



Simply Intelligent Computer Applications for Business

## **Transport/Courier Information System**

### **User Manual**

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# 1 Installation

## 1.1 Requirements

### Database Server

The CIS program uses **MySQL** for its database with the **InnoDB** ACID compliant storage engine used to build the tables.

Current tested MySQL version is **4.1**. The next version that will be evaluated for use with this system will be **5.1** as soon as possible after it is released for general availability.

### ODBC

Client interface is through ODBC. Current tested versions are MyODBC **2.50.39** and **3.51.23** (also known as "MySQL Connector/ODBC"). In general most ODBC versions should work. When installing ODBC there is no need to create a DNS as the the program manually prepares the connection string parameters required for connection to the database.

### Operating System requirements

- Windows 2000 or Windows 2003 server with 2GB plus of RAM, the more the better.
- Windows XP Professional with 1GB plus of RAM.
- Linux, any distribution, with 1GB plus of RAM running Samba.

Minimum disk space for the application should be at least 50MB. Disk space requirements will increase only with the amount of data that needs to be stored.

### Workstations

- Will work with Windows 98, but Windows XP or Vista is preferable.
- Screens with resolution of at least 1280 x 1024 will give the best result. Screens with a resolution of 800 x 600 will work but is not recommended.
- Each workstation should have at least 512MB of RAM but 1MB or higher is recommended.
- Each workstation must install the ODBC driver. No ODBC configuration is required.

## 1.2 Installation

- Install standard MySQL database keeping in mind that the database uses InnoDB tables and so should be optimised for transactional usage.
- Download these files:  
<http://www.sicab.com.au/download/C6BASE.ZIP>  
<http://www.sicab.com.au/download/CISBASE.ZIP>  
<http://www.sicab.com.au/download/CISSQL.ZIP>
- Create the directory where you want the programs to reside and unzip the contents of the above files into the directory.
- Create a database called **cisdb**. Then you need to create a user that the program will connect to the database as and set the password to the old format by using the following commands.
  1. e.g. to create a user called mandela use the command: **GRANT ALL ON cisdb.\* to 'mandela'@'%';**  
 this instruction will create the user and grant permission to use all the tables in the **cisdb** database.
  2. **SET PASSWORD FOR 'mandela'@'%' = OLD\_PASSWORD( 'new-password' );**

- Run the script to create the tables. The script name will be **cisdb\_create\_x.x.xx.sql**
- Edit the file called **sicab\_sample.ini** and change the Server, UserName and Password to match your setup
- Change the name **sicab\_sample.ini** to **sicab.ini**
- You can now run the program **cissql.exe** and the login screen should come up. There is a default initial login as **admin** with password **admin**
- Go to menu **Security** and then **Register Program** and follow the registration prompts. The data you need to enter will have been sent to you via email.

If all the steps above were performed without error you should now have a clean system waiting for you to create the data required to run the system.

## 2 Getting Started

### 2.1 Setting Up Files

Before you can start booking jobs, you must have the following information entered into the system. This is done by using the **Master Files** menu options.

- **Control Record**

There is only one record for the whole system. This record contains global information and once created you can generally forget about it. Enter all the information that is available to you. Skip over the information that does not make sense yet. Make sure that you go through the information on each tab.

**Note:** Make sure that you enter a value for the **Current Period** dates in the **Client Period Dates** tab. If you do not have Fortnightly account clients then simply enter a date such as 31/12/2099.

- **Company/Branch codes**

You only need to create entries here if you want to split your clients by branch and/or if you want bill some clients on a different company name. Normally you would use this if you have branches and would like to generate some reports by branch. If you do not have any branches (for the purpose of running this system) then do not create any records here.

- **Service Codes**

Service code is a mandatory field on every job so you must create at least one service code. You can have as many service codes as you wish. Most of the information is self-explanatory but for now you can skip over the information you don't understand.

**Note:** You should specify the **Kilograms per cubic metre** to be used when converting cubics to kilograms for client rating. All other fields can be left empty until they are required.

- **Additional Job Charges**

Every job can have any number of additional charges attached to it. For example, "Dangerous Goods Surcharge", "Additional Labour" etc. Standard charge descriptions and charges/cost can be created as a template here. However additional charges can be added to a job even if there is no corresponding entry in this table. You may use this file simply to specify a description (by leaving the charge/cost as zero) and then when using this description as an additional charge on a job you would specify the charge and the cost applicable to that job.

- **City/Town/Suburb File**

This is the list of valid suburbs, towns and cities that can be used when booking jobs. Each job must have a pickup and delivery location that is validated against this file. If you don't charge using kilometre distances then leave the **Grid No.** as zero. The grid number is used as a pointer to the kilometre distances to be used when using the location being created. Multiple locations can be pointed to the same grid.

- **Kilometre File**

This is a matrix of kilometres between suburbs/towns. This is only necessary if your billing is based on kilometre distances.

- **Rate Increase Dates**

**Note:** You must have at least one entry in this table. Just enter a date to signify the date your current rates are applicable from, e.g. enter the first day of the current financial year and

enter "STARTING DATE" in the **Rate Increase Note** field.

This is necessary because rates are created and used by grouping them as **Rate Sets**. Each set is differentiated by a date. The reason for this is that when you want to increase rates you can duplicate a set under a new date and you can then specify in the client file that this new set is applicable from a specified date. The advantage is that whenever a job is rated it will check which rate set it should use according to the job date.

- **Rates File**

Enter at least one record in this table so that you have something to test when you get to the point of creating your first job. The rate record is very generic and you only need to enter the values you wish to use for rating the service code in question. You can best learn the permutations by changing the values and seeing how it changes the rating of a job (a dummy job you are using for testing, of course). Whenever a job is rated it will always pickup the current values in the rate record.

- **Client File**

Enter some of your existing clients. Enter as much information as you can. If you don't understand any field then leave it as the default.

**Note:** Client code is an alphanumeric field, up to 10 characters.

- **Driver File**

Enter as much information as you have available. Leave fields you are not sure about as their default value.

**Note:** Driver number is a numeric field, you should try and limit the value to 4 digits.

### 3 Working With The System

This system has been written to be very easy to use. All the hard work is done in the background.

However, as with all complex systems a user needs to understand the scope and nuances of the system in order to maximise its benefits.

All functions are accessed through drop down menus with the most common functions also placed as icons on the toolbar.

#### 3.1 Job Booking - STD

##### Booking a Job

##### Note:

- The fields which are shaded yellow are mandatory fields.
- All changes to jobs, after they are created, are audited detailing the information that was changed and who changed it. You access this information via the "View Audit" button.

**Changing a Job Record**

Client Code: **AFFT** **AUST FREIGHT FORWARDERS TRANS** **Operations** Job Number: **230651** D  
 Phone: **96669222** Booked by: **DDI**

Job Date: **26/03/2007**

Line/CN No.: **REF.123**

Reference: **REF.123**

Cost Centre: **NINO**

Contact: **NINO**

Service Parameters  
 Service Code: **STDFU**  
 Items/Parcels: **12**  
 Weight (Kgs): **52.5**  
 Cubic Metres: **0.123**  
 Waiting Time:   
 Hire Time:

Times  
 Time Ready: **10:30**  
 E.T.D.:   
 Despatched:   
 Picked Up:   
 Delivered:   
 POD Name:

Pickup Details  
**HABERFIELD**  
**SICAB COMPUTER SERVICES**  
**20 DENMAN AVENUE**

Delivery Details  
**LEICHHARDT**  
**SICAB**  
**LEVEL 1**  
**14 NORTON STREET**

Follow On Job Details (follow from the Delivery details above)

Pos	Items	Weight	Cubic	Town/Suburb	Details
3	3	34.0		MASCOT	ACME 45 BOTANY ROAD

Buttons: Add, Edit, Delete

Drivers and Driver Instructions  

Driver	Pay	Revenue	% Re

 Buttons: Add, Edit, Delete

Delivery Info: **SEE HUY**

Job Comment (prints on Invoice/Statement)

Quoted Charge ☐  
 Cash Job ☐  
 COD Amt: **0.00**  
 Job Cost: **0.00**  
 Total Kms: **10**  
 Channel Number: **0**

O/S Destination:

Job Charge: **0.00**  
 Fuel Surcharge: **0.00**  
 Add. Charges: **0.00**  
 GST charged: **0.00**  
 Client Charge: **\$0.00**  
 Fuel Surcharge %:

