

HOW TO PROCESS AND COMPLETE TRANSPORT DOCKETS

IN BMA

Transport dockets include:

- Delivery dockets
- Pickup dockets

These dockets are created and assigned to the relevant driver in Baseplan Enterprise. Once assigned, drivers can process the dockets in BMA.

This document describes the process of completing delivery and pickup dockets in BMA.

Please refer to the 'How to Process Rental Contracts' guide for more information on creating transport dockets.

Software Version: 2.0

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To process and complete rental docket, the app user must:

- be a Baseplan User configured in the Enterprise system
- have the 'Driver' **Role** assigned

PROCESSING AND COMPLETING DELIVERY DOCKETS IN BMA

Please refer to the 'How to Install BMA on Mobile Devices' guide for information on logging into the application.

The *My List* tab will display all the dockets assigned to the driver for the current day.

1. Tap the delivery docket to be processed
2. Tap 'IN TRANSIT' when travelling towards the location where the rental item(s) will be loaded onto the delivery vehicle
3. Tap 'AT BRANCH' after arriving at the location
4. Tap 'LOAD'
5. On the *Load* screen, check the item(s) to be loaded onto the delivery vehicle or do not check the items that need to be excluded from the delivery
6. Alternatively, scan the QR codes on the equipment items by tapping the SCAN button at the bottom of the screen or using the hardware scanner

The *Equipment* screen will be displayed if an equipment item on the docket has one or more of the below requirements:

- No Equipment Code
- Pending Inspection
- Mandatory Meter Reading
- Outstanding Items

Note: The inspection will be disabled if the user does not have access to the branch of that inspection record.

Please refer to the 'How to Process and Complete Equipment Inspections' guide for more information on inspections and checklists.

7. Enter the required details

8. Tap CONFIRM on the *Equipment* screen
9. Tap CONFIRM on the *Load* screen
10. Tap 'IN TRANSIT' when travelling towards the delivery destination
11. Tap 'AT SITE' after arriving at the destination
12. Tap 'UNLOAD'
13. Check the item(s) to be unloaded from the vehicle or do not check the items that need to be excluded from the delivery
14. Alternatively, scan the QR codes on the equipment items by tapping the SCAN button at the bottom of the screen or using the hardware scanner
15. Tap CONFIRM
16. The customer signs directly on the mobile device in the *Signature* panel
17. Enter the customer **Email** address if the docket must be emailed
18. Tap CONFIRM

PROCESSING AND COMPLETING PICKUP DOCKETS IN BMA

1. Tap the pickup docket to be processed
2. Tap 'IN TRANSIT' when travelling towards the location where the rental item(s) will be loaded onto the vehicle
3. Tap 'AT SITE' after arriving at the location
4. Tap 'LOAD'
5. Check the items to be loaded onto the vehicle or do not check the items that need to be excluded from the pickup
6. Change the **Return Qty**, if required
7. Alternatively, scan the QR codes on the equipment items by tapping the SCAN button or using the hardware scanner

The *Equipment* screen will be displayed if an equipment item on the docket has one or more of the below requirements:

- Mandatory Meter Reading
 - Fuel To Bill
 - Outstanding Items
8. Enter the required details
 9. Tap CONFIRM on the *Equipment* screen
 10. Tap CONFIRM on the *Load* screen
 11. Tap 'IN TRANSIT' when travelling towards the destination where the returned item(s) will be unloaded from the delivery vehicle
 12. Tap 'AT BRANCH' after arriving at the destination
 13. Tap 'UNLOAD'
 14. Check the item(s) to be unloaded from the vehicle
 15. Alternatively, scan the QR codes on the equipment items by tapping the SCAN button at the bottom of the screen or using the hardware scanner
 16. Tap CONFIRM

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