

SOP Template: Guidelines for Booking Transportation (Flights, Trains, Car Rentals)

This SOP provides **guidelines for booking transportation** including flights, trains, and car rentals. It covers the procedures for selecting appropriate transportation options, booking processes, payment methods, cancellation policies, and ensuring compliance with company travel policies. The purpose is to streamline transportation arrangements, optimize costs, and enhance travel efficiency and safety for all employees and stakeholders.

1. Scope

- Applies to all employees and stakeholders requiring transportation bookings for business-related travel.
- Covers domestic and international bookings for flights, trains, and car rentals.

2. Responsibilities

- **Traveler:** Submit accurate travel requests and required documentation.
- **Travel Coordinator/Administrator:** Ensure bookings comply with company policies and optimize cost efficiency.
- **Finance Department:** Process payments and approve expenses.
- **Management:** Approve exceptions and support policy enforcement.

3. Transportation Selection Guidelines

1. Choose the most **cost-effective** and **time-efficient** mode of transportation based on destination, urgency, and company policy.
2. Consider traveler safety, convenience, and the total cost of travel (including transfers, layovers, and ancillary charges).
3. Prefer direct bookings over third-party platforms where possible, unless cost savings are substantial and reliable.

4. Booking Procedure

1. **Travel Request Submission:**
 - Submit travel details (dates, destination, purpose) using the company's travel request form/portal.
 - Attach required approvals from supervisor or management, if applicable.
2. **Review and Approval:**
 - Travel coordinator reviews the request for policy compliance and seeks approval if needed.
3. **Booking:**
 - Book flight/train/car rental as per approved request.
 - Prefer economy class for flights/trains unless policy dictates otherwise.
 - Book car rentals through preferred vendors and select appropriate vehicle type based on necessity and policy.
4. **Confirmation:**
 - Send booking confirmation and itinerary to the traveler and store copies in the designated travel records system.

5. Payment Methods

- Use company credit cards or pre-approved payment channels for all bookings.
- Personal payment and reimbursement are allowed only when pre-approved.
- Retain all receipts and invoices for expense reporting.

6. Changes, Cancellations & Refunds

1. For changes or cancellations, notify the travel coordinator immediately.
2. Follow vendor-specific change/cancellation procedures to minimize penalties and maximize refunds.
3. Document any change or cancellation and update travel records.
4. Refunds must be processed through the finance department with all supporting documentation.

7. Compliance

- Adhere to company travel policy regarding allowable expenses, class of service, preferred suppliers, and advance booking requirements.
- Non-compliance may result in non-reimbursement of travel expenses and/or disciplinary action.

8. Documentation & Record-Keeping

- Maintain records of all transportation bookings, approvals, payment receipts, and expense reports for audit purposes.
- Store records in the company-approved document management system.

9. Review and Update

- This SOP should be reviewed annually and updated as necessary to reflect changes in company policy or travel regulations.

10. Contact Information

Role	Contact
Travel Coordinator	travel@example.com Ext: 1234
Finance Department	finance@example.com Ext: 5678