Buttons: Additional Charges, Calculate Charge, Email/Record Job Notes, OK, Cancel

Buttons: Make into a Quote, Check Channel, View Audit, Email Address, External Documents

Field	Description
-------	-------------



Client Code	The client code is used to identify who the job is being done for and uses the unique code which has been entered into the system for each client.
Line/Docket number	This is used as a reference
Reference	This is the client's reference
Cost Centre	This is for the client's client, to help identify what job is being done and by which department.
Contact	The person who is booking the job and the person who should be contacted in regards to the job
Service code	The service code is the determinant of the rate for the current job from the services which have been entered into the system.
Waiting Time	Is a dollar charge for the period of time a driver is waiting at a premises for a job to be prepared for delivery.
Hire time	The hire time charge is used when a client is going to be using a driver for an extended period of time, meaning the driver is going to be out of service for that period.
Phone	This is the client's phone number which has been entered into the client record
Job Date	The job date is the day the job is to be performed. The system will automatically this field to the current date
Items/parcels	The number of items/parcels which need to be delivered
Weight	The total weight of the items/parcels
Cubic metres	The size of the items/parcels
Time Ready	The time the job is ready.
Despatched	The time at which the job is allocated to a driver
Picked Up	The time at which the driver collects the job from the client
Delivered	The time at which the job reaches its final destination
Pickup details	The address from where the job needs to be picked up from
Delivery details	The address that the items/parcels need to be delivered to
Follow on Details	For a detailed explanation of follow on details go to topic 3.8
Drivers and Driver Instructions	Drivers performing the job and specific instructions for this job.
Job Comments	These are client related comments that you may want to print on reports and invoices to to the client.
O/S Destination	Overseas/International destination for items/parcels being delivered outside national borders.

Cash Job	If cash job is ticked, than the courier is expected to collect money at the clients premises.
Quoted Charge	If quoted charge is ticked, the price can be adjusted manually. If the box is left blank than the price is determined by the system depending on the service code and cannot be adjusted.
COD Amt	Cash on Delivery amount is the amount of money that needs to be collected at the client's premises.
Job Cost	
Total Kms	The distance between the pick up suburb and the delivery suburb
Channel Number	Channel Number is the channel that the driver who is performing the job will be allocated to. For more information regarding channel allocation go to the channel allocation topic (topic 4.2)
Job Charge	The price of the job determined by the service code and the individual job details
Fuel Surcharge	Additional cost added to the job charge if fuel surcharge is included in the job
Add. Charges	Additional charges for any type of ad-hoc service can be itemised and added to a job.
GST charge	Dollar amount of GST charged for the job
Client charge	The cost of the job charged to the client. The total of the job charges.
Additional Charges	Opens window for additional charges.
Calculate Charge	Click on this button to view the final price of this job without committing to booking the job.
Email/Record Job Notes	This allows you to add any notes to the job that need to be recorded. It also allows you to email job notations to the client, if you wish.

### 3.2 Job Notes

This screen is displayed when the **Email/Record Job Notes** button is pressed from the **Job Booking** screen.

**Job Notes - Record to disk and Email**

To record this "message" without sending it to anyone simply leave the "To" entry blank.

From:

To:

CC:

BCC:

Subject:

Message Body:

### 3.3 View Job Audit

This screen is displayed when the **View Audit** button is pressed from the **Job Booking** screen.

**Job Audit of changes**

Date	Time	Changed By	Field Changed	Value Before Change	Value After Change
22/01/2008	20:38	admin	Job Date	3/03/2007	26/03/2007
30/01/2008	11:22	admin	Service	STDFU	S
30/01/2008	11:22	admin	Service	S	STDFU

Search:

### 3.4 Despatching Jobs - STD

#### Allocating/Despatching a Job to a Vehicle/Driver

After a job has been entered into the system, it will appear in the unallocated jobs window.

**Allocate Job** to allocate the selected job press this button and the system

will ask you for a driver/vehicle number. Enter the number and the system will take care of the rest, for example, if the system has a GPRS interface with PDA's installed in the vehicles it will despatch the job information directly to the PDA.

**Pre-Allocate Job** this function allows you to place your preferred driver/vehicle number against the job without actually despatching the job. It acts as a marker when you are creating runs for vehicles.

**Allocate Pre-Allocated** when you have finalised your pre-allocations and are happy with your selections you can then despatch all the jobs for a specific driver/vehicle in one action.

Ch	B	D	<-Date>	Ready	Serv.	Items	Weight	Cubic	From	To	Other Legs	Client Code	PreA
0	D	26-03-07	10:30	TECH	12	52.5	0.123	HABERFIELD	LEICHHARDT	MASCOT	AFFT		
0	D	26-03-07	10:30	STDFU	12	52.5	0.123	HABERFIELD	LEICHHARDT	MASCOT	AFFT		
0	D	26-03-07	10:30	STDFU	12	52.5	0.123	HABERFIELD	LEICHHARDT	MASCOT	AFFT		
1	W	26-03-07	10:57	S	2	6.0		AIRPORT - INT.	ALFORDS PO		AFFT		
1		26-03-07	11:00	HH	1	1.0		ALEXANDRIA	BLAKEHURST		FEDEX		
2		26-03-07	11:00	PLT	6	36.0		MOUNT KURI	ABBOTSFORD		CHROMA		
1		26-03-07	12:00	S	4	5.0		SEVENHILLS	BOTANY		EXPRESSEX		
0	D	26-03-07	12:30	STDFU	12	52.5	0.123	HABERFIELD	LEICHHARDT	MASCOT	AFFT		
1		26-03-07	12:57	TLIFT2	52	20.0		AIRPORT - DOM	ARTARMON		AAEREGION		
1		26-03-07	13:00	ST1	5	55.0		FRENCHS FO	AIRPORT - DOM		AAEREGION		
1		26-03-07	13:00	HH	5	55.0		RYDALMERE	AS DIR		FEDRYD		
1		26-03-07	13:00	HH	4	44.0		RYDALMERE	AS DIR		FEDRYD		
0		26-03-07	13:12	HH2	2	3.0		MASCOT	ALEXANDRIA		AFFT		
1		26-03-07	16:17	XT9	1	232.0		MASCOT	MASCOT		AAEMASCOT		

Field	Description
Channel 1, 2, 3 and 4	To view jobs allocated to a channel, check the box next to the desired channel, and only jobs allocated to that channel will be displayed.
Display if ready next	If a number is entered into this box only jobs which will be ready within that number of hours will be displayed.
Get Records	Click this button to refresh the window, which will now show only jobs which comply with any search criteria which has been entered.
Allocate Job	Click on this button to allocate the highlighted job to a driver
Pre-Allocate job	Click on this button to pre-allocate the highlighted job to a driver

Allocate Pre-allocated job	Click on this button to allocate the highlighted pre-allocated job to a driver.
Add	Click on this button and the job booking window will open allowing the user to create a new job
Delete	Click on this button to delete the highlighted job
Edit	Click on this button to edit information in the highlighted job.
Warn me when list changes	If checkbox is checked any changes to the list will prompt a window to be displayed telling you that some information has changed. If the checkbox is not ticked then any updates will automatically refresh the screen.

This is the screen that allows you to view the jobs from the driver/vehicle point of view.

