

HOW TO PROCESS TRANSPORT REQUESTS

The Transport module is a hub for managing and processing transport requests initiated through:

- Rental contracts
- Service jobs
- Equipment sales (PDW)
- Equipment transfers
- Manual transport dockets

Transport requests and transport dockets can be processed and managed from the *Transport Allocation* screen.

The Transport module further allows for the creation and management of day sheets for drivers and transporters.

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CREATING TRANSPORT REQUESTS

Transport requests can be created from the following screens:

- Equipment Rental
- Service Jobs
- PDW
- Equipment Transfer
- Transport Docket

Creating Transport Requests for Rental Contracts

Delivery Requests

When using the Transport module, it is assumed that the rental operations staff creates delivery requests when processing the rental contracts from the *Equipment Rental* screen. The delivery requests can then be processed by the transport staff from the *Transport Allocation* screen.

When adding a rental item to the rental contract, the option for **Delivery** is available in the *Add Rental Item* screen (*Delivery \ Customer Pickup* panel). If transport is required, the **Delivery** option must be selected.

The rental item will be added to the contract with the **Delivery Status** 'PENDING'.

Please refer to the 'How to Process Rental Contracts' guide for information on adding rental items to contracts.

After the rental item is added, the delivery request can be created by following the steps below:

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Add New Delivery Docket**

Note: In order for the delivery request to be displayed in the *Transport Allocation* screen, the **Complete Delivery** checkbox in the *Add Delivery Docket* screen must be unchecked. The default behaviour of this checkbox is controlled by the parameter **Default Complete Delivery on Delivery Docket**.

4. In the *Schedule Details* panel, check the item(s) to be delivered
5. Enter a delivery charge in **Delivery Amount** field of the *Shipping Details* panel, if applicable
6. Alternatively, a delivery charge can also be added from the *Add Rental Item – Sales Item* screen

Note: The delivery charge must be set up in the *Stock Master* screen with **Item Code** 'DELIVERY'. The **Sales Item** checkbox must be unchecked for this item.

7. Click OK

This will update the **Delivery Status** of the rental item to 'DEL REQ', and that of the delivery charge to 'QUOTED' on the rental contract.

This transport request will now be displayed in the *Delivery Requests* panel of the *Transport Allocation* screen. The **Action Type View** for this request will be 'Delivery'. The **Delivery Type** for such requests will be 'Hire'.

Pickup Requests

Transport requests can be created when terminating rental items. Typically, this may happen when the customer requires the terminated item to be picked up.

Only delivered rental items can be terminated.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Terminate**
4. In *Shipping / Transport Details* panel, check the **Transport Required** checkbox

This will allow the user to allocate a **Vehicle** and **Driver** from the *Terminate Rental* screen. Alternatively, this can be done from the *Transport Allocation* screen.

5. In the *Details* panel, check the item(s) to be terminated
6. Enter a pickup charge in the **Pickup Amount** field, if applicable

Note: Similar to delivery charges, pickup charges can also be added from the *Add Rental Item – Sales Item* screen. The pickup charge must be set up in the *Stock Master* screen with **Item Code** 'PICKUP CHARGE'. The **Sales Item** checkbox must be unchecked for this item. This pickup charge will also be displayed in the *Details* panel, and can be selected with the item to be terminated.

7. Click OK in the toolbar

This will update the **Delivery Status** of the terminated item to 'OFF RENT', and that of the pickup charge to 'QUOTED' on the rental contract.

This transport request will now be displayed in the *Delivery Requests* panel of the *Transport Allocation* screen. The **Action Type View** for this request will be 'Return'.

If a **Vehicle** or **Driver** was allocated from the *Terminate Rental* screen, this request will appear in the *In Progress* panel of the *Transport Allocation* screen.

The **Delivery Type** for such requests will be 'Hire'.

Creating Requests with External Transporters

External transport is carried out by third party transport companies or transport contractors. In this case, the details of the transport company or transport contractor are required.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Add New Delivery Docket**
4. Select the **External** radio button

This will enable the **Supplier** and **Sub Rental Cost** fields in the *Transport Details* panel.

5. Select the relevant **Supplier**
6. Enter the cost of using this external transporter in the **Sub Rental Cost** field
7. In the *Schedule Details* panel, select the item(s) that will be delivered by this transporter
8. Click OK

This will update the **Delivery Status** of the rental item to 'DEL REQ', and that of the transport charge to 'QUOTED' on the rental contract.

This request will be displayed in the *In Progress* panel of the *Transport Allocation* screen. The **External Docket Status** will be 'PENDING'.

External transport requests can also be created for pickups by selecting the **External** radio button on the *Terminate Rental* screen.

Creating Transport Requests for Service Jobs

1. From the Menu, select **Equipment Management > Service Jobs**
2. Display the relevant 'OPEN' service job
3. Select **Actions > Transport Docket**

This will open the *Add Delivery Docket* screen.

Transport requests can be created following the same steps as described in the [Rental Contract](#) section of this document.

In the *Transport Allocation* screen, the **Delivery Type** for such requests will be 'Service Job'.

Creating Transport Requests through the Predelivery Wizard

Transport requests can be created if transport is required when selling serialised equipment items.

