods.** The overview, a chapter's own page and People & hours open on 12 months. The Chapters list covers the last 30 days, and Reports opens on 90 days. Check the period before comparing a figure on one screen with a figure on another.
- **Hours a chapter has not approved are not here.** Drafts, entries waiting for review and rejected entries are all hidden from an umbrella account. If a chapter's hours look low, it is usually a review queue on their side rather than a quiet volunteer season.
- **If you belong to more than one umbrella account**, the one you are looking at is the one named in the sidebar, and every page has it in its web address. A link you send a colleague opens the account you copied it from.

CLIMBING

Crags and climbing routes: topos, grades and fixed gear

Manage climbing areas next to your trails: crags with topo photos and route lines, routes with discipline, grade system, stars and protection, pitches on multi-pitch routes, and an inspection history for every bolt and anchor you look after.

If your organization manages climbing as well as trails, TrailsIQ keeps full records of your **crags**, **routes**, **pitches** and **fixed gear**. That includes topo photos, grades and an inspection history for every bolt and anchor you look after.

Turning climbing on

Crags and Routes appear in the sidebar only when climbing is enabled for your organization. If you manage climbing areas and do not see them, ask us to turn climbing on. There is nothing to set up on your side.

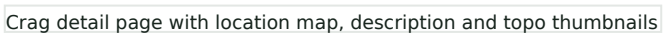
Trails and climbing work side by side, and turning one on does not affect the other.

Crags

A **crag** is a climbing area, such as a cliff, a boulder field or a wall. Everything else belongs to a crag, the same way trails belong to a network.

Create one from *Crags* → *New*. A crag has a name, a description, a location on the map and one or more topo photos.

Crags show on your maps next to trails and infrastructure, so you can see an approach trail and its wall together. That helps with the everyday question of who looks after what. A washed-out approach is a trail task, and a loose block at the base belongs to the crag, but the same person usually reports both on the same day.


Crag detail page with location map, description and topo thumbnails

Topos

A **topo** is a photo of the crag with the routes drawn on it. It is how climbers usually share route information, and it is far more useful than coordinates on a vertical wall.

Upload a photo to a crag and draw each route's line onto it. A crag can have several topos. That helps when you photograph a wall from more than one angle, or split a long cliff into sections. Each route line stays with the photo it was drawn on.

The field app shows the topos to a volunteer standing at the base, and a public page shows them to visitors.

Routes

A **route** belongs to a crag and records what climbers need to know:

- **Name** and description
- **Discipline**, such as sport, trad or boulder
- **Grade**, with the **grade system** it uses, so nobody mixes up a French sport grade and a Yosemite Decimal grade
- **Star rating** for quality, on the usual 0 to 3 scale
- **Height**
- **Protection summary**, saying what to bring
- **First ascent**, saying who and when

- **Status**, saying whether the route is open, closed or being worked on
- **Tags** and a base location

Status is the most useful field day to day. When you close a route for nesting raptors, loose rock or a failed anchor, one edit closes it everywhere at once: on the dashboard, in the field app and on any public page.

Multi-pitch routes

Mark a route as multi-pitch and it gains **pitches**, each with its own grade, length and description.

This matters because fixed gear is recorded against a *pitch* as well as a route. "The second bolt on pitch 3" becomes a record you can inspect and replace, instead of a line in a notes field. On a long route, that makes your inspection log something you can act on without having to puzzle it out.

Fixed gear and inspections

Every bolt, anchor and piece of fixed hardware can be recorded against its route or pitch, with:

- **Type** and **position** on the pitch
- **Manufacturer** and **model**
- **Installed** date, and who installed it
- **Last inspected** date, and who inspected it
- **Condition**
- **Notes**

An inspection is recorded separately from an edit, so you build up a history of who checked what and when.

If you look after fixed hardware, this is the most important part of the climbing feature. Anchors wear out, and corrosion is not always visible from the ground. When somebody asks when an anchor was last checked, you need a dated record to answer, not somebody's memory.

Climbing in the Field App

Crags and routes are in the field app, so you can create and edit them at the base of the wall.

The usual way to work is to photograph the wall, draw the lines, and fill in grades and protection while you can see the route in front of you. Doing it from memory at a desk is where mistakes creep in.

Common gotchas

- **Always set the grade system.** "5.10" and "6a" are on different scales, and without the system nobody can tell which one you meant.
- **On a multi-pitch route, record fixed gear against its pitch.** Recording everything against the route works, but then you cannot say which pitch a doubtful bolt is on.
- **Close a route instead of deleting it.** Use the status for a seasonal or temporary closure. Deleting a route deletes its inspection history too.
- **Route lines belong to their photo.** If you replace a topo photo, redraw the lines, because they were drawn on the old one.
- **File approach problems against the trail.** Report a washed-out approach as a maintenance task on the trail rather than a note on the crag, so it reaches the crew that fixes trails.

Still have a question?

Ask us at https://trailsiq.com/contact-us. A person reads every message.