**Driver Jobs**

Clear Jobs from Driver MDT ☒ Channel 1 ☒ Channel 2 ☒ Channel 3 ☒ Channel 4 ☐ Display Undelivered Jobs

Driver	Veh	Ch	Name	Job No.	D	Date	Rdy	Desp	Acpt	P/Up	Del	Serv	From	To	Qty
1	PAN	0	AFFT	228730		26/03/07	7:30	12:32				LCL	BOTANY	BROOKVALE	
2	VAN	0	MICHAEL JACKOM	229860		26/03/07	6:30	12:31				TECH	BOTANY	ERMINGTON	
4	VAN	0	MOUSSA MOUSS.	230418		26/03/07	10:00	12:32				S	INGLEBURN	SMITHFIELD	INC
10	F/T	0	KENNETH PATTEI	230605		26/03/07	10:00	12:35				S	HABERFIELD	KURNELL	
11	6T	0	TED SIMMONDS	230648		26/03/07	10:30	16:28				STDFL	HABERFIELD	LEICHHARDT	MA
12	VAN	0	ORLANDO OLIVAF												
99	UTE	0	Test												

Working Date: 26/03/2007

Buttons: View/Update Selected Job, Remove Job from Driver, Update Pickup, Add New Driver on Job, Remove Job from the driver's MDT, Update Delivery, EXIT

Field	Description
Channel 1, 2, 3 and 4	To view jobs allocated to a channel, check the box next to the desired channel, and only jobs allocated to that channel will be displayed.
Display Undelivered Jobs	Check this box if you wish to only view jobs which are yet to be delivered.
View/Update	Click on this button if you wish to view or change the

Selected jobs	information contained within a job
Add new Driver on Job	Click on this button to add more drivers to a job
Remove job from driver	Click on this button to unallocate a job from a driver
Remove job from driver's MDT	Click on this button in order to remove a job from a driver's Mobile Data Unit
Update pickup	Click on this button when the highlighted job has been picked up and a pickup time will automatically be entered into that job record
Update delivery	Click on this button when the highlighted job has been delivered and a window will open with the current date, time and a field where a receiver name can be entered into (although this is not a compulsory field)
View/Update Selected jobs	Click on this button if you wish to view or change the information contained within a job
Add new Driver on Job	Click on this button to add more drivers to a job
Remove job from driver	Click on this button to unallocate a job from a driver
Remove job from driver's MDT	Click on this button in order to remove a job from a driver's Mobile Data Unit ( PDA )

**Note:**

When drivers are equipped with MDT's with remote communication to the system the operator does not need to update pickup or delivery times manually. This option however is always useful for those situation when an MDT breaks down or malfunctions.

### 3.5 Logging On a Driver

A log record is created for each day a driver is at work.

**Note:**

**When an operator attempts to despatch a job to a driver that is not logged on, the system will ask you if you want it to automatically create a log record. This avoids having to use this manual method to quickly log a driver on.**

In the window which is now open Click on the *add* button

**Driver Log File**

Driver Number  From Date  To Date

Driver	<+Date>	Ch	Log On	Log Off	First P/Up	Last Del.	First Desp.	Last Desp.	Time Off	MDT On
3	2/01/2004	1	6:30	18:30	0:00	0:00	0:00	0:00	0:00	0:00
5	2/01/2004	1	9:00	17:00	0:00	0:00	0:00	0:00	0:00	0:00
11	2/01/2004	2	9:00	14:00	0:00	0:00	0:00	0:00	0:00	0:00
12	2/01/2004	1	9:00	13:30	0:00	0:00	0:00	0:00	0:00	0:00
17	2/01/2004	1	9:00	14:15	0:00	0:00	0:00	0:00	0:00	0:00
21	2/01/2004	2	9:00	17:30	0:00	0:00	0:00	0:00	0:00	0:00
24	2/01/2004	1	9:00	13:30	0:00	0:00	0:00	0:00	0:00	0:00
26	2/01/2004	1	9:00	14:45	0:00	0:00	0:00	0:00	0:00	0:00
27	2/01/2004	1	9:00	15:30	0:00	0:00	0:00	0:00	0:00	0:00
28	2/01/2004	1	6:30	18:30	0:00	0:00	0:00	0:00	0:00	0:00
31	2/01/2004	1	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
32	2/01/2004	1	7:30	18:00	0:00	0:00	0:00	0:00	0:00	0:00
33	2/01/2004	1	7:00	16:30	0:00	0:00	0:00	0:00	0:00	0:00
34	2/01/2004	1	9:00	16:30	0:00	0:00	0:00	0:00	0:00	0:00
35	2/01/2004	1	8:15	14:15	0:00	0:00	0:00	0:00	0:00	0:00
37	2/01/2004	1	9:00	14:15	0:00	0:00	0:00	0:00	0:00	0:00

Search:

Field	Description
Driver Number	To search for a driver's record enter their number, from the driver record, and press tab or click get records.
From Date	Enter the Date from which you wish to search
To Date	This field needs to be used in conjunction with the From Date field. When a date is entered into each of these fields, all driver records between these two dates will be shown.
Get Records	Refreshes the current window, providing only information which meet search criteria entered into the window.
Search	To search for a driver enter in the driver's number and click tab or get records to view that driver's log record. This varies from other search fields in that it is dynamic and the search criteria applies to the column that is currently highlighted.
Add	To log a driver into the system, click on this button and a window will appear in which the driver number can be entered into the system. In the new window the date and time default to the current

These fields are all search fields. In the Driver Log file, the user can search for a specific driver, a specific driver during a certain time period or all drivers in a certain time period. To search by any of these criteria enter the information in the appropriate field and click on the *Get Records* button. The information in the window will now be refreshed, only showing information that meets the search criteria.

This is the driver log record for a specific day.

**Adding a Driver Log Record**

Driver Number  Date  Channel Number

Times

Log On  First Despatch  First Pickup

Log Off  Last Despatch  Last Delivery

Total Time Driver spent Not Working during the scope of this log record

Notes for the day

OK Cancel

Field	Description
Driver Number	The number for the driver who is being logged into the system. The number is the one which has been entered into the driver master file for the driver.
Date	The current date, this field is automatically defaulted to the current date.
Channel Number	Channel Number is the channel the driver is allocated to. For more information regarding channel allocation go to the channel allocation topic (topic 4.2)
Log On	The time at which the driver is logged into the system and can begin to receive jobs
Log Off	The time at which the driver is logged out the system and will not be able to receive jobs from this point onwards.
First Despatch	The time at which a driver first received a job despatch for that day
Last Despatch	The time at which a driver last received a despatch for the day
First Pickup	The time at which a driver first pick up a job for that day
Last Delivery	The time at which a driver last delivers a job for that day
Total Time Driver Spent Not Working during the scope of this log record	The period of time that a driver was not working during the course of a driver log record
Notes for the day	Any notes which need to be recorded in regards to a



driver can be entered into this field

### 3.6 Moving Jobs to Accounts

Each job has a status code that tells the system at which stage of the billing process it finds itself in. The status field is displayed in the first column of the browse screen below. A blank status field means the job is in operations, a status of **A** means the job is in the accounts area and is ready to be billed to the client, a status of **B** means the job has already been billed to the client.

Jobs are moved in bulk to the accounts area when the billing period for the job becomes current but you can also selectively move individual jobs into accounts for special reasons.

To move a job into accounts open the job browse screen highlighting jobs in Operations, highlight the job and then click on the **Move Job to Accounts** button. An **A** should now appear in the first column.

The screenshot shows the 'Jobs File' window with a table of job records. The table has columns: S, <+Date>, Client Code, Reference, Line/CN, Serv, Items, Weight, Cubic, From, To, Job Chg, GST, and Driver(s). The 'S' column contains status codes (S, A, B). The 'To' column contains destination names. At the bottom, there is a 'Search:' field and buttons for 'Move Job to Accounts', 'Add', 'Edit', 'Delete', and 'EXIT'.

Field	Description
Select Jobs In	Select an option in this drop down box to view jobs in either, operations, accounts, billed or to view all jobs
Client	Enter client code to view job record for that particular client
From Date	The Date from which you wish to search
To Date	This field needs to be used in conjunction with the From Date field.

	When a date is entered into each of these fields, all driver records between these two dates will be shown.
Get Records	Refreshes the current window, providing only information which meets the search criteria.
Search	The user can search any of the fields, except for the Driver(s) column. To search any of these fields, click onto the column heading, and in the Search field enter the whole word to find exact matches to your search. The user can also search for a range of matches. For example when searching for a suburb, entering a 'b' in the search field will display every suburb beginning with 'b'. To be more specific the user can enter another letter/s such as 'ba', now every suburb beginning with 'ba' will be displayed, and so on.
Add	Click on this button to create a new job in the system.
Edit	Click on this button to edit the information contained within the highlighted job record
Delete	Click on this button to delete the highlighted job.

The fields above the list of jobs are all search fields. To search by any of these criteria's enter the information in the appropriate field and click on the *Get Records* button. The information in the window will now be refreshed, only showing information that meets the search criteria.

To view jobs in accounts, use the drop box (Select Jobs in) and select *Accounts*. Now click the *get records* button, and the jobs which are in accounts will be displayed.