1. From the Menu, select **Stock > Predelivery Wizard**
2. Display the relevant PDW record
3. Select **Actions > Transport Docket**

This will open the *Add Delivery Docket* screen.

Transport requests can be created following the same steps as described in the [Rental Contract](#) section of this document.

In the *Transport Allocation* screen, the **Delivery Type** for such requests will be 'Sales'.

Creating Transport Requests for Equipment Transfers

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Display the relevant transfer
3. Select **Actions > Transport Docket**

This will open the *Add Delivery Docket* screen.

Transport requests can be created following the same steps as described in the [Rental Contract](#) section of this document.

In the *Transport Allocation* screen, the **Delivery Type** for such requests will be 'Fleet Transfer'.

Creating Transport Dockets Manually

Transport requests can also be created by entering transport dockets manually.

1. From the Menu, select **Transport > Transport Dockets**
2. Click ADD NEW

This will open the *Add Delivery Docket* screen.

Transport requests can be created following the same steps as described in the [Rental Contract](#) section of this document.

In the *Transport Allocation* screen, these requests will be displayed in the *Delivery Requests* panel. The **Delivery Type** for such requests will be 'Transport Job'.

TRANSPORT ALLOCATION

The *Transport Allocation* screen is used to manage transport requests and to monitor the transport allocations that are in progress.

As the transport requests are created from rental, service, sales, equipment transfers or manual dockets, the system will display the transport requests in the *Delivery Requests* panel on the *Transport Allocation* screen.

Allocating a driver / transporter to a transport request in the *Transport Allocation* screen will move the transport request from the *Delivery Requests* panel to the *In Progress* panel.

Allocating a Driver / Transporter to a Transport Request

1. From the Menu, select **Transport >Transport Allocation**
2. Select the required search criteria in the *Transport Allocation Search Criteria* panel
3. Click REFRESH

This will list the current transport requests in the *Delivery Requests* panel and the transport allocations in progress in the *In Progress* panel.

4. From the *Driver / Transporter* panel, drag and drop the required driver / transporter onto the required request in the *Delivery Requests* panel

Note: If a **Branch** is selected in the *Other Selections* panel when filtering, only the drivers / transporters from this branch will be displayed. Checking the **Show For Other Branches** checkbox will display drivers / transporters from all the branches.

To be available for selection from the *Drivers* tab, the Skilled Person must have the 'Driver' role assigned.

Only the suppliers with the **Transporter** checkbox checked in the *Supplier Master* screen will be available for selection from the *Transporters* tab.

After the transport request has been assigned to a driver or transporter, the transport request will be moved from the *Delivery Requests* panel to the *In Progress* panel.

Once a request moves to the *In Progress* panel, the right click Context Menu can be used to update the progress of the transport run. The following options are available from the Context Menu:

- Driver Left Yard – Select this option when the allocated driver / transporter has left the yard to complete the delivery
- Delivered To Site – Select this option when the driver has completed the delivery / pickup and has returned with the signed docket. This will complete the delivery and remove the entry from the *In Progress* panel. The delivery docket **Status** will be 'COMPLETED'.
- Remove Driver / Transporter – This will remove the allocated driver / transporter and move the request back to the *Delivery Requests* panel
- Print / Fax Docket – This will open the *Print/Fax/Email Delivery Docket* screen, allowing the user to preview and / or print the docket
- Display – This allows the user to view the relevant rental contract, contract notes or customer notes

DAY SHEET

The Day Sheet or 'Run Sheet' displays the transport dockets / tasks according to the scoping criteria entered in the *Search Criteria* panel.

Selecting a detail line and using the available buttons within the *Day Sheet* screen, allows to make changes to the detail lines.

The detail lines can be re-sequenced according to transport requirements.

Checking the **Show Sequence** checkbox will display the **Sequence** column in the results grid. Sequencing the detail lines according to transport requirements allows for preparing individual day sheets for each driver/or transporter. The **Sequence** can be entered / changed directly from the column. Alternatively, the relevant detail line can be selected and the sequence can be changed using the UP and DOWN arrows on the right.

Selecting the transport tasks by driver/transporter allows for printing a run sheet with the transport tasks allocated to the selected driver / transporter.

1. From the Menu, select **Transport > Day Sheet**
2. Select the relevant search criteria

For example: A particular date range

3. Click FILTER

This will display all the transport runs matching the criteria.

The following operations can be processed for the transport runs from the *Day Sheet* screen:

Add New Actions to Rental Contracts

Actions can be added to existing rental contracts by clicking the ADD NEW ACTION button. This will prompt the user to enter the relevant rental contract number and then display the *Add Action* screen.

Please refer to the 'How to Use Rental Operations' guide for more information on rental actions.

Run Actions

Clicking the ACTION SELECTED button will run the action and add the charge for the action to the rental contract.

Reschedule Transport Runs

Selecting a transport run and clicking the RESCHEDULE SELECTED button will allow the user to enter a new date for the run.

Change Driver / Change Transporter

Selecting a transport run and clicking the CHANGE DRIVER button will allow the user to select a new driver for the run.

Selecting an external transport run and clicking the CHANGE TRANSPORTER button will allow the user to select a new transporter for the run.

Attempted Actions

This relates to rental actions. Selecting the relevant detail line and clicking the ATTEMPTED button will add a duplicate detail line for the same action so that it can be completed.

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