The screenshot shows the 'Jobs File' application window. At the top, there are search filters: 'Select Jobs in' (set to 'Accounts'), 'Client' (empty), 'From Date' (empty), 'To Date' (empty), and 'Job#' (empty). A 'Get Records' button is on the right. Below these is a table with the following columns: S, <+Date>, Client Code, Reference, Line/CN, Serv., Items, Weight, Cubic, From, To, Job Chg., GST, and Driver(s). The first row of data is highlighted in blue and contains: A, 29-09-04, AFPT, CITY, 123478, NC, 1, 1.0, 1.164, AS DIR, BOTANY, 103.90, 10.39, 999. The second row is: A, 29-09-04, TRANSTAR, 123478, LCL, 11, 557.0, 1.164, BANKSMEADO, ALEXANDRIA, 45.00, 4.50, 25. Below the table are navigation buttons (back, forward, etc.) and a search field. At the bottom, there are buttons for 'Move Job to Operations', 'Add', 'Edit', 'Delete', and 'EXIT'.

S	<+Date>	Client Code	Reference	Line/CN	Serv.	Items	Weight	Cubic	From	To	Job Chg.	GST	Driver(s)
A	29-09-04	AFPT	CITY	123478	NC	1	1.0	1.164	AS DIR	BOTANY	103.90	10.39	999
A	29-09-04	TRANSTAR			LCL	11	557.0	1.164	BANKSMEADO	ALEXANDRIA	45.00	4.50	25

### 3.7 Printing an Invoice/Statement

This is the screen from which Invoice/Statements are selected for printing and emailing.

**Print Client Invoice/Statement**

Please note that irrespective of the options selected a PDF Invoice/Statement is always created

**Print for ...**  
☐ Daily  
☐ Weekly  
☐ Fortnightly  
☐ Monthly

**Client Code range**  
From   
To   
blank selects ALL clients

**Page Format**  
☐ Portrait ..... Lines per page   
☒ Landscape ..... Lines per page   
adjust number of detail lines that print per page to compensate for printer differences

**Print option**  
☒ Invoice  
☐ Statement

For Invoices that are NOT e-mailed   
For Invoices that are e-mailed   
Settlement Discount Date   
☒ Print only for Clients that have traded

**Message to print on statements**

PDF Folder: c:\apps\clarion6\cis\aff\pdf\invoices

Redirect Emails To

Save settings Print Cancel

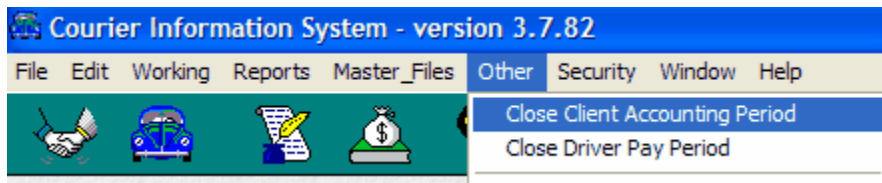
Note that the only mandatory field in this window is the *Print for...* box.

Field	Description
Print for ...	There are four options for printing an invoice statement: daily, weekly, fortnightly and monthly. It is important to note that when printing an invoice/statement for a client the option chosen in this box must correspond to the option which was entered in the client file (under accounting information and in the billing period box).
Client Code range	An invoice can be printed, e-mailed or viewed for a single client or a range of clients. For a single client, enter the client code only in the from field. For multiple clients enter the first client (alphabetically) in the From field and the last client (alphabetically) in

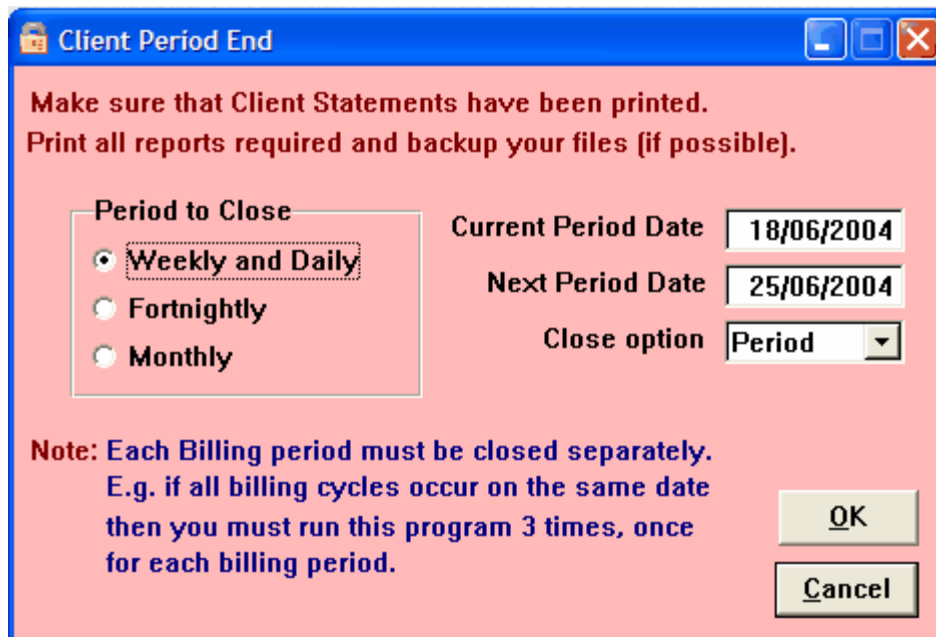
	the To field. For all clients leave both fields blank.
Page Format	Invoice statements can be printed either as a portrait (information viewed vertically on the page) or as landscape (information viewed horizontally across the page).
Print option	The user can choose to print an invoice or a statement by choosing the desired option in this box
For invoices that are NOT e-mailed	For invoices which are not e-mailed (To determine whether an invoice is not emailed for a particular client, open their client record and click on the email addresses tab, where this information should have already been entered), the user has four options to choose from: Create a PDF file, Create a PDF file and print it, Create a PDF file and print two copies or Do Not Process.
For invoices that are e-mailed	For invoices which are e-mailed (To determine whether an invoice is emailed for a particular client, open their client record and click on the email addresses tab, where this information should have already been entered), the user has four options to choose from: Create a PDF file, Create a PDF file and e-mail it, Create a PDF file and e-mail it and print it or Do Not Process
Settlement Discount Date	If a date is entered into this box, than the client will be notified that (if they are eligible) they may take a predetermined settlement discount if payment is received by the nominated date.
Print only for Clients that have traded	If this box is checked than clients who have not traded during that period won't have an invoice/statement pdf created/printed/ e-mailed for them
Message to print on statements	Any message or notes the user wishes to place on an invoice/statement can be entered in this field and will appear on the invoice/statement.
Redirect Emails To	Enter an email address if you want all e-mailed statements redirected to another address. This can be useful for testing purposes to see which statements are being e-mailed.
Save Settings button	This saves the major settings so that next time the screen is opened these values are already selected.

### 3.8 Closing an Accounting period

To close the current accounting period, click on the *other* menu and then click *Close Client Accounting Period*.



In the *Client Period End* window which will now be open, click *Ok*, and the period will be closed.



Closing an accounting period

Field	Description
Period to close	This option allows the user to choose which billing period to close. All clients that have the billing flag set to the period being closed will be processed.
Current Period Date	The date of the period being closed.
Next Period Date	The last day of the next trading period.
Close option	Normally you select the default option which is "Period" but the last period in the financial year you select "Year" which performs the same tasks as "Period" plus it resets the trading year-to-date values

back to zero.

### 3.9 Client Master Record





The client record (apart from jobs) is possibly the most important record in the system. It determines how the system bills jobs and contains critical details necessary for carrying out the main activity of the business.

The client master browse screen allows you to quickly find the record you want. You can sort by any of the displayed columns.

**Client File**

Contacts for Selected Client      Status: Active      **Get Records**

<+Client Code>	C/B	Name	Rep.	Class.1	Class.2	Def. Serv.	BP	Default Pickup	Site ▲
AAEMASCOT	SYD	AUSTRALIAN AIR EXPRESS MASCOT		34			W	ALEXANDRIA	OLD
AAEN/F		AUSTRALIAN AIR EXPRESS NEXT FLIGHT					W		CNF
AAERADIO		AUSTRALIAN AIR EXPRESS RADIO ROOM					W		CNF
AAEREGION		AUSTRALIAN AIR EXPRESS REGIONAL					W	AIRPORT - DOM	CNF
AAERETAIL		AUSTRALIAN AIR EXPRESS RETAIL SVCS					W		TUL
AAEWEST	SYD	AUSTRALIAN AIR EXPRESS WEST BASE					W		50 E
ACA		ACA INT'L					W		ATT
ACSDOCS		ALLSTATES CUSTOMS DOCUMENT CLEARANC					W		ATT
ACTION		ACTION FORWARDING & LOGISTICS P/L					W		797
ACTIVE8		ACTIVE 8 LOGISTICS PTY LTD					W		ATT
ADM		ADM / SEA + AIR					W	ROCKDALE	20 N
ADMOON		ADMOON YOUSIF					W		
ADVANCE		ADVANCE BADGES PTY LTD					W	REDFERN	61 C
ADVANCELOG		ADVANCE LOGISTICS PTY LTD					W		ATT
AFFT		AUST FREIGHT FORWARDERS TRANS					W		28 E
AG		A & G WROUGHT IRON					W		ATT
AIRMAU		AIR MAURITIUS HOLIDAYS					W	SYDNEY	L1, .
AIRPAK		AIR PAK FREIGHT SERVICES P/L					W		18 C
ALLSTATES		ALLSTATES CUSTOMS SERVICES PTY LTD					W		ATT
ALPHAMED		ALPHAMED PHARMACEUTICALS PTY LTD					W		26 E

Search:              Add       Edit       Delete      **EXIT**

This is the client's master record general information.

**Changing a Client Record**

General | Accounting Information | General Notes | Financials Summary | Email Addresses | Other Information

Client Code:  ☒ Active Comp./Branch:  Sales Rep.:  Client's ABN:

Client Name:  Created: / / By:

Postal Address:

Site Address:  
  
  
   
City/Town:

Contact Information:  
Phone:   
Fax:   
Contact(s):

Client Groups/Classification (free format):  
1.  2.   
e.g. LAW, TRAVEL, MFG etc.

Operational details:  
Default Service Code:  Send jobs for this client to channel number:   
Display when creating a job:   
Frequency of bookings - at least one job every  days

Contacts  
Client Calls  
Permanent Jobs  
Service Discounts  
Leg Specific Rates  
Jobs  
Credits  
View Audit

This screen contains information relating to billing and payments.

**Changing a Client Record**

General | Accounting Information | General Notes | Financials Summary | Email Addresses | Other Information

Client Rate Codes:  

Rate Codes	Discount
1 <input type="text" value="STD"/>	<input type="text"/>
2 <input type="text"/>	<input type="text"/>
3 <input type="text"/>	<input type="text"/>

Billing Period:  
☐ Daily  
☒ Weekly  
☐ Fortnightly  
☐ Monthly

Statement Options:  
Charge Account Fee on Statement: ☐  
Print Reference Summary on Statement: ☐  
# of significant characters in reference:   
Deduct Settlement Discount on Invoice?: ☐  
Settlement Discount:   
Trading Terms (days):   
Credit Limit:

Rate Increase change dates:  
Rates Dated:   
are applicable up to (but not including):   
then from the above date use Rates Dated:

Cheques Received Details:  
Name on Cheque:   
Bank Name:   
Bank Branch:

Fuel Surcharge:  
☐ Rate 1  
☒ Rate 2  
☐ No Surcharge  
☐ Custom

Custom Fuel Rates:  
Percent 1:   
up to date:   
then this:

Message to print on Invoice (if not blank this text will print on all invoices):

Contacts  
Client Calls  
Permanent Jobs  
Service Discounts  
Leg Specific Rates  
Jobs  
Credits

This screen allows you to specify e-mail addresses where the three most common reports are to be emailed to.

The are 3 buttons you can select for "Email Invoice option":

1. Automatically - this will send the document in the background without prompting.
2. Prompt - this will display a screen when sending the document for verification.
3. Skip Emailing - you can use this to temporarily stop sending via e-mail without having to remove the person's e-mail address from the system.

### 3.10 Rate File

The Rate File is structured so as to give maximum flexibility in creating price structures that fit the requirements of the user. There are no fixed calculation formulae within the program. The only formula that exists in the program uses all the parameters specified in the rate record. This means that if you do not want a particular value used then leave the value as zero (or spaces).

You can create as many rate records as you wish, the only constraint is that the "Rate Key" fields (taken as a set) must be unique.

#### Rate Key

The "Rate Date" is a very important field of the rate record. It cannot be left blank and must be a value that already exists in the "Rate Increase Dates" table. It is used to group



together a "Rate Set" from which the rate record is then selected to price a job.

Think of rate sets as different folders containing sets of rates. For example, one set of rates is valid only for jobs dated after a particular date and the other for jobs before that date.

You can create a rate set that is to be used for a proposed rate increase.

The only field that must be filled in is the "Service Code" field. A record with the rest of the "key" fields blank (Rate Code, Pickup From, Delivery To) acts as the general rate for that service. This means that unless a more specific rate is found for pricing a job then the general rate is used. For example, let us assume that we have four rate records with the following key values:

Record 1	Record 2	Record 3	Record 4
Rate Date = 01-01-2000	Rate Date = 01-01-2000	Rate Date = 01-01-2000	Rate Date = 01-01-2000
Service Code = STD	Service Code = STD	Service Code = STD	Service Code = STD
Rate Code = {blank}	Rate Code = {blank}	Rate Code = {blank}	Rate Code = {blank}
Pickup From = {blank}	Pickup From = MASCOT	Pickup From = {blank}	Pickup From = MASCOT
Delivery To = {blank}	Delivery To = {blank}	Delivery To = BOTANY	Delivery To = BOTANY

When a job with service code "STD" is entered the rate record would be selected as follows:

- If the pickup is from MASCOT and the delivery is to BOTANY then Record 4 is selected.
- If the pickup is MASCOT and the delivery is NOT BOTANY then Record 2 is selected.
- If the pickup is NOT MASCOT and the delivery is BOTANY then Record 3 is selected.
- If the pickup is NOT MASCOT and the delivery is NOT BOTANY then Record 1 is selected.

Of course you can have as many records as you wish specifying pickup and/or delivery locations. This allows you to tailor rates to/from specific Town/Suburbs.

Perhaps the "Rate Code" field is the hardest one to conceptualise how it works. I will try to demonstrate this by another example. Keep in mind that the pickup and delivery location fields can be used in conjunction with the "Rate Code" field.

Record 1	Record 2	Record 3	Record 4
Rate Date = 01-01-2000	Rate Date = 01-01-2000	Rate Date = 01-01-2000	Rate Date = 01-01-2000
Service Code = STD	Service Code = STD	Service Code = STD	Service Code = STD
Rate Code = {blank}	Rate Code = LOW	Rate Code = {blank}	Rate Code = LOW
Pickup From = {blank}	Pickup From = {blank}	Pickup From = MASCOT	Pickup From = MASCOT
Delivery To = {blank}	Delivery To = {blank}	Delivery To = {blank}	Delivery To = {blank}

Using the above rate records let us assume that we have client "ABC" in whose record we have entered the value "LOW" in the first "Rate Codes" field on the "Accounting Information" tab in the client master record maintenance. Let us also assume we have client "XYZ" for which nothing has been entered in the "Rate Codes" section.

When we perform a job with service code "STD" for client "ABC" the rate record selected would be as follows:

- If the pickup is from MASCOT for client "ABC" then Record 4 is selected.
- If the pickup is from MASCOT for client "XYZ" then Record 2 is selected.
- If the pickup is NOT from MASCOT for client "ABC" then Record 2 is selected.
- If the pickup is NOT from MASCOT for client "XYZ" then Record 1 is selected.

In the above example, if "Record 2" did not exist then a job for client "ABC" where the pickup is NOT MASCOT would select "Record 1" as the rate record to be used as this would be the most appropriate in such a case.

One use of the "Rate Code" is in situations where you want to tailor a set of rates specifically for one account. In this case you would make the "Rate Code" value the same as the "Client Code" so that you can then easily see the connection between these records and the client (make sure that this rate code is also entered in the first "Rate Codes" field in the client record).

Once you have a set of rates with a particular "Rate Code" you can link as many clients to this set of rates by specifying the "Rate Code" value in the appropriate field in the client's master record.

You do not have to create a "full" set of rates for any specified "Rate Code" because for those that are not created (e.g. for a specific service code) the system will fall back to select the general rate for that service.

The main thing to keep in mind is that the system will try to find the rate record that fulfills most of the parameters for the job being priced.

The best way to understand the variations possible is to set a test account and create/change several rate records and see the effect it has.

## Rate Values

These are the values that are actually used to calculate the price of the job once the correct rate record is selected as described above.

All values specified are used in the calculation formula. If a rate record is not based on some of these values then leave them as zero. For example, if you do not wish to use "Item/Parcel Breakpoints" for the rate record you are constructing then leave all these values as zero.

The fields in "Rate record is valid only for this Kilometre range" can also be used to distinguish the scope of the rate record. You can define more than one rate record where the "Rate Key" values are exactly the same if you specify that the records are valid for different kilometre ranges.

### Rate record is valid only for this Kilometre range

Enter a kilometre range only if you wish to limit the use of this rate record for that range.

### Basic Pickup Charge

The amount specified here is added to all jobs calculated using the rate record. If this field has a value and all other values are zero then this record behaves as if the job calculated is at a fixed price irrespective of time taken for the job, distance traveled or items/weight carried.

### Minimum Charge

This value comes into effect only if the job price calculated using all the other values is less than the amount in this field. If the price is less than the "Minimum Charge" then the Minimum amount is charged.

### Discount waiting time if applicable

Tick this box if you want waiting time charge discounted if the client has a discount specified in the master record in the "Client Rate Codes" Discount column.

## 3.11 Channel Allocation

Channel allocation of jobs when booked is achieved as follows:

1. The client on the job is checked to see if a channel number has been specified in the client's master record. If it has then this number is assigned as the channel number for the job. No other checks are performed.
2. If no client channel is specified then the Service code is checked to see if jobs for the particular service are to be allocated to a pre-defined channel number. If a channel number has been specified for the service then this number is used for the

- job. No other checks are carried out.
3. If no channel has been specified for the client or service on the job then the Pickup Location (City/Town/Suburb) is checked and the channel number specified here is used. If no channel number has been specified then the job is assigned to channel zero.

Note that a job with channel number zero is displayed on all channels.

## 3.12 Security Implementation

### General Security overview

Security is implemented using a Login user identification and Password. The users defined in the security system use this login identification and password to access any of the applications for which this security is implemented.

For any system to which the general security system applies a user can be defined as a "Supervisor", "Operator" or "No Access".

A user can be defined as a "Supervisor" in one system, an "Operator" in another and "No Access" in a third system.

For example, a user can be defined as "No Access" to the General Ledger , as "Operator" to the Creditors and "Supervisor" to the Debtors/Operations system. This means that using the same login ID and password this user would be denied any access to the General Ledger but can access the Creditors system but would be unable to change security access for any other users, but as a Supervisor to the Debtors/Operations system has access to modify other users access of the Debtors/Operations system.

Once logged in any user can access the "Security" menu to change their password and "lock" their screen if they wish to leave their computer unattended without exiting the program.

If your login defines you as a supervisor then you can also access the "User Login Maintenance" program. This allows you to add new users to the security system and/or change existing user's access.

When adding a new user the only fields that must filled in are:

- First Name
- Surname
- Login - this the user ID and will be used as the password until changed
- Level - this defines the security level for the current application program

It is important to understand the significance of the "Level" parameter. To use an example, if we are creating a user whilst in the General Ledger system then the level specified here is the user's access level for the G/L. However, since this security system is also used by the Creditor system, this user will also be visible if you log in as a supervisor in the Creditor system, but the default access will be set to "No Access" until a supervisor changes the new user's access to the Creditors.

The login security is kept in a file called DSSW2.TPS. This file can only be created using a special program. This means that if the file is maliciously destroyed or tampered with then no one will be able to access the protected systems.

The security file location is given by an entry contained in the "SecWin.ini" file. The easiest place to keep this file is in the same directory that contains the protected applications. To do this use a text editor (e.g. Notepad) to create this file and make sure that it contains the following lines:

```
[SecWin]
Path=Here
```

The above two lines are all that is required. The line "Path= Here" means that the security file is contained in the current directory. You can, if you wish, specify the actual name of the working directory, e.g. **Path=C:\APPS**.

---

## User Groups

When there are many users in a system it can be time consuming to individually modify permissions to different parts of the system for each user, particularly if a large number of them are to have the same access levels.

This security maintenance work can be greatly reduced by creating one or more user groups. You can then assign the selected users to this group(s) and whenever you modify permissions for this group all users belonging to this group will be automatically modified.

---

## How it works

The areas that can be protected are defined at the programming level. In order to change access for a user a supervisor runs the program and calls up the screen to which access needs to be modified.

Pressing Ctrl+F8 will display a list of users and their access. Tab to the fields that need to be changed and when highlighted you can press the Enter key to toggle between "Yes" and "No".

Note that if "Access" is "No" then the user will not be able to even view that screen.

Note also that users that belong to a group will not be displayed, only the group name is visible. Changing the group's access will change all the users that belong to that group.

The columns displayed in the "Set User Access" screens will vary depending on what is actually being protected.

### 3.13 KPI reporting

One of the most complex reports produced by the system is a native Excel report that can be generated from emailing to your clients.

This report contains eight sheets with performance data relating to any selected date range and then grouped by calendar month and by weeks within the month for some of the sheets in Excel.

	Jan-03	Feb-03	Mar-03	Apr-03	Jun-03	Jul-03	Aug-03	Sep-03	Oct-03	Nov-03	Dec-03	Totals
Bookings	33	20	7	1	9	21	11	44	15	34	29	224
Weight (Kgs)	2502.0	3.0	800.0	0.0	1034.0	0.0	3144.0	6665.0	2771.0	7765.0	7965.0	32649.0
Cubic Metres	0.000	1.000	0.000	0.000	2.080	0.000	2.500	0.000	3.000	1.930	0.000	10.510
Client Charge (ex.GST)	8884.70	6430.02	2173.45	339.51	3190.42	8479.15	2715.89	14519.68	3285.53	8259.68	9312.98	67591.01
Waiting Time Hours	0.00	0.50	0.00	0.00	0.00	0.00	0.00	3.00	1.00	2.00	0.00	6.50
Waiting Time Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fuel Surcharge (incl. above)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Avg Days to POD	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

### 3.14 Other Information

### 3.14.1 PDF Documents

PDF document folders are specified in the "System Parameters" file.

You can alter the default locations to place them on any network folder.

PDF documents created by the system can be emailed using any external mailing program in exactly the same way as you would any other attachment. You can use the Adobe Acrobat Reader e-mailing option.

### 3.14.2 Client Invoice/Statement

Client Invoice/Statements can be automatically e-mailed from the CIS system. To do this simply enter the details of the person that is to receive the Invoice/Statement in the client master record as displayed below.

If you leave the email address blank then the Invoice/Statement for this client will be printed.

There are 3 buttons you can select for "Email Invoice option":

1. Automatically - this will send the document in the background without prompting.
2. Prompt - this will display a screen when sending the document for verification.
3. Skip Emailing - you can use this to temporarily stop sending via e-mail without having to remove the person's e-mail address from the system.

To use the email option you must have valid information entered for the "E-mail Parameters" in the "System Parameters" file.

### 3.14.3 Invoice frequency

For each client you specify whether they receive invoices (or statements) on a:

- Daily
- Weekly
- Fortnightly
- Monthly

Note that "Fortnightly" can also be used for bi-monthly, e.g. on the 15th and last day of the month. In fact any of the options can have variable time periods and their names only reflect the most common usage.

If a client receives daily invoices then some extra rules are enforced. They are:

- The format must be **Invoice** and not **Statement**
- The date of the invoices must be specified when selecting to print.
- When an invoice is created the system will ask if the invoice is **OK** and if you answer **Yes** then the jobs on the invoice are marked so that they do not appear on the next daily invoice.

- The outstanding record is immediately created, even before a period is closed
- The sales statistics are accumulated with the **Weekly** clients when the weekly periods are closed.
- The jobs remain in accounts but cannot be modified after the invoices are printed and will be marked as billed when the weekly period is closed.

### 3.14.4 E-mail Parameters

These parameters are kept in the "System Parameters" file. They are required only if you wish to send e-mails through the CIS system.

SMTP stands for "Simple Mail Transfer Protocol" and is the system most widely used by computers to send e-mails. In effect these parameters tell the program to which computer should the requests for sending e-mails be directed to.

The following two parameters are required:

#### **SmtpDomain**

This the domain name of your mail server. E.g. sicab.com.au

#### **SmtpDefaultServer**

This is the mail server full name, e.g. if the SmtpDomain value is "mycompany.com.au" and the name of your mail server computer is "mail" then this entry would be "mail.mycompany.com.au".

The following parameters are optional:

#### **SmtpSenderAddress**

The email address of the sender of emails. If this is not created then the system will automatically create one made up of the the user login id and the value in "SmtpDomain". E.g. if the user logged in is "bridgette" and the domain name is "mycompany.com.au" then the system will create "bridgette@mycompany.com.au".

#### **SmtpDefaultPort**

Only use this if your email server uses a non-standard port. The standard port is 25.

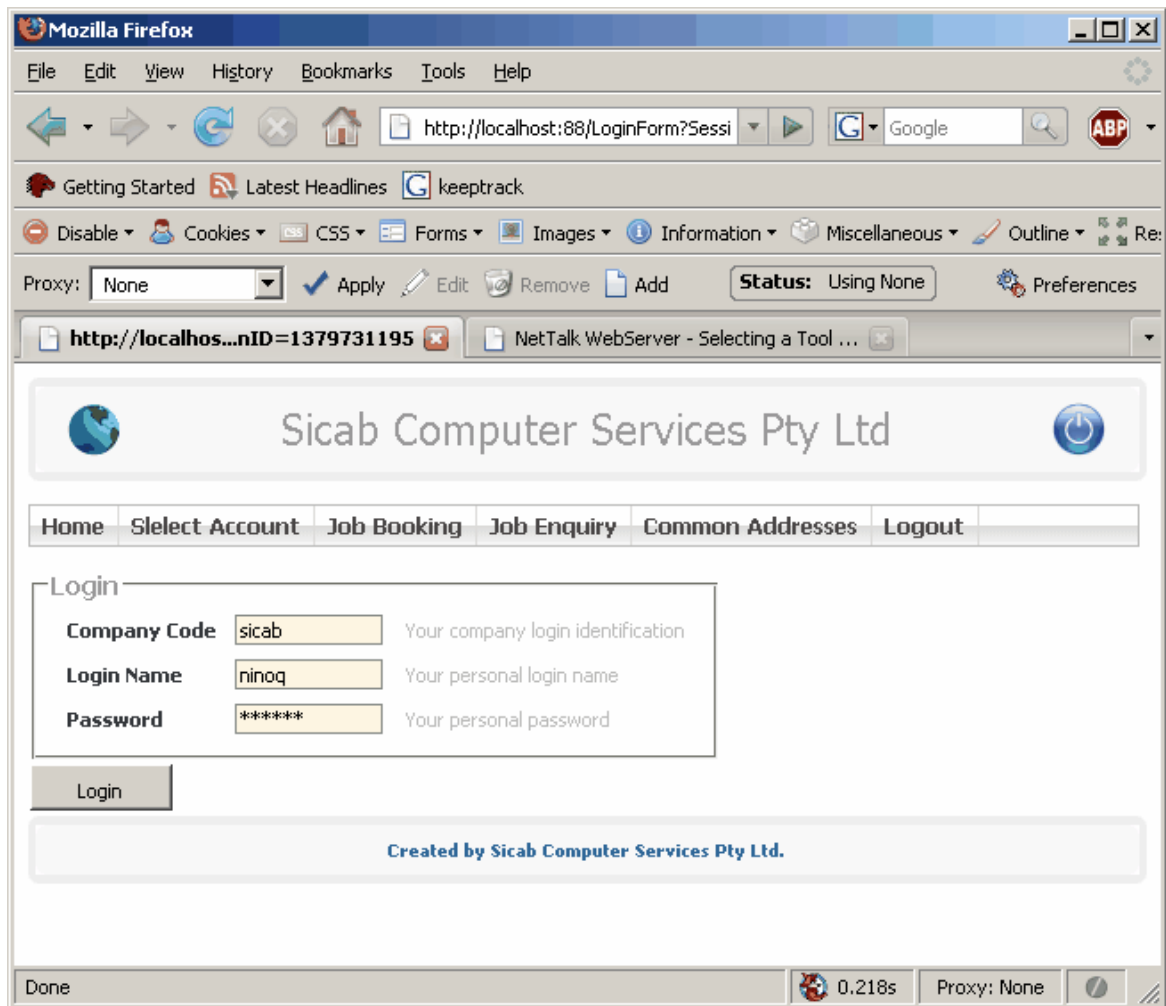


## 4 Web Interface

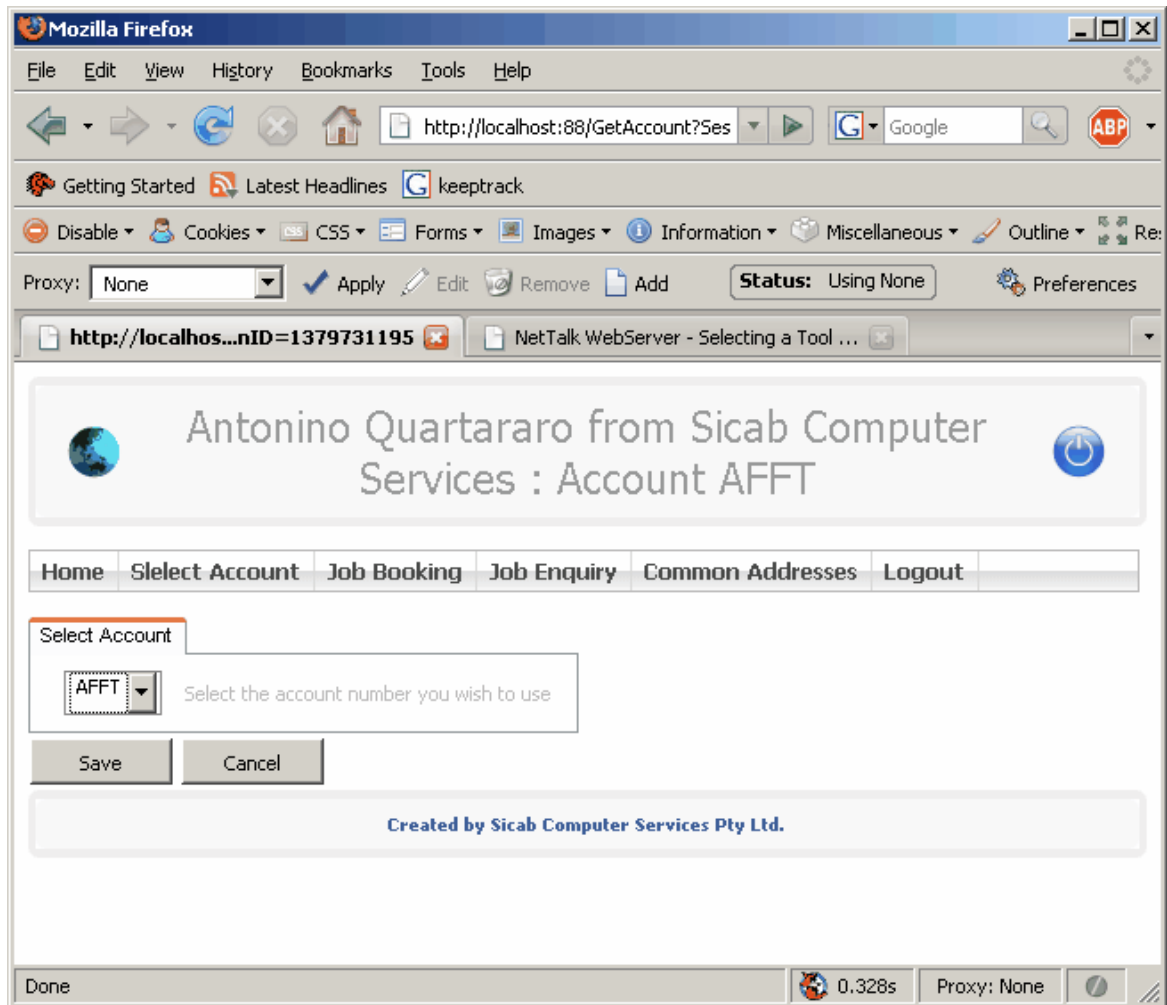
The screens displayed here are unadorned by customization that may be requested by clients to create a particular "look and feel".

### 4.1 Login page

This is login page for clients that access the system through the Web. Each user is identified by the company, personal login name and password.



If the user is allowed to access more than one account the system will present a drop list of all accounts this user is allowed to access. The user can change the account they are working with at any time. There is no limit to the number of accounts a user can be given access to.



## 4.2 Job Enquiry and Booking

Parameters to view a range of jobs for the selected account.

**Antonino Quartararo from Sicab  
Computer Services : Account AFFT**

Home | Sleect Account | Job Booking | Job Enquiry | Common Addresses | Logout

Leave dates empty to select all jobs for today.

**Date Range**

From Date: 1/01/2007 Use calendar icon to select starting date

To Date: 31/12/2007 Use calendar to select ending date

**Optional Search Parameters**

Pickup is from Suburb/Town starting with:

Delivery to Suburb/Town starting with:

Reference contains:

Get Jobs

Created by Sicab Computer Services Pty Ltd.

Find: time f Next Previous Highlight all Match case

Done 0.281s Proxy: None

This is the result screen.

Job Booking - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost:88/BrowseINV#

Getting Started Latest Headlines keeptrack

Disable Cookies CSS Forms Images Information Miscellaneous Outline Resize Tools View Source Options

Proxy: None Apply Edit Remove Add Status: Using None Preferences

Job Booking NetTalk WebServer - Basic Introductio... NetTalk WebServer - FAQ

Antonino Quartararo from Sicab Computer Services : Account AFFT

Home Select Account Job Booking Job Enquiry Common Addresses Logout

New Job View Job

Job Number	Job Date	Service	Reference	Cost Centre	Con.Note/Docket	Items	Weight	Cubic Metres	From	To	Charge (ex.GST)	GST Amt	POD Name	Account
230652	3/03/2007	STD	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230655	3/03/2007	STD	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230654	3/03/2007	STD	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230419	11/04/2007	NC	MAIL			1	1.0		MASCOT	BOTANY	0.00	0.00	AFFT	
230486	26/03/2007	5	26262626			2	6.0		AIRPORT - INT.	ALFORDS PO	21.75	2.18	AFFT	
230656	26/03/2007	STDFU	REF.999			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230471	26/03/2007	HH3	EE			1	1.0		ANNANGROVE	AIRDS	0.00	0.00	AFFT	
230651	26/03/2007	STDFU	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230653	26/03/2007	STDFU	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230193	26/03/2007	INTRA	26262626			12	12.0		SYDNEY	NEWCASTLE	195.00	19.50	AFFT	
230657	26/03/2007	HH2	R5457			2	3.0		MASCOT	ALEXANDRIA	53.21	5.32	AFFT	
230649	26/03/2007	TECH	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	
230648	26/03/2007	STDFU	REF.123			12	52.5	0.123	HABERFIELD	LEICHHARDT	0.00	0.00	AFFT	

New Job View Job

Created by Sicab Computer Services Pty Ltd.

Find: time f Next Previous Highlight all Match case

Done 0.265s Proxy: None

If we wish to view the job details simply select the job and press "View Job" (press "New Job" to create a new job).  
The following is a partial screenshot of the detail screen.

Antonino Quartararo from Sicab Computer Services : Account AFFT

Home Select Account Job Booking Job Enquiry Common Addresses Logout

Job Booking

General Job Details

Job Date 3/03/2007 Use the calendar icon to select the job date

Ready Time 10:30 hh:mm - the time the job is ready for collection.

Service Code STANDARD COURIER

Your Reference REF.123

Cost Centre

Con.Note/Docket No.

Quantities

Number of Items 12 Enter number of items/parcels, up to 9999

Weight (in Kgs) 52.5 Enter the weight in kilograms, up to 99999.9

Cubic Metres 0.123 Enter Cubic Metres, up to 99.999

Pickup Details

Company Name SICAB COMPUTER SERVICES Required. Name of organization goods are to be picked up from. Use the lookup button to select one of the regular addresses.

Address Line 1 20 DENMAN AVENUE



## 5 Change Log

### 5.1 Version 3.8.50

- Create "EXPORT INVOICES" field to allow specific client invoicing data to be suppressed when exporting to an external accounting system
- Created and MDT Type field in the Driver file to allow multiple type of MDT's in the fleet in case of different programming requirements.

### 5.2 Version 3.8.49

- Additional Charges where not included in service code analysis. Now are included under the main service code.
- Email drop list for address selection when sending job details was not scrolling down the list.

### 5.3 Version 3.8.36

- Increase email address length in the "Scheduler" file. This allows more than one email address to be entered.
- Add Company/Branch field to client file. This allows the system to run as multi company/branch. Each Company/Branch has its own Name and Address. If this field is left blank then the system runs as normal.
- Increase Fuel Surcharge allowable amount from 999.99 to 99,999.99
- Use "Airfreight Weight" field so that user can enter this weight in Kg ( up to 999) and the system will convert this to cubic metres at 167Kg per cubic metre and then calculates the chargeable weight based on the cubic conversion for the service code on the job.
- Add option to save Invoice/Statement selection parameters
- Fix SQL error when getting driver log records using a driver number and from and to dates

### 5.4 Version 3.7.90

- Add new table to record "Job Notes" with the ability when creating these notes to e-mail to someone.
- Added new field to client master record to record who created the account.
- "D" column in driver job screen
- Account number on an existing job cannot now be changed to an inactive account
- Fixed a period close error for Daily invoices
- Client KPI Excel file

### 5.5 Version 3.7.82

- Added job fields to record waiting time at pickup and waiting time at delivery.
- When allocating a job to a vehicle that is not logged on the program now asks if you wish to log the vehicle on and if yes it will create a login record immediately.

## 5.6 Version 3.7.71

- Added security icon (lock) to Job Browse screen as the "Move Jobs" button has security on it.
- Fixed "External documents" button in that it displayed files related to job but did not allow them to be opened.
- Added security to "Other Information" tab on client master record.

## 5.7 Version 3.7.70

1. Add **Daily** invoice option for clients
2. Add button to job record so that any documents relating to the job can be displayed. Documents relating to the job must begin with the job number.
3. Added fields to the control record so that you can select that when booking a job the number of items and the weight fields default to 1.
4. On job entry screen the mandatory fields have a different coloured background.
5. Secured screen now display a "padlock" in the upper left-hand corner of the screen for easy identification.

## 5.8 Version 3.7.50

### **E-mail client invoice to multiple contacts**

this is achieved by checking a field in the contacts file.

### **E-mail activity report to multiple contacts**

this is achieved by checking a field in the contacts file.

### **Add "Document Directory" to client master record**

### **Add e-mail address to job records**

this will be used for sending job details to the client.

## 5.9 Version 3.7.47

### **Print Client Invoice/Statement**

Removed the checkbox to print 2 copies as a blanket option and added an extra option to the drop down option of **For Invoices that are NOT e-mailed** to print 2 copies

### **Job Quote window**

New option to calculate a job charge without having to create a job

## 5.10 Version 3.7.46

### **Cancel Button disabled fix**

The **Cancel** button on the job screen was disabled when any action when performed on the follow on legs, even if no information was changed. Now you can view/edit a follow on leg without the button being automatically disabled.

### **Add New Driver to a Job from Driver Screen**

improved the wording and layout of this screen.

## 5.11 Version 3.7.45

### **New Driver on Job**

This is a new button on the "Driver Jobs" screen. This allows an already allocated job to be handed over to another driver. The existing driver will remain on the job and the revenue is split. This job will be visible from both drivers. If the existing driver has an MDT then it is removed from the existing driver's MDT and sent to the new driver's MDT.

### **FleetmaX CLEANUP routine**

added a routine that is performed approximately every ten minutes whereby all "waiting" status messages are re-examined against the status of the job and if out of sync they are updated.

## 5.12 Version 3.7.44

### **Audit driver allocation**

when a job is allocated to a driver or a job is removed from a driver create an entry in the audit file to record the driver and person doing the change

### **Secure Active checkbox**

in the client master record added security to the "Active" field so that non authorised logins cannot change it.

### **Option to print 2 statement copies**

in the client invoice/statement print screen you can now select to print the invoices that will be printed twice.

### **Items and Weight are now mandatory fields**

these two fields must now have a non-zero value before the job can be booked.

### **Change font on Landscape invoice/statement**

change font to Arial 8 so that the Reference field and Line No./CN number can print in the job detail line